

# FLBUG Agenda at a Glance

Thursday October 12<sup>th</sup>, 2017

|                   |   |  |   |  |   |                                      |  |
|-------------------|---|--|---|--|---|--------------------------------------|--|
| 11:30–<br>1:00 pm | Registration (U building First Floor Lobby) Visit the sponsor vendor tables!                |  |   |  |   |                                      |  |
| 1:00 –<br>1:30 pm | <b>Welcome (U-102) – Dr. Jeff Stewart, Provost &amp; VP Academic Affairs, FSW</b>           |  |   |  |   |                                      |  |
| 1:30 – 2:30<br>pm | <b>Keynote (U-102) – Ellucian “Banner 9 Today &amp; Beyond” - Jacob Chandler - Ellucian</b> |  |   |  |   |                                      |  |
| 2:30 – 3:00<br>pm | Break: Snacks & Refreshments available in the vendor area (U 1 <sup>st</sup> Floor Lobby)   |  |   |  |   |                                      |  |
| 3:00-3:40<br>pm   | <b>Banner Users Roundtable Discussions (U-102)</b>  |  |   |  |   |                                      |  |
| Tracks            | <b>Finance Track (U-206)</b>  | <b>Student Track (U-209)</b>                 | <b>Financial Aid Track (U-219)</b>      | <b>Human Resources/Payroll Track (U-220)</b> | <b>Technical Track (U-210)</b>  | <b>Open Track (U102)</b>             |  |
| 3:50-4:40<br>pm   | Pcard Birds of a Feather - FSW  | Auto-graduation- Removing the barriers – FSW | Course Program of Study Roundtable- FSW | Banner Webtime Roundtable - FSW              | Learn all the ways you can use the Ellucian Ethos technology - Ellucian | Emergency Notification Systems – FSW |  |
| 6:30-9:00<br>pm   | Dinner/Reception Networking in Suncoast Credit Union Arena Hospitality Suite                |  |   |  |   |                                      |  |
|                   |   |  |   |  |   |                                      |  |

FLBUG Agenda at a Glance

| Friday October 13 <sup>th</sup> , 2017 |   |   |   |  |   |  |   |  |  |
|--|---|---|---|--|---|--|---|--|--|
| 8:00- 8:30 am                          | Breakfast (U-102)   |   |   |  |   |  |   |  |  |
| Tracks                                 | <b>Finance Track (U-106)</b>  | <b>Student Track 1 (U-107)</b>  | <b>Student Track 2 (U-109)</b>  | <b>Financial Aid Track (U-110)</b>                   | <b>Human Resources/ Payroll Track (U-118)</b>             | <b>Reporting Track (U-119)</b>   | <b>Technical Track (U-205)</b>  | <b>Open Track 1 (U-206)</b>                        | <b>Open Track 2 (U-209)</b>  |
| 8:30-9:20 am<br>Session 1              | Banner 9 – SSB Requisitions “From Start to Finish” - FSW                                  | Banner Student, Financial Aid and Communication Management – Ellucian | Automating Florida Prepaid in Banner – FSW                                | Streamlining Financial Aid with Atomic/Appworx – FSW | Human Resources with Communication Management - Ellucian  | Ellucian Analytics powered by Ethos – A Game Changer for Higher Education - Ellucian | Accelerate Your Banner 9 Adoption Timeline - Ellucian   | EllucianGO Mobile app Roundtable - FSW             | Catalog & Curriculum Management: Bring Consistency and Accuracy from Curriculum to Catalog to Banner and Web – Acalog (Digarc) |
| 9:30 – 10:20 am<br>Session 2           | Drop for Non-Payment (Purge Process) - FSW  | Streamlining Advising using Banner 9 and automated assignments – FSW  | Ellucian CRM Advise – Ellucian  | Using Algorithmic Rules - FSW                        | FLAC BOF – Faculty Load Birds of a Feather - FSW          | Impacts of Banner 9 on state reporting – FSW   | Application Express _A Development Tool to Improve Business Processes Beyond Banner – St. Johns River | Ellucian Intelligent Learning Platform - Ellucian  | SQL 101 for Functional Users - FSW   |
| 10:20 – 10:40 am                       | Break: Snacks & Refreshments available in the vendor area (U 1 <sup>st</sup> Floor Lobby) |   |   |  |   |  |   |  |  |
| 10:40- 11:30 am<br>Session 3           | What’s New with Banner Finance and Communication Management – Ellucian                    | Automating your transcript process – FSW                              | CONVENIENCE IN A CARD Integrating Your ID Card with Campus Services - FSW | Financial Aid Self-Service How to’s – FSW            | Leveraging Banner Workflow to Automate HR Processes - FSW | Are we up or down? Enrollment Dashboards in Argos - FSW                              | Banner 9 Implementation roundtable- FSW   | Ellucian Ethos Workflow Powered by Ethos- Ellucian |  |
| 11:30- 12:30                           | Lunch/Door Prizes (U-102)   |   |   |  |   |  |   |  |  |
| 12:30 – 2:00 pm                        | Finance Birds of a Feather  | Student Birds of a Feather  |   | Financial Aid Birds of a Feather                     | HR/Payroll Birds of a Feather                             | Reporting Birds of a Feather   | Technical Birds of a Feather  | CIO Birds of a Feather                             |  |
|  |   |   |   |  |   |  |   |  |  |

