

# NWEUG 2017 Conference Sessions

## Alumni Relations & Fundraising

### Alumni Relations & Fundraising Roundtable (B/C)

*Andrew Wynings, Linn-Benton Community College*

Join your fellow alumni relations and fundraising professionals for a networking session to share best practices, policies, tools of choice, and the success and challenges in meeting the alumni relations and fundraising needs specific to your institution.

### Implementing Advancement Metrics (B/C)

*Capt. Mark Ellis, Whitworth University*

There are many valuable metrics for analyzing giving and donor inclinations, and in this session we'll look at moving from a conceptual view to practical implementation. We'll review the algorithms and specific data items used, as well some ideas for set-up, and we'll end with a shared discussion. This session will focus on giving metrics rather than on specific processes, and should be relevant to anyone who is implementing advancement metrics.

### Integrating Banner and Raiser's Edge - What Works and What Doesn't (B)

*Donna Mainord & Andrew Wynings, Linn-Benton Community College*

Seamless Banner Alumni information import into Raiser's Edge relies heavily on header setup in Banner. This can be challenging. Linn-Benton Community College Foundation Office will share what we have found helpful, and challenging, when importing alumni information from Banner into Raiser's Edge and how we create workarounds to address those challenges.

### Key Metrics in Major Giving Fundraising . . . and Why Visits This Fiscal Year to Date Should Not Be One of Them (B/C)

*Daniel Ross, ADVIZOR Solutions, Inc.*

Many major giving teams manage the wrong metrics. As a result they do not achieve the results they should. In particular, there is an over focus across the sector around fiscal year based activity metrics. While these can be useful, most prospects are indifferent about fiscal year and are cultivated across different time periods. This session highlights best practices in managing major giving teams to a set of metrics that include: · Prospect pool size · Pool penetration · Prospect movement through stages · Ask levels vs. expected values based on capacity and affinity · Proposal close rates · Revenue.

## **Analytics & Reporting**

### **A Look at How Peer Institutions Have Improved Reporting with Evisions Argos (B/C)**

*Susy Jonsen, Evisions*

Hundreds of colleges and universities have found an easier, quicker way to run reports, visualize data, and boost institutional insights with Evisions Argos. Learn how peer institutions are getting timely and accurate information through reporting made simple. This session will examine how current Argos users are going beyond basic reporting with easy-to-use tools such as Dashboards, DataBlocks, and Banded Reports. See how they're using Interactive Charts, OLAP Cubes, and the new DataBlock Connector to enhance their reporting capabilities and improve visibility throughout their institutions. If you are using Colleague® by Ellucian or Banner by Ellucian and are involved in some aspect of reporting – from creating, to running, to reading reports – come see how Argos can get you the data you need when you need it, empowering you to make timely, better-informed decisions.

### **Analytics & Reporting Roundtable (B/C)**

*Kim Channraseut, Idaho State University*

Join your fellow data professionals for a networking session to share reporting practices, tools of choice, and the successes and challenges in meeting the information and analytical needs of your institution.

### **Big Data, Big Challenges: Moving Toward Business Intelligence Maturity (B/C)**

*Henry DeVries, Ellucian*

Did you know that the traditional structured data managed by organizations doubles every 18 months? At the same time, the depth of analysis, number of data users, and need to visualize data also grows. Join us to learn more.

### **Ellucian Analytics Powered by Ethos - A Game Changer for Higher Education (B/C)**

*Chris Fontenot & Adam Lenhart, 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.

## **Enterprise Reporting with ODS (B)**

*Diana Lindsley, Oregon State University*

How we implemented ODS successfully. What we did and how we implemented ODS, problems encountered, solutions discovered.

## **Implementing Dashboards at your Campus (B/C)**

*Steve Thatcher, A. Lange Consulting, LLC*

Do you need dashboards at your campus, but don't know where to start? Like all technology projects, designing dashboards involves much more than just purchasing new software. Thoughtful consideration must be given to each step in the process, including your data metrics, process, and people. This session will explore the principles and proven methods for a successful dashboard project.

