Ellucian Experience Notes (Tenants to End)

# 🔹 Tenants in Ellucian Experience

- Tenants are separate environments:  
 - Production Tenant – Live environment used by end-users.  
 - Test Tenant – For experimentation, testing, and training.  
  
- Ways to Identify/Confirm Tenant:  
 - Check URL:  
 - experiencesetup.elluciancloud.com → Production  
 - experiencesetup-test.elluciancloud.com → Test  
 - Use Customer Center path:  
 - “Experience Setup” = Production  
 - “Experience Setup Test” = Test  
 - Check dropdown at the top-right (if multiple tenants exist).  
 - Compare cards/screenshots of each tenant.  
 - Observe background color or branding (if institution uses color coding).  
  
- Why Important:  
 - Avoid accidental changes to live environment.  
 - Proper testing and staging before go-live.  
 - Needed for extension uploads, role testing, etc.

# 🔹 Card Permissions & Access

- To interact with a card, two things must be configured:  
 1. Card must be visible to the user (via role audience in Card Management).  
 2. User must be granted application permission (via Experience Setup > Permissions tab).  
  
- If permissions are missing:  
 - Users will see the card but cannot interact or will receive errors.  
  
- If audience is missing:  
 - Users will not see the card, even if they have permissions.

# 🔹 Card Ordering Behavior

- Locked Cards:  
 - Experience Admins can set a specific order.  
 - The order is preserved and based on user roles.  
 - Cannot be rearranged by users.  
  
- Cards in Discover:  
 - Admins can set the order of locked and recommended cards.

# 🔹 Experience Admin Permissions

- Permissions can be:  
 - Role-based (not assigned to individuals).  
 - Module-specific (e.g., Announcements vs Theming).  
  
- Test and Prod environments have separate permission setups.

# 🔹 Roles in Experience

- Roles are used for:  
 - Granting admin/app permissions.  
 - Defining who sees what content (audiences).  
 - Determining who can log in.  
  
- Role Sources:  
 - IDP Roles – From Active Directory or similar; must be passed in SAML claim.  
 - Ethos Roles – Based on the Person model (e.g., Student, Advisor, Employee). Cannot be customized.  
 - ERP Roles – Defined in ERP like Banner (e.g., via GORIROL). Requires Ethos integration.  
  
- You can use multiple role types together.

# 🔹 Card Templates

🖼️ Image Card  
- Used to link a single image to a URL or simply display an image.  
- Optional URL – If blank, image is not clickable.  
- Add alt text for accessibility.  
  
🔗 Quick Links Card  
- Best for groups of related URLs.  
- Styles:  
 1. Simple Links – Show favicon/icon only.  
 2. Descriptive Links – Custom icons + optional description.  
 3. Links Grid – Icon in boxes, optional image, more visual layout.  
  
📝 Free-Form Card  
- Combines text + images + links + contact info.  
- Ideal for departments like Advising, Graduation info, etc.  
  
💻 HTML Card  
- Admin can enter full HTML or just body content.  
- Useful for custom layouts or embedded elements.  
  
🌐 Embedded URL Card  
- Displays external web pages inside the Experience frame.

# 🔹 Experience SDK and Extensions

- Requires Experience Premium license.  
- Used to create custom cards/pages via development.  
- Created using Node.js SDK, then uploaded to Experience.  
  
📦 Extension Folder Includes:  
- extension.js – Defines configuration, cards, etc.  
- package.json – Scripts & dependencies.  
- src/cards/\*.jsx – Card code.  
- .env – Environment variables.  
- webpack.config.js – Build control (advanced use).  
  
⚙️ Steps to Create Extension:  
1. Install & use nvm to manage Node.js.  
2. Create folder and cd into it.  
3. Clear NPX cache (npx clear-npx-cache).  
4. Use correct Node.js version (nvm use 18.15.0 or 18.16.1).  
5. Generate project via: npx create-experience-extension  
  
🚀 To Deploy Extension:  
- Use token from Experience Setup > Extensions > Tokens.  
- Run command after each change:  
 npm run deploy-dev --env forceUpload

# 🔹 Common Use Case Guidance

- Graduation Info Card:  
 → Use Free-Form template for rich content (image, links, text).  
  
- Faculty at Specific Campus:  
 → Use IDP or ERP roles (not Ethos) for such specific targeting.  
  
- Link Order Rearrangement:  
 → Use Action menu ("Move up"/"Move down") to reorder links in Quick Links card.