

MBUG 2013 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

Banner Boot Camp I (G).....Donna Hayden (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).

Employee Self-Service (H).....Rita Singleton (JSU)

The attendees will understand the basics of using the Employee Self-Service application. Attendees will how employees view, update, and print records from the Human Resources database using Web technology. Hypertext capabilities provide easy navigation through the Employee Self-Service Web pages.

Report Writing from a Functional Perspective (F).....Tracy Stapleton (JSU)

Many Finance Banner users can relate to the challenge of developing user friendly reports. In this session presenter will share tips and reports created through the use of Access.

The Banner XE Student Experience (S).....Ed Hauser (Ellucian)

This session takes a deeper look at the Banner Student XE modules (Course Catalog and Schedule of Classes, Faculty Grade Entry, Attendance Tracking and Event Management) that have been released to date. Banner Student XE provides architectural, functional, and usability improvements to both Administrative Banner and Self-Service Banner with the initial focus on the student, advisor, and faculty persona. We'll discuss customer adoption and provide a glimpse of Banner XE projects in progress such as student registration and some common components.

Using Holds to Require Orientation (S,T).....Allen Coleman, Steven West (ICC)

This session will look at how Itawamba Community College used a Banner hold to require freshmen to attend orientation. We'll discuss how ICC automated the adding and removing of the hold and briefly describe the technical details we used, while emphasizing areas were other schools could be creative and automate the process in their own way.

Using SQL and PL/SQL for Queries and Reporting (G).....Stephen Frederic, Eric Atchison (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.

Veterans' Benefits BOF (R,S).....Dow Ford (PRCC), Mandy Walker (ICC)
A sharing of ideas of how College personnel can best use the functions of BANNER to track Veteran's applications and certifications, attendance, enrollment changes, and withdrawals for reporting.

12:30 Monday

Automated Holds for AR & Others (F,S).....Sandi South (ICC)
Learn how to place delinquent accounts on hold and release paid accounts without going to SOAHOLD. Set it up once and use it often. Other offices besides AR can take advantage of this process too. Come see how it works!

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

Banner XE Student Registration (S).....Ed Hauser (Ellucian)
This session will provide customers with a deeper look at the registration planning function that is being added to Banner student registration. Specifically, it will examine the new registration planning function which provides students and advisors with the ability to create either course or section level plans which can be saved as students work with their advisors to come up with an optimal schedule from which they can use to register for classes. The new function will also work with either CAPP or Degree Works to assist students and advisors in the registration planning.

Best Practices in Gift Processing Using Banner Advancement (A).....Michelle Hart (Ellucian)
Whether you and your staff are new to Banner Advancement, or, have been in production for many years, the area of gift processing is one where good policies and procedures must in place so that the data entry process is quick, efficient and accurate. This session will cover recommendations for the proper set up of Banner rules and validation tables and provide suggestions for efficient processing.

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.

Financial Aid Self-Service Panel Discussion (R)

Bobby Walker (ICC), Angie Sherrer (MVSU), Amber Kelly (MDCC)

Base line Banner Self-Serve 101. Set up and use to provide basic information to students.

Award Letters, Cost of Attendance and Shopping Sheet, and forms.

The BIG Idea in Analytics for Student Success (I,S).....Jeff Admonius (Oracle)

In the world of analytics, business intelligence and enterprise performance management solutions have provided the most adept schools with powerful insights and actionable tools to improve decision making and performance. The current Higher Education environment now requires even more advanced capabilities in order to react and respond quickly to increasing demands from students and state governments for information and evidence of successful student performance. Institutions now need new information, where from a variety of sources to explore multiple paths, ask different questions and validate new ideas. Oracle provides the solutions that empower you to explore and analyze information from any combination of structured and unstructured sources such as Student, HR and Finance systems, evaluation data, social media, websites, content systems, files, email, database text and other sources of big data. The result is improved decision making that will drive Student Success.

- The Impact of Big Data on Student Success
- Using Analytics to impact Student Performance
- Turbo charging Student Analytics Deployment

Today, Money Moves Mobile (F).....Will Rogers (TouchNet)

From Paying tuition to buying books to shopping at campus stores, mobile commerce is growing like never before - and changing the way students, parents, alumni and all your campus constituents shop, browse, purchase, and pay. Now more than ever, campus commerce professionals need a single solution for enabling mobile payments from across the campus enterprise and into a unified and secure financial technology platform. Come to this session to learn about TouchNet U.Commerce Mobile, and find out how money can move mobile on your campus.

2:00 Monday

Argos Case Studies and What is the Argos Deployment Service? (G).....Alice Levy (Evisions)

Argos, the Enterprise Reporting Solution from Evisions, has helped hundreds of Higher Education sites solve reporting and information access challenges. This session will go through examples from letter generation and basic reporting to data cubes and dashboards. Using client examples you will see how Argos goes beyond basic reporting and gets access to the information you need quickly and easily. Get ideas on what others have done. See how Argos is Easy to Use and Easy to Manage.

