

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

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A&S and Con Admissions go live on BANNER

On Monday, October 4, 1999, Oberlin's College and Conservatory Admissions offices officially went live on BANNER. The Admissions portion of the system is actually a subcategory of the Student Records module, but the complexity of Oberlin's admissions procedures meant that the work involved in the conversion—for both the ACS staff and the Admissions staff—was just as long and difficult as that involved in larger modules of BANNER.

Although the live date for Admissions was October 4, the actual conversion took place the weekend before, on October 2-3. Katie Styer, the Analyst/Programmer supporting the Admissions conversion, spent those two days glued to her machine in the CIT, running the dozens of computer programs—31 in all—that converted the thousands and thousands of records in the Admissions legacy system into BANNER data.

But of course, the real work began long before that weekend. Maryann Stillwell, Office Manager

of College Admissions, and Michael Manderen, Director of Conservatory Admissions, have been working with Styer for over two years to prepare for this change. In addition to countless hours of learning to navigate the system, fitting BANNER's functionality to Oberlin's admissions procedures, and setting up rules, tables, and codes, there was also the more basic difficulty of having to let go of the old system. Since the legacy system's hardware and software is fairly obsolete, there was never any question that Admissions would have to make the switch, but that didn't make it any easier on the staff. "Our legacy system really spoiled us," sighs Maryann Stillwell. "It was written specifically for us by the Analyst/Programmers, so it worked perfectly with the way we do things here. We knew from the beginning that making BANNER 'fit' with the Oberlin processes would be difficult, but we knew it had to be done."

prospects and applicants

Basically, there are two major functional areas that needed to be built in BANNER for the Oberlin Admissions cycle to function: prospect entry and applicant entry. In the prospect entry stage, the College and Con Admissions staff enters the thousands and thousands of students who show an interest in Oberlin College into the system. Data at this stage includes the student's name, address, high school, academic interests, and other basic information. Sounds fairly simple, but remember, this is Oberlin and this is BANNER. Stillwell and Manderen had countless complex decisions to make: Which forms do we use? What data do we have to enter and where? What rule tables and codes need to be set up and how? The

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At right: there's never a dull moment when College Admissions Office Manager Maryann Stillwell and Director of Conservatory Admissions Michael Manderen are working on BANNER



...feature

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Conservatory also had to figure out how to store the special information it requires that isn't needed at most other schools: where do we store a student's primary instrument? Secondary instrument? Musical teacher preference? Where can we put youth orchestras, audition requests, prior musical study? And how in the world are we going to deal with Double Degree prospects?

In addition to all these questions, a major part of setting up the prospect portion of BANNER was a monster called the Communication Plan. Every prospect entered in the system is sent a number of mailings, including a College or Conservatory application (or both, for Double Degree prospects), brochures about financial aid and visiting campus, and descriptions of Oberlin's academic, extracurricular, and athletic offerings. BANNER's Communication Plan had to be built to process all these requests so that those materials were sent automatically to students when they were entered in the system.

And once the prospect side of things was set up, the applicant stage had to be attended to. Entering applicants involves less volume than entering prospects, since not every student who initially shows an interest in Oberlin ends up applying, but the structure of Oberlin's admissions processes is unique enough that building the applicant procedure had plenty of challenges. The BANNER forms had to be studied, more rules and tables needed to be built, procedures had to be written, and the applicant Communications Plan (separate from the prospect one) had to be set up as well.

behind the scenes: training and programming

When the setup decisions were made and procedures decided on, the process of training the Conservatory and College staff to use the new system began. Separate training sessions, lasting three and four days, were scheduled for prospect entry training and applicant entry training. Within the training sessions, there were also some differences between the way in which College admissions staff entered data and the way the Con admissions staff entered data; Conservatory Admissions Administrative Assistant Alice Davis and Assistant Director of Conservatory Admissions Beth Weiss also had their own training sessions with Director Michael Manderen to go over the pieces of BANNER unique to the Con admissions process.