## **Improve Efficiency and Completions Through Data-Informed Course Scheduling (B/C)**

*Dr. Brian Messer & Brett Adams, Ad Astra Information Systems*

Colleges and universities are using data in new ways to align course schedules with student need and campus resources. Campus leaders will share their journeys and outcomes using student demand, financial, and capacity data to transform scheduling. National data from Ad Astra's Higher Education Scheduling Index (HESI™) will provide key performance metrics that influence student-friendly schedules.

## **Improve Student Success with a Transformed Course Schedule (B/C)**

*Dr. Brian Messer & Brett Adams, Ad Astra Information Systems*

The typical course schedule tends to mirror the organizational structure of the institution rather than act as a personalized roadmap for students. What if the course schedule automatically adapted to the individual needs of the students based on where they are at in their program of study? Learn how Colleges/Universities are using predictive data to determine when, where and how to offer courses to better align with student demand. This session will show how schools are using multiple data points to better serve students and improve program completion/retention rates. Join us to learn more about how this powerful model combines Degree Audit, Aggregate Student Plans, Enrollment Management, and Historical Trend Data Points to drive demand-based scheduling.

## **Informer 5: Next Generation Architecture for Institutional Data Exploration and Analysis (B/C)**

*Timothy Nicholson, Entrinsic*

The new Informer 5 data discovery and analytics platform simplifies the often complex process of accessing, cleansing, blending and analyzing data with its extraordinarily flexible, extensible architecture and intuitive web-based user interface. Informer 5 incorporates several exciting new features including intelligent and suggestive data discovery, data governance, collaboration, an extensible framework, and much more. Informer's new architecture is uniquely suited to deliver high performance data exploration and analysis. Join us for this demonstration to see how Informer 5 can enable you to boost recruitment, optimize financial planning, better engage alumni, enhance security, and support student achievement. Attend the session and receive a \$25 Amazon Gift Card!

## **Position Security in ODS / Reporting (B)**

*Diana Lindsley, Oregon State University*

How we designed and implemented position security in our reporting system. No longer are users required to submit security requests - security to reports is granted automatically based on position; when a person changes positions, their access automatically changes.

## **Reporting at OSU - How We Are Getting 'One Version of the Truth' (B)**

*Diana Lindsley, Oregon State University*

How we developed and implemented our CORE reporting system - a major change from the old data warehouse model. Getting to 'one version of the truth' - developing common reports, access rights, This was a major cultural change for OSU. How it has impacted users and how we did it.

## **WhereScape RED - An Agile IDE for Data Warehouses (B/C)**

*Douglas Barrett, WhereScape*

This session shows how you can use WhereScape RED to accelerate project delivery and drive agile development of your data warehouse. There is a proliferation of beautiful tools for providing data visualizations and self-service data delivery to business users - but these tools rely on having data available, often in a data warehouse. And building / maintaining the data warehouse is often the lengthy, fraught part of BI projects. WhereScape RED is an IDE for building and managing data warehouses, marts, stores and vaults. RED supports all common modeling approaches and architectures in an open, flexible and scalable environment. Developers use RED to massively accelerate delivery and documentation of rapid / agile projects without sacrificing control. Join us for a discussion and demonstration on how you can deliver projects with the business to empower your enterprise with data and see why so many other higher education organizations are using WhereScape!

## Business & Finance

### Business & Finance Roundtable (B/C)

*Kevin Mahoney and Jess Jacobs, Linn-Benton Community College*

Pull up a chair and join fellow business and finance users in this roundtable session to go over current issues, share your experiences and best practices. A variety of topics will be covered and discussed. It's also a wonderful opportunity to re-establish old connections and make new ones.

### Electronic Check Reconciliation in Minutes! (C)

*Rex Burch, The College of Idaho*

Are you tired of spending hours each month doing your check reconciliation? We'll show you how to do your one-time setup in less than an hour, and then let Colleague do the rest in minutes each month. Setup instructions, a convenient conversion application, and documentation will be provided.