Also learn what the Argos Deployment Service is all about. What does your institution receive when you purchase this package, and what are the benefits to using this?

Housing Setup and Use (S).....Lari Wright (MSU)
In this presentation, we will take you "back to the basics" of how our housing assignments team utilized Banner before integrating with our housing software system, StarRez. You will gain insight into the daily Banner forms, tables and codes in which we applied toward our normal application and assignments processes.

How to Find and Understand Documentation - Using the new Ellucian Hub (G)
Lisa McDaniel (MUW)
This session will cover the new Ellucian Hub which includes the Customer Support Center, Action Web, and Commons as a means of finding Banner documentation and help. Finding help in Banner INB will also be covered.

Leave Accrual and Processing via Employee Self Service (H).....Lisa Giger (DSU)
This session will illustrate system setup screen by screen. The presentation will also include a demonstration of leave time entry through Banner by the timekeeper and approval by the supervisor through Employee Self Service.

Online Requisitions (F).....Kevin Baker (HCC)
Learn how to setup online requisitions. We'll discuss organizational routing, how to configure approval queues, setup approvers and more.

Requirements Tracking (R)Sandra Spraglin (Ellucian)
The purpose of this session is to gain an understanding of the Requirements Tracking module and its uses which allows for configuration of unlimited document requirements and status codes which can then be assigned to applicants.

Student Accounts Receivable to Finance Interface and Feeds - A Best Practice Approach (F)
Rose Most (Ellucian)
What are the critical links between accounts receivable and finance? This session will review the best practice approach for accounts receivable in setting up business processes and detail codes, including the general ledger accounting strings needed to feed data to the appropriate accounts in Finance. Due to the critical nature of AR detail codes, a full review of configuration options will be presented. This session will also review the configuration of the accounting interface block, the feed to Finance and the business processes that are necessary to ready the data for the feed to Finance, and the best practice on bank reconciliations and do a high level review of the AR to Finance reconciliation.

Wait Listing (S).....Tilda Bouchillon (ICC)
This session will define wait listing, present step-by-step setup, and demonstrate how the process works once setup is complete.

3:30 Monday

- Alumni/Advancement BOF (A)**.....Cindy Hampton (MC)
- Finance BOF (F)**.....Joyce Dixon (MVSU), Louise Brown (MGCCC)
- Financial Aid BOF (R)**.....Bobby Walker (MGCCC), Sandra Spraglin (Ellucian)
- Human Resources BOF (H)**.....Stephen Frederic (IHL)
- Institutional Research BOF (I)**.....Eric Atchison (IHL)
- Student BOF (S)**.....Ashley Hunter (MCC), Cassandra Atley (MDCC), Ed Hauser (Ellucian)
- Technical BOF (T)**.....Allen Coleman (ICC), Chris Giger (DSU)

9:00 Tuesday

Banner Security Administration Overview (T).....Artis Smith (JSU)
Attendees will get a better understanding of how Internet Native Banner (INB) security works. We will discuss security administration and options for set up in INB. Time permitting, we provide a glimpse into Distributed Security.

CAPP Boot Camp (S).....Jimmy Smith (ASU)
A birds-eye view of CAPP at Alcorn State University. This session will cover setting up a CAPP program; running a compliance; generating an output from a compliance; and using online services to generate compliances on demand.

Explore All the Possibilities for Your Schedule! (S)

Mike Ayers (College Scheduler), Ginger Robbins (MC)

Students struggle with finding the perfect schedule to balance with their busy lives. At the same time, administrators struggle with determining what courses students want and when to offer them without conflicting with other courses. Mississippi College recently implemented College Scheduler with their student information system and found where students are excited about exploring ALL of their options in generating that PERFECT schedule. Administrators can see how much students are using College Scheduler and see trends in student selections. Come see in this demo how easy a student or an advisor can generate ALL the possible schedules for students while collecting course demand analysis at the same time. Creating the perfect class schedule each semester has never been easier!

FMLA (H).....Kim Thomas, Sarah Perry (MSU)

The Family Medical Leave Act (FMLA) requires effective communication with employees and Banner processes that support compliance. This session will focus on FMLA, recognition of important FMLA provisions, leave request "triggers" that help staff recognize and follow FMLA guidelines, and how FMLA is processed in Banner.

How to Put Money Back in Your Budget! (F,T).....Karin Sammons (ECSI)

Heartland Campus Solutions/ECSI—provides a PCI Level 1 and PA-DSS compliant Hosted payment solution, which removes the middleman and saves schools on average \$40,000 a

year. Other product offerings are Refunds, 1098Ts, Loan servicing, Delinquent A/R, Payment Plans, eBill, Storefront, etc.