**Thursday October 12<sup>th</sup>, 2017**

**1:00-1:30 Welcome Address (U-102)**

Dr. Jeff Stewart, Provost and VP Academic Affairs -FSW

**1:30-2:30 Keynote: Banner 9 Today and Beyond (U-102)**

Jacob Chandler - Ellucian

Banner 9 is here and ready for you with an innovative and new interface, options to improve extensibility, and significantly improved access for all users. Join us to learn how Banner 9 will make it easier to get things done within your institution both for your staff, faculty and students. We will also go over where Banner is headed in the future.

**2:30 – 3:00 Refreshments. Don't forget to visit our sponsors! (U Building – 1<sup>st</sup> Floor lobby)**

**3:00 – 3:40 Banner Users Roundtable Discussions (U-102)**

Join the FCS College CIO's for discussions around the latest implementations, projects and challenges across all colleges and universities. This is an interactive session with questions and answers related to topics around Banner

**3:50 – 4:40 Finance Track –Pcard Birds of a Feather – FSW (U-206)**

Marianne Rosenhauer – Application Support Specialist, Lisa Tudor – Director, Procurement Services

Open discussion around processing, banner forms, reports, best practices, audits and more from institutions using pcards, implementing or looking to use Banner in the future.

**Student Track - Auto-Graduation – Removing the barriers – FSW (U-209)**

Garnett Salmon – Registrar, FSW

Come see how FSW removed graduation barriers and adopted the model of auto-graduation. Students don't have to apply for graduation any further as FSW has automated this entire process for them. This process is more student friendly and has positively impacted our completion rates

**Financial Aid Track –Course Program of Study Roundtable – FSW (U-219)**

David Sankies – User Support Analyst, Milana Williams – Coordinator, Student Information Systems – FSW

Discussions around Banner's course program of study, how it is working, issues, and more.

**Human Resources/Payroll Track – Banner Webtime roundtable (U-220)**

Leslie Ryder – Application Support Specialist

Discussion about the web time entry processes used by the session participants.

**Technical Track – (U-210)- Learn all the ways you can use the Ellucian Ethos technology**

Joe Harple - Ellucian

Modernizing your campus, innovating to meet constituent demand all takes an intense amount of effort. Integration, data exchange, navigating information, choosing your device, and the list goes on. The Ellucian Ethos Platform is the cornerstone of our product strategy. We want to expose you to the platform and how it drives our design, develop and deployment decisions and discuss how you can begin integrating this within your current environment.

**Open Track – There’s an emergency on campus, now what? Emergency Notification Systems are as crucial in today’s world, come join us to see what FSW uses for reporting and communicating to our constituents. – FSW (U-102)**

Jason Dudley, CIO, Bo Young, Director, Technology User Services – FSW

After what we all experienced with Hurricane Irma, we thought it would be a good time to discuss emergency notification systems and what FSW currently uses and has in place to notify staff, faculty & students of emergencies as well as the different applications that can be used to report situations to FSW police. Some of the discussions will be around how we changed from an opt-in model to opt-out, visual alert systems and communications.

