MBUG 2014 Conference Program

Session User Codes:
A – Alumni/Advancement
F – Finance
R – Financial Aid
G – General
H – Human Resources
I – Institutional Research
S – Student
T – Technical

Breakout Sessions:

9:30 Monday

Argos Reporting Basics (G) ……………………………………………………………………Steven Tiller (HCC)
This session will present a basic overview of Argos Report viewing and Writing. We will build an Argos report during the session.

Banner Accounts Receivable – Refreshing the Basics (F) ………………………… Laura Chisolm (PRCC)
We will be refreshing the basics concerning detail and priority codes, fee assessment, and application and unapplication of payment. Discussion as to how other modules affect AR. As well as sharing a brief summary of information gathered from Ellucian Live 2014 Conference.

Banner Boot Camp I (G) ……………………………………………………………...Katangelia Tenner (ASU)
This session, targeting new Banner users, will review different search and navigation methods, the quickflow process, general user's preferences, enterprise pin preference, and protection of sensitive data (masking).

Banner Human Resources and Finance: The Road to Ellucian XE (F,H)
<div align="right">Laura Weathersby (Ellucian)</div>
In this session we will provide an overview of the Ellucian XE strategy and how it applies to the Banner human capital management and Banner financial management solution portfolios.

Ellucian Mobile App (T) ………………………………………………………………………Drew Sawyer (MGCCC)
The MGCCC IT dept. would like to present on Ellucian Mobile (aka the Banner Mobile App) - its basic functionality and the Ellucian Cloud architecture used to configure and deploy it. We'd also like to provide an overview on what is necessary to 'brand' the app to use an institutions own icons and colors, etc.

Is Your Institution on the Cutting Edge for Delivering Touch Free Transcripts? (S)
<div align="right">Paul Taylor (National Student Clearinghouse)</div>
Partnering with the National Student Clearinghouse and Ellucian, colleges are now able to deliver the first touch free/hands free delivery of e-transcripts of its kind. This new solution, as a deliverable from Ellucian to your SIS, will change the way you think about and process

transcripts forever. The system will create a pdf or xml for delivery through a network or to any third party in the world without anyone in your office touching anything. Or it will send a transcript to a print tray—ready to drop in the mail or hand to the student.

Come to this session and learn about this new and innovative solution.

Processing State Aid Using Microsoft Access and Banner (R)

Angie Sherrer, Rosiland Garner (MSU)

This session will provide insight into how state aid files such as MTAG and MESG are loaded into Banner and processed in batches. Various reports are then used to identify any discrepancies. This system will use both Banner and Microsoft Access.

Reqs to Checks (F) …………………………………………………..Amanda Burgess, Helen Callahan (MSU)
This session will provide a summary of the requisition process, sending the purchase order, receiving the invoice and finally paying the vendor.

Roundtable Discussion on CAPP: Functionality and Usage (S) ……………………Jimmy Smith (ASU)
Join us for a lively and interactive discussion for individuals who are seasoned and new to the world of CAPP. This session allows individuals the platform to share their knowledge, which in turn, may enhance others usage of CAPP.

10:45 Monday
2014-2015 Banner Financial Aid Spring Release (8.20) (R) ………Greg Ross, Tim Nelson (Ellucian)
Session Agenda:
- MAP-21 (150% Subsidized Usage Limit) Overview
- 2014-2015 COD Processing and Updates
- Updates to Support 4.0a Schema Changes
- Transfer Monitoring and Financial Aid History Updates

Banner Boot Camp II (G) …………………………………………………………………Cay Lollar, Sandi South (ICC)
Tips and tricks beyond Boot Camp I.

Electronic Personnel Action Forms (H) ……………………….Keunta McPhearson, Linda Wilson (JSU)
The Electronic Personnel Action Form (EPAF) is a Banner module that was designed to accommodate a more efficient approval signature process for HR actions. It improves and simplifies the process for completing and approving a wide range of personnel actions for all employee types. Participants will learn how Personnel Actions are originated electronically, via Employee Self-Service, by the department and electronically routed for approval. After approval the actions are applied to Banner by a central process.

Finance Self-Service (F) ………………………………………………………………….Keilani Vanish (JSU)
Attendees will learn all the wonder of Finance Self-Service. Finance Self-Service gives users simplified access to information that in the Banner Finance System. With Finance Self-Service, you can access query information, submit transactions, and approve documents.

