

MBUG 2022 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:

3:00 Sunday

Banner Boot Camp (G)Carmela Staten (MVSU)

What is Banner 9 and how to use it? This session provides an introduction to Banner 9 or a refresher for existing users. Covering navigation, shortcuts, data entry, forms, user documentation and how to get help. Highlighting tricks and tips to help you master the platform.

4:00 Sunday

New Banner Users / New Conference Attendees Birds of a Feather (G)Lilly Austin (HCC)

General Session:

9:30 Monday

Ellucian Experience: Where Power Meets Personalization (G)Steve Hanner (Ellucian)

Join Ellucian product experts as they discuss Ellucian Experience, the personalized digital dashboard that organizes what your students, faculty, and staff need to know and accomplish daily. This session will give you the opportunity to ask questions personalized to your institution, converse with your peers, and learn more about the functionality around Ellucian Experience.

Breakout Sessions:

10:45 Monday

Annual Fund (Day of Giving) Fundraiser (A)David Howard (JSU)

In this session you will learn how JSU started and grew its Day of Giving Campaign. The unique strategies discussed in this session can be implemented at any institution; helping you to increase your donor participation and alumni giving percentage.

Streamling the Year-End Budgeting Process to Improve Transparency (F)

Kelvin Davis, Edwin Craft (DSU)

Hear how Delta State University embarked on a journey to overhaul their existing planning processes to improve resource allocation, increase stakeholder engagement, and enhance

administrative efficiencies with the annual budget planning process. Presenters will discuss how they have successfully transformed planning capabilities and now spend less time reviewing data entry, inefficient consolidations, and manual reporting—and more time optimizing institutional resources by aligning them to strategic priorities. Presenters will provide attendees a practical framework to follow, including key considerations for success and common pitfalls to avoid. Join this presentation to learn how you can help your institution enable agile planning and improve data-driven decision making.

Banner Financial Aid Q&A with Strata Information Group (R)Mary Krallman (SIG)
Topics for Discussion: Tips for Period Base Budgeting Setup, Arguments for or Against Running RPEDISB Multiple Times During the Day, and Suggestions for students submitting financial aid forms electronically and having digital signatures.

Introduction To Banner Communication Management (G)Brian Regan (SIG)
Introduction to Banner Communication Management including set up, common use cases and overview of components.

Banner 9 Leave Management (H)Keunta Mcphearson (JSU)
The Banner 9 Self-Service System will allow employees to report absences, supervisors (or their Proxy) to verify and approve reported leave, and both employees and supervisors to better manage leave. The web-based system is designed to improve accuracy in leave reporting and management.

Registrar Birds of a Feather (S)Shannon Lucius (MUW)

Text Messaging for Student Success and Engagement (G)Drew Boyles (MSU)
Mississippi State is in the process of evaluating options for an enterprise-wide text messaging platform. This session will give you an overview of how Ellucian and third-party vendors are addressing this need, and how such functionality can integrate with Banner.

1:30 Monday

Banner Account Receivable Refreshing the Basics I (F)Laura Chisolm (PRCC)
This session will cover detail and priority code information and how they relate to un-application and application of payments. We will discuss topics from Ellucian Live 22 pertaining to the student accounts receivable module.

Advanced Financial Aid Q&A with Strata Information Group (R)Mary Krallman (SIG)
Topics for Discussion: Tips for Federal Work Study with Time Card Setup, Secure Document Upload Options, and Does Banner Communication Management (BCM) work well with Financial Aid.

Cloud Services ... Explained (G)Digi Edwards (Ultimate Consulting)
This session will explore the three options for Ellucian Cloud Services for maximizing operational efficiency and long-term value with access to the latest upgrades, security improvements and product enhancements without the need for internal staff managing these.

Extractions are Painless at MUW, Using Evisions Argos (G)
Andrew Garner (MUW), Michael Ruzek (Evisions)
Andrew Garner will discuss how MUW creates extract text reports from Evisions Argos and then use those reports to aid with retirement reporting, NSC, Student Tracking, and Banner job submission outputs. Evisions will also be on hand to provide a brief introduction and overview of Argos.

Ellucian CRM Recruit (S)Georgia Ryle (DSU)
Ellucian CRM Recruit (Recruit) is software that helps create and foster relationships with prospective students. From an inquiry to admission, CRM Recruit tracks the student throughout the recruiting life cycle. Recruit can be used for collecting names and information about prospective students, communicating with prospective students, submitting applications, and admitting students. This presentation is to go through Recruit to show some of the features of Recruit.

Streamlining the Class Cancellation Process (S)Mikhail Collins, Kelvin Davis (DSU)
The timely payment of tuition and fees is a hot topic at institutions of all types and sizes. Curious to see how colleagues are handling issues surrounding timely payment of tuition and fees? Learn how Delta State University totally redesigned their class cancellation process to improve student success while stabilizing the University accounts receivable. Presenters will provide attendees with best practices and helpful tips in developing a comprehensive plan for the class cancellation process which could ultimately enhance effective communication of settling student accounts by each semester's payment deadline and increase harmony amongst the process's stakeholders.

