



October 2006

Banner 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.

Fall 2006 - Human Resources to launch

Fall 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 Basics

Sunguard Banner is the only fully integrated, Oracle-based, Internet-native technology solution available today for the higher education community. It is the market-leading suite of software applications for student information, human resources, financial aid, faculty, finance, alumni, advancement and more. Thirteen UNC institutions and Wake Forest are currently converting to Banner.

Banner is designed to support the way universities want to run their institutions. It is easy to configure, so software remains synchronized with institutional objectives. With Banner, universities can focus on their mission of teaching and learning, while delivering responsive service to the people that matter.

Sunguard is the leading global provider of "e-education" technology solutions. With 2,500 employees and headquarters in Malvern, Pa., the company supports more than 1,600 client institutions worldwide.

For more information, visit www.sungardscet.com.

A word from UCIS



University Computing and Information Systems took a lead role in guiding the conversion to Banner and Dr. Maurice Mitchell,

associate vice chancellor for Information Resources and Chief Information Officer for the University, is working with his staff, including Tom Jackson, Delores Lowry, Dawn Albrecht, Terry Oxendine and Kim Calabrese, to lead efforts.

Recently, Dr. Mitchell sat down to discuss Banner's purpose and mission, which began in the summer of 2002 even before he arrived at UNCP. He had words of encouragement.

"First, I can't overemphasize how hard people have worked to make this happen," Dr. Mitchell said.

FRS, he said, is going away. It's an outdated system that is on the brink of losing technical support from its manufacturer.

"FRS is limited because it was built for crunching numbers, while Banner was built for users," he said.

"Banner is the most widely used information management software in higher education today," Dr. Mitchell said. "People who use it like it a lot, but we all recognize that moving an entire university to something new presents difficulties."

Dr. Mitchell said the real strength of Banner lies in its simplicity for users and its ability to help administrators manage the University. Student records is another strong point, and Banner will help the University make all records more secure. Social security numbers will no longer be used to identify students.

"Banner is new generation productivity software with drop down windows and the ability to use Windows applications with it," he said.

Banner allows users to gather information quickly that was not possible with FRS. For purchase requisitions, one click reveals detail

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What key players say:



Ila Killian, Controller

Key staff: Paulette Dial, Kimberly L. Locklear, Natasha Allen, Judy Presley, Patty Deese, Karen Staab

Comments: I thank my entire staff and especially the core team of Paulette (lead person), Kimberly, Natasha, Judy, Patty, Karen, and UCIS for their dedication and efforts during our time of development and conversion from FRS to Banner Finance. UNCP went live with Banner Finance April 1, 2005, with transactions for the year. Though not planned, UNCP was the first University in the system to go live with Banner Finance and also the first to use Banner to complete a year-end and the 13th month processing. A tremendous number of personal hours have been put into the Banner Finance project. We still have much we wish to accomplish with Finance, and at the same time, we are moving ahead preparing for Banner Student. The campus users can extract various data from Banner Finance to help them do a better job. More detail is available to the users than ever before. The most significant problem is the fear of Banner that many users have. The task ahead is to bring users to an acceptable comfort level and a good understanding of what Banner Finance does for them.



Pamela Barkett, Director

Office of Human Resources
Key staff: Lori Carter

Comments: I would like to personally thank Lori Carter, Assistant Project Lead, and the HR Team, for their dedication and commitment to seeing the first phase of this project through to implementation. Banner HR is the first step in making personnel data accessible to campus online that will reduce the need for maintaining departmental personnel spreadsheets. I'm excited that 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. Once training is completed this fall, the paper time sheet and request for leave forms will be eliminated.



Lela Clark, Director

Office of Admissions
Key Staff: Tracy Dial, Sylvia Chavis, Amie Ward

Comments: The Office of Admissions plans to go live with Banner for Admissions and Recruitment in late fall 2006. Having used Banner before, I feel certain that we will see a number of advantages for faculty and students. We are building and implementing an automated system for transfer articulation which will allow the admissions office to enter transfer work into the system at the time we evaluate a file. Although this requires extensive work up front, this should speed up the evaluation process once built and will allow for prerequisite checking at the time our students register. Banner should also enable our office to be more independent in reporting and gathering needed data from the time a student becomes a prospect through enrollment. This will benefit us in future planning to ensure that we are best using our resources to meet new student enrollment goals.



