# MBUG 2015 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
**What's New with Ellucian and the Transformation of Banner? (G)** ……………Rick Skeel (Ellucian)
Join us as we share Ellucian's strategy for more quickly evolving the solutions on which you rely and providing the flexibility you need to improve the experiences of all those you serve.  We'll report on how our Ellucian XE strategy drives how we design, develop, and deliver applications. Learn more about the available applications and how your institution can adopt today!

### 10:45 Monday
**Accounts Receivable – Fee Assessments – Application of Payments Cleanup (F)**
Laura Chisolm (PRCC)
We will be discussing fee assessment, application and un-application of payment in detail. Discussion as to how the setup of detail codes can assist in smoother application of payments.

**Advancement Basics (A)** …………………………………………………………………Cindy Hampton (MC)
This session will illustrate easy ways to navigate through the Advancement system to find the information you need.

**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).

**Ellucian Enterprise CRM (S)** …………………………………………………………Sarah Farmer (Ellucian)
Hear the latest overview of the Ellucian Enterprise CRM strategy and roadmap and how it leverages Banner by Ellucian for powerful web services integration with Banner.  Learn about Ellucian's new student success solution, as well as updates on Ellucian Recruiter and Ellucian's next generation advancement solution.

**Navigating Ellucian XE: Tips and Tricks (G)** …………………………..………Antonio Trepesowsky (Ellucian)
If you use Banner daily, this session is for you. While it's true that in XE some of the shortcut strokes have changed, there are many exciting features that make Banner XE more user friendly

for the average Banner user. Rediscover features of Banner you've ignored that give you the power to make Banner work for you.

**Technical Basics (T)** ……………………………………………………………………………Steven West (ICC)
"Banner back-end basics and creative ways to use your data"

**The Transformation of Banner Human Resources (H)** …………………………………Rick Skeel (Ellucian)
In this session we will provide an overview of the Ellucian XE strategy and share the exciting HR release that improves the look and feel and usability of your Banner pages

**Utilizing R in IR – Follow up From 2014 (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.

## 1:30 Monday
**Banner Authentication and Login Validation (T)** …………………………………………Allen McGehee (MC)
Authentication using a username and password doesn't seem to be enough anymore. This session will cover the current problems and solutions facing IT admins trying to secure their systems and protect their users.

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

**Banner Communication Management (G)** ......................................................Rick Skeel (Ellucian)
Check out this exciting new baseline application, which delivers communication management capabilities across Banner.  This new application supports the creation, publication, and tracking of emails, letters, SMS, and targeted announcements for any person or organization with a PIDM record.

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

**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.

**SAP Process and Procedures in Banner (R)** …………………………………………….Angie Sherrer (MSU)
This session will cover Satisfactory Academic Progress processes and procedures used to complete the SAP check. Participants will be able to discuss how this process is completed at their institution and the pros and cons associated with their processes.

**Uploading Banner Data to the NCAA Compliance Assistant Software (S)**

Ginger Robbins, Jay Garrett MC)

Mississippi College staff will discuss how the institution implemented an academic information upload process from Banner to the NCAA Compliance Assistant application.   Both functional and technical perspectives will be addressed. The upload has replaced countless hours of manual data entry, from which institutions from all NCAA divisions may benefit.

**Using Banner to Facilitate Course and Faculty Evaluations (I)** …………………………Nicole Evans (JSU)
The quality of instruction provided to students is very important to the administration, faculty, and staff at Jackson State University (JSU). The most direct way to assess this is by collecting information from students about current courses in which they are enrolled. JSU uses Banner to facilitate this confidential course evaluation process and allows the student to print a certificate to verify completion.

