



November 2006

Milestones

A 5-year Odyssey

Summer 2002 - Planning began

2002-03 - Business process analysis began with each division

July 2003 - Finance module training began in Wilmington and Charlotte.

April 2005 - Banner Finance goes "live," the first UNC campus to do so.

November 2006 - Human Resources to launch

December 2006 - Admissions to launch

January 2007 - Financial Aid to launch

Spring 2007 - Student module to launch

Spring 2007 - Students will register for fall classes for the first time using Banner

Summer 2007 - Advancement to launch

Summer 2007 - Conversion era closes

Banner work exemplary

Chancellor Allen C. Meadors



Chancellor Meadors

Banner is our new suite of applications for student information, human resources, financial aid, faculty, finance, alumni, advancement and more. UNCP began a five-year migration to Banner in 2002 and will wrap up in summer 2007. This was necessary for many reasons, most of all to better serve our students, faculty and staff (in other words, ourselves).

This necessary process has taken a great deal of work and time, and there is still much more to do as the other modules come online. We should all be proud of the way our staff has worked diligently, collaboratively and intelligently to get this job done. I certainly am.

Banner is designed to support the way universities want to run their institutions, and UNCP did a lot of the designing.

I am proud of our staff and administrators. Their work has been exemplary during this conversion process. We have come a long way and with everyone's support, we will finish this conversion up in an outstanding fashion.

Banner HR is the next step

*Dr. Maurice Mitchell,
Associate Vice Chancellor, UCIS*



Mitchell

In the inaugural issue of *Banner Bits N' Bytes*, we wrote about the effort that has gone into the Banner project since its beginning in

2002. The focus in this issue is on some of the benefits and productivity gains that we are beginning to realize from the effort – and this is only the beginning.

Several campus Banner users/trainers will share some of their favorite new features and tips. As a budget manager, I want to share my two favorites: the "My Banner" menu and exporting query results to an Excel spreadsheet. The first makes my work and use of Banner more efficient while the second

makes me more productive.

MY BANNER

The My Banner menu is an easy-to-use personal list of the forms, or information management tools, that I use in the day-to-day management of my budget. The menu is found on the very first page after you log onto Banner. My menu has 12 different forms listed. For instance, I frequently review the details of transactions. The menu choice for that task is, "Detail Transaction Activity [FGITRND]." If I only used a couple of forms, or if I used all menu listings daily, I could probably memorize the form labels (i.e., FGITRND), but I don't use them every day. Many of the choices on the list are used very

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What key players say

Monthly hands-on training is available for Banner finance



Killian

Roger Killian is the director of the Office of Financial Planning and Budgeting and one of the key players in Banner training. In an interview,

he discussed the conversion and ongoing training.

Killian offers a monthly Banner budget training class in either the Human Resources Training room or one of the University's computer labs. It is recommended for new Banner users and users who want to advance their skills.

The two-hour classes are usually held on the third Thursday of the month at 10 a.m. Registration should be requested in advance through UNCP Human Resources: <http://www.uncp.edu/calendar/>.

"It's hands-on and specific questions are answered," Killian said. "It's a two-way street, and I've learned things from our users such as short cuts."

"Training Notes" are also available at "Users on Harmony/Budget/Training Notes." There, Banner finance users will find tips and answers to actual questions from UNCP users of the BANNER budget system.

"With any new program like Banner, there are pluses and minuses, but mainly there is change, which is difficult," Killian said.

Killian, who crunches more numbers than most on campus, is a Banner advocate.

"At least every other week somebody writes a requisition to an account that does not belong to them," he said. "Banner routes the requisition to the proper approval authority."

Banner has a safety net for spotting these unintentional errors before they happen, Killian said. That is the "good Banner," but there's a "bad Banner" side too.

"When a UNCP user signs things, where he or she does not know what they're signing off on, Banner has an electronic signature stamp and a tracking history. Some people are learning this the hard way."

There is "built in accountability," he said. "If a budget is overspent, the requisition comes straight to me, and I send the originating department a message."

Planning and accountability are Killian hallmarks since he became the University's first director for the Office of Financial Planning and Budgeting. Banner makes his job easier.

