

The Score

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

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FinAid goes live as Banner 4 arrives at Oberlin

On Monday, October 2, 2000, the College officially went live on Banner 4, the upgraded version of the Banner system. Banner 4 represents a number of changes for offices across campus, and also involved a number of technical upgrades for the staff in the CIT.

For the ACS group, the weeks before October 2 were spent preparing for the upgrade. Database Administrator Darrick Strange was particularly busy, since part of his job is to prepare all the new Banner forms for installation in a process known as "generating" the forms. "There is quite a bit of setup work associated with forms generation," Strange says, "including modifying scripts and putting the forms in the appropriate location in the database." All told, Strange had to work on 2,697 Banner 4 forms to get them ready for installation. Then, the weekend before the live date, Strange and his backup in ACS, Millie Modic, spent the weekend actually installing the forms, starting at noon on Friday and ending

Sunday evening. "Fortunately we were able to work in parallel," Strange says. "Otherwise, it would have taken much longer."

For users, the most obvious change is the look of the new system. In many ways, Banner 4 looks and behaves more like a web page than the old version of the system—there are blue "links" along the side of the Banner screen that allow users to choose various options, and a new search feature where users can search for records by the name of the person or vendor, and then point-and-click to select the record they need.

Looks aren't the only thing that is different in Banner 4. Functionally, the biggest changes are probably in the Finance module, where the Purchasing segment of the system has undergone a serious transformation. "The Purchasing module is noticeably better than in the old system," says Director of Financial Information Systems Pearl Lin, adding that the A/P and General Ledger portions of the Finance module are "pretty much the same." Lin also notes that many of the Finance users are happy with the new look of Banner 4: "they especially like the layout of the form," she reports, "and the fact that the Options all show on the left side of the form."

FinAid goes live

October 2 represented a major milestone for the College in another way: the last major portion of the system, the Financial Aid module, finally went live on Banner. "We're very happy to be in production on the new system," says Director of Financial Aid Brian Lindeman. "Using Banner means that we'll be much more in sync with the Registrar, Admissions, and the Student Accounts Office, and that will make life easier for all of us,

continued on page 2...

*The man behind
the curtain:
Database
Administrator
Darrick Strange,
who is responsible
for applying all
Banner upgrades to
the database.*



...feature

including our students.”

The Office of Financial Aid is taking its “live” very slowly, with a gradual rollout that won’t be entirely complete until next year. Because the office continues to process financial aid for the current year well into the summer, the old legacy system on the VAX will be necessary until the fall of 2001. But in the meantime, all new financial aid applications will be processed through Banner, including the Early Decision applications arriving in the office currently. Processing ED applications will give the FinAid staff a chance to test the Banner waters, with the help of Analyst/Programmer Dave Foons, before the onslaught of regular applications arrives in late winter and early spring.

a group effort

On the technical side of things, all three groups in the CIT had to put their heads together to ensure a smooth transition on October 2. For the ACS group, that meant testing the new version into the ground to make sure everything was working on both the Banner side and the PRESTO side. Since Banner 4 also included a new version of the web product, several mock registrations were conducted to make sure that all the features of PRESTO were still operational and would allow students to register successfully during the registration period in mid-November.

For the Networking group, and Network Administrator Robin Cannon in particular, October 2 was the deadline for adding a new wrinkle to things: a third Citrix server to handle increasing Banner traffic. Cannon had been working with Analyst/Programmer Cathie Radabaugh for months to resolve several server-overload problems on the two Citrix servers, and when it was decided that a third server was needed, Cannon and Radabaugh had to gear up to make sure that all was in order for the Banner 4 live date. Fortunately, “Citrix 3” behaved itself and is now a permanent resident of the “Citrix Farm” that handles Banner traffic.

The Client Services group also had a role to play in the move

Group effort: all three groups in the CIT put their heads together to ensure a smooth transition to Banner 4

to the new system. Despite every attempt to warn, train, and generally inform the Banner-using public before the upgrade, there was always the chance that some users would come in on Monday, October 2, turn on Banner, and be completely surprised by the fact that a new system had taken over. To prepare for this, the Help Desk, Consultants, and other Client Service staff kept up-to-date on the upgrade and the questions about Banner 4 that might come up in that first week. Fortunately, there were no major Banner-induced panic attacks in any offices on campus, but all the groups in the CIT will continue to play a role in keeping up the systems that keep Banner running.

coming soon to a computer near you

With the move to Banner 4 complete, users of the system can afford to get comfortable with this version of the system: another major upgrade to Banner shouldn’t be necessary for another 2 years or so. But SCT, the manufacturer of the Banner product, is constantly producing “point releases”—minor upgrades to the system that correct errors in the system or provide small enhancements and changes. These point releases keep the ACS group busy, as do the numerous other projects associated with system maintenance, output, and reporting.

