

The Score

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

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The changing face of Finance

The next big test for OPUS will come on July 1, 1998, when the BANNER Finance module goes live. If it's true that "money makes the world go round," then the changes in Finance will have a definite impact on the world of the College.

It seems that just when we're all beginning to get used to the changes produced by HR and Payroll going live on BANNER—new paychecks, new timecards, a new student payroll system—another set of campus-wide changes is fast approaching. Coming down the pipeline is the Finance module, which is in its final countdown before going live on July 1, 1998. And when Finance goes live, so will a number of new College policies and procedures.

The BANNER Finance module will primarily affect the way College departments do their accounting, budgeting, and tracking of expenses. Although it may be tempting for many faculty and staff members to disregard financials as

something that only the Controller's Office has to deal with (or maybe the departmental assistant that does all the expenses for your office), the truth is that many more people than you think—maybe even you!—will have some interaction with the changes that BANNER Finance will bring.

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Pearl Lin, Assistant Controller and the team leader for the BANNER Finance implementation team, points out that the very basics of the accounting system at Oberlin will be changing come July. Those "basics" include the way account numbers are structured: "Most people will

see the changes in the account numbers that they charge things to for their departments," Lin says. "The six-digit department number and four-digit subcode will be replaced by the FOAPAL. That's the change that most people will notice right away." Whoa, partner. FOAPAL?

the FOAPAL

In BANNER-land, the FOAPAL is the account number to which departments will charge their expenses. The weirdness of the word "FOAPAL" is due to the fact that BANNER uses acronyms for pieces of the system; each letter of the term FOAPAL is associated with a different part of the

At right: Pearl Lin, team leader for the Finance module implementation, laughs gleefully with SCT trainer Evonne Walters at the prospect of going live on BANNER in July.



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Finance module and with a code that tells the system where the money in question is supposed to come from.

Here's a breakdown of what those letters mean:

- **F** stands for Fund. This code tells BANNER which fund to charge. For example, is the expense coming out of a restricted fund? An unrestricted fund? A grant or contract?
- **O** stands for Organization. Basically, the organization, or "org," is your department.
- **A** stands for Account. Account codes tell BANNER what sort of transaction is taking place: revenue, expense, transfer, liability, etc.
- **P** stands for Program. This code defines the function of the transaction and is used mostly for report purposes.
- **A** stands for Activity. How to utilize these codes in BANNER is still under discussion within the Finance team.
- **L** stands for Location. These codes are used when the transaction in question involves a fixed asset, like a computer. The location code tells BANNER where the asset actually is on campus.

Using the FOAPAL will be a change, but it's a change that will seem routine once the campus becomes accustomed to the new system. The bottom line for most staff and faculty is that

instead of seeing 10-digit numbers like 7-62367-8100 and using those numbers to charge expenses, you'll be seeing FOAPALs and using those numbers instead.

forms and formalities

The changeover of your departmental account number to the FOAPAL isn't the only thing that will change, however. The actual forms that you fill out that have to do with financial transactions are all being redesigned and updated. "The look of everything will change," says Lin, "and that includes the requisition form, the payment request form, the purchase order, and disbursement checks."

Along with those new forms will come some changes in policies and procedures, and the Finance team is already making plans to avoid the invariable confusion that comes with new ways of doing business. In June, the Finance team will offer a number of BANNER Finance sessions for all staff and faculty who will touch the Finance system. That includes individuals who are in charge of requisitions, who make payment requests, and/or who are in charge of departmental budgeting. These sessions will introduce staff to the new system, explain the FOAPAL in more detail, and go over all the new policies and procedures that will come our way once the module is live.

Lin is looking forward to these summer sessions as a way of getting the

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opus notes

New FAMIS team and timeline

Following FAMIS team leader Michael Lynn's move to the position of Assistant Dean of the Conservatory, the team and timeline for the FAMIS implementation has undergone some changes. The new team leader for the implementation is Dan Cunningham, Area Manager in the Physical Plant, and the FAMIS team is now planning a modified implementation of the software for July '98, with the entire FAMIS program set for implementation in January '99.

Cunningham notes that although he had been involved in the project "to a limited degree" before the change in staff, the recent changes are a bit overwhelming: "With the departure of Gene Matthews on top of Mike's move to his new position at the Con, I have been a bit overwhelmed by the additional workload that comes with the FAMIS project," Cunningham says, noting that he is grateful for the cooperation and assistance from Monica Wachter, OPUS Project Manager, Cathe Radabaugh, Analyst/Programmer, and Rose Marie Ferenec,

Departmental Assistant in the Physical Plant. "The coordination required for the entire FAMIS migration is somewhat mind-boggling," says Cunningham, "but it certainly does point up the need for a fully integrated system." ■

Admissions reschedules for '99

The College and Conservatory Admissions Offices, originally scheduled to go live on BANNER this October, have rescheduled their cutover for October of 1999. The new timeline was prompted by concerns about the complexity of BANNER and the comfort level of both Admissions and Computing Center staff with the software.