### How Can You Know Where You Are Going (If You Don't Know Where You've Been)? (C)

*David Morelli, Pacific University*

When a department requested a view of the five years of actual expenses on the same table that could be downloaded to Excel, we said "Sure. Do you want it sorted by Department/Object or Object/Department?". When another department requested that the view be for Year To Date rather than Year End numbers, we said "Sure. Do you want to be able to look at arbitrary dates in the Fiscal Year?".

### Modernize Your Budgeting and Reporting in the Cloud (B/C)

*Tony Ard, Kaufman Hall*

Leading higher education institutions today are realizing the need to modernize their budgeting and forecasting processes. Today's challenges from revenue uncertainty to increased scrutiny on the cost of delivering programs cannot be met with yesterday's technology of legacy planning solutions or offline spreadsheets. Technology advances such as cloud computing make enhancing these processes easier than ever before. In this session we will share how to:

- improve access to financial data and improve financial reporting across the university
- create driver-based operating budgets to improve budgeting and increasing collaboration in the process
- leverage modern cloud technology to rapidly deploy solutions while reducing IT maintenance costs

Axiom Software has experience delivering budgeting solutions to Colleague and Banner customers. This session will include a live demonstration of Axiom Software.

## **Power UP Colleague by Ellucian (B/C)**

*Chris Beckstrand, ACI Worldwide*

Power UP - with knowledge on all the Self-Service modules available to you today, including proxy payments, student finance, financial aid and student planning. Keep UP - with services already available to you within your current Colleague system. Learn about ACH disbursements. Gear UP - with a business case for utilizing Ellucian for all of your campus eCommerce needs. Consider moving to a service fee or split fee model to save up to 94% of tuition payment processing costs.

## **Providing Payment Options for your Campus Community – While Keeping Your Sanity (B/C)**

*Phil Le & David Carlen, Blackboard Transact / Cashnet*

As schools look for ways to boost retention rates and student success, and students struggle to meet increasing costs, alternative payment methods have emerged to keep up with these unique demands. Payment plans, wire transfers, 529 plans, and international payments all offer both opportunities and challenges for campuses wanting to offer expanded payment methods to students and parents. Students live in a world of Paypal, Venmo, and Starbucks prepay and now also want the convenience of using their smartphone to conduct campus business. Join us as we discuss this changing payment world and students' and parents' swift adoption of a cashless campus.

## **Sponsored Billing - The Good The Bad and the Ugly! (C)**

*Diana Plum, North Idaho College*

Students pay their tuition using a variety of ways including having sponsors pay it. This session will explain the pros and cons of using it and give you ideas to make the process easy for the students, sponsors and office staff.

## **Transform Your Financial Reporting with Synoptix Software (B/C)**

*Gabriela Alvarado, Synoptix*

Financial statements are required, there's no way around them. We've just changed the way you do them. Stop spending 10-15 days completing reports to presentation-ready formats. Synoptix does this in minutes. Create templates that can be scheduled for future use, maintain less reports and know the data is always up-to-date. See what schools like Mount Saint Mary's, Napa Valley, and Cawtaba College have used to enhance their reporting.

## **Using Point-of-Sale (POS) With Your TouchNet Marketplace (C)**

*Rex Burch, The College of Idaho*

Ready to take your TouchNet Marketplace to the next level? See how POS units (both Desktop and Mobile) can speed up transactions, reduce errors, and meet your PCI compliance needs. In addition, we will be showing you how you set up your store and users to allow you to use this equipment after implementation.

## Utilizing Form Fusion for Invoices, Reports, and Emails (B)

*Mark Bierly, Oregon State University*

Form Fusion can be your ally in creating desirable invoices and reports. Simply create a job submission that passes a .LIS text file to Form Fusion. We will walk through the steps to create an invoice, report, and email notification. We will share examples of how Form Fusion has been utilized at Oregon State University.