**6:30-9:00** Dinner/Reception Networking in Suncoast Credit Union Arena Hospitality Suite

Join us for a tailgating themed reception at the FSW arena. Finger foods and refreshments will be provided. Open bar will be until 8:30 then will operate as cash only.

**Friday October 13<sup>th</sup>, 2017**

**8:30 – 9:20 Finance – Banner 9 Purchasing Requisitions from Start to Finish – FSW (U-106)**

Marianne Rosenhauer, User Support Analyst, Lisa Tudor, Director, Procurement Services

FSW implemented Banner 9 purchasing requisitions last year, running parallel with Banner 8 until completing the switchover for the new calendar year. We will discuss the implementation, the rollout, issues we encountered and more.

**Student Track 1 – Banner Student, Financial Aid and Communication Management – Ellucian (U-107)**

Billy Benton (Remote) - Ellucian

Join us to learn more about what's here and what's coming for Banner Student and Financial Aid. View the new modernized user interface, improved accessibility and usability improvements to help all users. See key examples of the forms. We will explore new functionalities like Student Administration, Name Display and Student Advising Profile with release holds and advising notes. Additionally, check out Communication Management, delivered across the Banner Administration applications. This new application supports the creation, publication, and tracking of emails, letters, messages to Ellucian Go mobile for any person or organization with a PIDM record.

**Student Track 2 – Automating Florida Prepaid in Banner –FSW (U-109)**

Amber Redfern – Asst. Bursar, Paul Allen– Sr. Programmer – FSW

Keeping track of Florida Prepaid students can be a monumental task. Come see how FSW leverages third party contracts in Banner to track FPP using an automated process to assist in the processing and tracking of FPP students.

**Financial Aid – Streamlining Financial Aid with Atomic/Appworx – FSW (U-110)**

David Sankies – User Support Analyst, FSW

Join us as we discuss how FSW users Atomic/Appworx to streamline and create efficiencies as it relates to Financial Aid processing.

**Human Resources/Payroll Track – Human Resources with Communication Management – Ellucian (U-118)**

Paul Huizenga – Ellucian

Join us to learn more about what's here and what's coming for Banner Human Resources. View the new modernized user interface, improved accessibility and usability improvements to help all users. See key examples of the forms. We will explore the new functionalities like consolidated Employee Self-service, and enhanced Effort Reporting and Labor Redistribution. Additionally, check out Communication Management, delivered across Banner. This new application supports the creation, publication, and tracking of emails, letters, messages to Ellucian Go mobile for any person or organization with a PIDM record.

**Reporting Track – Ellucian Analytics powered by Ethos – A game changer for Higher Education – Ellucian (U-119)**

Joe Harple- Ellucian

A SaaS solution built on a single data source across applications, departments, personas all while using the best of the best market ‘tools’. Ellucian Analytics is purpose built for higher education processes and users. It allows for a different way of working with data, provides easy access to related data [views] and dynamically changes planning and decision-making on campuses throughout the higher education industry. No matter who pulls data from where and for what purpose, everyone is drawing from the same pool of information, updated in real time.

**Technical Track – Accelerate Your Banner 9 Adoption Timeline – Ellucian (U-205)**

Jacob Chandler – Ellucian

The modernization of Banner 9 has been completed and new modules and enhancements have been rolled out. How should you prepare for the move to Banner 9? What hardware and software do you need? What skill sets will be required? How are customizations handled in the new software? Join us to learn the answers to these questions and more to get you to Banner 9.

**Open Track 1 – EllucianGO Mobile App Users Roundtable – Ellucian (U-206)**

Discussions around the how schools are using EllucianGo with sessions attendees.

