

# The Score

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

## in this issue

3 Banner banter:  
Welcome to Banner 4

4 opus notes

## opus events

October 2  
Banner 4 and Financial Aid  
module go live

October 19-20  
BANNER Midwest Regional  
Users Conference

November 28-30  
Financial Aid functional  
training

December 12-14 (tentative)  
CAPP functional training

## feature

# Winds of change: Getting ready for Banner 4

When Oberlin's Banner users turn on their computers on Monday, October 2, a big change will boot up on the screen. Over the previous weekend, several members of the ACS staff will have been working furiously to get the next big piece of OPUS off the ground: the upgrade to Banner 4.

"Since Banner is an integrated system, all modules make the leap to a new version together," notes OPUS Project Manager Monica Wachter, who says that the October 2 live date was chosen as the best window for balancing the needs of all the offices across campus. "It falls between August and November student registration cycles," she says, "and after new student billing and general back-to-school bustle, after finance year-end processing, between payroll cycles, and before the admissions application crunch." Wachter adds that the October 2 date is also in time for the Financial Aid module to go live on Banner with early decision processing.

Oberlin has been through Banner upgrades before, but never where so many more offices and users are affected. The change from Banner 2 to Banner 3 took place several years ago, at a time when very few offices were live on the system. Now, there are almost 200 Banner users across campus—a huge change from the early days when you could count the "Banner people" on two hands and maybe a foot. Because of the vast increase in usage, the change to Banner 4 involves a great deal of coordination between the ACS group, the module administrators, and all those Banner users across campus.

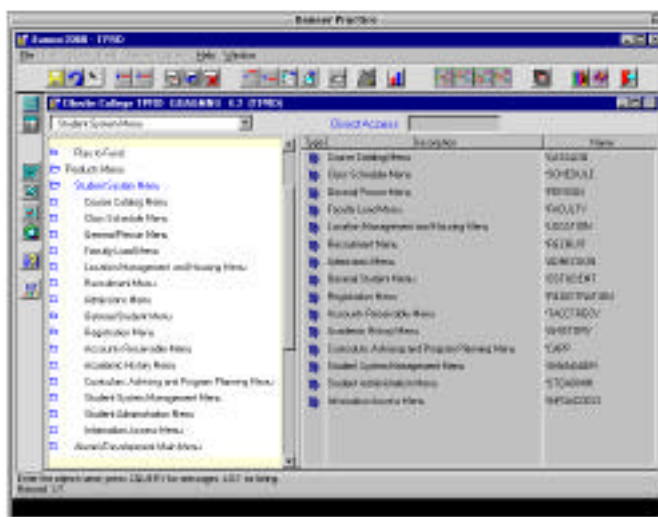
## training and testing

Work on Banner 4 has been going on behind the scenes for a number of months, and a version of the upgrade has been available since the spring in a test database to allow offices to look at the new system. Users have to determine what in Banner 4 is different, what's the same, and what things need to be tested to make sure they work correctly after the upgrade.

Essentially, users are looking for two sets of changes between the old and new Banner: navigational changes and functional changes. Navigational changes are relatively simple to address (see Banner Banter on page 2 for a rundown of some navigational differences in the upgrade). In Banner 4, navigation won't be too hard to get used to, especially for users who have been using the Citrix setup for the last few months since things essentially work the same. Usually, it's in the functional areas where things can get sticky, but in general, the upgrade to Banner 4 hasn't caused any major problems in the testing phase. The payroll staff in the Controller's Office

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*A new menu structure, like the one shown right for the Student Records module, is one of the navigational differences in Banner 4*