## What's New with Colleague Finance? (C)

*Dave Schroeder, Ellucian*

In this session, you'll get a checklist of Colleague Finance conference highlights, a quick update of what has happened over the past year, and a look at what Ellucian is working on for the future. **Remote Session**

## **Enrollment Management & Student Success**

### **Banner Registration 9: Modernizing the Student Experience (B)**

*Rusty Horton, Pacific Lutheran University*

Pacific Lutheran University recently implemented the XE registration 9.x product. This product offers a modern online experience and has a transformative effect on the student experience in registration. Come and learn about the implementation and roll out experience from the perspective of a funky tech in the Registrar's office. Product features as well as tips for a smooth launch will be discussed.

### **Colleague Self-Service Overview (C)**

*Amy Mayer, North Idaho College*

This session will be an overview of Colleague Self-Service and a few of the modules North Idaho College has implemented, including student planning/advising and student finance. It will be a high-level overview so the audience can see NIC's implementation of these new modules. The format will be a short overview of basic setup/implementation followed by a demonstration.

### **Ellucian CRM Advise (B/C)**

*Sumi Yourtee, 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.

### **Ellucian eTranscripts: A Functional User's Guide to Implementation (B)**

*Rusty Horton, Pacific Lutheran University*

Pacific Lutheran University (PLU) has enhanced its partnership with the National Student Clearinghouse to include implementation of the Ellucian eTranscripts solution. Come and learn about the implementation process from the perspective of a funky tech in the registrar's office. Session includes tips, tricks, and pitfalls to avoid in order to have a successful implementation and roll out. Although Ellucian eTranscripts is usable for Colleague and Banner, PLU is a Banner school, and this presentation will be Banner specific.

### **Engage Students AND Cut Catalog Production Time in Half (B/C)**

*Ted Tollefson, Digarc*

Learn how schools of all sizes have used their academic catalogs to turbo-charge student engagement while slashing production time in half. There is a better way. We'll show you how nearly five hundred institutions efficiently manage their catalog with record speed, turning it into a powerful marketing tool to attract, retain and interact with students using the 21st-century tools they demand.

## **Enrollment Management & Student Success Roundtable (B/C)**

***Mary Collins, Willamette University***

Join your fellow enrollment services professionals for networking and discussions of best practices in areas such as Admissions, Registrar's, Degree Audit, Degree Works, Recruiting, Advising, and others.

## **Mining Student Data for Student Success – Remote Session (B/C)**

***Henry DeVries, Ellucian***

Student success is a hot topic in higher education. This session will help you understand a working definition of student success and what it means for the students on your campus. We'll also explore the connection between the emerging roles of data mining, predictive analytics in higher education, and student success. Finally, we'll look at some current examples of the interesting connections between business intelligence tools and student success efforts.

## **Online Acceptance of Admission with TouchNet and Colleague Self-Service (C)**

***Steve Mason, Pacific University***

Learn how Pacific University Oregon made the transition from paper-based acceptance of admission to online processes for undergraduate tuition deposits and financial aid. Benefits include an online PCI-compliant deposit payment process, easier access to online financial aid award processing, less work for the staff, faster entry into the advising and registration process, more transparency for the student's family, and a sustainable paperless process.

## **The Layered Logic of Degree Requirements (C)**

***Mary Collins, Willamette University***

You, your faculty, and your students long to be supported by clearly readable degree requirements . . . even (or especially) when the requirements are complex. Simultaneously, the logical structures available in Degree Audit aren't exactly an exhaustive set of options. But they're pretty good. Let me show you what I know.

## Financial Aid

### Academic Works - Improving Scholarships Management (B/C)

*Nicole Ballinger & Michelle Slay, Linn-Benton Community College*

This session will help you understand how to use Academic Works to improve the efficiency of your scholarship processes. You will learn the basics of how to set up scholarship opportunities, accept applications, set up reviewers, and award scholarships, and how to automate these processes.

