

The Score

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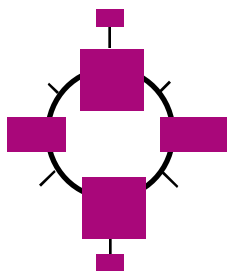
October 1998

The monthly review of the Oberlin Project for Unified Systems for the staff and faculty of Oberlin College

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no more spaghetti

Right: the new "non-spaghetti" graphic, which depicts how BANNER will link Oberlin's academic and administrative offices



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Working the system: BANNER in action at Oberlin

Ever since the beginning of OPUS, the discussion about BANNER has always been in the future tense: "when BANNER goes live it will..." or "eventually we'll be able to..." or "at some point we'll have to..."

In many cases, however, the future tense has become the present. There are plenty of folks around campus who aren't just talking about BANNER, they're using it. In fact, they're using it a lot, in some cases every day, to accomplish their routine tasks. What's more, some of these users aren't even in Human Resources, Payroll, the Controller's Office, or Purchasing, even though those offices are the only ones that are officially "live" on BANNER. Many BANNER users are scattered around campus in offices that are connected to the workflow of the offices that are live, and for better or for worse, they've become part of the BANNER conversion.

So just what are these folks doing in BANNER? Here's a profile of a few BANNER users and how they're using the new system.

User: Jeanie Watling
Title: Administrative Secretary
Office: Human Resources

Why she uses BANNER: Since Jeanie answers the phone for the Human Resources office, she's often responsible for answering basic questions people have about their employment at the College. She's often asked by callers to look up employment start dates, the birthdates of employees' dependents (this is important information for tuition remission, for example) or to verify an on-campus address (although she won't give out off-campus or personal information for security reasons). She also helps out colleagues in the Service Building; for example, if the mailroom receives a piece of mail for an employee addressed to an outdated office location, they'll call her to see if the person has

switched offices or departments on campus.

What she likes about BANNER: "It's really easy to use," Jeanie says, "and it really didn't take all that long to learn." She also notes that "once you get the hang of moving through the screens, it's not hard at all to find what you need." She likes the fact that all the information she needs is in one place and that she doesn't have to go from application to application on her computer—or from her computer to a file cabinet—to answer people's questions.

What she doesn't like about BANNER: "Sometimes going from screen to screen can be time-consuming," Jeanie says. Also, because Jeanie was not a part of the original implementation team in HR (she didn't become a permanent employee in the office until after HR went live) she had to learn BANNER after everybody else in the office was already up and running.

Final words: Jeanie says that one of the things she likes most about the system is what she *can't* do with it. The BANNER security is set up so she can only view the information she needs to answer people's questions, and she can't even bring up BANNER forms on her computer that don't pertain to her job. "The things I can see are the bare minimum that I need to do my work," she says. "Plus, I can only *look* at data in BANNER, not modify or update it. I can't change a thing—and I like it that way!" she says, smiling.

Users: Karen Arcaba and Debbie Williams
Titles: Karen is a Supervisor for Production Services; Debbie is a Computer Operator
Office: Center for Information Technology
Why they use BANNER: Karen and Debbie are responsible for the data entry that goes along with student and biweekly payrolls. Once the Payroll Clerks in the Controller's Office have

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checked over timecards to make sure the information is accurate, all the timecards are sent over to Karen and Debbie, who then have the task of entering all the information into BANNER. The data they enter is what generates student and biweekly paychecks.

What they like about BANNER: "We like the graphic format of BANNER," says Karen, who notes that the appearance of BANNER is a lot more like a Mac or PC application, unlike the old system. "We also like the fact that we can use our desktop machines, rather than switching to a VAX terminal," Karen says, "since the screens in BANNER are much easier on the eyes." She also says that the batch jobs run quickly, are fairly simple, and that there is a lot less data to enter in the BANNER system than what they used to enter into the old system.

