# Ellucian Live 2019

PO BUG PRESENTATION

# Top Key Points

- Banner extensibility
- Banner Performance
- CRM Advance
- Document Imaging
- Action Item Processing
- Name Preference
- Emergency Contact/Missing Person Contact

# Action Line: Banner Extensibility with Tim Horne and Mike Mastro

- Banner 9 and Banner 9 SSB changes
- Ability to change the theme in Banner 9 Pages and SSB utilizing the extensibility features
- Explored the Banner theme editor vs the Ellucian theme editor
- Ability to display a welcome message by upgrading our application navigator to 3.11
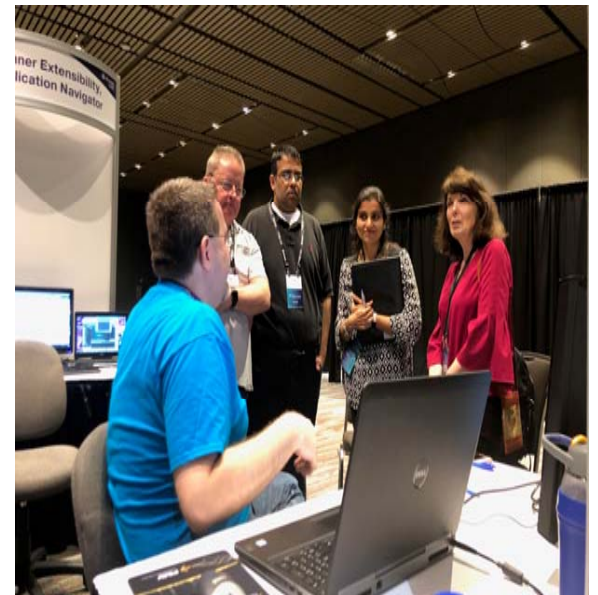
## Action Line: Banner Performance with Krysia Kaminski

- Discussed upgrades to tomcat 8 on all of our app servers

- Verified our client stations meet the minimum requirements to run Banner 9.

- Discussed upgrading our Oracle database from current 11.2.0.4 to 12c

- Discussed other upgrades to aid in performance, Banner Admin Common 9.3.11, Banner General 8.10, and grails 3. We have since upgraded Banner Admin Common to 9.3.16, and Banner General to 8.11.

- Discussed issues encountered testing RMAN (hot backups)

## Action Line: CRM Advance with Meg Gray

- Can take registration for events through CRM Advance, but can't take registration payments yet.

- SSRS and Visual Studios Reporting tool – require training

- Mass emailing through vendor partner – Salesforce Marketing Communication

- Online gift ability via PayPal

- Student to CRM Advance import

- Built in integration tools from Banner Advancement to CRM Advance
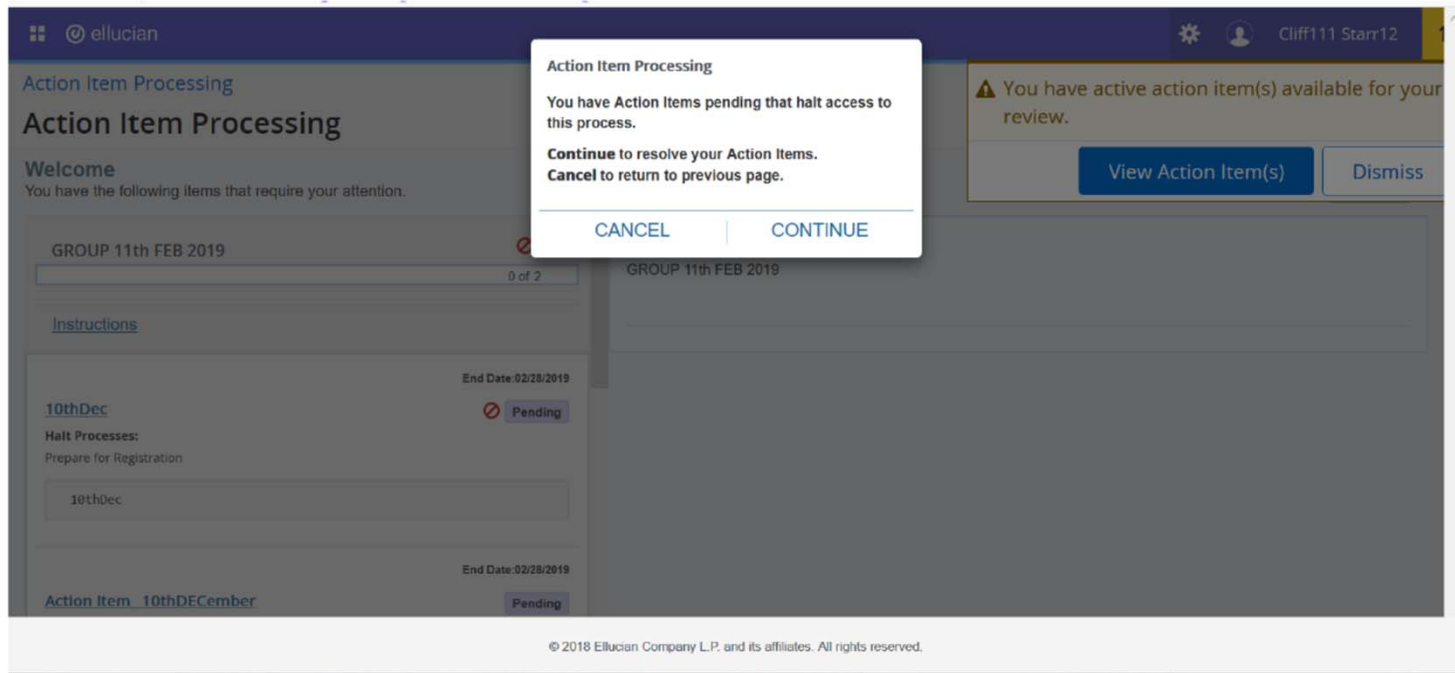
# Action Item Processing

