The Score

Volume 4 • Number 2

March 2000

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

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Reporting report: New tools, new rules

There have been plenty of complaints about BANNER since the beginning of the implementation, but many of them have had less to do with the data *in* the system as with trying to get the data *out* of the system. As legacy systems disappeared one by one, so did the reports generated by those legacy systems–reports that offices depend on to get their work done.

Producing reports in the office is still an issue, but almost three years into the BANNER project, many offices are finally feeling comfortable with their reporting and are learning ways to extract the information they need. This is mostly due to two reporting tools now in use around campus–the first called FOCUS and the other called BrioQuery.

"Both of these reporting tools are in the hands of one or two users per department, and these users have had training beyond the regular BANNER use," says Cathe Radabaugh, the Analyst/Programmer in the CIT who manages desktop tools. Radabaugh herself has worked with many of these users one-on-one to give them a sense of how each reporting tool works, since using both Brio and FOCUS requires some behind-the-scenes "techie" knowledge. "These users look 'behind the curtain' of the BANNER forms at the actual Oracle views and tables," Radabaugh says. "Within the part of the database that applies to their area, they can create reports of their own design or adapt reports that have been created for them by the ACS group."

At right: Cathe Radabaugh, the Analyst/Programmer who helps users manage their desktop applications, including the FOCUS and BrioQuery reporting tools.

the FOCUS group

So what's the difference between these two tools? One major difference is where each tool lives: the FOCUS software is housed on the database server and is accessed by the user via a client/server setup (the same way BANNER lives on a server and is accessed by the client machine), whereas Brio is a desktop application–it lives on a person's machine in the same way that Word or Excel does.

According to Radabaugh–and some users–FOCUS is also more difficult to use for reporting. "Since FOCUS is character-based [i.e., you can't use the mouse], the user has to actually code in the FOCUS language," Radabaugh notes. This means that if you're using FOCUS, you have to know the computer language in which it's written in order to produce reports.

This is both a plus and a minus, according to those staff members at Oberlin who are using FOCUS. "Although using FOCUS is assisted by programming knowledge and familiarity with the database structure, prepared FOCUS reports can be easily shared and adapted to specific needs," says John Rote, Budget Director. Rote uses the tool for ad hoc data extracts of budget data and supporting financial data in varying levels of detail. "Learning to use FOCUS can take anywhere from months to a year or more depending on the sophistication of the report required and the amount of commitment by the user," Rote says,

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"but even an inexperienced FOCUS user may become functional and ultimately proficient using it as a tool."

Sandy Fox, Human Resources Budget Director, has also found FOCUS an extremely helpful tool. "Writing reports is, perhaps, my favorite activity in BANNER," Fox says, although she adds that "learning FOCUS has been the epitome of the Oberlin motto 'learning and labor,' since everything learned is the result of much labor–and sometimes considerable frustration!" However, the results of Fox's FOCUS labors are most satisfying: "I've written nearly 100 scripts that I use to extract data from BANNER HR and BANNER Finance," she reports. "I then download that data into Excel for further manipulation and formatting."

FOCUS does have its downsides, though. Pearl Lin, Director of Financial Information Systems, uses FOCUS to generate statements of activity, statements of financial position, and reports of detail transactions, and she finds the tool cumbersome: "Our legacy reports were much better," Lin says, "since they were much easier to manipulate than in FOCUS." Bruce Richards, Associate Dean of the College, agrees: "FOCUS is really a dinosaur!" Richards says. "It appears to me like a tool that was developed years ago, and then expanded and enhanced at random."

Although Richards has a technical background, he still found FOCUS a challenge to learn: "I've had lots of programming experience in my career," he notes, " and I think FOCUS would be pretty tough for folks who are not programmers." Richards says that FOCUS does have its positives: "The huge advantage of FOCUS is that one can make up one's own reports to get data from BANNER, instead of being confined to the reports that come with the system." But for now, Richards reports, "I don't see lots of non-programmers using FOCUS."