## 2:45 Monday
**Alumni/Advancement BOF (A)** …………………………………………………………….Jim Pilgrim (MC)
**Finance BOF (F)** ……………………………………………………………………………Joyce Dixon (MVSU)
**Financial Aid BOF (R)** …………………………………………………………Gail Muse Beggs (HCC)
**Human Resources BOF (H)** …………………………………………………………….Linda Wilson (JSU)
**Institutional Research BOF (I)** …………………………………………………Rhonda Loper (DSU)
**Student BOF (S)** …………………………………………………………………………Tammie Dill (ICC)
**Technical BOF (T)** ……………………………………………………………………….Chris Giger (DSU)

## 4:00 Monday
**Address Verification in Banner using CLEAN_Address (G)** ……Chris Eaton (Runner Technologies)
CLEAN_Address verifies, standardizes and enhances postal addresses in real-time and in batch using a seamless integration in Banner. Learn how every department in an institution can benefit using CLEAN_Address including Student, Alumni, HR, and Finance.

**Banner Tips & Tricks for AR & AP (F)** ………………………………………………………Sandi South (ICC)
This presentation will cover tips and tricks for Banner Accounts Receivable, Accounts Payable, and some Finance.  Banner has many shortcuts and tricks that aren't always in a manual or passed on from user to user. Join me to see if you can take something new back to your institution.

**E-COMMERCE Anyone? (T)** …………………………………………………………………Artis Smith (JSU)
Would you like to provide your students, faculty, staff, alumni, and community members with the capability to register and pay online 24/7 for events sponsored by your school?
In this session, we will discuss benefits of e-commerce and review the process for setting up a standard Universal Store (uStore) including accounting codes that map to Banner detail codes.
If time permits we will discuss text messaging, social media, categories, product options, modifiers, table builder, reports, and maybe private stores.

**Federal Grants Updates (F)** ……………………………………………………………………Louise Brown (MGCCC)
Guidelines and changes for educational institutions administering federally funded grants. (Includes policy and procedures, time and effort reporting, purchasing and measurement requirements)


**Financial Aid Basics (R)** …………………………………………………………………………Angie Sherrer (MSU)
Quick tips on how to easily navigate the financial aid module within Banner. This will be an open forum where all participants will be allowed to share their experiences and preferences.

**MCCB Enrollment Audit (S)** …………………………………………………………Allen Coleman, Cay Lollar (ICC)
This session will cover the MCCB enrollment audit process from a college's prospective.  It will explain some preventative steps that ICC takes to limit work when it's time to build the files.  It will provide a semi-technical view of the file creation process, without looking at a bunch of code (but code will be available to look at if requested).  This session encourages you to bring your own tips and tricks to share with attendees, so everyone can better their enrollment audit experience.

**Replacing Book Vouchers or Batch Systems with a Real-Time Financial Aid Interface (R)**
                                                    Leila MacCarthy (Trimdata)
Implement a two-way, real-time interface between the campus bookstore and Banner Financial Aid. Students have easy access to course materials before classes start. Admins have a streamlined process that reduces errors and eliminates manual labor. Charges are authorized in real-time and an invoice is created on the student account. No need to disburse early.

**Self-Service Graduation Application (S)** ………………………………………….…………Tammy Prather (MUW)
In this session, we will walk through the steps to set up the screens in Banner that allows a student to apply for degree online through self-service.  When the student submits, banner is updated and any fees are charged to the student account.  Come expecting to take home a new process.

## 9:00 Tuesday
**Argos Reporting Basics (G,I)** …………………………………………………………………….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.

**Basic Award and Proposal Tracking Using the Banner Research Accounting Module (F)**
                                                    Jennifer Easley (MSU)
Are you interested in learning more about the Banner Research Accounting module? Join us as we walk through basic proposal and award data entry and tracking. We'll also take a look at common search functions within the Research module as well as describe the recent implementation process at MSU.

**Credential Solutions/RoboRegistrar (transcript processing solution) (S)**

Josh Guest (HCC), Tiffany Black (ICC)

Holmes Community College and Itawamba Community College processes transcript requests using Credentials Solutions.  This has reduced the time to process transcript requests and has allowed transcript clerks to do other tasks within the office.  Transcripts can now be sent even when offices are closed.  Come and see if this will work for your office.