At the same time as staff training was taking place, Katie Styer was taking care of the technical side of things. Styer had plenty of setup work to do to make sure the behind-the-scenes aspects of the admissions process would run correctly, as well as helping Maryann Stillwell map the legacy data for the conversion programs. Since the programs themselves are so time-consuming to write—time that the ACS group didn't have—they were written by Rao Pokuru, a consultant from CompuWare, who spent nine weeks on site in the CIT working on the conversion programs. In addition, Analyst/Programmer Millie Modic was helping out by working on a number of Admissions reports, including data entry checking cards, labels, listings of prospects and applicants, and other related output. Modic

put together the specifications for the reports, and Vanitha Kotte, another consultant from CompuWare, did the coding. In addition, Bill Halsey, a consultant from Sharidionne, also worked on the coding for several Admissions reports such as the A&S Admissions Committee report and the Conservatory prospect listing.

the final step: conversion

The week before the actual conversion was spent in the usual last-minute frenzy. Maryann Stillwell was still finding things that needed to be set up or verified in the procedures. "I feel like at this point I should know absolutely everything about the system and I definitely don't," says Stillwell. "But I hear from my colleagues at other schools that you really never know everything about BANNER!"

Styer in ACS was also getting ready for the weekend by testing the conversion programs written by Pokuru. She was prepared for the programs to take the entire weekend to run, but wanted to make sure that there were no bugs that would bring the entire BANNER house down. And as it happened, there weren't: the conversion did indeed take the entire weekend, but the results seem to be positive. "So far, we're finding extraordinarily few problems," Styer says. "We have had some problems with students that came over with no social security numbers, and we've had some some issues with the validation tables, but so far, we haven't had any 'dirty data,' which is quite a miracle!" Styer also points out that having Pokuru on site helped with this as well: "With Rao here

we could review the data before the conversion actually happened, since he did a fairly large-scale test with 10000 recruit records beforehand," Styer notes.

Stillwell is also cautiously optimistic: "From our perspective, the conversion went very, very well," Stillwell says. "We had only a few records to fix in BANNER after the programs ran." Stillwell notes that her staff is still "mourning the loss of the old system, which they really liked," but for the most part, things seem to be running smoothly.

Over in the Con, there is also cautious optimism. AA Alice Davis was actually the first to really "go live" on the new system, since she began entering Conservatory prospects on that first Monday (the College admissions staff didn't begin entering College prospects until Tuesday morning). And Director Michael Manderen has even found parts of BANNER that he likes better than the legacy system, especially the flexibility he now has in reporting on Conservatory prospects.

Director of College Admissions Debra Chermonte has also supported the conversion by attending training sessions and providing a good deal of morale-boosting. Chermonte surprised her staff with a celebratory "we're live!" continental breakfast on the Monday after the weekend conversion. "I came in over the weekend and set up a fancy fall table complete with tablecloth and flowers," Chermonte reports. "The food part is not out of the ordinary in Admissions since we eat anything, anytime, and as often as possible, but I also made badges for everyone to wear that day that said 'we're all in this together'."

"I thought the badges, especially, were a nice idea," notes Katie Styer, "because after all, we really are all in this together." ■

"So far, we're finding extraordinarily few problems," Styer says. "We haven't had any 'dirty data' yet, which is quite a miracle!"

Uh-oh, BANNER's slow: A guide to reporting system problems

They are the three words that strike fear and dread into the hearts of BANNER users everywhere, a fear and dread that is born when it takes you five minutes to log into BANNER and comes to fruition when you discover that the forms are just barely crawling along. The word spreads through the office—and across campus—like integrated-database wildfire: “BANNER's slow today.”

