

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

## in this issue

- 2 opus notes
- 3 banner banter:  
solving login problems
- 4 opus update:  
swan song for  
*The Score*

## opus events

March 12-16  
Human Resources refresher

March 19-23  
CAPP functional training

April 8-11  
SCT Summit in Toronto

## feature

# The trickle-down theory: Banner moves across campus

**I**n the early days of the Banner project, use of the system was mostly limited to “power users”: administrators around campus who were very much involved in the implementation and who used the system every day in order to get their work done.

Now that the implementation phase is pretty much over, use of Banner has trickled down to the rest of us—occasional users who don’t need Banner to do everyday work, but do use the system for secondary tasks. These folks log on perhaps once a day, once a week, or just over one particularly busy time during the year for a few months. This is how the system gets “leveraged”; how we get our money’s worth by using the system for as many different varied tasks across campus.

These occasional users are all across campus, in a number of different administrative and academic offices. Some of them spoke with *The Score* about how they use Banner, the differences the system has made in their work, and whether they think we’re getting our money’s worth.

**Tom Mulligan**  
**Assistant Director of Athletics**  
**Department of Athletics**

“I use the Banner Student Records module to keep track of prospective students and athletic recruits in the admissions process,” says Tom Mulligan, who has been using Banner for about a year. “I also use the Finance module to keep track of department budget information.”

Having access to Banner has certainly changed the way Tom manages these tasks. “Before Banner,” he says, “coaches had to call or visit the Office of Admissions and ask a counselor to give us the information we now are able to get from Banner.” Often, this was a time-consuming process, especially in the spring, when both admissions and the athletic recruiting cycles are at their peak, and coaches and Admissions staff are extremely busy.

Similarly, Tom used to wait for reports to arrive from the Controller’s Office to keep track of Athletic Department expenditures. “In regard to the budget, we had to rely on the printouts that came out just a couple times each year,” he says. “In both cases, being able to look at the information in Banner helps us to operate more efficiently.”

As Tom notes, those are the up-sides of Banner. The downsides? Having to learn a new, fairly complex system and staying up-to-date with upgrades, as the system seems to change constantly. “I see that we must have a system like Banner in order to share information,” he says, “and I’m sure I will feel more comfortable with the system the more I use it.” Tom points out the challenges of staying current with Banner since his peak usage time is during the spring, and upgrades and other changes may take place during his “downtime.” “At this point I am just scratching the surface of

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*Barbara Winterich, Secretary to the Director in the CIT and occasional (and enthusiastic) Banner user*



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Banner," he says. "I look forward to working with it and learning more about how it can help me and my staff in daily work."

### **Barbara Winterich** **Secretary to the Director** **Center for Information Technology**

As the Administrative Assistant to Director of Information Technology John Bucher, Barbara Winterich serves as the "air traffic controller" for the CIT. She uses Banner to keep an eye on the money going in and out of the Center. "I use the Banner Finance module to track CIT budget expenditures, check YTD totals and fund balances," Barb says. She can also find out if a check has been cut for a particular invoice and if it's been cashed by the vendor.

She likes that "Banner makes it very easy to check the FOAP on a particular purchase order and match budget expenses to individual invoices." She also likes the fact that now, she spends much less time on the phone with the Controller's Office, checking on purchase orders, requisitions, and budget figures. "Before Banner, obtaining much of the above information required a phone call to the Controller's Office," she says.

"In general, I like Banner," Barb says, noting that she only uses the system two or three hours a week. She's also getting used to the quirks of the system: "Usually, I find the performance and response time to be very good," she says, "but if I find the system is a little sluggish, I'll log off and try another time."

Barb is also pleased with the upgrade to Banner 4, which took place in the fall. "The new version of Banner is a little more intuitive than the old one," she says. "I like having the 'Options' window on the left side of the form and the ability to customize the main window with frequently used forms."

### **Beth Weiss** **Associate Director** **Office of Conservatory Admissions**

"A very occasional Banner user" is how Beth Weiss describes herself. "I use it to access file info on current applicants to the Conservatory and prospective students," she says. "I need to see if they auditioned for us, where they auditioned and what instrument they play, what their audition score was, and other admissions information."

Beth has also entered the wide world of Banner data entry. "I have done a little data entry in an attempt to help out in the office during our busy season," she says, noting that the late winter and spring are incredibly busy in the office, as admissions documents come flooding in. "I've entered prospect information and aural skill and theory test scores of applicants," she says, "and it's helped me to get a handle on how Banner works."