Speaking of reporting, there are a few developments on the horizon in terms of how users will manage output from Banner in the coming months. A product called AppWorx is currently being tested by Systems Administrator David Waldron; AppWorx would allow users to schedule print jobs and manage those jobs from their desktops. The product is still being examined by Waldron and the A/P’s in the ACS group, but will be available in a gradual rollout to users sometime in the spring of 2001. ACS is also working towards a solution for a tool to expand user reporting capability and add to current use of the Brio and Focus products.

If you have questions about Banner 4 or associated tools, email opus@oberlin.edu. ■

opus notes

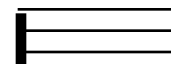
December CAPP training

On December 5, 6, and 7, staff in the Office of the Registrar, Office of the Conservatory Dean, and the ACS group in the CIT attended training for the Curriculum, Advising, and Program Planning (CAPP) sub-module of Banner. CAPP is the degree audit portion of the Banner Student Records module, and will eventually be the tool used by the College and Conservatory to determine if students have met graduation requirements. CAPP will also help students and advisors determine a student’s progress and plan for the future. The CAPP training was led by SCT consultant Dianne Louis. ■

Get ready for SCT Summit 2001

Information and planning material is now available on the SCT website for Summit 2001, the annual Banner users’ conference. This year the conference will be held in Toronto from April 8-11 and will include tracks for Accounts Receivable, Finance, Financial Aid, Human Resources, Reporting, Student Records, Technical, and Trainer, among others. If you are interested in attending Summit 2001 or would like more information, visit the SCT Summit website at <http://summit.sctcorp.com>, or email opus@oberlin.edu. ■

The
Score



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Banner Banter:

Setting up your Personal Menu in Banner 4

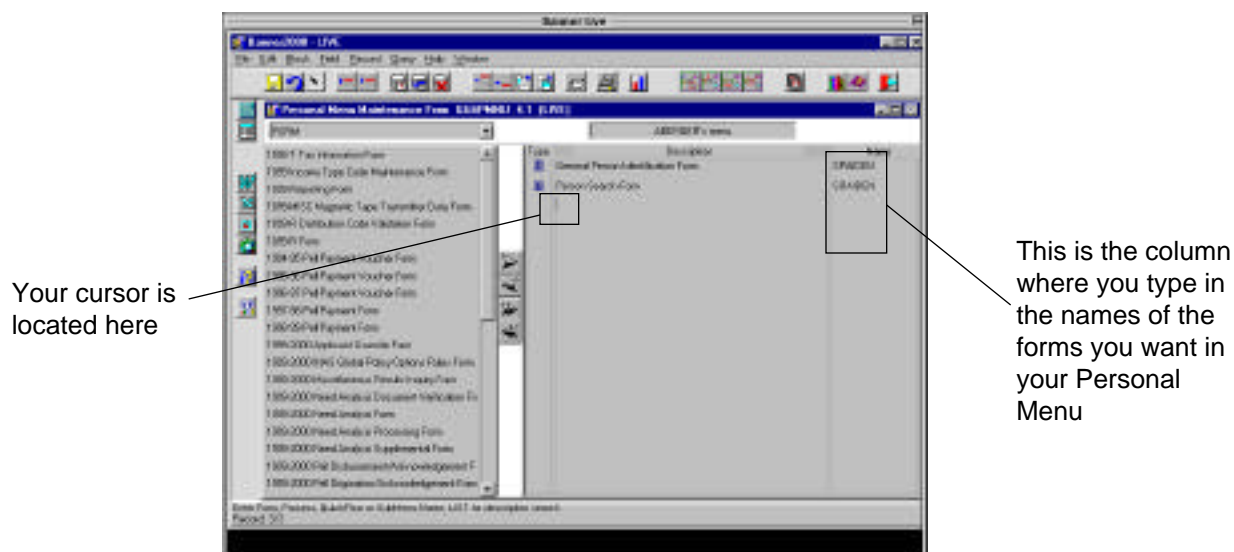
One of the most convenient features of the Banner menu is your ability to set up a Personal Menu that lists only the forms you want to see. With a Personal Menu, you don't have to worry about trying to remember the spelling of all those funny-looking form names, and since the Personal Menu also lists a description of what the form does, you can see at a glance which form you need to access to do a particular task. If you don't currently use a Personal Menu, it's a really good idea

to set one up, especially if you don't use Banner very often, since a Personal Menu can also function as a reminder of which forms you have access to and what you use them for.

The Personal Menu feature in Banner 4 works in a similar way to the one in Banner 3, but the forms do look a bit different in the upgrade. Here's how to navigate GUAPMNU, the Personal Menu setup form in Banner 4.

using GUAPMNU to set up your Personal Menu

1. Go to form GUAPMNU, shown below. When you first come into GUAPMNU, locate your cursor in the **Description** column on the right-hand side of the form.