Since BANNER is a client/server system (i.e., the data and forms you see on your computer are piped onto your desktop via the network), there are many things that can cause system slowness: it could be the forms server, the data server, the other applications you have open on your desktop, a network problem, a resource issue...you name it. When slowness occurs, your first point of contact should always be the Help Desk at 8197, but it's important to pinpoint exactly what's happening before you call. Simply telling the Help Desk folks “the &*!\$ system is slow!!!” won't help them figure out what's wrong or who they need to alert to research the problem. You need to have some more specific information about what's holding you up, since this information is needed to track down the source of the slowness. Here are some questions to ask yourself when reporting a problem with BANNER:

Who has the problem?

Do some system-snooping around your office. Are you the only one having problems, or are others in your office experiencing slowness as well? Have you spoken with other offices today who are having the same problem?

Where is the problem?

Take a few moments to test the other applications that you currently have open on your machine. Are they acting funny too or is the problem just with BANNER? Make sure you take a look at both networked applications (such as Netscape, Mulberry, and Meeting Maker) as well as applications that don't need the network, like Word or SimpleText.

What (exactly) is the problem?

When slowness is the problem, take a moment to figure out what specific functions are slow. Is BANNER slow logging on? Moving between the forms? Entering or populating data within a form? Also note whether or not the crawl-like pace is consistent or intermittent: is it always slow or sometimes normal? If BANNER has frozen up, can you go to other applications or is your whole machine stuck? How long have you given it to “unfreeze” itself before giving up? If BANNER has been generous enough to have produced an error message, make a note of the error message number, the text of message, and what you were doing when the message popped up: were you moving between forms? Querying? Moving to a new block or field? Saving your changes? And if you've rebooted your machine already, note whether or not this had any effect. All of this information will make it much easier for the CIT to locate the problem, fix it, and send you on your merry BANNER way. ■

opus notes

Waldron makes a switch in CIT

David Waldron, currently an Analyst/Programmer in the ACS group in the CIT, will be switching to a new position in the Networking, Operations, and Systems (NOS) group. Waldron, whose responsibilities in ACS include the technical underpinnings of PRESTO and the implementation of BANNER in the Student Accounts Office, will be taking on more system administration work in his new position.

“Dave will fill the computer systems manager position in the Networking group,” says OPUS Project Manager Monica Wachter. “The general idea is that Dave will manage system administration for Opusweb, Cobweb, Bravo, and provide additional backup for Jane [Zuzek, Computer Systems Manager in the NOS group]. While there are many details yet to be finalized,” Wachter adds, “we are extremely happy with this turn of events.” A search for Waldron's replacement in the ACS

group is currently underway. ■

Financial Aid delayed until 2001

In a decision made by the ACS group and Director of Financial Aid Brian Lindeman, the production cutover of the BANNER Financial Aid module will be delayed until February of 2001. The decision to delay was a difficult one, since putting off BANNER for 18 months means relying on the VAX for financial aid processing. “We had a situation where either decision—to go ahead or to delay the implementation—would be problematic,” says OPUS Project Manager Monica Wachter. “In the end, it became clear that the Financial Aid staff simply could not be stretched any further at this point in time.”

Lindeman is disappointed but realistic about the delay. “Frankly, I would have loved to have been able to work on BANNER,” Lindeman says, “but with the number of positions we've either just filled or have yet to