What they don't like about BANNER: "There's less data to enter now, but we have to do a lot more visual checking," Karen says. She also points out that the BANNER screens are sometimes slower than the old system, and says that the ACS group in the Center for Information Technology is working on ways to speed things up.

Final words: In contrasting BANNER with the old system that they used to use, Karen says that it's really impossible to make such a comparison: "It's just altogether different," she says, "like comparing apples and oranges. The data entry is still pretty easy to do, it's just that BANNER is much more complex and not nearly as simplistic as the old system."

User: Aida Reyes

Title: Assistant Director of Financial Aid

Office: Financial Aid

Why she uses BANNER: As the coordinator of the Student Employment Office (SEO), Aida is responsible for making sure that students have filled out the necessary paperwork for employment and answering questions about student jobs. In addition, the interns in the SEO will soon begin entering student job information into BANNER and maintaining those student job records.

What she likes about BANNER: Aida can use BANNER to look up pertinent information about a student's employment eligibility and/or job detail. Some of the questions she uses BANNER to answer are:

- Has a student filled out the I-9 paperwork?
- Has a student been set up for a particular job in BANNER?
- What is the student's pay rate?
- Where will the student's check be sent?
- How much has the student earned this year?
- Has the student been terminated from a job?

What she doesn't like about BANNER: Aida says that it's been difficult working with BANNER since she's the only one who has it in her office. "My knowledge of BANNER is very limited," Reyes says, noting that she and her office-mates have only been in training for their own module since September and won't go live on BANNER Financial Aid until next year. "Hopefully once Financial Aid is operating under BANNER it will be easier to manage." ■

opus notes

Luncheon honors Finance team

On Thursday, September 3, the BANNER Finance team was honored at a luncheon to celebrate their production cutover in July. The luncheon featured a short presentation by President Nancy Dye and John Bucher, Director of Information Technology, which included certificates of recognition for Finance team leader Pearl Lin along with the entire Finance team.

The Finance team is made up of A&PS and Administrative Assistants from the Controller's Office, the Office of Purchasing & Auxiliary Services, the Finance Office, and the Center for Information Technology. ■

New consultant for Financial Aid

Ginger Gamberg, the SCT consultant originally assigned to lead Oberlin's Financial Aid team through their BANNER implementation, has accepted a new job within SCT. As Gamberg will no longer be leading implementations, the Financial Aid team was given a choice of alternate

consultants. After some research, the Financial Aid team chose Steve Bellin, an SCT Senior Financial Aid Consultant, as their new trainer. Bellin's first training trip took place September 29-October 1 and consisted of a fairly comprehensive overview of Financial Aid processing in BANNER. Team leader Brian Lindeman pronounced Bellin's trip "successful, and a good step forward for our team." ■

Staff to attend SCT conference

The BANNER Midwest Users Conference is scheduled to take place October 8-9 in Terre Haute, IN. The conference is an opportunity for users from the same region to meet and discuss system usage and implementation issues.

According to OPUS Project Manager Monica Wachter, the regional conference is valuable since it allows team members to meet BANNER colleagues who are close by geographically and may be helpful in terms of sharing ideas and resolving issues together. College staff from the Admissions Office, the Controller's Office, the Office of Financial

Aid, the Student Accounts Office, and the Center for Information Technology will be attending the conference. ■