Introducing Banner Data Defense (T) ……………………………………………………Alan Hansen (Ellucian)
A security breach of your institution's database can be devastating to the people whose personal information is accessed, as well as to your institution's reputation. Are you doing all you can to protect your institution and the sensitive data you store? Join this session to learn about Banner® Data Defense, the industry's only Banner-specific security solution that combines multiple layers of IT security defense solutions including an encryption package, firewall, and audit tool, into one solution with implementation services to help you ensure data privacy, protect against threats, and maintain regulatory compliance.

Query of Donation or Pledge by Gift # or Pledge # (with no donor info) (A)
Johnyelle Lee (JSU)
During the presentation, we will cover alternate ways to query pledge and gift data when limited donor information is known. Participants will gain knowledge on how to search for information by variables such as amount of gift, gift/pledge date, gift/pledge type, category, etc. and how to extract the data from Banner for reporting purposes.

Reporting Data Using Argos (I) ……………….……….……………Justin Chandler, Rhonda Loper (DSU)
This session will be a presentation on the use of Argos and reports created this past year for IRP purposes and maintaining university data consistency between live data and frozen IHL data.

Stackable Credentials Roundtable (S) ………………….…….………Dan Webb, Michelle Sekul (MGCCC)
What is it? What does it mean for the students you serve and the community college. During this interactive round table discussion, Michelle Sekul, MGCCC College Registrar and Dan Web, MGCCC Application Director, will walk you through what MGCCC did to get this off the ground and possible ways to track and administer using Banner.

Tracking Students Using a Sign-In System & Early Alert Program (S)
Bronson Prochaska, Steven West (ICC)
Thru the leadership of the Telecommunications & Information Services Department, ICC has developed a sign-in system to track students utilizing the College's academic support services. Students utilizing the college's Advising, Student Success and Writing Centers are required to login when they utilize these services with a notation of the reason they are visiting each center. This information is beneficial for these departments; providing a way to determine student utilization, course utilization, track tutoring as well as a student's usage of academic support services. This information is vital to administration in the planning process as well as beneficial when dealing with students submitted thru the College's Early Alert Referral System.

We will also highlight ICC's Early Alert Referral System that pulls information from our system so that each Early Alert submitted by a faculty or staff member may be addressed fully and

correctly. This is a vital piece of the puzzle in dealing with "at risk" students because of violent college tragedies across the country and our heightened interest in student retention and graduation rates. Both systems work hand-in-hand and integrate faculty concerns, Campus Police Incident reporting, Housing Departments Incident reporting, student class attendance and academic support services attendance as we address student's needs.

1:30 Monday

Commodity Level Accounting (F) …………………………………….…………………………Billy Scott (MVSU)
This presentation will discuss the difference between Commodity Level Accounting and Document Level Accounting as it relates to cost allocations.

Ellucian Recruiter (S) ....Jennifer Taylor (Ellucian)
Join us to learn how Ellucian Recruiter helps improve the efficiency and effectiveness of the admissions office for better enrollment management outcomes

Ellucian XE and the Acceleration of Banner (G) …………………………………….Alan Hansen (Ellucian)
Join us to learn how Ellucian XE strategy is helping institutions become more flexible, more collaborative, and more ready to meet the future. We'll report on how our Ellucian XE strategy drives how we design, develop, and release the products and services that can help your institution move forward. Ellucian will review the Banner product roadmap, and discuss Banner direction and deliverables.

Mike Ayers and Mississippi College Share Many Benefits of College Scheduler (S)
Mike Ayers (College Scheduler), Ginger Robbins (MC)
More and more institutions are striving to raise graduation rates and increase service to their students. With the common goal of helping students complete the college educations that prepare them for the real world, Mike Ayers with College Scheduler, and Ginger Robins with Mississippi College, will speak on abilities in place to support students achieving this goal. Looking at reports of the student planning process will offer effective steps & strategies to improve your current enrollment management and registration practices. Assuring your students have an efficient registration process to maximize full potential of each semester can directly attribute to increasing on-time graduation at your institution.

Payroll Deductions Beginning to End (H) ……………………………………………..Donna Switzer (MSU)
This session will introduce basic and not-so-basic payroll deductions and how to process them. Screen shots will be presented for those "tricky" deductions.

Tracking Renewable Scholarships Using Microsoft Access (R) ………………Rosiland Garner (MSU)
This session will show how Mississippi State University uses a Microsoft Access Database to track renewable and one year scholarship information. This system uses objects created in Microsoft Access, along with links to Oracle tables.

Unlocking Microsoft Access (G) ………………………………………………………………David Howard (JSU)

Having trouble analyzing and understanding the information in your database? Well this class is for you. This class is designed to show how Microsoft Access can be used to quickly analyzed data and generate reports from your data. You will learn how to create complex queries, forms, and customized reports.