"Banner is a tool that is very,

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Using 'My Banner' eliminates code confusion

Kimberly Locklear
Banner Trainer, Controller's Office





Locklear

My Banner is a tool that will allow you to create a personal menu that includes the forms that are most important in daily job duties. Using

My Banner allows you to open the My Banner folder and select the form you wish to use. This eliminates scrolling through all the forms in order to locate the name of a particular form which you need.

SETTING UP MY BANNER


Double-click on the "My Banner folder"  **My Banner** listed on the general menu page. Then, double-click "Empty Select to Build" if you have never set up a My Banner menu, or double-click "Organize My Banner" if you have previously set up your My Banner menu. Click "Sort Objects" . Sort Objects will list Banner forms in alphabetical order.

Scroll up and down until you find the form you are looking for or enter a query and type in the form you want to add.

When you have your form highlighted, you will need to click



The My Banner Menu

"Insert" . Clicking "insert" moves the form from the main list

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infrequently, so it helps me to see the description.

The My Banner menu comes with a pre-loaded choice, "Organize My Banner [GUAPMNU]." If you wish, you can simply double-click on the "Organize My Banner" choice and begin moving the form descriptions you expect to use from the table on the left to the table on the right. The table on the right becomes your My Banner menu.

If you need help building your My Banner menu, give Kim Locklear, the Banner trainer, a call at extension 5756. (Kim offers more details beginning on page two in this edition of *Banner Bits 'N Bytes*.)

EXPORTING QUERY RESULTS TO AN EXCEL SPREADSHEET

One of my biggest frustrations with the previous financial system, FRS, was paging through dozens of

detail transaction activity screens to find information. Then I would have to scribble it down on a yellow pad. Frequently, I had to gather information from many different screens and then aggregate and put the data into a spreadsheet for more analysis. The process of getting data aggregated on a spreadsheet was very counterproductive. For instance, trying to tally up all the costs for staff travel in an FRS budget was very labor intensive.

Banner provides the utility of dumping the entire detail transaction activity directly to an Excel spreadsheet. Once the data is in the spreadsheet you can delete unwanted data and sort the data any way that makes analysis easier. Now I download the budget data directly to the spreadsheet, delete all of the non-travel activity and sum the costs. I can even sort the transaction activity by staff mem-

bers' names, if I want that level of detail.

For help in extracting data from a Banner form, give Kim Locklear, the Banner trainer, a call at extension 5756.

COMING SOON! HUMAN RESOURCES SELF SERVICE!

Here's a comment from Pam Barkett: "Financial managers and department administrators will have access to organization-specific personnel data with the ability to review employee leave balances and approve leave requests and time reporting online. Employees will be able to access and/or update information through 'Employee Self Service,' such as emergency contact, time-off requests and time sheets, leave balances and position and pay stub information."

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very powerful," he said. "We now have a rocket ship, but we're still riding it like a skateboard."

Tracking expenses and revenues can be taken to a new level of detail, Killian said. The University has not yet used all of the potential of Banner or of the Chart of Accounts to facilitate budget management. With Banner as a tool, UNCP Financial Managers and their designees can plan better, and can review, monitor and manage the funds with which they have been

entrusted by UNCP students and North Carolina taxpayers. Banner and the revised UNCP Chart of Accounts have much more flexibility than the former system.

Killian said Banner gets a bad rap because it is new and comes with a learning curve.

"Banner was inevitable if only because FRS was going away," he said. "I remember the FRS that used to go down all the time because the hardware/software was obsolescent, if not obsolete."

Killian sings the praises of Controller Ila Killian's office for their work on the conversion.

"UNCP is the leader among UNC institutions in Banner implementation," he said. "We were first, and when people have questions they come to us."

"We're writing the book and helping other UNC institutions," Killian said. "People don't realize how much work we put into this. I rate our performance an 'A++.'"


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and inserts it to your My Banner list.

Continue this process until you have moved all the forms that you want listed in your personal menu.

Once you have inserted all the forms you want listed in My Banner,

click "Save"  then click the

"Exit"  and log out of Banner. You will need to log completely out of Banner and re-enter the Banner System for your changes to be

effective in My Banner.

When you re-enter the Banner system and click on My Banner, you should see all the forms you added to your personal menu.