Demystifying Ethos (T)Brian Regan (SIG)
This session will review the steps needed to setup and maintain Ethos Integration, including an overview of the Ellucian Ethos API Management Center

2:45 Monday

Alumni/Advancement Birds of a Feather (A)Cindy Hampton (MC)
Finance Birds of a Feather (F)Keilani Vanish (JSU)
Financial Aid Birds of a Feather (R)Ashley Broyles (HCC)
Human Resources Birds of a Feather (H)Gena McBrain (MC)
Institutional Research Birds of a Feather (I)Frager McCline (MDCC)
Student Birds of a Feather (S)Lilly Austin (HCC)
Technical Birds of a Feather (T)Desmond Stewart (ASU)

4:00 Monday

MCCB Updates with emphasis on the link between Data Collection and Reporting (G)

Ashley Payne (MCCB)

Along with general MCCB updates, this session will focus on the critical link between local data collection and global data reporting. From the campus to the system portal, there is an undeniable correlation between what is captured on campus and what is eventually reported statewide. This interactive session invites attendees to share best practices for data collection and management from the campus view while fostering an appreciation for big data reporting.

9:00 Tuesday

Banner Account Receivable Refreshing the Basics II (F)Laura Chisolm (PRCC)

This session will cover fee assessment processes, billing statements, and contracts. We will discuss topics from Ellucian Live 22 pertaining to the student accounts receivable module.

Financial Aid Screens for Advisors (R)Ashley Broyles (HCC)

Tip and tricks for first time users within the Financial Aid banner forms and how to use them.

Banner Basic – How Forms Connect and Function (G)Cindy Hampton (MC)

This session will demonstrate Banner form navigation and how different forms connect.

How Do You Eat An Elephant: Making Your Scholarship Awarding Processes Digestible (A,R)

Ayanna Smith (JSU)

How do you advertise, award, package your current and incoming student population and steward your donors through an academic cycle? The same way you eat an elephant – one bite at a time. This session will share tactics on transforming outdated scholarship processes through using Blackbaud Award Management and Banner. Learn how to streamline the collection of student data, award institutional and foundation scholarships and provide data in real time.

Clearinghouse Reporting Roundtable (S)Megan Pritchett (MC)

It seems that most Clearinghouse knowledge comes from experience rather than training. Let's pool our collective experience to answer questions for new Clearinghouse users, wrestle with problems that even seasoned users struggle to solve, and discuss other ways institutions are using Clearinghouse. Some questions will be prepared by the moderator, but the floor will be open for all Clearinghouse concerns or queries. Topics to include reporting accelerating classes (7 or 8 week sessions), working with auditors, when to use NSLDS and who has access, new reporting dashboards, and Post-Secondary Partnership.

DataflowHBR (T)Richard Wendell, Phillip Brooks (RTSDBA)

A new integration system that will continue to function even after migration to SaaS. It is ultimately tailorable and provides custom forms, reports, and even workflow. We have connectors for on-prem Active Directory, Ellucian ethos, Canvas and we're working on modules for D2L, Moodle, generic LDAP. In addition, we're including cloud-hosted SSO options as well.

Getting Ready for Banner SaaS (T)Steve Hanner (Ellucian)

This discussion will provide a high-level overview of the focus areas an institution should address when considering a move to a Software as a Service (SaaS) platform. Topics covered will include considerations such as campus change management, repurposing technical skill sets, and the process of reviewing, consolidating, and retiring customizations, reports, and integrations.

10:15 Tuesday

Accounts Payable – Tips and Tricks (F)Ashley Broyles (HCC)

This session will look at most AP screens and will walk through the process. Will also look at the entry and correction of W-9 information.

Financial Aid Self-Service 9 - Why the Upgrade is Worth It (R)Jaime Missimer (PRCC)

Still using Self-Service 8? In this session we will discuss why Self-Service 9 works better for students and your office. See how it looks for students, how it is easier to navigate, and how to set it up in Banner to fit your needs.

Introduction to Ellucian Insights Reporting Tool (G)Steve Hanner (Ellucian)

This session will discuss Ellucian Insights' embedded reporting experience. In addition to providing access to the out-of-the-box content provided with Ellucian Insights, the embedded reporting tool allow report developers and consumers to easily create, share, and view insights all within the cohesive experience provided by the Ellucian Experience platform.

Slate CRM Demo (S)Megan Pritchett (MC)

Mississippi College implemented Slate in 2021. This will be an informal demo of how MC uses Slate for recruiting and admissions. The Registrar's Office at MC processes all admissions documents and renders decisions. Therefore, this demonstration will emphasize processing, decisions, and linking the Slate interface with Banner in order to create student records. After the demo, the floor will be open for a Q & A.

It's Right Around the Corner: Accelerating To Banner 9 SSB and Away From COBOL (T)

Steven Terry (Ferrilli)

Ferrilli will share approaches to moving from Banner 8 to Banner 9 SSB and considerations for the move away from COBOL. Strategies for decommissioning Banner 8 SSB and COBOL will be suggested. Ferrilli's service delivery model, to support schools in these important transitions, will be presented.

How an Internal Process Department Expedited IT Requests (T)

Hannah Miller, Amanda Brumfield (PRCC)

Come join us in a discussion about how Pearl River expedites IT related requests and bridges the gap between PRCC and Ellucian. As liaisons between PRCC and our outsourced IT Department. The Office of Internal Processes works with all the departments on campus to research new requests that need IT support. This may be a new report request or a brand-new

process that may affect multiple offices on campus. We work to utilize Banner in the most efficient way possible to complete these requests and to optimize Banner to its full potential for Pearl River. This office has been successful in working together with IT to expedite requests.