Brio to the rescue

The frustrations that some users have with FOCUS may be remedied by BrioQuery, the second reporting tool. "Since Brio is a graphical tool [i.e. you can use the mouse], the user can see on the screen how the tables are joined and which pieces of information they want to see," says Cathe Radabaugh. "The Brio tool is especially strong as an ad hoc analysis tool and lets the user alternate from a summed-up perspective to a very detailed perspective of the data." Brio also lets users create charts, printed reports, and also allows for downloading extracted data to the desktop for use in other applications like Excel.

Brio users around campus very much appreciate the tool's flexibility: Ross Peacock, Director of Institutional Research, provides ad hoc reports, management reports, and institutional extract files; he reports that Brio "is an excellent tool for all three categories. The graphical interface makes learning the table structures and join conditions [i.e. the way certain pieces of data are combined in a report] a more intuitive process," Peacock says. He has found that Brio makes exporting data files to Excel very easy, and is also impressed with the tool's speed: "The performance is excellent," he says. "Brio retrieves data much faster than FOCUS and returns files that are easier to work with."

Aaron Milenski, Senior Associate Director of College Admissions, is also a big Brio fan. "It's great for gathering statistics together," Milenski says. "I also use it for small reports–when people ask for a list of applicants from a certain high school or something like that." He notes that although he doesn't use any complex Brio features, he found the system fairly easy to learn: "To do the basic things I do, I thought it was really easy and quick to figure out," Milenski says. "I was able to start using it the first day I had it."

Of course, reporting isn't that quick and easy for everyone: all of these users have had some technical experience with managing and manipulating data in their legacy systems, and nearly all of them have had additional training with FOCUS or Brio or both. But as the campus continues to utilize these tools–especially Brio–reporting should become less of a hassle for all involved.

And like everything else these days, the future of reporting may be on the web. "I think the future is sure to include some web-based reporting," Cathe Radabaugh says. In fact, a bit of web reporting is already taking place on campus: Ross Peacock has a few web reports in place for the Admissions office. "We use the web features in Brio to create and post daily admissions reports on a web server in a password protected environment," Peacock reports. "This has allowed both Con and College admissions staffs to get up-to-the-minute stats on applications and admit numbers without the hassle of transferring the numbers from a printout to a spreadsheet or other reporting application."

Peacock thinks that this flexibility is part of the reward for such a massive undertaking as OPUS: "While I recognize the difficulties offices have had at the front end entering data into BANNER," Peacock says, "Brio has helped me understand the great improvements in the quality, not to mention the sheer amount, of data now at our disposal." ■

opus notes

a new face in ACS

As of February 21, Jerry Coleman has joined the Administrative Computing Services group in the CIT as an Analyst/Programmer. Coleman fills the position left open by David Waldron, who is currently a Computer Systems Manager in the Networking and Operations group in the CIT.

Coleman, a Strongsville native, has worked in information technology for over 19 years, mostly in the banking industry. He will be working with the other Analyst/Programmers in ACS to support the remaining pieces of the OPUS project. ■

keystrokes for the PC/Citrix

For BANNER users working on a PC rather than a Macintosh desktop machine, your keystrokes for BANNER are now available on the web. To see the PC keystrokes, go to http://www.oberlin.edu/~acs/opus/keystrokes.htm. Users should also note that choosing the "Show Keys" option from the BANNER Help pull-down menu will also show the keystrokes available for use. ■

PRESTO for faculty

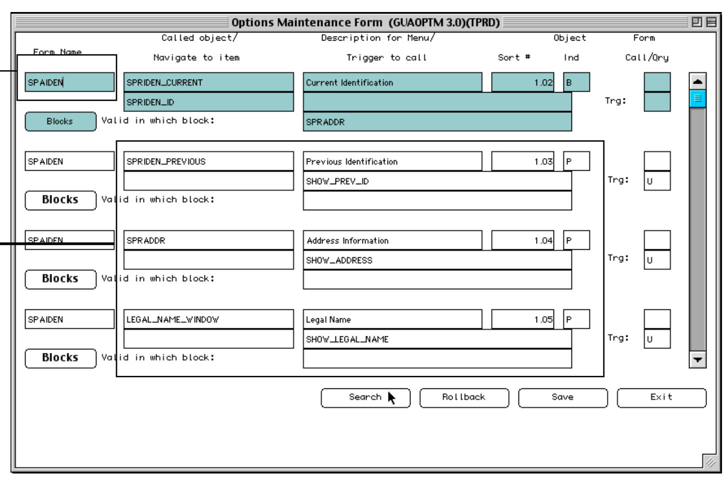
Faculty members who are interested in using PRESTO for registration functions but are unsure how to use the system can arrange for an individual instruction session at their convenience. Instruction includes web-consenting students, checking and printing class lists, and checking course enrollment. To set up an instruction appointment, email Ami Berger at ami.berger@oberlin.edu, or call extension 6643. ■