### Financial Aid Roundtable (B/C)

*Ben Wessel, Oregon State University*

Please join other financial aid professionals to network, discuss current topics and get tips from your peers.

### Replace Batch Files or Book Vouchers with FA~Link, a Real-Time Financial-Aid Interface to Your Campus Bookstore (B/C)

*Afshin Ghafouri, TrimData Corp*

Implement a two-way, real-time interface between Banner or Colleague Financial Aid and the Campus bookstore. Students have easy access to course materials before classes start. Admins have a streamlined process that reduces errors and eliminates manual labor. Charges are authorized and posted on the student account in real-time. Works with most Bookstore systems including Follett, Barnes & Nobles, MBS, Booklog, Nebraska, eCampus, Akedemos, BBA Solutions, and more.

### SAP Basics (C)

*Karen Fobert, Lewis & Clark College & Robin Polly, Pacific University*

This session will discuss the basic set up of the Colleague Satisfactory Academic Progress module and how rules can help with the tracking of student's SAP progress. We will talk about tips and tricks in setting up the SAP module to accommodate your institutional and financial aid SAP policies and how to include other key institutional offices in your process.

### What's New in Colleague Financial Aid? (C)

*Sarah Crook, Ellucian*

In this session, we will share highlights from the past year and preview a broad range of upcoming topics for the new processing year and beyond. **Remote Session**

## General Interest

### **Banner 9 (XE) Basics (B)**

*Mark Bierly, Oregon State University*

Are you one of the many schools scrambling to get ready for Banner 9? This session will be walking through the new interface and discussing the changes to navigation. We will include Application Navigator, new terminology, notification delivery, changes in queries and filters, and keyboard shortcuts.

### **Campus Scheduling Roundtable (B/C)**

*Lara Miller, Debby Zeller, & Shawna Hunter, Linn-Benton Community College*

Join your fellow schedulers for a networking session to share best practices, policies, tools of choice (EMS, 25Live, Outlook, etc.) the success and challenges in meeting the integration and scheduling (academic and campus) needs specific to your SIS and institution.

### **Communications Management Basics (C)**

*Tammy Robertson, North Idaho College*

Communications Management is a powerful tool for managing and processing official college communications. However, it can also be overwhelming and daunting when getting started. This session will cover just the basics of Communications Management including document creation, batch processing, and when to use the Express Correspondence Processing Form (PCEX).

### **Ellucian Ethos Workflow (B/C)**

*Chris Fontenot & Adam Lenhart, 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.

### **Excel Tips & Tricks (B/C)**

*Peter Morgan, Pacific University*

50 tips (or so) in 50 minutes. We will move quickly through a wide range of nuisances and nuances. Come ready to share your favorites and frustrations.

### **Forms and Workflow: PBNJ for BPM (B/C)**

*Michael Quiner, Linn-Benton Community College & Jennifer Murray, Cities Digital*

Look at what LBCC has done using Laserfiche Forms, Process mapping and workflow to improve business processes. Get some ideas that what can be done to eliminate the paper chase and streamline your business processes using Workflow tools.

### **Series25 Campus Wide Scheduling and Calendaring (B/C)**

*Andrea Martin, CollegeNet*

Come join a CollegeNET consultant as we introduce you to the Series25 Campus wide scheduling and calendaring solution. Topics to be discussed will include mobile scheduling, classroom optimization, interfacing to Banner, Colleague and PowerCampus, publishing master calendars and more.

### **The Next Generation of Paperless: Beyond Imaging (B/C)**

*Tom O'Rourke, Softdocs*

The idea of of the 'paperless institution' has evolved over the years. From basic imaging and paper file conversions, to modern day enterprise content management platforms, schools are looking for technology to help meet growing demands from students and staff alike. Their expectation for immediate access to relevant content from any device at any time is forcing institutions to eliminate paper and create a true centralized repository for information. Join us for a look at best practices around automating common HR, finance and student services processes to assist in creating a campus-wide 'paperless' initiative.

