

The monthly review of the **O**berlin **P**roject for **U**nified **S**ystems for the staff and faculty of Oberlin College

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## feature

# The Running of the Bills: SAO goes live on BANNER

On July 1, 1999, the Student Accounts Office officially went live on the BANNER system. The production cutover culminated in the generation of the first BANNER student bills, printed on July 20. Approximately 4000 bills were produced over three-and-a-half hours, reflecting students' current charges for fall semester 1999 as well as other charges and payments.

The production of the bills represented a high point in a long and complicated setup and testing period. Over the past year, the BANNER Accounts Receivable team (David Lazcko, Director of Student Accounts, Todd Rasmussen, Manager of Student Financial Counseling, and David Waldron, Analyst/Programmer), have worked long and hard to build the rules and data in BANNER that would produce the bills accurately and in following with Oberlin's policies. In addition, the A/R team was in constant contact with the BANNER Student Records team, the BANNER Financial Aid team, and the Office of Residential

Life, since producing the bills correctly involves data connected to a student's registration, financial aid, and housing/dining data.

An additional factor for the A/R team was the setup of another new system: the Office of Residential Life's new CBORD system (see story, page 3). Since all housing and dining assignments are entered into CBORD by the Res Life staff, a line of communication needed to be built between the two new systems so that correct housing and dining charges would be reflected on the BANNER bills.

"The initial production of the bills went fairly smoothly," says David Lazcko, "but there remains much to do." Lazcko notes that there are still plenty of changes to be made in how the bills are generated and how the office provides data from month to month. And all those changes will require the same sort of careful preparation that went into generating the first batch of bills.

## a creature called SFARGFE

One of the first steps in the A/R team's preparation was getting well-acquainted with a creature called SFARGFE. SFARGFE (pronounced suh-FAR-juh-fee) is the form in BANNER that drives much of the billing function. It's also what makes BANNER billing so different from the old system. "The BANNER process for bills is quite different from the legacy system," says Lazcko. "The billing is now system-generated, based on a student's status, including the number of registered hours, living on-campus or participating in an enrolled-not-in-residence program, and other factors."

SFARGFE automatically matches the particulars of each student to the correct amount

*The bill-runners  
on the BANNER  
A/R team: Todd  
Rasmussen, David  
Lazcko, and  
David Waldron*



*continued on page 2...*

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to be billed, which eliminates most of the manual billing which the legacy system required. Of course, the “automatic” part of SFARGFE came only after hours and hours of work were invested in building the data and rules behind the form and then testing those data and rules to make sure they worked the way they were supposed to. In addition, there are plenty of other forms in BANNER that relate to A/R and those, too, needed extensive testing.

And once the BANNER forms were set up correctly and tested, CBORD needed to be brought into the picture. The data setup in CBORD had to match the billing setup in BANNER in a number of ways in order for accurate housing and dining information to be fed into BANNER A/R and then be reflected on the new bills. “Housing and dining information in CBORD is related to codes in BANNER which enter the charges on the bill,” Laczko notes, adding that this code match-up is also how data from the legacy Financial Aid system makes its way onto the BANNER bills.

#### prepare to be billed

In addition to preparing the BANNER system itself, it was also important for the SAO to prepare the Oberlin community, particularly the students, for the new billing system. “One of the general aspects of changing from the legacy billing system to BANNER has been preparing the bill recipients for the change,” says Laczko. This preparation began with a letter sent with the bills at the end of May, explaining that a new billing system would be implemented and encouraging recipients to pay off any balances by June 25 (the last day that charges were entered into the legacy billing system). “This was just good business,” Laczko notes, “but was also meant to help eliminate having to transfer any more balances than necessary from the legacy system to BANNER.”

Bill recipients also received a letter with the last legacy bill at the end of June, thanking them for their cooperation and explaining a few features of the new bills. This last item was important, since the BANNER billing forms look very different from the old bills.

In addition to the new forms themselves, bills are now printed on a laser printer rather than on an impact printer.

This all means big changes for the SAO as well. Members of the staff are now responsible for the actual printing of the bills, whereas bills out of the legacy system were produced by Production Services in the Center for Information Technology. This changeover means the office will have more control over the billing process, but also means that the office is responsible for a new task that previously lived in the CIT. “I will miss coordinating with Debbie and Karen [staff members in Production Services],” says Laczko. “Fortunately, the wonderful staff in Printing Services—Wendy, Roxanne, and Marjorie—still does the folding and stuffing of

copies of the bills pulled and matched to the envelopes,” he says. “Now, these second copies are produced separately with the second billing address printed right on them. This eliminates the sorting and matching, and the second billing address is housed on the same BANNER form as other address types.” Laczko also notes that invoices can be printed individually in the office as they are needed.