**Explore the Banner Finance Purchase Requisition Powered by XE (F)** ...........Rick Skeel (Ellucian)
Learn how Ellucian XE brings Banner to the device of your choice to solve business problems in real time. This session will provide an overview of the Banner Finance Purchase Requisition Powered by XE which the first Finance Self-Service application developed under the Ellucian XE strategy

**Help Students Graduate on Time with Ellucian Degree Works Student Educational Planner (S)**

Tim Dawson (Ellucian)

Many states now require students to develop an academic plan their first year, ensuring students minimize excess credits and graduate on time. The Student Educational Planner in Ellucian Degree Works permits students and advisors to lay out a recommended sequence of classes that is validated against remaining program requirements. Also, the planner provides visibility into course demand, enabling institutions to offer the right courses at the right time.

**Human Resources Basics (H)** ………………………………………………………..Teresa Yarbrough (DSU)
You may call this a "Refresher".  In this session we will cover all the "basic" screens.  We will touch on the screens that should be completed first to what you need and don't.  It can get confusing, do I need to do this?  Do I need to do that?  Hopefully when all is said and done, you will leave this session feeling confident.

**The Integration of Banner & Microsoft Office to Create Customized Solicitation Appeals and Reports (A)** ..............................................................................Dameon Shaw (MVSU)
In this session the user will learn how to use population selections and letter generation in order to create customized reports and letter via Microsoft Word and Excel.

## 10:15 Tuesday
**Banner Human Resources and Finance: The Road to Ellucian XE (F,H)** ……….Rick Skeel (Ellucian)
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.

**Empower your students by simplifying scheduling! How Student Schedule Planning Benefits The Entire Institution (S)** ……………………………………………………..Mike Ayers (College Scheduler)
Are you challenged to improve student service, increase enrolled credit hours, and enhance course demand accuracy? Mike Ayers with College Scheduler will demo the functionality of the schedule planner and share the benefits for students and administration. College Scheduler provides every possible schedule option to your students, reducing frustration during registration. At the same time, administration benefits from real-time course demand,

enrollment optimization, and bulk scheduling specific student populations. By providing a more efficient and user-friendly registration process, students can maximize courses taken each semester which supports increased enrollment credit hours and on-time graduation.

**FERPA (S)** ……………………………………………………………………………………….Jeff Loggins (MVSU)
This session is for those who are new to the profession and will address many of the "what" and "how" questions relative to FERPA and the registrar's office.  A significant portion of the session will focus on understanding and applying FERPA. Attendees will leave the session with a better understanding of the depth and duties of the registrar as related to FERPA compliance, where to find information and answers, and a network of professional colleagues.

**Get to Know Ellucian Pilot (S)** …………………………………………………………..Tim Dawson (Ellucian)
Ellucian Pilot, part of a suite of Ellucian Enterprise CRM offerings, can help your institution improve your student success and retention efforts by providing new capabilities across the full arc of the student experience.  Join us to hear how this new solution applies embedded analytics on key performance indicators to drive personalized scorecards and dashboards, automate and track engagement processes, and enable your institution to make informed decisions about how to best support your students and strengthen your programs.

**Travel and Expense Module (F)** ………………………………….Stephanie Weekly, Keilani Vanish (JSU)
An overview of the Travel And Expense module that will show how to streamline and automate the travel process and establish policy-driven  controls for expense reimbursements.  The Travel and Expense Module can reduce the amount of time and effort required to submit, approve, process and pay reimbursements.

**Using Argos to Discover a Whole New Data World (G,I)** …………………………….Rhonda Loper (DSU)
You are in a time crunch, a report is due in less than 24 hours, and the data pulls from a host of different fields, so what should you do now? Well, if you have planned ahead by creating preset reports in Argos, you simply select the report you are needing and pull the data. This session will share a true story about how Delta State utilized preset reports in Argos to provide the data needed on our *First in the World* grant proposal, which once awarded, allowed us to implement a new program in our Student Success department. This session will be a fun-filled journey into how a *Whole New Data World* was discovered through utilizing Argos, a reporting solution by Evisions software.

**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.