## Human Resources

### HR Automation with Laserfiche (B/C)

*Dan Siegel, Cities Digital*

Learn how you can Automate all stages of recruitment and onboarding with Laserfiche. Let the experts at Cities Digital show you how you can use web forms to capture and route job applications. Instantly send notifications to hiring managers when an application requires review. Route hiring decisions to HR to expedite the employee onboarding process. Automatically schedule IT provisioning, benefits enrollment and other onboarding tasks when a new employee is hired.

### HR/Payroll Roundtable (B/C)

*Sandra LeHoullier, Linn-Benton Community College*

Join HR professionals to discuss current HR issues and best practices, and get some insights to deal with day-to-day challenges. Some possible topics are complying with policies and procedures using Banner and the American Health Care Act compliance using Colleague.

### Oregon HR/Payroll Banner Users (B)

*Sandra LeHoullier, Linn-Benton Community College*

Reconnect with HR/payroll Banners users in Oregon or the Northwest. The intent is to get the group reconnected.

### Monitoring Adjunct Faculty - Hours, Step Advancement and Payroll (B)

*Catherine Williams, Sandra LeHoullier, & Kelli Dunleavy, Linn-Benton Community College*

Come learn from us how LBCC moved from an entirely manual (and tedious) process of calculating hours worked, step advancement, backing into a contract and manual payroll authorizations to an automated process using Banner.

### Part-Time Faculty Compensation System (B)

*Catherine Williams, Sandra LeHoullier, Kelli Dunleavy, & Teresa Woods, Linn-Benton Community College*

Before FLAC was available, Linn-Benton invested in automating a relatively complicated Part-time Faculty Compensation system. LBCC built net new functionality to populate classes from the schedule of classes, assign salary from Banner tables and the instructor's calculated current step, calculates worker comp and populates the deduction record in Banner calculates PERS and ACA hours, allows instructor substitute assignments, and creates compensation records in Banner. Come see how we have done it!

## Information Technology

### **Banner Today and Beyond (B)**

*John Kopke, Ellucian*

Join us to learn about what's new in the Banner 9 administrative pages. View the new modernized user interface, improved accessibility and usability improvements to help all users. See key examples of the forms in each of the administrative applications; Human Resources, Finance, Student, Financial Aid. Learn the benefits of easier deployments and upgrades via the Ellucian Solution Manager.

### **Colleague Technical Client Advisory Board Forum (C)**

*Kathy Tymoczko, Lewis & Clark College; Mike Osterman, Whitman College; Rich Hinz, Whitman College; & Celeste McCormick, Lewis-Clark State College*

Programmers and system administrators who support Colleague by Ellucian are invited to meet with members from the Colleague Technical Client Advisory Board to share feedback and help set priorities.

### **Ethos Roundtable (B/C)**

*Chris Fontenot & Adam Lenhart, Ellucian*

Join Ellucian to discuss current topics on Ethos.

### **Increase Productivity with Laserfiche and Digital Signatures (B/C)**

*Jennifer Murray, Cities Digital*

Learn how utilizing Electronic and Digital Signatures with Laserfiche increases efficiency. Users will learn how easy it is to send documents to Signix or DocuSign via a single click in Laserfiche and how to utilize Laserfiche Workflow Activities to automatically route documents for signature!

### **Information Technology Roundtable (B/C)**

*Michael Quiner, Gabriel Williams, Linn-Benton Community College*

Join your fellow IT professionals for a networking session to share ideas, best practices, problems, and the successes and challenges in meeting the technology needs of your institution.

### **Learn All the Ways You Can Use the New Ellucian Ethos Technology Platform for Integrations (B/C)**

*Chris Fontenot & Adam Lenhart, Ellucian*

Learn All the Ways You Can Use the New Ellucian Ethos Technology Platform for Integrations.

## **Manage User Access in a Dynamic Colleague by Ellucian Environment (C)**

*Steve Mason, Pacific University*

Managing security access in a dynamic enterprise resource planning (ERP) environment can be challenging. While we often place emphasis on new security access, we tend to overlook the importance of reviewing the security access of current users. In this roundtable session we will discuss best practices in the Colleague by Ellucian environment. This is a clone of a very popular and lively session at Ellucian Live 17.