## What need does action item processing address?

- **Institutions on occasion, have the need to restrict access to certain functions until people complete actions, such as**

  - Students must agree to be responsible for financial charges before registering for classes

  - Employees may need to confirm their valid address

  - Everyone must agree to the institution's code of conduct

# Student is at the Registration Self-service landing page
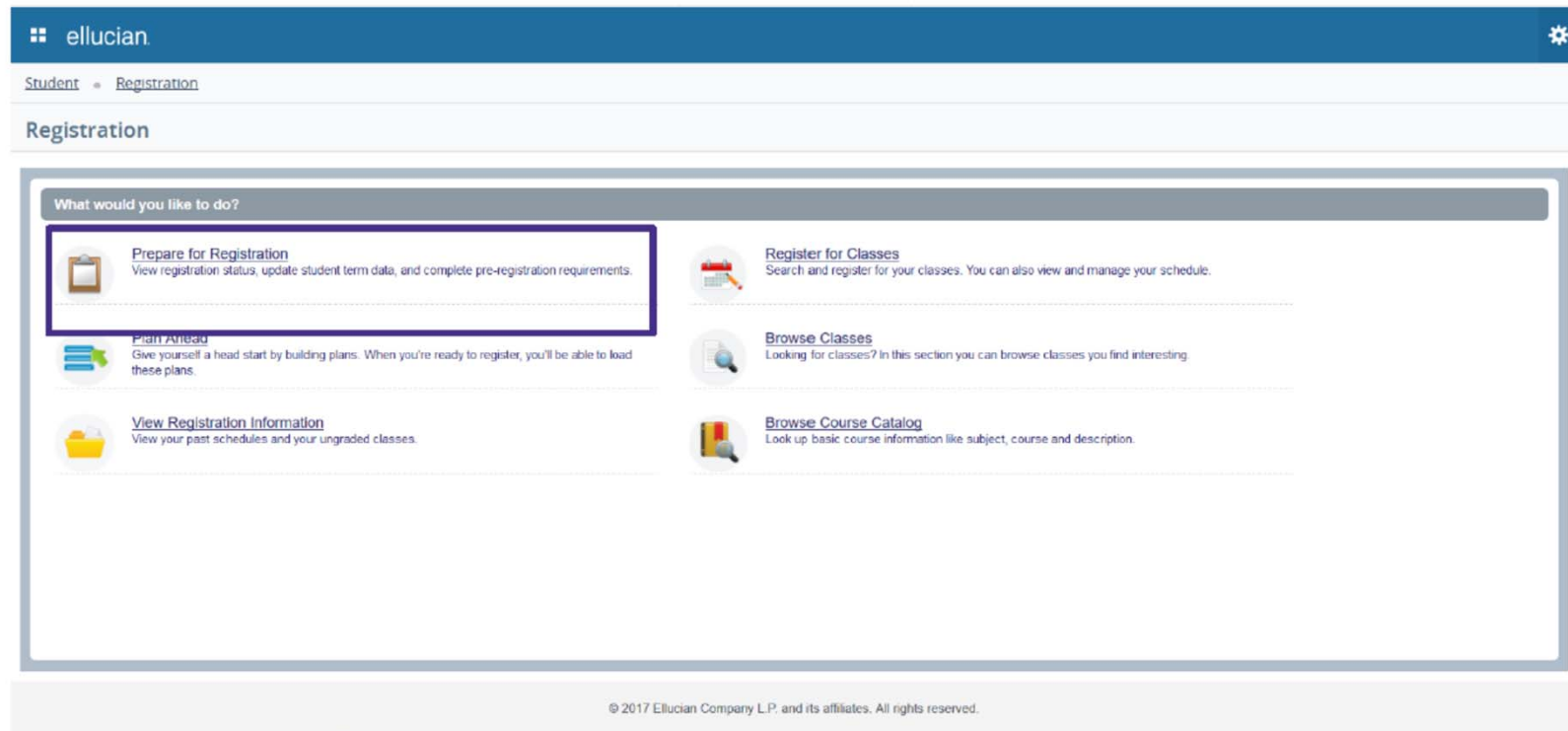
# What our student will see when trying to register

