California Community Colleges Banner Group

CONFERENCE PROGRAM
September 29, 2011

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WELCOME!

California Community Colleges Banner Group, College of Marin and SunGard Higher Education CCC Solution Center welcome you to the 2011 3CBG Northern Conference!

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SunGard Higher Education CCC Solution Center

SunGard Higher Education created the California Community Colleges Solution Center (C3SC) to support the constantly evolving regulatory and administrative environment unique to the California Community Colleges.

The C3SC works with client institutions to analyze the impact of changes to administrative, business and reporting processes and to produce localized versions of SunGard Higher Education products to support them.

3CBG Annual Conferences

2000 - Yorba Linda
2001 - Ventura
2002 - Burlingame
2004 - San Diego
2005 - Bakersfield
2006 - San Diego
2007 - Newark
2008 - Costa Mesa
2009 - Costa Mesa and Walnut Creek
2010 - Irvine and Walnut Creek
2011 - Buena Park and Walnut Creek
General Session

Thursday, September 29
9:15—10:30 a.m.

Welcome and Introductions

**Jeannine Methe**
Chair, 3CBG
Chief Technology Officer
Chabot-Las Positas
Community College District

Keynote Speakers

**Michelle Reed**
Senior Vice President
Product Management & Marketing
SunGard Higher Education

**Rhett Burnham**
Vice President
Strategy & Product Management, Common Components
SunGard Higher Education

**Deborah Ludford**
Director, Information Services
North Orange County Community College District

**Mike Reid**
Director, California Community Colleges Solution Center
SunGard Higher Education

Breakout Sessions

Session Group A - 10:45—11:45 a.m.
Luncheon - 12 noon
Session Group B - 1:15—2:15 p.m.
Session Group C - 2:30—3:30 p.m.
Session Group D - 3:45—4:45 p.m.
Breakout Sessions

Session Group A - 10:45—11:45 a.m.

A1  Student  10:45 a.m.  Salon E-F
Loading Electronic Transcripts—The Gory Details
Lee McDonald, Applications Manager, College of the Sequoias
Setting up the loading of electronic transcripts is involved and the instructions keep referencing other documents and in some cases don’t tell you enough. This presentation will show what COS has done - complete with the values we used - and will provide the set of documents that we needed to complete the process. We will also discuss the future of loading California eTranscript files.

A2  Financial Aid, Finance  10:45 a.m.  Salon D
Panel Discussion on Application of Payments and Title IV Financial Aid Disbursements
Shawna Aced, Registrar, Cashier Supervisor, Foothill College
Cindy Castillo, Director, Financial Aid and Scholarships, De Anza College
Kevin Harral, Director, Financial Aid, Foothill College
Karen Peña, Administrative Systems Analyst II, Chabot-Las Positas CCD
Chien Shih, Director of IT and Operations, Foothill-De Anza CCD
Rachel Tai, Cashiering Services Supervisor, De Anza College
Sisley Wong, Student Services Specialist III, Chabot College
Federal guidelines dictate what charges can be paid by Title IV payments. When cash payments are mixed with Financial Aid disbursements on student accounts, there are many process concerns that must be carefully taken into consideration:
1. Detail code/priority code setup including Like Term and Like Aid Year
2. Unapplied and applied processes at the Cashier’s Office
3. Pitfalls to watch for when a new Banner school first disburses across financial aid years
4. Set up issues with parameters such as those needed for TGRAPPL

A3  Student  10:45 a.m.  Contra Costa 1
Meeting the Challenge of MIS Reporting
Antonio Trepceowski, Banner Student Senior Consultant, SunGardHE
Do you find the ins and outs of MIS reporting confusing? This presentation will discuss gotchas, tips and tricks to help you get the most out of your MIS reports in California Banner.

A4  Technical, General Interest  10:45 a.m.  Contra Costa 2
ARGOS Integration With Luminis
Matt Rapczynski, Senior Programmer/Analyst, Foothill-De Anza CCD
Susan Malmgren, ETS Training Coordinator, Foothill-De Anza CCD
Chien Shih, Director of IT and Operations, Foothill-De Anza CCD
How do we integrate our ARGOS reporting tool with Luminis? The challenge of ARGOS in a mixed Mac and PC environment, single sign on and Luminis integration. Demonstration and Q&A with FHDA team.
Breakout Sessions

Session Group A - 10:45—11:45 a.m. (continued)

A5 Finance 10:45 a.m.  Santa Rosa

Birds of a Feather
Moderator: Marshall Northcott, Director, Information Technology, College of Marin

Meet with your counterparts at other Banner colleges to share best practices, discuss common concerns, and develop suggestions for product and process enhancements.