## **Tips and Tricks for Colleague Administrators (C)**

*Kathy Tymoczko, Lewis & Clark*

Even if you've taken the Ellucian Colleague Administration courses, there are plenty of maintenance tasks that Colleague administrators must do. Learn more about files to purge, auditing security assignments, record-level and field-level security, transaction auditing and more.

## **Transforming the Mobile-First Student Experience (B/C)**

*David Newson, DubLabs*

Today, students rely on their mobile devices more than ever. In response, some colleges and universities have rolled out multiple mobile apps, but haven't looked at the mobile channel strategically. Hear how several NWEUG schools have rethought their mobile strategies by integrating Banner, their LMS and other enterprise systems to help mobile-first students succeed.

## **UI 5.X - Deployment and Transition (C)**

*Kathy Tymoczko, Lewis & Clark College, Mike Osterman & Rich Hinz, Whitman College*

Join us for this panel discussion on learning best practices for deployment of UI 5.X, including running side by side with UI 4.6, nuts and bolts of implementation, and philosophy of continued use of 4.6 alongside 5.X.

## Strategy & Planning

### **A Single Source of Truth: Why You Need Effective Data Governance (B/C)**

*Henry DeVries, Ellucian*

Your numbers don't match my numbers. Join us to learn how you can turn that data into useful information that supports data-driven decision-making.

### **Balancing IT Project Requests (B/C)**

*Kim Channraseut, Idaho State University*

Do you find yourself juggling numerous IT project requests/initiatives? Come learn how Idaho State University is working to build a project management framework into our campus culture. Topics will include a brief overview of our IT project prioritization efforts and the tools we use to manage and track our portfolio of IT projects.

### **Been There Done That: Banner 9 Migration Success Tips (B)**

*Keith Myers, CampusWorks*

With the clock ticking on the Banner 9 migration deadline many schools are in the midst of figuring it "all out" while still trying to keep all the other projects moving forward at the same time. Whether you are almost done, in the middle of migration or still planning to kick off this fall, this session will provide lessons learned from over a dozen Banner 9 migrations and provide insights essential to ensuring a successful migration.

### **Best Practices in Integrated Planning and Reporting (B/C)**

*Brandon Bloomquist, Kaufman Hall*

The challenges facing high education today mean colleges and universities need financial planning processes that optimize the use of existing resources. Too often today's planning processes are disconnected, labor-intensive, and prone to error. This session will present Kaufman Hall's perspective on an integrated planning framework that includes long range planning, labor planning, operational budgeting, tuition planning, reporting using Axiom Software.

### **Managing a Banner Baseline Project (B)**

*Gabriel Williams, Linn-Benton Community College*

As institutions move from Banner 8 to 9, we are having to reevaluate how much we invest in making changes to the product. At LBCC we took on a project with the goal of removing 100% of those changes. This presentation will show how we were successfully able to do that. Topics covered will focus on project management, change management, and IT leadership.

### **Moving to the Cloud: Ellucian Cloud Solutions (B/C)**

*Chris Fontenot & Adam Lenhart, Ellucian*

Cloud solutions are transforming and improving the way higher education institutions serve both internal and external constituents. Learn about Ellucian's portfolio of cloud solutions and how you can leverage the Ellucian Cloud for your applications. This session explains Ellucian's cloud strategy and our direction around a scalable, cost-effective, and secure environment for managing your enterprise systems. For those who are already cloud clients, we will discuss how and when to move to the next level.

### **Strategy & Planning Roundtable (B/C)**

*Kim Channpraseut, Idaho State University*

Join your fellow strategy and planning professionals for a networking session to share best practices, policies, tools of choice, and the success and challenges in meeting the alumni relations and fundraising needs specific to your institution.

Preliminary Conference Schedule subject to change. Please visit often!