In the old days, Beth used the legacy system on the VAX to access info, but doesn't feel too much sentimentality in losing it. "According to Mike [Manderen, Director of Conservatory Admissions], Banner seems to be better for generating reports," she says, "and I think the institution as a whole is better off with Banner."

### **Joseph Palmieri** **Professor and Chair** **Department of Physics**

As the Chair of the Academic Standing committee, Joe needs to have access to student academic history and current standing in order

*continued on page 4...*

## opus notes

### **CAPP continues**

Work continues on the Curriculum, Advising, and Program Planning (CAPP) piece of Banner. CAPP is the sub-module of Banner Student Records which computes a student's progress towards an Oberlin College or Conservatory degree. Currently, CAPP is being built for the Conservatory curriculum leading to the Bachelor of Music. In the late spring and early summer, work will begin on the College curriculum leading to the Bachelor of Arts and the Double Degree program.

Dianne Louis, SCT consultant, will be on campus during the week of March 19 for a final visit with the CAPP team, which includes staff from the Office of the Conservatory Dean, the Office of the Registrar, and the CIT. The tentative live date

for the Conservatory portion of CAPP is the fall of 2001. ■

### **New student info on PRESTO**

Several components of a student's record, both academic and financial, have been added to PRESTO, the web product linked to the Banner database.

Students can now access their academic transcripts online via PRESTO, which was previously used by students primarily to register for courses, check their schedules, and view midterm and final grades. Now, students can view their entire academic history via the Student Records menu in PRESTO. This includes grades for every semester of attendance at Oberlin, but not transcript comments or non-course requirements, which

are not available online but do appear on the hard-copy transcript.

In addition, the production cutover of the Banner Financial Aid module in the fall means that students can now view portions of their financial aid information via PRESTO as well. Students can use the web product to see what materials are missing from their 2001-2002 aid applications, as well as what has been received. In the future, students will also be able to see their current financial aid award (Early Decision applicants for next fall can already see this information). The Financial Aid staff can also post personal messages for students on PRESTO that are secured by the student's PIN. In addition, students can see their tuition account history, summarized by semester, going back to fall 1999. ■

# Let me in!

## Solving Banner login problems

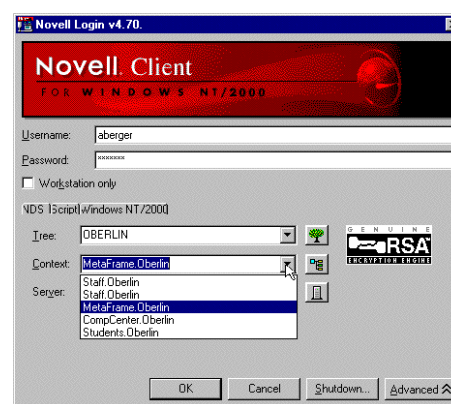
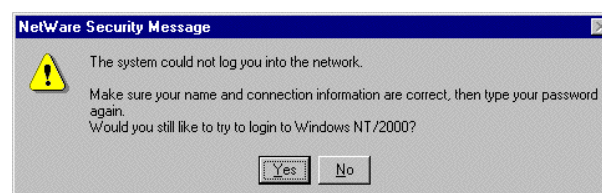
Even for the most experienced users, logging in to Banner can sometimes present a challenge. Multiple passwords, cryptic error messages, and the occasional server problem can all hinder logging on to Banner, but it's often difficult to diagnose exactly what the problem is. The error messages that pop up are incomprehensible unless you're fluent in Oracle (the database software that runs Banner)

and it can be very frustrating not knowing if the problem is you, your machine, or Banner in general. There are some clues, however, to login problems, and before you do anything—call the Help Desk, track down an Analyst/Programmer, or throw your machine out the window—use these tips to see if you can diagnose and fix the problem yourself.

### Symptom #1: Errors at the Novell login box

When you first open Banner, you always see your Novell Client login box. This is the box where your Novell username (or “citrixuser”) automatically comes up with a starred password in the Password field. Most of the time, you simply click the **OK** button and everything is fine. On occasion, however, you'll get an error message, shown top right, telling you that the system could not log you into the network. The culprit here is your “context,” and here's how to fix it:

- In the error dialog box, click **No**. This will take you back to the Novell login box.
- In the bottom right-hand corner is a button called **Advanced**. Click this button; the dialog box will expand down, shown at bottom right.
- Look at the **Context** field. Your context should always be **MetaFrame.Oberlin**. If there is another context in this field, click on the pulldown arrow to show the list of choices.
- Choose the MetaFrame context, and then click the **OK** button. This should start up Banner as usual.