2. Hit your **Tab** key once. Now your cursor will be in the **Name** column.
3. Type in the seven-letter form name you'd like to have in your Personal Menu and hit the down arrow on your keyboard. The description of the form you've entered will appear in the **Description** column.
4. Your cursor will now appear back in the Description column in the next empty row. Hit Tab again to enter the next form. Continue to repeat steps 2 and 3 until you have entered all the forms you'd like to see in your Personal Menu.
5. When you have finished entering your form names, click the **Save** button to save your Personal Menu. **NOTE:** make sure that your cursor is **not in an empty row** when you save; simply click in one of the form names or descriptions and then save.
6. Exit GUAPMNU to get back to the Banner Main Menu. In the left-hand window pane, click on the **Personal Menu** item. The forms you just entered will now appear in the right-hand window of the main menu. ■

2001: The Banner Odyssey Continues

The year 2000 was a busy one for Banner. Dozens of new users came on board, new procedures were implemented as offices moved to all-Banner functionality, a new client/server setup was installed with the move to Citrix, and just recently, the Financial Aid module went live along with the upgrade to Banner 4.

But there's no rest for the weary: next year is already packed with Banner projects, including some new user tools and functional areas that will go live. Here's a recap of Banner's coming attractions for the year 2001:

AppWorx: a new job scheduler

One of the first projects in 2001 will be work on the AppWorx product, a piece of software that will allow Banner users to schedule jobs they run through Banner. According to David Waldron, Computer Systems Manager in the CIT's Networking group, AppWorx gives users an alternative way for submitting jobs that otherwise would be run through Banner's job submission. "The product looks good so far," says Waldron, who has been testing AppWorx to ready it for production, "and it will give us some capabilities that we have been missing." These capabilities include:

- Scheduling ad hoc jobs,
- Specifying a start time for jobs for any point in the future
- Scheduling jobs to run on an ongoing basis (i.e. every Tuesday at 4 pm)
- Stringing jobs together to run in sequence
- Conditionally executing jobs
- Setting up a notification mechanism to let a user know if a job has failed

Waldron also notes that AppWorx will allow the CIT folks easier diagnosis of problems versus the job submission function in Banner, and will also make for easier management of the load on the database server. However, there are still some issues to be resolved, including setting up AppWorx accounts for all users, setting up (and maintaining) all the Banner jobs in AppWorx, and setting up security.

According to OPUS Project Manager Monica Wachter, the AppWorx product will be made available to users on a rolling basis, probably in the spring or summer of 2001. "We'll see a limited rollout of AppWorx over the next six months," Wachter says, "beginning with jobs and users with high-priority jobs—such as the feed to Finance from A/R—and then spread it out across campus."

BrioQuery and enterprise reporting

Another major project for 2001 will be addressing campus reporting needs. Currently, a very limited number of Banner users are using a tool called BrioQuery to generate reports, but due to some of the limitations of the software—especially the fact that it's no longer available

for Macintosh users—some research has had to be done to come up with a tool that can be made available across campus.

One possibility is another BrioQuery tool, called the "OnDemand" setup. OnDemand is web-based reporting software (which means that it would work on either a PC or a Mac), which would offer Brio users three different levels of reporting depending on their needs. The OnDemand product looks promising, but Wachter notes that there are still a number of issues yet to be resolved. "We would need to purchase and install both the OnDemand software and a new web server to run it on," Wachter points out, "and there's considerable cost involved in that, including the cost of the server itself and the cost in time and effort in the CIT to get the new hardware and software ordered, tested, and implemented."

Wachter is optimistic, though, that the OnDemand product will work for Oberlin's administrative reporting needs, and estimates that the software could be in production by July 2001. Currently, the Networking staff in the CIT is working on getting the necessary hardware ordered and tested, and the ACS group, particularly Analyst/Programmer Cathe Radabaugh, continues research and testing on the Brio software itself.

The year 2001 is already packed with Banner projects, including some new user tools and functional areas that will go live

CAPPING it off

On the functional side of things, the Student Records module of Banner continues to grow ever more complex. During the winter and spring of 2001, several staff will be involved in training to bring the Curriculum, Advising, and Program Planning portion of Banner SR live. Known as CAPP, this sub-module of SR performs degree audit functionality, providing an automated way of gauging students' progress towards their degree.

The CAPP implementation will be accomplished in stages, with the Conservatory degree requirements scheduled for setup in the system first. The decision to take the Con live on CAPP first was made for a number of reasons, including the fact that Conservatory graduation requirements are more straightforward than the College's and therefore easier to set up in the system. David Stull, Associate Dean of the Conservatory, is working on the Con CAPP project and is enthusiastic about what CAPP will offer.

"It is our hope that Banner's CAPP program will substantially enhance the capacity of Conservatory students and faculty to perform advising activities and imagine possible majors," says Stull, who was one of five Oberlin staffers to attend CAPP training in December with SCT consultant Dianne Louis. The other CAPP team members include Registrar Lori Gumpf, Associate Registrar Ron Bowman, Analyst/Programmer Millie Modic, and OPUS Communications Manager Ami Berger. "After our brief period of training," Stull adds, "we are cautiously optimistic regarding the positive impact that CAPP will have on the Conservatory." ■

Questions, comments, complaints about Banner? Email opus@oberlin.edu.