# Assigned Action Items are available to the person

# Requesting the first Action Item in the list

# After saving my response

# Name Preference, Emergency Contact and Missing Person Contact

- ▶ Name Preference Campus wide policy – determined by the Cabinet

- ▶ Departments involved: HR, Registrars, Public Safety, Advancement, & ITS

- ▶ Presentations made by Macalester College, University of Denver, Grand Valley State University.

- ▶ A high priority on campuses nationwide

- ▶ Collecting and Updating Emergency Contact and Missing Person Contact if more critical on College Campuses now then its been in the past.

- ▶ Users can add up to 8 Emergency Contacts, but important to update the EC on an annual basis, for students, faculty and staff.

- ▶ Missing person contact is different from EC.

# Report back from the Financial Aid Area

▶ Banner 9 Self-service:  by implementing this technology, we will be offering our students a modern, mobile-friendly interface to their financial aid awards, requirements and cost of attendance data.  This new interface will make the distinction between direct and indirect costs, similar to our current award letter.

▶ Algorithmic budgeting:  by implementing period based budgeting, we will eliminate many hours of manual budget adjustments.

▶ DATALOAD automation:  we are currently "semi" automated in this area, but I expect that with a modification to our current program, we can fully automate this process.

# Vendor Connections



## College Source

Met Vince, Ed and their team to discuss our continued partnership with CollegeSource.



## Hylands

Met with individuals from Hylands that presented at Ramapo, in regards to document imaging.



## Evisions/Argos

Met our trainer from Evisions – Mike Schmidt.

Asked about Evision's continued partnership with Banner 9 and CRM Advance in particular

# Next Steps

- Complete phase 1 of transition to Banner 9 SSB in Production.
- Summer of upgrades and Maintenance
- Upgrade our test and production database hardware
- Upgrade to Oracle 12c in test and prod
- Improve performance by upgrading all Banner 9 application servers to Tomcat 8
- Transition from cold backup to hot backup to keep Banner available 24-7 with the exception of maintenance periods.

- New product for Advancement
- Evaluate CRM Advance
- Evaluate RaisersEdge/Blackbaud

# Banner 9 Self-Service Available – Next 12 Months

## Student

- Class Roster
- View Grades
- Student Profile
- Advisor Student Profile
- Student Attendance Tracking View
- Student Card
- Drop Roster
- **Financial Aid**
- **Student Aid**
- **Accounts Receivable**
- **Degree Evaluation**
- **Enrollment Verification**
- **Graduation Application**
- **Transcript Request**

## Registration

- Student Registration
- Class Schedule
- Course Catalog
- Registration Status
- Plan Ahead

## Faculty

- Attendance Tracking
- Final and Midterm Grades
- Incomplete grades
- Electronic gradebook
- Student Academic Review
- **Schedule View**
- **Faculty Feedback**

## General

- Personal Information
- Direct Deposit
- Action Item Processing
- Communication Management
- Proxy Access – Proxy Experience
- **Proxy Access – Student Experience**

## Finance

- My Finance
- My Requisitions
- My Finance Query
- My Journals
- **My Approvals**
- **My Budget**
- **My Purchase Orders**