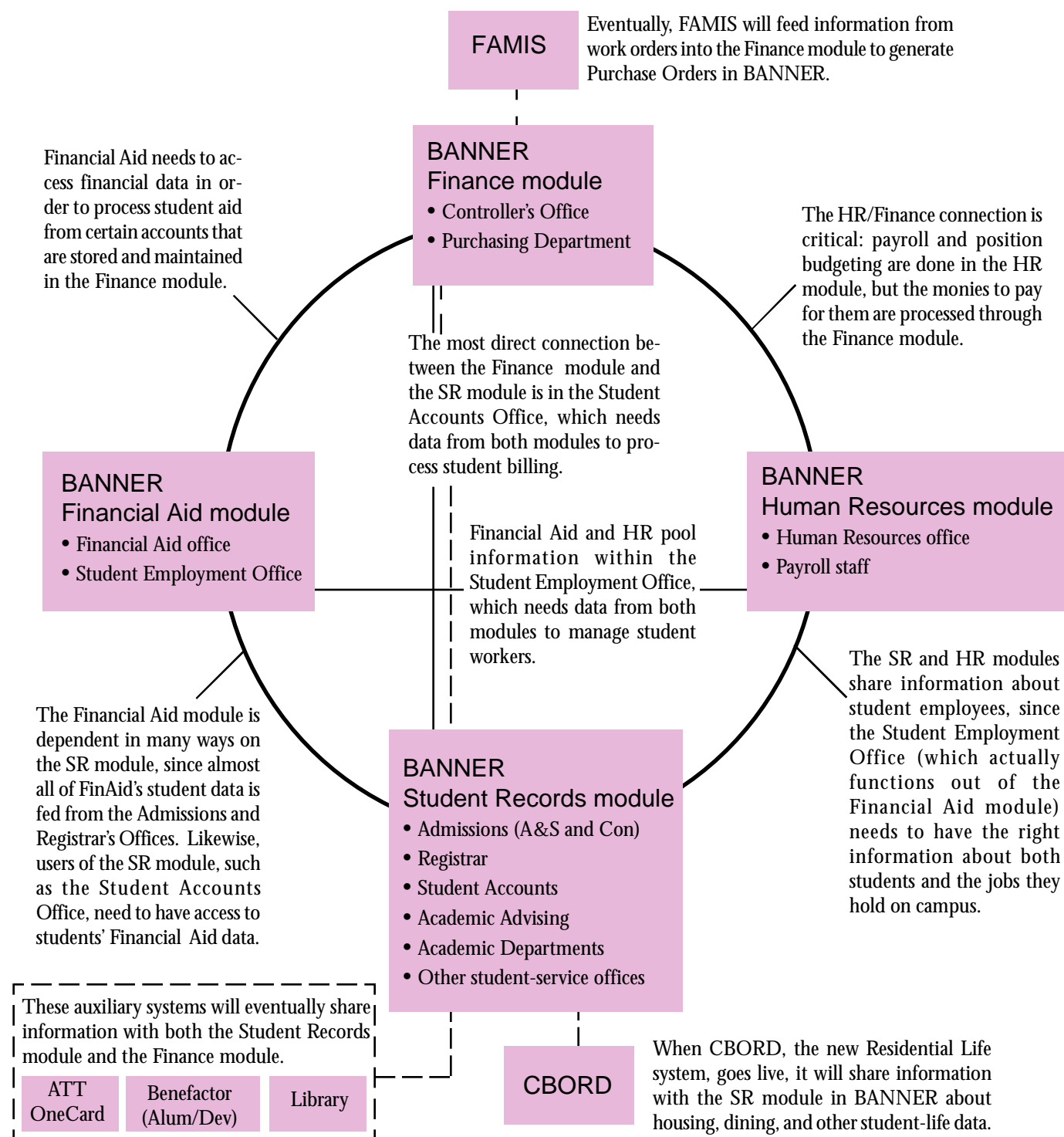
Res Life gears up for CBORD

The Office of Residential Life and Services has purchased a new administrative computing system, called CBORD, to replace their current system. CBORD will be used to process housing and dining assignments and for billing purposes. Four CBORD modules will be used in the office: Facilities/Residents, Automatic Assignments, Financial Transactions/Batch Processing, and Data Interface.

Sandy Houglund, Assistant Manager of Housing & Dining, reports that "CBORD will be able to interface with BANNER to import and export student and billing data from the Admissions, Student Accounts and Registrar's Offices, provide assistance in the assignment process, and store building, room and assignment data. In addition, it will interface with the ATT ID card system." The Res Life staff is scheduled to begin training on CBORD in October. ■

No more spaghetti: The new look of computing at Oberlin

Remember the “spaghetti” drawing that appeared on the cover of the March 1998 issue of *The Score*? It was a mishmash of lines, squiggles, and arrows depicting the College’s old administrative computing systems. Well, the mishmash is on its way out. With two BANNER modules live, two to go, and a number of auxiliary systems going live or in the works, the new connections between campus offices, depicted below, are decidedly cleaner and more user-friendly than all that spaghetti.