Web Tailor Basics (T) ……………………………………………………………………………………Chris Giger (DSU)

This session will cover each aspect of Web Tailor. From customizing global parameters, to modifying information text for certain packages and procedures. This will help the user gain a basic understanding of what web tailor is about.

2:45 Monday

Alumni/Advancement BOF (A) …………………………………………………………………David Howard (JSU)
Finance BOF (F) ……………………………………………………………………………………Joyce Dixon (MVSU)
Financial Aid BOF (R) ………………………………………………………………………………Gail Muse (HCC)
Human Resources BOF (H) ………………………………………………………………………Trish Reid (MC)
Institutional Research BOF (I) …………………………………………………………..Eric Atchison (IHL)
Student BOF (S) ……………………………………………………………………………………Cay Lollar (ICC)
Technical BOF (T) …………………………………………………………………………..Allen Coleman (ICC)

4:00 Monday

Adjusting Pledge Status When There is a 3rd Party Pledge (A) ……………………Johnyelle Lee (JSU)

During the presentation, we will cover how to enter a third party payment, how to assign the proper soft or hard credit to the original donor's pledge, and how to view the payment information in Banner.

Building Custom Banner Self-Service Based Applications (Basics) (T) ...Prashant Bomidika (ASU)

This session will demonstrate the basic requirements for building custom Banner self-service applications. We will look at a sample PLSQL package and the process of setting up the procedures in the Banner self-service environment. Also, we will look at the efficiencies gained at Alcorn through self-service customizations.

Creating an Efficient Admissions Quickflow (S) ………………………………….Cassandra Atley (MDCC)

This will be an interactive session on the importance of creating a quickflow for your admissions staff. Participants would learn how to create a quickflow, what forms are vital to the quickflow, and learn what others are doing and why.

Kronos at Alcorn State University (H) ………………………………………………………Cora Fuller (ASU)

Kronos makes easy work of the tedious tasks involved with monitoring employee time and attendance. The simplified time-tracking software helps you control labor costs, minimize compliance risk, and improve workforce productivity.

Simple Steps to Registration and Advising (S) ………………….Tammy Prather, Shelley Moss (MUW)
In this session, we will walk through our process of admitting a student to scheduling their classes. Sometimes it sounds simple, but often times it becomes complex.

Time and Effort Reporting (F) ………………………………………………………………….Keilani Vanish (JSU)
Effort reporting is a federally-mandated process (OMB Circular A-21) by which the salary charged to a sponsored project is certified as being reasonable in relation to the effort expended on that project. The systematic certification process and formal effort report is essential to ensure that your institution is always prepared to respond to sponsors with the required information.   This session will give a step by step on how to set up Banner for time and effort, best practices, and etc.

Transfer Articulation Setup (S) …………………………………………………………………Tammie Dill (ICC)
This session will show you how to set up Transfer Articulation.

Workflow Implementation Roundtable (T)
                            Allen McGehee, Jim Pilgrim (MC), Judson Matthews (MAK-Solutions)
This session will be a roundtable discussion about implementing Banner Workflow out of the box. We used a web page for students to start the workflows we built for Change of Major and Withdrawal from University.

9:00 Tuesday
Autopacking Institutional Awards 101 (R) ……………………………Robert Gatewood, Ellen Little (MC)
Learn how Mississippi College, a "vanilla" school, uses Banner's built-in auto-packaging feature to automate the awarding process for institutional aid, or any other aid besides federal aid, that you wish to award automatically.

Banner Boot Camp II (G) ……………………………………………………………Cay Lollar, Sandi South (ICC)
Tips and tricks beyond Boot Camp I (Repeat presentation).

Dealing With the Not So Easy Customer (G) ……………………………………………Ashley Hunter (MCC)
Who is the customer? Is the customer always right? Customers in higher ed are primarily the student, but is also the students' parents, faculty, staff, and community members. How do we convey appropriate information and the very best service to those that are not so easy to assist? Bring your best practices and perhaps funny stories and how you overcame the "not so easy customer" to the table for this round table discussion.

Documentation, Training and Support for the Banner End User (G) ……….Tamara Gibson (MSU)
Learn techniques and methods to create Administrative Banner documentation for end users, discuss guidelines for creating and delivering training and providing support to the end user.

Enhance Enrollment Data Analysis with Informer (G,I) …………………………..Pam Barber (Entrinsik)
Entrinsik Informer is used by over 300 universities and colleges using Ellucian software. See how Informer helps organizations optimize decision-making and boost enrollment by delivering ad-hoc reporting, self-service data analysis, and interactive dashboards all in one.