Although the A/R team is generally pleased with the way the first billing has gone, everyone agrees that there is still plenty of work yet to be done with BANNER. And since the generation of bills occurred in the summertime, Laczko points out that the office does not yet know how BANNER will impact its ability to serve students when they return to campus. “BANNER continues to change how we accomplish various tasks,” he comments. “Instead of writing receipts for payments, for example, a payment is posted to the system and a receipt is printed out of BANNER. This saves writing, but we can only wait and see if it is efficient during periods of heavy student traffic in the office, such as during enrollment.”

There’s also plenty more to do on the technical side. Dave Waldron, the Analyst/Programmer working with the A/R team, notes that there are still a number of processes to solidify in BANNER, including the reconciliation processes, incorporating data regarding the Hope Scholarship tax credit, and figuring out an “imaging” strategy which would allow the SAO staff to exactly reconstruct the bills they produce.

“BANNER will change the office operations as does any new technology or methodology, but the changes will evolve over time,” says David Laczko. “This is for two basic reasons: one, BANNER is operated as baseline, meaning that we do not change it to match our operations, but we still need to fulfill Oberlin College’s policies; and two, because the office has always been fully occupied with work other than BANNER, and has had to stay fully operational while implementing BANNER. We will work to make BANNER work for us, to become more efficient and timely, but it will take continued effort to be a true success.” ■

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#### billing the BANNER way

The actual billing process occurs in three phases: the printing of the original bill; printing a second billing copy to be sent to a different address than the original bill (this step actually occurs first when a second copy is necessary); and printing bills for charges not associated with the academic term—health insurance for retirees, for example. Student bills (and any second copies) were produced July 19 and 20; non-academic bills were printed on August 4.

Laczko notes that the ability to print second copies of bills to be sent to a different address is an improvement over the legacy billing system. “In the legacy system, envelopes would be printed and then duplicate

## Residential Life goes live on CBORD

The generation of student bills out of BANNER really marked two “live” dates: one for the Student Accounts Office, which actually ran the bills; and one for staff in the Office of Residential Life, whose new CBORD system also officially “went live” when the first bills went out. Sandy Houglund, the Assignment Manager for Housing and Dining and the coordinator of the CBORD implementation, is pleased with both the product itself and the successful first running of the bills. “There have been some screwups, but that’s just logical when you’re dealing with something like this,” says Houglund. “We’ve had no major glitches with either CBORD or the feed to BANNER.”

Officially called the HMS CBORD system (HMS stands for “Housing Management System”), the CBORD product is manufactured by the CBORD Group, Inc. in Ithaca, NY. According to the CBORD website, HMS CBORD is designed to provide housing administrators with tools to facilitate housing management for a residential community such as a college or university campus. Housing and dining administrators can compare occupancy levels and total revenue, update account information, and make room changes, along with other functions.

One of CBORD’s “other” functions, of course, is talking to the BANNER system. Since all housing and dining information is originally entered into CBORD but needs to be reflected on the bills generated out of BANNER, one of the major technical issues to be resolved was how to feed CBORD data into BANNER accurately and efficiently. This is where Analyst/Programmer Cathe Radabaugh came in: Radabaugh has been working with Houglund and with Dave Waldron, the A/P working on the A/R conversion, for the last several months to make sure that CBORD and BANNER could talk to each other. This was no small task, since the conversation between the two systems goes both ways: BANNER feeds data into CBORD, and then CBORD feeds other data back into BANNER.

The first half of the conversation involves a BANNER feed into CBORD: “CBORD receives a file from BANNER which lists most of the students along with the student type code, the resident type code, the hours and semesters, the date of birth, and gender,” Radabaugh explains. “This info is then used by the Res Life staff when making room assignments.”

The second half of the conversation goes the opposite way: “CBORD then passes two files back to BANNER,” Radabaugh says.

“One file goes to Student Accounts to handle billing for room and dining assignments, and billing adjustments as changes are made. The second file is for Fusers and Financial Aid.” This second file contains the students’ campus or town address, phone number, and an indicator to show whether a student is living on-campus, off-campus or commuting from home.

If all this sounds complicated, you’re right—it is. But Houglund feels confident about using the new system and about the functionality it will give the Housing and Dining office. “In CBORD, I can see much more information much easier than I could in the old system,” Houglund says. “Also, before we had much more back-and-forth with paperwork between us and the Student Accounts Office. Now, when BANNER changes, it changes CBORD, and vice-versa. It gives me much more current detail than I had before.”

Residential Life Secretary Bev Pycraft agrees. She can look up a student’s record by the T-number (the BANNER ID) or the student’s name, and can view details about that student’s housing and dining simply by pulling down menus and choosing what data she wants to see. She can also enter and adjust billing quickly and easily into CBORD and know that the exact data she’s entered will be fed correctly into BANNER. “I really like that there’s no paperwork,” Pycraft says, “and no reason to get up and walk over to Student Accounts. There was no talking between our computers before—now there’s lots of talking.”