Archiving electronic documents: College staff take on a brave new world

On September 25, about 45 Oberlin College staff members gathered in the College Archives for discussion of a topic that barely existed ten years ago: the management and preservation of electronic documents.

Attended by both A&PS and Administrative Assistants, the Electronic Records Administration workshop offered participants a chance to focus on how their offices currently manage electronic records and how they can improve that effort. The workshop, coordinated by College Archivist Roland Baumann, stressed the fact that since the majority of College documents are now created using a computer, it has become more and more important for offices to understand what needs to be preserved and how to preserve it.

The morning's agenda included a talk by attorney Jim Niehaus, a representative from the College's law firm, which covered electronic security and how College employees can protect and secure their privacy in the electronic age. Next was featured speaker Phil Bantin, University Archivist at Indiana University, who spoke to the "hows and whys" of electronic administration. The morning session ended with a panel discussion in which College staff members Ami Berger, Ken Gilson, and Barbara Winterich shared their experiences with managing electronic documents.

According to Baumann, who had been advancing the idea for such a workshop since 1995, the final push for the event came from VP for Finance Andy Evans at a 1997 meeting of the Archives Advisory Board. Baumann feels that it is critical to educate and inform the entire campus community about the need to preserve electronic documents, since the initial creators of such documents (and their supervisors) often aren't aware of importance of such preservation: "When staff members are interested in preserving office documentation, the process should start by involving the individual to whom the employee reports," Baumann says. He notes that he and his staff in the Archives are also eager to help offices manage the process of identifying and managing both useful and unnecessary documents: "When taking on the second step of document disposition, the employee should feel comfortable in consulting with the College Archives," Baumann says, "and we are always ready to provide consultative advice on records administration."

The success of the workshop, says Baumann, was evidenced by the many pertinent questions and concerns raised by attendees. These concerns included:

- The need for approved guidelines on the administration of electronic files. Should a campus-wide records committee be organized to produce this product?
- The need for secretaries and administrative assistants to be given time for file administration.
- Addressing the issue of how we translate traditional records retention concepts (for paper documents) to electronic record keeping systems.
- Deciding who is ultimately responsible for the records created/received by College offices and departments. What are records of permanent value?

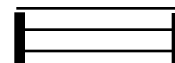
- Looking at the part the College Archives and the Center for Information Technology will play in this new universe containing electronic, classical, and non-classical records. Will the records management approach be centralized or de-centralized?

In addition to these concerns, plenty of other issues related to electronic documents are being raised due to several computer conversion projects taking place at the College right now. For example, in the panel discussion Barb Winterich discussed her experience with converting her old QuickMail files to Mulberry, and several participants in the audience were eager to hear her logic in both saving and disposing of old e-mail messages.

Then, of course, there's BANNER. Although BANNER and the systems migration was not a major topic of discussion at the workshop, Baumann describes the move to BANNER and the move towards archiving electronic documents as "two streams moving in the same direction." Baumann notes that "BANNER project personnel and the Archives staff share an interest in raising the consciousness of this community to make sure that Oberlin College possesses the records it needs in 2005." This is especially true for records created on the desktop (such as word-processed documents, spreadsheets, and desktop databases), since the BANNER archiving strategy will mimic current systems in terms of the long-term storage of mission-critical legacy data.

All in all, Baumann would like the entire campus to be aware of the institution's needs going into the 21st century: records for administrative use, records to support the instructional front in terms of classroom activity, and records to support the promotion of Oberlin College in higher education. The Electronic Records Administration workshop was one step towards meeting those needs: as one attendee put it, "The workshop on electronic records administration was very enlightening; it was just what I needed from a legal and practical perspective." ■

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