BANNER banter:
Customizing Options menus in GUAOPTM

The Options pull-down menu, which lets you select the next form you want to go to in BANNER automatically, is a nice feature–as long as the form you want is in the menu! If you're ever in a situation where having just one or two other forms in a particular Options menu would help, here's how to customize the Options menus in the form. From the Main Menu, go to form GUAOPTM, and follow the steps below.

Type the form name here and execute the query.

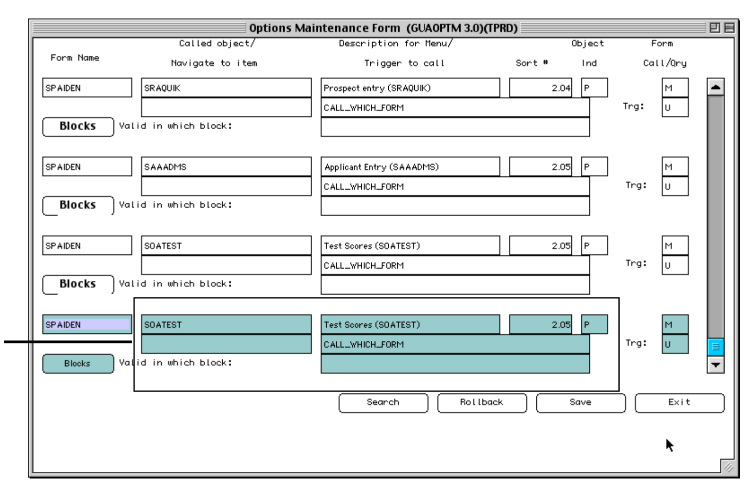
These are all the branch windows and forms that currently appear in the form's Options menu.



Step One: In the Form Name field (noted at left) type in the name of the form that contains the Options menu you want to customize. When you've typed in the form name, execute a query by clicking the Search button at the bottom, or by choosing Execute from your Query pull-down menu.

This will bring up a list of everything that is contained in that form's Options menu: both branch windows and other forms.

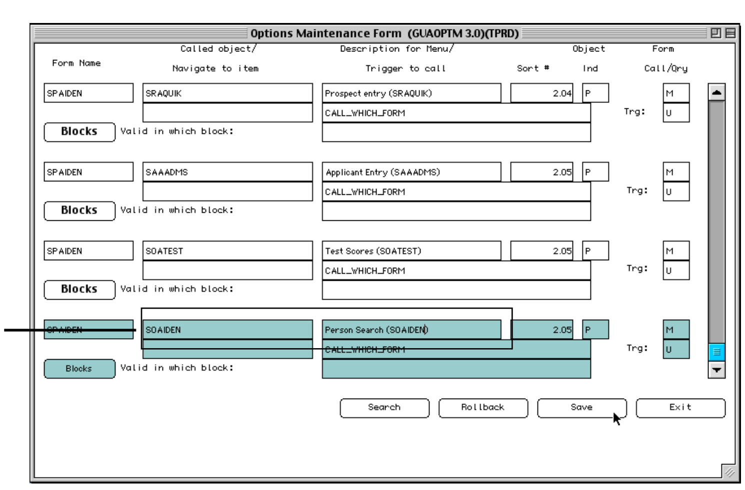
This is the record you just duplicated. This is the row you'll alter to add the new form to the Options menu.