Session Group B - 1:15—2:15 p.m.

B1 Financial Aid 1:15 p.m.  Salon D

Implementing BOG Waivers as Exemptions
Bob Hughes, Applications Support Manager, North Orange County CCD

Prior to Summer 2011, the North Orange County Community College District processed BOG Waivers like any other Financial Aid award. While it worked, it wasn’t ideal as students would not see their fees offset until after a nightly disbursement process ran, resulting in phone calls, over payments and unpaid balances. Beginning in Summer 2011, we implemented the Cal B BOG Waiver as Exemption functionality. This presentation will show how we set it up, benefits, and lessons learned in the implementation.

B2 Student 1:15 p.m.  Salon E-F

CurricUNET to Banner Interface
Ahsen Baig, Programmer/Analyst, College of the Sequoias
Joni Jordan, Chair, Curriculum Committee, College of the Sequoias
Lee McDonald, Applications Manager, College of the Sequoias

COS has developed a system for downloading pending and approved curriculum from CurricUNET and updating the Banner course catalog. This eliminates the need to manually re-enter courses that have been approved into Banner, avoiding creation of typos and other errors. The user can review the differences between what is currently in Banner and what is coming from CurricUNET. If there are no issues with the change, a click of an Update button will cause the creation or update of all the appropriate catalog table for the course for the effective term. We have had to make changes in the CurricUNET screens to make some of the Banner catalog requirements more apparent to curriculum developers.

B3 Student 1:15 p.m.  Contra Costa 1

Student Dashboard
Susan Malmgren, Project Coordinator, Foothill-De Anza CCD
Kathleen Moberg, Dean of Admissions & Records, De Anza College
Matt Rapczynski, Senior Programmer/Analyst, Foothill-De Anza CCD

FHDA developed a very easy to use approach to the Banner INB form access to student information. The idea is to grant different levels of access to different classified and administrative staff to the necessary student records, in the mean time considering all necessary security precautions (FERPA, SSN...etc). This session will show you the original development concept, development methodology and a demonstration of the end product.
Breakout Sessions

Session Group B - 1:15—2:15 p.m. (continued)

B4 Finance 1:15 p.m.  Contra Costa 2
Surviving Your First Year on Banner
Susan Cheu, Director, Business Services, Gavilan CCD
Laurel Blakley, Senior Accountant, Gavilan CCD
Surviving your first year on Banner Finance, especially if you’re new to an ERP system, can be challenging. This session will give you tips and tricks for the transition. Implementing a new system can be daunting and sometimes the smaller details take the longest to figure out. This session will provide helpful information to accelerate your learning curve and allow you to focus on the big picture.

B5 Human Resources 1:15 p.m.  Santa Rosa
Birds of a Feather
Moderator: Kyle Judson, District IT Analyst, Chabot-Las Positas CCD
Meet with your counterparts at other Banner colleges to share best practices, discuss common concerns, and develop suggestions for product and process enhancements.

Session Group C - 2:30—3:30 p.m.

C1 Technical 2:30 p.m.  Contra Costa 2
Supplemental Data Engine and Reporting
Julie Monfette, Human Resources Consultant, SunGard HE
This session will present and demonstrate the set-up for applying Supplemental Data Engine fields to forms in Banner and we will discuss how to use these fields for reporting purposes.

C2 Technical 2:30 p.m.  Contra Costa 1
Workflow Prototyping
Bill Pearce, Principal Consultant, Strata Information Group
Development of a Workflow, especially involving a Workflow database trigger, can be difficult and cumbersome at times. Using standard techniques, end users can't evaluate the outcome of a workflow until the workflow is activated, and changes to an activated workflow require a lot of steps to de-activate, change, and re-activate the workflow. This session will describe a technique to prototype a workflow, which can then be reviewed with the end user, and easily modified until it is approved. The session will also discuss techniques of utilizing HTML in workflows, as well as discuss several examples of workflows that have been developed by SIG at various sites.
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Breakout Sessions

Session Group C  -  2:30—3:30 p.m.  (continued)

C3 Finance  2:30 p.m.  Salon D
Tips and Tricks for the Accounts Receivable Feed to Finance
Richard Gerry, Senior Finance Process Consultant, SunGard HE
Antonio Trepesowsky, Banner Student Senior Consultant, SunGard HE
This session will discuss tips and tricks regarding the Accounts Receivable Feed to Finance. In particular, discussion of best practices in feeding data from A/R to Finance, and common issues in Banner AR reconciliation.