# Welcome to Banner 4

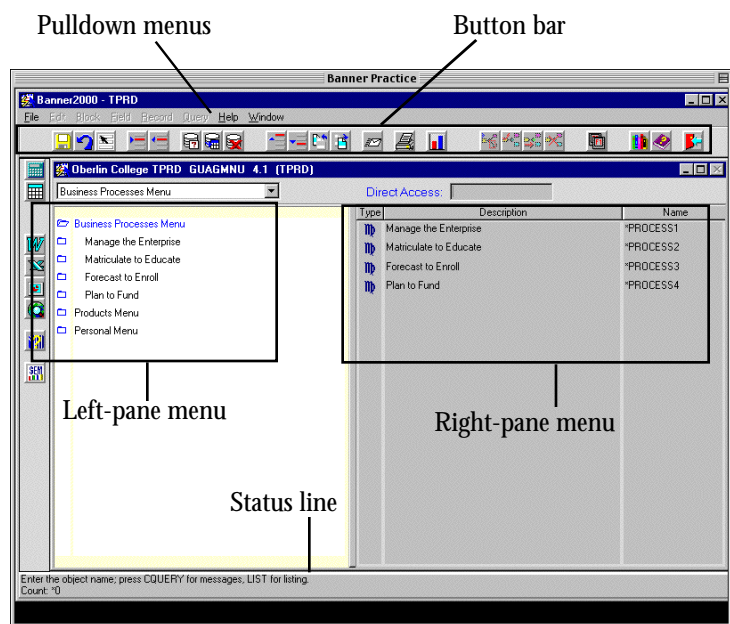
Beginning on Monday, October 2, Banner users will see an entirely new version of the Banner software when they log into the system. When you first see Banner 4, it will seem very new; there's a new introductory screen (those little dialog boxes that seem to appear and disappear on their own are gone) and when you first see the main menu, you may panic because it looks so different.

Don't panic. Once you start using Banner 4, you'll realize that although there are some navigational and aesthetic differences, they are fairly easy to get used to. There are basically four things to

get used to in Banner 4: new menus, new button functionality, new Options menus, and a new search mechanism. Each of these updates is explained below.

Now, it's important to keep something in mind: these four navigational differences don't address any *functional* features that may have changed in Banner 4. You'll need to talk to your module administrator about these. In the meantime, getting used to the new features mentioned below will help you get started in Banner 4.

## 1. The Banner 4 Main Menu

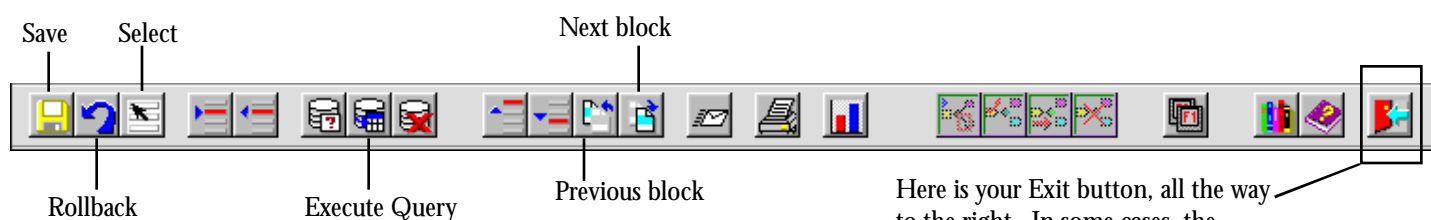


Here are the features of your Banner Main Window:

- **Pull-down menus**: these behave just like pull-downs in Word or Excel: click and hold on the menu item for a list of options. Note that the key function Shift + F10 allows you to use your up and down arrows to navigate your pull-down menus.
- **Banner button bar**: the button bar icons also behave just like the toolbar in Word or Excel. Note that when you hold your cursor over a button bar icon, the function of that icon appears in a yellow balloon.
- **Status line**: the status line at the bottom of your screen is where you can view any error messages, record counts, etc. Make a habit of checking your status line often during your session in Banner.
- **Direct Access box**: your cursor is blinking in the Direct Access box. Type in the name of the form you want and hit Return.
- **Left and right pane menus**: in the left pane are the category menus. Clicking on a category menu will bring up the contents of that menu in the right pane. For example, clicking the Product Menu in the left pane will bring up all the Banner modules in the right pane.

## 2. The Banner button bar (the toolbar)

Remember the buttons that always used to appear at the bottom of your Banner forms? The ones you used most often were probably Rollback, Save, and Exit. Well, say goodbye to those buttons: no form in Banner 4 has any buttons at the bottom anymore. Instead, all your button functionality is located in your button bar (or toolbar) located across the top of the form. Here's where you'll find the buttons you probably need most (if you hold your cursor over any button in the toolbar, a yellow balloon will tell you what that button does).