fill, I think a delay was inevitable.” ■

BANNER logout reminder

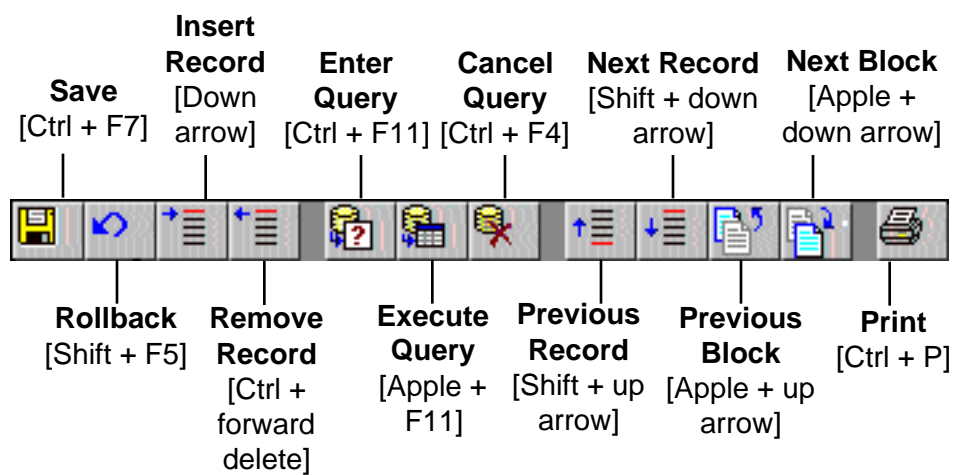
Now that more College staff are going live on BANNER, it's even more important that users remember to log out of the system when their sessions are finished. Whenever you are leaving your computer for an extended period of time, such as lunchtime or a meeting, you should quit your current BANNER session. And when you leave your office at the end of the day, it's critical that you log entirely off BANNER and off ORAforms; failure to do this takes up valuable resources on the servers and is also a potential security breach. If your machine freezes and you can't log off the system as you would normally, do a “Force Quit” function by pressing the Apple + Option + Escape keys on your keyboard. This will force your machine to quit the BANNER application. ■

BANNER Banter: Using the toolbar and pulldown menus

One of the nice things about BANNER is that it allows you to choose the ways in which you move around the forms and in between data fields. BANNER has a number of different navigation options: using the mouse, using key functions, using the toolbar, and using the pulldown menus. Users sometimes forget about these last two options, so in this month's *BANNER Banter*, we're offering some tips on using these little-known navigation tools.

the toolbar

The toolbar offers you a different way to perform many of the most common BANNER functions. At right is a map of toolbar, with each function labeled along with the keyboard equivalent of that particular function. The toolbar icons work the same way as icons in other applications that you may use on your desktop, such as Word and Excel: simply click on the button with your mouse to perform the function.



the pulldown menus

Your pulldown menu bar, shown at right, offers you another way to move around BANNER using a method that you already may be comfortable with, since applications like Word and Excel also use pulldowns. Below is a breakdown of some of the most helpful pulldown functions.

Action

Use your **Action** menu when you want to use the **Direct Access** option to move directly to another form. Also use **Action** to set your **Preferences**.

Edit

The **Edit** pulldown allows you to **Cut**, **Copy**, and **Paste**, much as you would in other applications like Word or Excel.

Options

The **Options** menu is a great feature that lets you navigate the branch windows of the form you are in, or lets you choose from a list of forms to which you may want to go next. When you click on **Options**, you will see a listing of choices separated by a dotted line; choices above the line are branch windows, and choices beneath the line are new forms.

Action Edit Options Block Field Record Query Help

Block and Field

These two pulldowns allow you to move to the **Previous** block or field, the **Next** block or field, and **Clear** the block or field you're currently in. In addition, the **Field** pulldown allows you to **Duplicate** the previous field's data into the current field, an option that may come in handy during heads-down data entry.

Record

Your **Record** menu offers choices associated with the record you're currently working on. **Clear** allows you to clear your screen of data that may be confusing without removing it from the database. The **Remove** option removes the entire record from the database permanently (once you've saved); this is a necessary and helpful feature, but use it with caution! **Insert** allows you to insert a new row or record in your form so that you can enter additional information. **Duplicate** will insert a duplicate of the previous record into your current record; this may be helpful when entering similar information in a number of records.

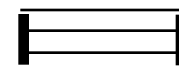
Query

This menu lets you manage your queries from the pulldowns, including the option to **Enter**, **Execute**, or **Clear** queries.

Help

This pulldown lets you see **Dynamic Help**, a list of **Keys** (key functions) or the **List** of values associated with the field you're in.

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