C4 Student  2:30 p.m.  Salon E-F
DegreeWorks—Zero to Sixty in Six Months
Eric Raznick, Director, Information Technology Services, San Mateo CCD
Robin Richards, Vice President, Student Services, Cañada College
San Mateo CCD has been a long-time user of Banner CAPP for degree audits and recently made the switch to DegreeWorks. We will discuss the collaborative process we used between Counseling, Admissions & Records and the IT department to bring DegreeWorks to production in six months. We will present a high-level overview of the product and how we shared the responsibilities of building the degree rules (scribing) among our three colleges. We will discuss how we created a pilot to roll out the functionality to staff and students. We will also describe the lessons we learned during the implementation process.

C5 Financial Aid  2:30 p.m.  Santa Rosa
Birds of a Feather
Moderator: Kathryn Linzmeyer, Director, Financial Aid, Chabot College
Meet with your counterparts at other Banner colleges to share best practices, discuss common concerns, and develop suggestions for product and process enhancements.

Session Group D  -  3:45—4:45 p.m.

D1 Student  3:45 p.m.  Contra Costa 2
An Application Process for Health Science Programs
Richard Oberlin, IT Project Leader, North Orange County CCD
Health Science Programs (such as Nursing) require a complex application and admission process outside the traditional community college application process. This presentation will demonstrate how the North Orange County Community College District developed a system for processing applications to Health Science programs at Cypress College. It features a self-service application and tracking system and a process to evaluate, select, and notify applicants of admission decisions via e-mail. This greatly streamlined a complex process that was labor and paper intensive. Tools used include Banner Admissions Self-Service, Banner Self-Service Engine and Oracle Application Express.
Breakout Sessions

Session Group D  -  3:45—4:45 p.m.  (continued)

D2    HR, Payroll  3:45 p.m.  Salon D
PERS Made Me Do It!
Barbara Dedo, Senior Programmer, San Mateo County CCD
Jan Wilder, Business Analyst, California Solution Center, SunGard HE

In September of this year, new reporting requirements will be in effect for CalPERS payroll reporting. In this discussion, we will describe the collaborative process whereby several community college clients worked with the SGHE California Solution Center to design and create the software needed to meet these requirements. There will be a review of the reporting process itself and an outline of the steps San Mateo took to get it in place.

D3    Technical, General Interest  3:45 p.m.  Salon E-F
Mobile Applications at North Orange County CCD
Brad Rippe, IT Project Leader, North Orange County CCD

The North Orange County Community College District has developed mobile applications using SunGard's Mobile Connection platform. The applications (available for Android, iPhone/iPad and BlackBerry) have been tested are now in full production. Included in the offering are campus map, news, grade, student schedule, directory and class schedule. The applications will be demonstrated and we'll talk about the development environment, lessons learned and the tools used to make this a collaborative development effort across the District.

D4    Student  3:45 p.m.  Contra Costa 1
Data Dashboard for College of Marin
Chialin Hsieh, Director of Planning, Research, and Institutional Effectiveness, College of Marin
Kathleen Kirkpatrick, Staff Development Administrator, College of Marin

Based on College of Marin's definitions of student achievement including course retention, course success, persistence, degree/certificates, and cohort tracking studies, College of Marin has developed an IT-based tracking system (Data Dashboard) that evaluates student achievement (all of the above) and student demographics. College of Marin is going to launch the system to administrators, faculty, and staff in fall 2011 so stakeholders will be able to use the information to make data-driven decisions. Professional development is also scheduled following the launch based on stakeholders' needs.

D5    Student/DegreeWorks  3:45 p.m.  Santa Rosa
Birds of a Feather
Moderator: Marshall Northcott, Director, Information Technology, College of Marin

Meet with your counterparts at other Banner colleges to share best practices, discuss common concerns, and develop suggestions for product and process enhancements.
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