Step Two: Using the down arrow on your keyboard, go all the way to the bottom of the list until you bring up an empty record. Now, choose Duplicate from your Record pull-down menu.

This will duplicate the last record on the list into your empty field. The duplicated record, which will be highlighted, is the record that you will change in order to put the form that you want in the Options menu.

Replace this info with the info of the new form you want in the Options menu.



Step Three: In the highlighted row, Tab once to highlight the name of the old form that appears in the Options menu. Delete the name and type in the name of the new form that you want to appear in the Options menu. For example, in the screen shot at left, SOATEST has been replaced with SOAIDEN.

Tab again to the form description field. Delete the description and name of the old form, and type in the description and name of the new form you've just entered at left. Now click Save. The next time you go into the form, you will have a new option in your Options menu!

Getting access to BANNER: Who, what, when, why, and how

Although we generally refer to BANNER as "software," getting access to the system is completely different from getting other kinds of software. Many staff are under the impression that BANNER is just like Word, or Excel, where you stick in the CD, click "Install," and then go from there. Unfortunately, it's not quite that easy.

For staff who are interested in using BANNER, there are a number of steps to follow before you begin. It may seem like a lot of hoops to jump through just to get access to a few pieces of info, but because of the confidential nature of much of the data in BANNER, it's important that all the i's are dotted and t's are crossed. Here's how to get started:

Step One: contact the module administrator

Your first step is to get in touch with the module administrator: the person who manages the piece of BANNER that you're interested in using. The module administrator will need to know several things, including:

• Do you really need BANNER or do you just need a report or other output? This isn't a nasty question, nor does it imply that the administrator thinks you're trying to get access to info that you aren't allowed to see. The fact is that BANNER is a huge, complex system: it takes up a big chunk of room on your computer and requires several hours of training. The administrator is asking this question for your benefit, really; if you can get by with a printed (or electronic) report, it will save you time and energy in the long run.

• Can your machine run BANNER? Currently, the system requirements for running BANNER are a PowerMac 7300 or better with Mac OS 8 and at least 32 mgs of RAM (64 is better). For PC users, you should have at least a Pentium machine and 32 mgs (48 is better). If you do need to run BANNER and your machine doesn't fit the bill, you'll need to talk to your budget manager (or whoever manages such things in your department) about getting a beefier machine. Contrary to popular belief, OPUS generally does NOT pay for new machines to run BANNER.

• What specific data do you need to see? Once it's been determined that your machine is capable of running the system, you and the module administrator will need to figure out what exactly you need to see in BANNER. This will help the administrator figure out how to set up your security and access.

The module administrators are:
• For Student Records data (current students): Lori Gumpf
• For Admissions data: Aaron Milenski
• For Finance or Budget data: Pearl Lin
• For Human Resources data: Sandy Fox
• For Financial Aid data: Brian Lindeman (Note: FinAid will be live in the Fall of 2000)

Step Two: request a BANNER install

Once you've determined that you do indeed need access to the system, call the Help Desk at 8197 and request a BANNER install. The folks from the CIT will come to your desk and install the system for you; the install takes about half an hour if all goes well.

Step Three: arrange for training

After you've gotten your BANNER install, it's time for training. The system requires a good bit of know-how in terms of moving around and viewing the data, and you'll need at least one training session (and maybe two) to get the hang of it:

• Navigation training: The first step for any BANNER newbie is navigation training. Conducted by OPUS Communications Manager Ami Berger, a typical navigation session takes about an hour and covers BANNER basics: logging in, moving around the forms, searching the database, and viewing the data. Much of the time, the navigation training takes place in your office on your own machine, but sometimes you'll join forces with other BANNER newbies and have your navigation in Mudd 303, the BANNER training room.

• Functional training: The second part of the training process is having functional training, in which you learn how to use your specific module and view the specific data that you need in the system. If you're only going to be using a few BANNER screens, sometimes functional training can be included in your navigation training. If your needs are more complex, you'll have a separate session with your module administrator or another BANNER user. Ask the module administrator how much training you'll need; he/she will know for sure. ■

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The Score is published by the Houck Center for Information Technology and the Oberlin Project for Unified Systems.

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