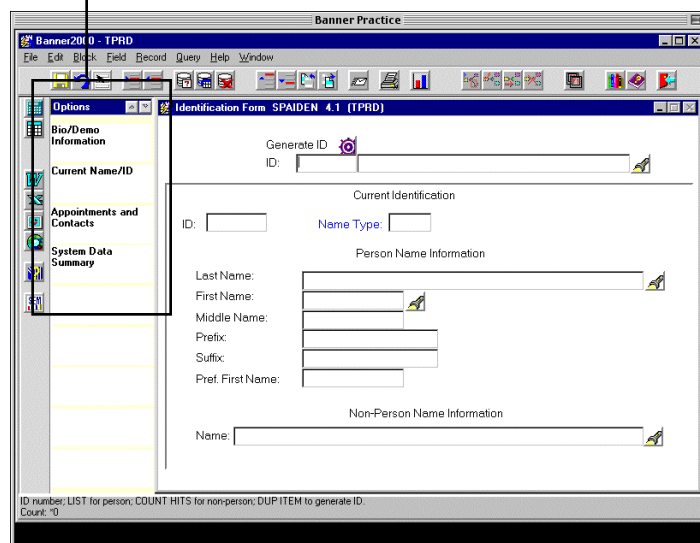
Here is your Exit button, all the way to the right. In some cases, the Cancel Query button (on the right of Execute Query) will also exit you out of a form.

### 3. The Options menu

In the old version of Banner, your Options menu was available to you in the form of a pulldown menu. In Banner 4, the Options pulldown menu is gone. Instead, an Options menu is always present in the left-hand window pane no matter what form you are in.

When you put your cursor over an Option in the menu, that option will turn blue, indicating that you can use it. Clicking on an option in the Options menu will take you to that window or form. In some forms, there will be more Options than can be viewed in the window; click the up and down arrows in the upper right-hand corner of the Options window to navigate up and down the list. Keep in mind that as you navigate through the form, the options available to you in your Options menu change.

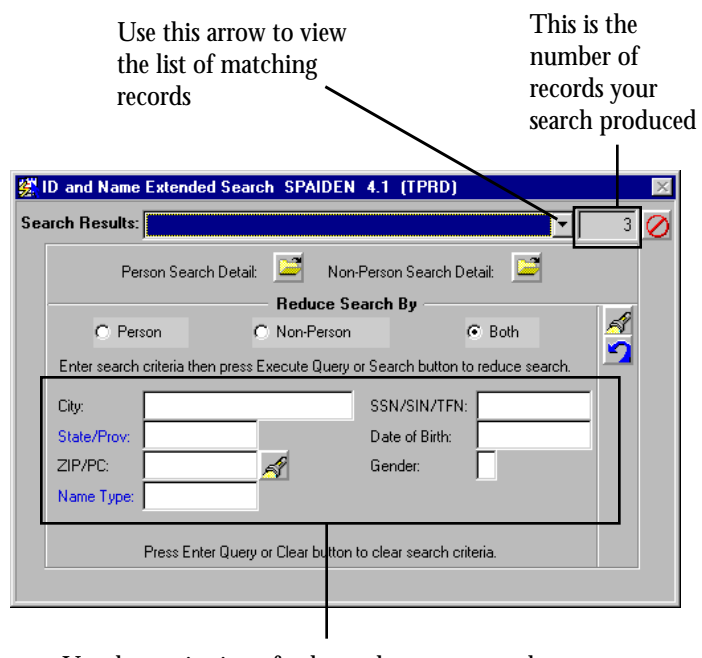
Your Options menu



### 4. Searching in Banner 4

A new feature of Banner 4 allows you to do a name search within the key block of a form, rather than going to a query form (such as SOAIDEN). Here's how to perform a key block search:

- Put your cursor in the key ID field. If there is an ID number currently in the field, hit Delete or choose Clear from your Field pulldown menu to clear the ID out of the field.
- When the ID field is clear, hit your Tab key. This will put your cursor in the Name field.
- If you know the first and last names of the person you want, type them in the Name field using lastname, comma, space, firstname protocol. Example: Doe, Jane
- Hit the Return key. If there is only one person in the database with that last and first name, the Name field will automatically populate with the person's name and ID number.
- If there is more than one person with that name in the database, the Extended Search dialog box, shown right, will pop up:



The number of records with your search criteria will appear in the upper right-hand corner of the Extended Search box. Use the pulldown arrow to view and select the record you want. If you want to further reduce your search, enter criteria in the bottom half of the dialog box, such as city, SSN, or date of birth, and click the flashlight to further reduce your search.