Introducing Ellucian Elevate (S) …………………………………………………………Jennifer Taylor (Ellucian)
Are you interested in learning how Ellucian Elevate, our new Continuing Education and Workforce Development solution will help to streamline business processes, increases learner engagement, facilitates growth for continuing education and workforce development offerings as well as provide deep integration into current Banner SIS offering?   Join us to learn how Ellucian Continuing Education and Workforce Development will help to streamline business processes, increases learner engagement and facilitates growth for continuing education and workforce development offerings.

Preparing for Banner Powered by Ellucian XE Strategy (T) ……………………..Alan Hansen (Ellucian)
This session provides an overview on software and hardware requirements for updating Banner to support the XE architecture, the skills needed for managing and maintaining Banner applications powered by XE, and git repositories and XE installer. It will include single sign on details.

The Bill Is Your Brand (F) ………………………………………………………………..Tom Gavin (Official Payments)
Are you using your Bill to grow your brand to engage your students and parents? Learn how to take advantage of new technology to engage your audience with yes your Bill. What is the one email they have to open? Your Bill! ACI Universal Payments is leading the payment DisrUPtion creating Win/Win payment experiences Lower Cost Payments and Higher Customer Satisfaction. Join the DisrUPtion learn the future of Payments!

Workflow … From Daunting to Done (Sort of) (S)
Ginger Robbins, Cindy Hampton (MC), Judson Matthews (MAK-Solutions)
Come hear how Mississippi College implemented the Banner Workflow module to transform paper processes into electronic processes. Pre-implementation, implementation, and post-implementation considerations and challenges will be discussed.

10:15 Tuesday
Aid Period Based Budgeting for Schools with POTs, a Work in Progress (R)
Robert Walker (ICC)
Itawamba's experience setting up period based budgeting for Fall 2014 term using Ellucian consulting to write SQL rules and help implement the setup. The system assigns students the proper aid period budget components, based on which Pot or Pots the student is enrolled in within the standard term. This is a work in process.

Implementing Automated Student Refund Disbursements (F) ………………...Shelly Ford (MGCCC)
If you are thinking about contracting with a third party to distribute your student refunds, you should attend this session. MS Gulf Coast Community College recently implemented with HigherOne and will share with you their experience from the perspective of the college. Learn how the process works between Banner, Intellicheck and the vendor.

Organizational Culture – How do you assess and adapt? (G)

Judson Matthews (MAK-Solutions)
Work Cultures have a huge impact on an institution's success and can help or hinder your ability to succeed. This presentation will explore how to assess your current culture and organizational readiness to successfully accept and implement automated applications and best practices.

Purchasing and Travel in the State of Mississippi (F) …………………………..…...Monica Ritchie (DFA)
This discussion features representatives from the Office of Purchasing, Travel & Fleet Management for the State of Mississippi. Learn about procurement and travel laws and regulations governing public entities in the State of Mississippi. They will also discuss state contracts that are established by OPTFM. Participants will be given the opportunity to ask procurement and travel related questions

Student Schedule Planning Plays Important Role in Graduation Initiatives & Student Success (S) ………………………………………………………………………...Mike Ayers (College Scheduler)
Is making your student's registration experience easy and efficient a goal that your institution strives for? Does increasing enrollment coincide with your institution's goals? Web based schedule planner for use by students when planning their schedule for an upcoming semester, College Scheduler automates the manual pen & paper process and presents the student with every possible schedule option that is open and able to be registered for RIGHT NOW. College Scheduler enables students to maximize credit hours, increase on-time graduation and find the perfect schedule. Creating a schedule around commitments has never been easier. Integrates with Banner, PeopleSoft, Colleague, and more! Used by 100+ institutions around the country large & small.

Using SQL and PL/SQL for Queries and Reporting (G) …………………………...Stephen Frederic (IHL)
SQL and PL/SQL are two languages used to extract information from Banner databases. In this session we'll discuss the basics of both of these and learn how to use them to create simple queries as well as more detailed reports for both on and off campus clients.

Utilizing R in IR (G,I) …………………………………………………………………………...Eric Atchison (IHL)
This session provides an introduction to the R software and programming language. R is a free software package that has numerous uses within the realm of data analysis. Topics of discussion will include background information, useful resources, and a discussion of how it may be used within institutional research or for general statistical analysis.

XE Architecture, Extensibility and API Strategy Explained for Banner (T)

Alan Hansen (Ellucian)

The updated new architecture that provides an evolutionary path to a new web 2.0-based user interface, optimized delivery, API strategy and an extendable platform. Additionally, one of XE's fundamental features is extensibility, and this session will present the new extensibility strategy. This session is for all audiences. It will not go so far into the technology that it goes over the head of the non-technical audience.