
🌐Introduction to Ellucian Experience

- A centralized platform for **students, staff, and faculty**.
- Provides quick access to **key info, links, and tasks**.
- Personalized dashboard with a clean, visual interface.
- Supports **single sign-on**, automatic updates, and low/no-code development.

🆙Experience Roles

Roles decide **what content a user can see or manage**.

◀️Types of Roles:

1. **Identity Provider (IdP) Roles**
2. Created in your directory server (e.g., LDAP, ADFS).
3. Passed via **SAML claim**.
4. Example: `idp-student`, `idp-faculty-main`

5. **Ethos Roles**

6. Predefined roles from **Ethos persons data model**.
7. Based on data in Banner/Colleague ERP.
8. Roles: `student`, `advisor`, `employee`, `alumni`, `instructor`, `vendor`, `prospectiveStudent`

✅Steps to Create Identity Provider Roles:

1. Define role names in the directory (avoid commas, max 60 chars).
2. Assign them to users in your directory.

✅Steps to Use Ethos Roles:

- Banner: Set up via forms like `SPAIDEN`, `SIAINST`, `SGBSTDN`.
- Colleague: Use forms like `FCTY`, `NFAC`, `RGPE`.

#️⃣Add Roles in Experience Setup

1. Go to **Ellucian Customer Center** > Tools > Experience Setup.
2. Select Test/Production environment.
3. Go to **Roles and Permissions tab**.
4. Click **Add**:
5. Select **Role**
6. Enter role name (**case-sensitive**)

7. Click **Add**
8. Repeat for all roles needed.

For multi-institution setups: - Define roles at **system level** (for all dashboards) or **institution level** (specific).

⚫Administrative Permissions

Types:

1. **Dashboard Permissions**: Manage cards, pages, and announcements.
2. **Application Permissions**: Manage access to apps like **Ethos Data Connect**.

How to Add Admin Users:

1. Go to **Experience Setup > Roles and Permissions**.
2. Click **Add > User ID**.
3. Enter user's Banner ID / Colleague ID / userId claim.
4. Assign specific permissions.

> ⚠️If a user has individual and role-based permissions, only **individual permissions** are used.

🆘Experience Application Permissions

- Manage access to connected applications.
- Grant **View** or **Manage** permissions to **roles or users**.

Steps:

1. Go to **Experience Setup > Permissions**.
2. Choose application (e.g., Data Connect).
3. Select the feature.
4. Assign permissions to a role/user.
5. Click **Save**.
6. Ask users to **logout/login** to refresh access.

♻️Accessibility in Experience

Follow the 4 accessibility principles: 1. **Perceivable**: Info should be understandable through various senses. 2. **Operable**: Interface must work via keyboard or assistive tech. 3. **Understandable**: Content must be clear. 4. **Robust**: Content must work across devices/tools.

🔚Theming & Branding

- Customize colors, logo, background, and favicon.

- Done from **Theming tab in Configuration**.

Steps:

1. Go to **Experience Configuration > Theming**.
2. Enter:
3. Color codes (primary/secondary/button)
4. Logo image URL
5. Background image/color
6. Favicon & App Name
7. Click **Save**.

🈚Cards vs Pages

Feature	Card	Page
View	Small dashboard tile	Full-screen view
Use	Quick info or links	Detailed content, forms
Design	Controlled in extension	Made via Page Designer

🈲Page Designer & Pages

- No-code tool to build full-screen content pages.

Steps to Create a Page:

1. Go to **Pages tab** in Experience.
2. Click **Create Page** or **Duplicate Page**.
3. Use WYSIWYG editor to add text, images, links, videos.
4. Save as **Draft**.

> Users need **Page Management permission** to access Page Designer.

Publishing Pages:

1. Set **access roles** or choose "public".
2. Click **Publish**.
3. Link page to:
4. Cards
5. Announcements
6. Other pages
7. External sites

> ⚠️Only users with the role will see the page.

🚮Experience Calendar

View events from up to **5 calendars** in one place.

Add Calendars (2 Ways):

1. **File Upload (.ics)**:
2. Upload .ics file
3. Events show immediately

4. Re-upload to update events

5. **Public URL (.ics)**:

6. Enter public calendar URL
7. Auto-updates every few hours
8. Use **Refresh** to sync immediately

♏Announcements in Experience

- Shown at the **top of the dashboard**.
- Include title, content, and optional link.
- Targeted by **role** and **date range**.

Create an Announcement:

1. Go to **Announcements tab** in Experience.
2. Click **Add Announcement**.
3. Enter:
4. Title
5. Content
6. Link (optional)
7. Start/End date
8. Roles to see it
9. Save

End of Notes