### Symptom #2: Errors at the Banner login box

After logging into Novell, you'll be presented with your Banner login box, where you enter your username, password, and database. There are a couple of common error messages that you can get at this stage:

- If you get the error message at top right, about “no interface driver connection,” you've probably forgotten to enter your database. In the Banner login box, you always have to specify which instance of Banner you're going into: LIVE, PPRD, TPRD, etc. For most people, the instance you want is LIVE.
- If you get the error message at bottom right, about an invalid username/password, you guessed it—you've forgotten your password or entered the wrong username. Remember that your Banner username is always the first letter of your first name and the first seven letters of your last name, not your Mulberry username (a common confusion). When you originally get your Banner account, your password is the same as your username, but since you're instructed to change it as soon as possible, try all the passwords you regularly use. If none of those work, contact your module administrator. He or she will arrange to have your password changed back to your username, so you can get into the system and change it again.



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to make decisions about student status. "I use Banner directly to view students' academic records," Joe says, "and less frequently to look at their current schedules. The CIT has also designed several reports that provide the Committee with information that is stored in Banner."

For years, Joe used the legacy student system on the VAX, and still misses the ease of that system. "In general Banner has made my work harder to do," Joe says. "With the old system, I could view an entire transcript on line at once, scrolling up and down as necessary. The one screen gave me the student's major and advisor, and a semester-by-semester summary of the student's hours passed and failed and his/her GPA. It showed me when the student had taken a leave or was suspended."

In Banner, one convenient screen with all of that information simply isn't available. "In Banner, I need to go from screen to screen to see grades, one semester at a time," Joe notes, "and even then, I don't see major or advisors or leaves. In addition, to find a course with a missing grade, it is necessary to go to a screen which shows the courses the student was enrolled in, but you need to suspect beforehand that a grade is missing in order to know to do that. In general," he says, "I think the old system was more helpful to me."

**Abigail Johnson**  
**Assistant Director**  
**Office of Financial Aid**

Abby Johnson has just begun to use Banner in the last several months, learning the system as the Office of Financial Aid proceeds with its production cutover. "I'm using Banner to award student financial aid

for the 2001-02 academic year," Abby says. "Banner calculates the expected contribution for parents and students and automatically calculates financial aid packages for each student."

This automation is a feature which the legacy system did not provide, Abby says: "Before Banner was implemented I used the VAX system and an Excel spreadsheet to package students," she notes. "This system required us to manually enter the information to calculate the estimated parent and student contribution for each student applying for financial aid at Oberlin." Abby likes Banner's ability to calculate such contributions, since it "eliminates the extra step we previously had to take to determine parent and student contributions. Banner also allows us to electronically update ISIR's (Institutional Student Information Record) information, a process that also used to be done manually."

In spite of these improvements, there are things Abby still has to get used to in BannerLand. "It is a definite challenge navigating in the world of Banner," she says. "Screens are sometimes buried beneath one another and often are hard to find." She also wishes that the form names in Banner were in English: "The Financial Aid screen names don't make sense at all," she notes. "With names like 'RPPAWRD' and 'RNAPRO2,' I feel like I'm learning a foreign language."

Names aside, Abby thinks Banner will eventually make procedures in the office flow much more smoothly. "The software allows us to be more efficient with our time, while assisting us in becoming more accurate with our calculations and updates," she says. "When I finally understand the world of Banner, especially the 'unique' names and multilayered screens I feel Banner will help our office to increase both the quality and ease of our work." ■

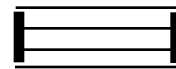
## opus update

### Swan song for *The Score*

After almost four years of reporting on the status of the Banner implementation, *The Score* will cease publication after the May 2001 issue. "Now that the OPUS project is everyday life for the College, rather than a full-scale implementation, the need for a project newsletter has diminished," says Monica Wachter, manager of Administrative Computing in the CIT. Wachter notes that updates on Banner will be folded into the Center for Information Technology's newsletter, *CIT News & Views*, which will publish its first issue this spring. *News & Views* will feature stories and updates regarding all four groups in the CIT: Networking, Client Services, Administrative Computing, and the Computer Store. (For more information about *News & Views*, contact Cindy Murnan or Ami Berger in the CIT.)

The final issue of *The Score* will feature a look back over the implementation process, as well as some final words from the major players in the Banner project. Back issues of the newsletter will continue to be archived online at <http://www.oberlin.edu/~acs/opus/scorelink.htm>, and hard copies may also be requested by contacting Ami Berger. ■

The  
Score



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

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