Sara Brackin, Registrar

Key Staff: Marilyn Blackburn, Marsha Frink, and Natricia Drake

Comments: First, I would like to thank my staff for all the hours they have put into this important project. Their commitment and hard work is greatly appreciated. Our plan is for early registration in April 2007 for Fall 2007 to be done in Banner. Students and faculty will notice the benefits right away when using the Banner system. Prerequisite checking and faculty approval for closed sections will allow students to streamline registration, reduce errors in schedules and eliminate closed section cards. The student body will benefit from the upgraded degree audit system, DARS. This powerful degree audit system works well with the Banner system and allows much more flexibility in defining degree requirements. Schedule 25 and Resource 25 is the automated scheduling software package that will also go live with Banner. Room scheduling and search capabilities will also be greatly enhanced.



Bruce Blackmon, Director

Office of Financial Aid
Key staff: Mildred Weber

Comments: First, I want to thank Mildred for her hard work. She has devoted many hours of time and energy to this project. We are looking forward to our launch in January. Banner will improve service to our rapidly growing student population. It will greatly improve our ability to organize data and make student awards. We are excited about the future.



**Sandy Waterkotte,
Vice Chancellor**

Office for Advancement
Key staff: Janet Taylor

Comments: We are about to begin training and scrubbing data for a 2007 launch. We're looking forward to finding out how Banner can improve Advancement's efficiency. In recent years, all of us have been aware of our limitations in terms of collecting and storing important data, so we're anxious to see the changes in store.

Banner Banter

Here are some common Banner terms heard around campus:

Crosswalk: A term used to describe the cross-reference translation from the old system field definition to a Banner field definition.

Database: A collection of tables used to store data.

Relational Database: Oracle is a relational database. A relational database has several characteristics that make it different from databases and other file storage systems of the past. These same characteristics increase the complexity of querying or reporting from the database.

- Each data item is stored in only one location; someone's mailing address is stored in one table; every data entry form and report looks at this one table; all changes are made in this one table.
- The database is designed once, with an emphasis on the relationships between data. For example, the Banner database was designed to allow more than one type of address, so additional address types can be added at any time without altering the design.
- To query related data: Data must often be pulled from multiple tables; tables are joined together via a common field(s).

ERP: Enterprise Resource Planning is an industry term that encompasses a set of integrated software systems that support the administrative functions.

Query: A question or inquiry in Banner that looks for data in the Banner database.

Wildcard: A character substituted for unknown character(s) in a Banner query. A percent sign (%) stands for any number of unknown characters; an underscore (_) stands for one unknown character.

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that was not available on the old system. It can be approved with another click.

"When it's all said and done, it will be more functional, more efficient and we will work more productively together," Dr. Mitchell said.

As financial managers already know, Banner Finance is already in use. The human resources module is now in use by members of the UNCP Human Resources department. Later this fall, faculty and staff members will be able to use the web-based self-service functionality of Banner Human Resources.

Mitchell said that the Banner Student system, that includes admissions, financial aid, student records, registration and the academic advising functions is expected to come into use by next spring. BraveWeb will look pretty much the same to students and faculty since the current BraveWeb was designed to look the same to ease the transition to Banner. There will, however, be additional functionality that will work smarter. One of the benefits that many students and

faculty look forward to with the new Banner Student services is being able to use the student information system in the evening hours!

Later this fall, work will begin in earnest on Banner Advancement: the parts of Banner that help our Advancement and Alumni Affairs offices better do their jobs. The project is not finished yet. It has another year to run to complete the fundamental goals of this five-year effort. Actually, UNCP will be working on added features of Banner for many years. Some of these added features will be obvious, some will be behind the scenes, but all will dramatically improve efficiency and effectiveness of services to students, faculty and staff.

Everyone that has worked on the Banner project has had to do their regular jobs while they worked on their portion of Banner. In every case, this meant long overtime hours at night and on weekends.

"I thank every one of these folks. They've shown grit, determination...and great, great dedication to UNCP," said Dr. Mitchell.