**Open Track 2– Catalog & Curriculum Management: Bring Consistency and Accuracy from Curriculum to Catalog to Banner and Web– DIGARC (U-209)**

Gina Monaghan - Digarc

In this fast-paced session, learn how over 500 colleges and universities use the Acalog Academic Catalog Management System to create, organize, and publish electronic catalogs for the web and mobile devices. See how they maintain consistency and accuracy across the catalog, web and Banner with a data-driven, relational system that provides greater ease of use, eliminates errors, and enables faster catalog production cycles. Then get a sneak peek at how Curriculog transforms a cumbersome and complex curriculum path into an intuitive, automated process, with the most flexible curriculum development and approval system on the market. Save your staff time, your institution money, and yourself aggravation — discover a better way!

**9:30-10:20 Finance – Drop for Non-Payment (Purge Process) - FSW (U-106)**

Come see how FSW manages the drop for non-payment process. FSW has set up customizable rules for drop and part of term drops allowing us to manage specific groups of students. We will also show how the process is able to forecast drops and provide daily dashboard drop reports.

**Student Track 1 – Streamlining Advising using Banner 9 and automated assignments (U-107)**

Andrae Jones - Associate Director, Academic Advising, Career and Transfer Services, Jessica Rebstock - Associate Director, Academic Advising, Career and Transfer Services

Building positive meaningful relationships with students can have a significant impact on student retention, satisfaction, and success. Learn how FSW streamlined the advising process by creating advisor assignments using Banner and other technologies to maximize the time spent with students.

**Student Track 2 –CRM Advise (U-109)– Ellucian**

Ellucian CRM Advise, part of the Ellucian CRM suite, can help your institution improve 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.

**Financial Aid – Using Algorithmic Rules – FSW (U-110)**

David Sankies – User Support Analyst, FSW

Come see how FSW uses algorithmic rules in Banner financial aid; fund awarding, aid period assignment, budgeting and batch posting.

**Human Resources/Payroll Track – Faculty Load & Compensation (FLAC) Birds of a Feather - FSW(U-118)**

Leslie Ryder – Application Support Specialist

FLAC discussions with those that have implemented FLAC or are in the process of doing so. This is an interactive session so please bring topics to discuss!

**Reporting Track – Impacts of Banner 9 on State Reporting (U-119)**

Discuss the possible impacts around reporting as it relates to Banner 9

**Technical Track – Application Express – A Development Tool to Improve Business Processes Beyond Banner - St. Johns River State College (U-205)**

Rachel Klama – St. Johns River State College

This presentation will cover how SJR State overcame challenges from Banner limitations by developing supplement systems utilizing Application Express. Most solutions did not require any Banner modifications. Briefly demonstrate some systems developed in-house including:

- Disabilities Services – Communication to Instructors
- Online Orientation Follow Up
- Counseling System – Group Advising Scheduling and Student Profile Packets
- FLEID Processing
- Student Web Application Question Tree

**Open Track 1 – Ellucian Intelligent Learning Platform - Ellucian (U-206)**

Joe Harple – Ellucian

Come learn about the Intelligent Learning Platform. The Intelligent Learning Platform (ILP) enables rich, two-way, real-time integration between Colleague and a variety of Learning Management Systems such as Canvas, Desire2Learn, Blackboard, and Moodle, and Ellucian applications such as the Ellucian Portal and Ellucian Mobile. ILP also enhances the user experience by surfacing consolidated LMS data in the portal, providing deep-link single sign-on, and enabling faculty members to post midterm and final grades from the LMS.

**Open Track 2 SQL 101 for Functional Users - Basic SQL statements for use in Banner Population Selection (POPSEL) and reporting tools. FSW (U-209)**

Paul Allen – Sr. Programmer Analyst, FSW

This course will cover basic clauses of an SQL statement, typical Banner tables and data, and how to apply these statements in Banner POPSELS or reporting tools that accept SQL statements. This will cover basic filtering of data, joining of multiple tables, self-joins for effective based repeating tables, and tools available to help learn the Banner database structure.