CBORD still has a way to go before it’s fully live: the actual room assignments still live in the legacy system on the VAX, and the letters to students informing them of their rooms for the fall will still be generated from the old system. But this is the last time for that procedure; once this year’s letters are out, the entire operation will take place in CBORD. “Right now it’s nice to have both systems running,” says Houglund, “because we can use one to cross-check the other. But once those letters are out, that’s it for the VAX.”

For the most part, Houglund is satisfied with the way the project has gone, despite the tremendous amount of time it has taken. “Most people really don’t understand the time and effort that goes into something like this,” Houglund notes, “especially when you’ve still got your regular job to do.” Nevertheless, Houglund admits that she’s enjoyed many parts of the project. “When I have the time to work on it,” she says, “it’s actually fun!” ■

### opus notes

#### FinAid timeline on hold

Due to recent staff turnover in the Office of Financial Aid, the BANNER implementation in that office is currently on hold. Director of Financial Aid Brian Lindeman is currently working on filling a number of vacant positions in the office, including the Associate and Assistant Director of Financial Aid positions.

According to OPUS Project Manager Monica Wachter, the FinAid implementation timeline will be reevaluated in the fall. “Once the staffing needs in the office have been met,

we will work out what our next steps will be in terms of bringing Financial Aid live,” says Wachter. A delay in the Financial Aid timeline is not as critical as delays for some other offices might have been, Wachter notes, because the Financial Aid legacy system is already Year-2000 compatible. ■

#### Admissions staff begins training in BANNER

About fifteen members of the College and Conservatory Admissions offices began their user training in BANNER during July 20-

22 and 27-29. Many of the Admissions staff had already been working in BANNER in a number of functions, but this training marked the first time that most of the staff worked with the pieces of BANNER that will handle the data entry for prospective students.

Maryann Stillwell, Office Manager for College Admissions, is planning another week of prospect entry review during August 10-13. The last portion of staff training, focusing on application entry, will take place in late August or early September. The College and Conservatory Offices of Admissions go live on BANNER October 1. ■

# BANNER Banter:

## Using key functions instead of the mouse

*Welcome to BANNER Banter, a new feature of **The Score**. In this column, we'll feature tips and shortcuts to help make using BANNER easier and more time-efficient. If you've discovered a feature of BANNER that's made the system easier for you, please drop BANNER Banter a line at [opus@oberlin.edu](mailto:opus@oberlin.edu).*

One of the features of BANNER is that it is a GUI system—that stands for Graphical User Interface, a fancy way of saying “you can use your mouse.” Using the mouse is a handy way to move around BANNER, but for some folks, it can be a pain, especially if you're doing heads-down data entry or if you're just more comfortable using the keyboard.

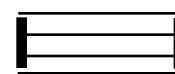
If that sounds like you, you're in luck, since almost every single

thing you can do with the mouse in BANNER has a keyboard equivalent. In other words, you can use keyboard combinations (otherwise known as “key functions”) to move around BANNER. Below is a listing of those key functions. Just choosing two or three to use on a daily basis, rather than going back and forth between your mouse and your keyboard, may save you some needed time and unneeded frustration. ■

Action	Key function
Accept (Save).....	Ctrl + F7
Application menu.....	Ctrl + F10
Block menu .....	Shift + F9
Break.....	Ctrl + h
Cancel .....	Escape
Clear block .....	Ctrl + b
Clear form .....	Shift + F5
Clear field .....	Ctrl + u
Clear record .....	Ctrl + F5
Count query hits .....	Ctrl + q
Debug mode.....	Shift + F4
Delete record.....	Ctrl + Forward Delete
Display error.....	Apple + d
Duplicate item .....	Ctrl + =
Duplicate record .....	Apple + =
Edit .....	Ctrl + e
Enter Query.....	Ctrl + F11
Execute Query .....	Apple + F11
Exit .....	Ctrl + F4
Help.....	Ctrl + h
Insert record .....	Down arrow
List of values .....	Ctrl + l
Main menu .....	Shift + F11
Next block .....	Apple + down arrow
Next field .....	Tab
Next primary key .....	Shift + F2
Next record.....	Shift + down arrow
Next set of records .....	Ctrl + s

Action	Key function
Option menu.....	Shift + F9
Previous block.....	Apple + up arrow
Previous field.....	Shift + Tab
Previous menu .....	Shift + F10
Previous record .....	Shift + up arrow
Print.....	Ctrl + p
Change password .....	Ctrl + j
Rollback .....	Shift + F5
Save .....	Ctrl + F7
Search (execute query)	Apple + F11
Select (exit w/value) .....	Shift + F2
Show keys.....	Ctrl + k
Toggle insert/replace.....	Apple + F12

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