Make Data-Driven Decisions Faster With Informer (G).....Pam Barber (Entrinsik)

Please join us to see why over 300 Universities and Colleges using Ellucian's administrative systems use Entrinsik Informer. Informer's powerful and intuitive web interface provides simultaneous access to multiple data sources, and the ability to share report definitions and dashboards with other Banner schools. Using drag-and-drop capabilities, Informer can quickly turn real-time data into interactive reports that allow users to easily visualize and monitor key metrics from a single consolidated view; then immediately drill into the underlying details within the different databases with just one click. Informer is often used to analyze and report on revenue and expense information from different departments and systems, perform real-time analysis to find and retain the most profitable students and courses, and measure the effectiveness of institutional research against results.

Repeat Coursework Setup (R).....Sandra Spraglin (Ellucian)

This session will discuss how you can setup Banner Financial Aid to support Repeat Coursework processing. We will review the setup necessary to implement Repeat Coursework processing and the logic Banner uses to determine a course is a repeat.

Travel and Expense Management (F).....Chris Eby (Ellucian)

Designed from the ground up for higher education and supporting processes unique to it, Banner Travel and Expense Management is a comprehensive solution for managing travel and expense activity. With it, you can establish appropriate policies for your institution, encumber travel funds, authorize expenditures, process reimbursements, electronically store supporting attachments, manage per diems, and manage approvals—all from a single, process-directed web interface. Because it leverages key accounting and payment capabilities within Banner Finance, Banner Travel and Expense Management ensures consistency with your accounting system of record and improves compliance with fiscal policies.

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.

What is the Evisions Research Suite? (G).....Alice Levy (Evisions)

Research organizations in Higher Education face ever steeper requirements for reporting, compliance, and administrative accuracy. The Evisions Research Suite addresses those needs with a range of solutions designed to meet the unique needs of sponsored research and research compliance. At this session you will see the Cayuse 424 (pre-award proposal development), Cayuse SP (award life cycle management) and Cayuse 424 Analytics solutions. We will go over how these solutions help you gain visibility into the research portfolio, manage

the processes and workflows more efficiently and increase grant and sponsored project activity. The Evisions Research Suite is Easy to Use, Easy to Launch and Easy to Manage.

10:30 Tuesday

Academic Scheduling and Configuration: In Practice (S)

Amy Adkerson, Sterling McCool (MSU)

A look at our experience setting up and using Astra Schedule at Mississippi State, with recommendations toward best practicing for up-and-coming institutions.

An Overview of EPAF and How it Works (H).....Angela Grandberry (ASU)
Electronic Personal Action Form (EPAF) went live January 1, 2013. It is designed to accommodate efficient approval signature processing for Human Resource Payroll operations and supports the movement of a paperless office. An EPAF, accessed within Banner Online Services, is an electronic venue to process employment actions that would apply information to the NBAJOBS, PPAIDEN and/or PEAEMPL forms. The forms and reports were developed to enter certain actions for approval, define the necessary approval hierarchy, track items through the approval process, and to provide an audit trail of approval/disapproval history.

Argos Administration and Setup – BOF (T).....Jim Pilgrim (MC)
Discussion of the administration and setup required when using the ARGOS reporting tool.

eCommerce Campus Suite: Payment Solutions for the Banner Campus (F,S)

John T. Braswell (Official Payments)

Official Payments, a leading provider of payment processing solutions to Banner, Ellucian Schools, offer solutions for all your campus payments, from tuition and fees to parking to event registrations. Now available, an enhanced interest-free installment payment plan that includes balance adjustment options for plan increases and decreases, administrative tools for making real-time plan adjustments, an intuitive user interface and account management tools for a convenient and fast payment experience.

Ellucian Recruiter (S).....Jen Taylor (Ellucian)
Come learn how Ellucian Recruiter can help cultivate personalized relationships with prospective students and support your enrollment goals. This session will provide information about the latest release (version 3.0) and highlights from the roadmap around some of the exciting new features planned for future releases.

Grants Research Accounting and Proposal Management (F).....Chris Eby (Ellucian)
Ellucian's sponsored research solution integrates with Banner Finance administrative applications and Workflow, Document Management, Luminis, and Data Warehouse. This solution helps institutions continue to grow research funds while containing administrative costs.

Identifying and Merging Multiple Entities (G)

Lisa McDaniel (MUW), Cindy Hampton (MC), Edith Riley

Since the beginning of Banner there has been the threat of multiple identity records (PIDMS). Whether from a keyboard or a “tape load” the risk is always present for a second or third instance for a person or other entity to be added to the database. This session will discuss best practices for minimizing the risk, identifying multiples that exist, and some tips on data merging.

The Return of Title IV Funds (R).....Sandra Spraglin (Ellucian)

The Return of Title IV funds module assists you in complying with Title IV regulations for federal financial aid. We will discuss the following ways that Banner handles return of Title IV funds: authorizing the return of Title IV funds; returning Title IV funds; determining the amount of Title IV Aid to return/disburse; and properly handling application and refunding of Title IV credits. Title IV features in Banner involve Accounts Receivable, Student & Financial Aid.

Using Monarch for Reporting (T).....Bernadette Coleman (ASU)

The purpose of this session is to provide a snapshot as to how to use the Monarch Professional software to extract data from certain types of report files, such as text, PDF, and HTML and turn them into actionable information.