**10:20-10:40** Refreshments. Don't forget to visit our sponsors! (U Building – 1<sup>st</sup> Floor lobby)



**10:40-11:30 Finance – What’s New with Banner Finance and Communication Management - Ellucian (U-106)**

Paul Huizenga - Ellucian

Have you seen the latest updates in Banner Finance? Join us as we explore how Banner Finance fits into the vision of a modern, connected campus. In this session, we will review the benefits and latest improvements in the Banner Finance administrative and self-service solutions. Learn how you can leverage tools like My Finance Query for effective financial management decision making on campus. See the user-friendly experience for requesting goods and services with My Requisitions. Learn what’s to come with My Journals, My Approvals and My Budgets. We understand your financial management experience on campus goes beyond Banner. Learn how you can maximize your investment through the Ellucian Ethos Platform to create value for your end users. Additionally, check out Communication Management, delivered across Banner. This new application supports the creation, publication, and tracking of emails, letters, messages to Ellucian Go mobile for any person or organization with a PIDM record.

**Student Track 1 –Automating your Transcript Processing –FSW (U-107)**

Garnett Salmon, Registrar –FSW

In partnership with Credentials Solutions FSW has changed the transcript processing from a manual time consuming process to an automated process eliminating all transcript labor. Sounds to good to be true? Come see how we made this change.

**Student Track 2 – CONVENIENCE IN A CARD Integrating Your ID Card with Campus Services – FSW (U-109)**

Grover Young – Director, Technology User Services - FSW

What does your school ID do? Join this session to learn about how Florida SouthWestern State College has brought convenience to the wallets of students, staff, faculty, and affiliates. You will also get a glimpse into how we collaborate on implementing processes from the think tank to execution and all steps in between.

**Financial Aid – Financial Aid Self-Service How to’s FSW (U-110)**

David Sankies – User Support Analyst - FSW

Discussions around setting up web text rules, tabs and variables in Banner financial aid self-service.

**Human Resources/Payroll Track – Leveraging Banner Workflow to Automate HR Processes – FSW (U-118)**

Jason Dudley – CIO – FSW, Leslie Ryder, Application Support Specialist

Tired of chasing paper and approvals? Don’t know when to pull a contract on a cancelled course? FSW leverages workflow for a number to automate a number of HR processes and the list continues to grow. Join us to see how we have made this process work and got workflow off the shelf for HR.

**Reporting Track – Are we up in enrollment? Enrollment Dashboards in Argos FSW (U-119)**

Kelli Dunlap – Director, Institution Research

Come see how FSW leverages Argos to show constituents across the institution enrollment numbers, comparative analysis and breaks down numbers for specific groups of students, schools and attributes.

**Technical Track - Banner 9 Implementation Roundtable – FSW (U-205)**

Daniel Ramos – Director, Application Development

Discussions around Banner 9 implementation at their respective institution with session participants. Some topics will relate to hardware, rollout, SSO, and more.

**Open Track 1 - Ellucian Ethos Workflow Powered by Ethos Ellucian (U-206)**

Joe Harple- Ellucian

Ellucian Workflow powered by Ethos is the second new enterprise solution to be built on the Ethos Platform. Ellucian Workflow is a cloud-based business process management and workflow solution that empowers you to define and execute business rules outside a single application. The solution is a web-based and leverages Ethos Integration, Identity and the Data Model, Ellucian Workflow to automate process across your institution. The solution is a web-based form designer that has a drag-and-drop interface, allowing you to create robust forms without writing any code and is mobile ready. Discover how this cloud-based product will allow you to create and manage workflows and business rules across your enterprise. This solution is separate from Banner workflow (which stays in place for needs WITHIN Banner).

**11:30-12:30 Lunch/Door Prizes (U-102)**

**12:30 – 2:00 Finance – Finance Birds of a Feather (U-106)**

**Student Track - Student Birds of a Feather (U-107)**

**Financial Aid – Financial Aid Birds of a Feather (U-110)**

**Human Resources/Payroll Track – HR/Payroll Birds of a Feather (U-118)**

**Reporting Track – Reporting Birds of a Feather (U-119)**

**Technical Track – Technical Birds of a Feather (U-205)**

**Open Track 1 - CIO Birds of a Feather (U-209)**

FLBUG Agenda at a Glance