## Human Resources

- Employee Profile
- Position Description
- Effort Reporting
- Labor Redistribution
- Time Entry & Leave Management
- **Personnel Actions**
- **Benefits Administration**
- **Salary Planner**
- **Faculty Load and Compensation**
- **Regulatory Tax Pages**
- **Campus Directory**

# Sneak peak Employee Self Service

# Timesheet

# Entering your time

# Timesheet

# Preview and Submit your timesheet

# Review your Leave Balance

# Approvers View of their Unit Timesheets
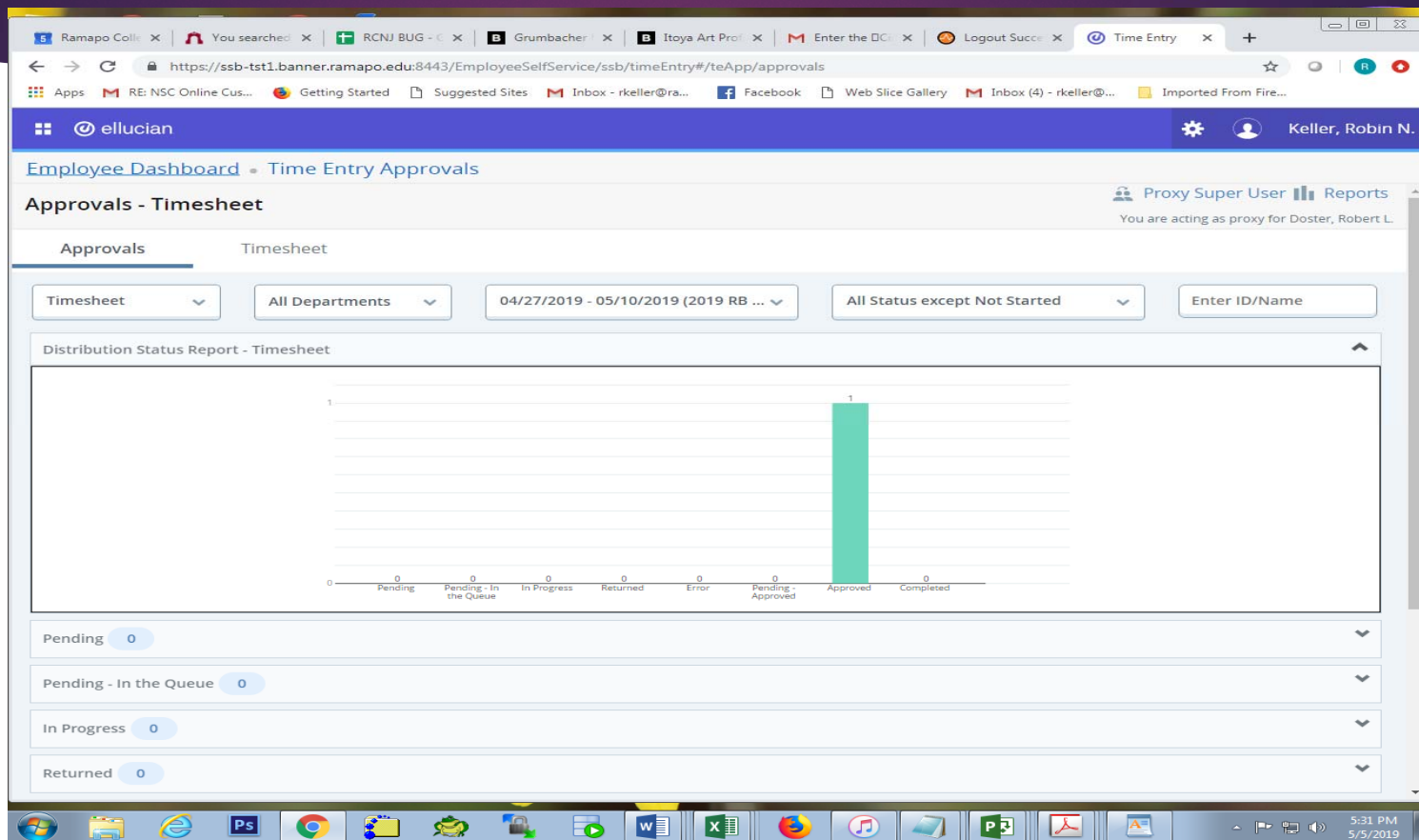
RCNJ left their mark at E-Live 2019: Action Line Appointments, Participated and Hosted Braindates, Built relationships with our counterparts at other institutions nationwide. Couldn't leaving without visiting Café Du Monde on the last day.