For more information about Banner 4 navigation, or to arrange a one-on-one or group navigation class, contact Ami Berger by email or at extension 6643. ■

## opus notes

### New calendar for *The Score*

Beginning with this issue, *The Score* will convert its publishing schedule from a monthly publication to once every two months. *The Score* will continue to cover the latest news about Banner and offer user tips about the software. If you would like to see a particular topic covered in *The Score*, email Ami Berger or opus@oberlin.edu. ■

### Forgot your Banner password?

College staff who are infrequent Banner users or who have returned after a summer hiatus

may have problems remembering their Banner password. If you have forgotten your password, please contact your Banner module administrator: for Student Records, contact Lori Gumpf; for Finance, contact Pearl Lin; for Human Resources; contact Linda Granville; and for Financial Aid, contact Brian Lindeman.

Users should also note that their Banner password is not related to the Citrix username and password that appears in the initial login box when you're using the Citrix setup to access the system. If you are unsure about your Citrix username or password, contact Ami Berger. ■

### Banner Midwest user conference

The 2000 Midwest Banner users' conference will be held October 19-20 at Miami University in Oxford, Ohio. The two-day conference will feature session speakers from the Miami of Ohio staff, SCT consultants, vendors, and other colleagues from current Banner schools. For more information about the conference or for online registration, see <http://www.units.muohio.edu/mcs/suppctr/lis/midwestbanner/index.htm>. ■

## ...feature

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tested the upgrade over the summer months, and they're ready for the October live. "We have been testing all aspects of payroll, including earnings, benefits, deductions, deferred pay, and leaves," says Donna Baxter, Accounting Supervisor. She also notes that "Banner 4 seems to be easier to move around in, not much different from 3.0."

In the Human Resources office, testing was also a summer project. "The Banner 4 testing went very well for us," says Linda Granville, Data Technician in HR. "There are not any problems that we can foresee. We were lucky with this conversion," she adds, "Since the new format for Banner HR is not that different from what we are currently using in Citrix." Granville notes that in general, the HR staff seems to like the new system. "I like to take advantage of any new changes," she says. "It does make the job that much more interesting!"

### FinAid: the finale

Aside from the move to Banner 4, October 2 represents another milestone for the OPUS project: the production cutover of the Financial Aid module. The Office of Financial Aid is approaching the production cutover gradually, since the Financial Aid staff will be working in both Banner and the legacy FinAid system for about another year. "We'll complete the 2000-01 processing in the legacy system so that there's no change for that school year," explains Brian Lindeman, Director of Financial Aid. "However, everything we do for the 2001-02 school year will be done in Banner, beginning with receiving and tracking financial aid applications for Early Decision candidates in October," Lindeman says.

In the Financial Aid module, all aid applicants will belong to a particular "decision plan," and each plan has several steps to it. The Financial Aid staff will use Banner to track and receive applicants, perform need analysis, and produce award letters. This entire process will happen in late fall for the Early Decision admission candidates, again in the winter and early spring for the Regular Decision cycle, and then again in the late spring and summer for all returning students.

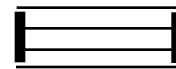
### keeping an eye on Citrix

What's making the move to Banner 4 possible, at least for the College's

Mac users, is the use of the Citrix setup. Because the Oracle software that runs Banner 4 is not compatible with the Macintosh platform, Citrix is necessary to run the upgrade on a Mac machine (if you are currently *not* using Citrix to run Banner, contact Ami Berger immediately). Most users have appreciated the move to Citrix: it runs Banner faster and has a more user-friendly appearance. The downside? Since the Citrix servers (there are two of them) can only handle so many users, sometimes it takes a few tries to get into Banner, and when lots of users are on, the system can become sluggish.

The solution? Put in another server, and that's exactly what the CIT is in the midst of doing. A new Citrix server is due to arrive at the end of September, just before the upgrade to Banner 4. Cathe Radabaugh, an Analyst/Programmer in the ACS group who has been working on the Citrix setup, is looking forward to the arrival of server #3. "The third server will give us a margin of safety," Radabaugh says, "since we want to handle all our Banner users with good response times." ■

The  
Score



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