Analyst/Programmer Katie Styer, who is the lead A/P for the BANNER Student Records Module, notes that "if we were to go live with Admissions in October, we would need to have worked out solutions to most of our problems by early June...only two months away! The new timetable simply gives us more time to figure out how to get BANNER to work for the Admissions Offices." ■

year 2000 watch

It could be the electricity that goes first, the national power grid brought down by confused microchips. It could be the banks, brought to their knees by befuddled bookkeeping programs that think they've been flung backwards in time by a century. Or maybe it will be the telephone system. Or the stock markets. Government agencies like the IRS. Trains, planes, even some automobiles. Whatever the order of our going, when the clocks on millions upon millions of computers and digital systems click over to "2000" at midnight on Dec. 31, 1999, we all may go down together.

Does the description above sound like a horror movie? It's actually author Edward Yourdon's vision of what might happen to the world's computers in response to the "Year 2000 bug," the chaos that threatens to erupt when the calendar turns to January 1, 2000. Yourdon has written a book about the Year 2000 bug called *Time Bomb 2000*, which he discusses in an interview with the online magazine *Salon*. You can read the interview with Yourdon on the Web in *Salon's* archives at http://www.salonmagazine.com/21st/books/1998/03/cov_02books.html. ■

Reaching the Summit

Oberlin staffers join the BANNER masses in San Diego for SCT's annual conference

Ten Oberlin staff members joined 4,000 other BANNER users in San Diego for SCT's annual user conference, held on March 15-18. According to SCT, this was the largest BANNER conference to date, with representatives from over 375 institutions from 45 states and 14 countries in attendance.

According to the Oberlin staff that attended the conference, those 4,000 other users were what made the conference most worthwhile: "Overall, the conference provides each attendee an excellent opportunity to network with their colleagues from peer institutions," says Monica Wachter, OPUS Project Manager. "The contacts made tend to expand an individual's knowledge base, and broaden our perspective on how we're doing with our implementations and our use of the BANNER system."

"a real relief"

Katie Styer, the Analyst/Programmer who is supporting the implementation of the Student Records module, found the opportunity to network with other schools "a real relief. It was a comfort to talk to people from other schools who are using BANNER successfully and find out exactly how they're doing it." Styer notes that colleagues from other schools can give perspective to what seems the most insurmountable of problems: "I've been extremely nervous about how we're going to use Letter Generation and the Communication Plan [the pieces of BANNER that generate mass mailings to students] in a way that will work for Oberlin," Styer says, "and hearing people at Summit say 'oh yes, we use Letter Gen and it works just fine for us and here's exactly how we do it' was really a great weight off my shoulders."

Darrick Strange, the Database Administrator in the Computing Center, was also pleased at how willing Summit attendees were to share ideas, and even computer scripts. "I came back with a list of e-mail addresses and a number of business cards for people who were more than happy to give us programs they had written," says Strange, adding that "It'll be a great time-saver for me." Katie Styer also mentions the generosity of fellow BANNER users: "I was also really impressed with how willing BANNER users are to share code and solutions," Styer says.

Oberlin leading the way

San Diego was the second Summit conference for Sandy Youngeberg-Fox, HR Budget Manager and the team leader for the BANNER HR module. She reflects that this year's experience was in "stark

contrast" to last year's: "Unlike last year, we are now familiar with the lexicon of BANNER," Youngeberg-Fox points out, "and we could throw out PEAEMPL, NBAJOBS, and NBAPOSN [names of BANNER screens in the HR module] with the best of them!"

For Youngeberg-Fox, it was especially gratifying to see that Oberlin's BANNER setup seems to compare favorably with that of other institutions: "One of the most positive experiences for me this year was discovering that we have our system set up very well, and we have a good conceptual grasp of database management that is sometimes lacking in other institutions."

Youngeberg-Fox points out that it's hard for an office to know whether it's doing well in BANNER without the benefit of comparisons to other institutions: "Susan Jennings, our SCT consultant, kept telling us how good we were, but we were naturally skeptical," Youngeberg-Fox says. "It was only when we had the opportunity to actually compare ourselves with other institutions did the reality of what we had accomplished finally become apparent."



Lori Gumpf, Registrar and Student Records team leader, and Katie Styer, lead Analyst/Programmer for Student Records, go over their notes for the SCT conference in San Diego in March.

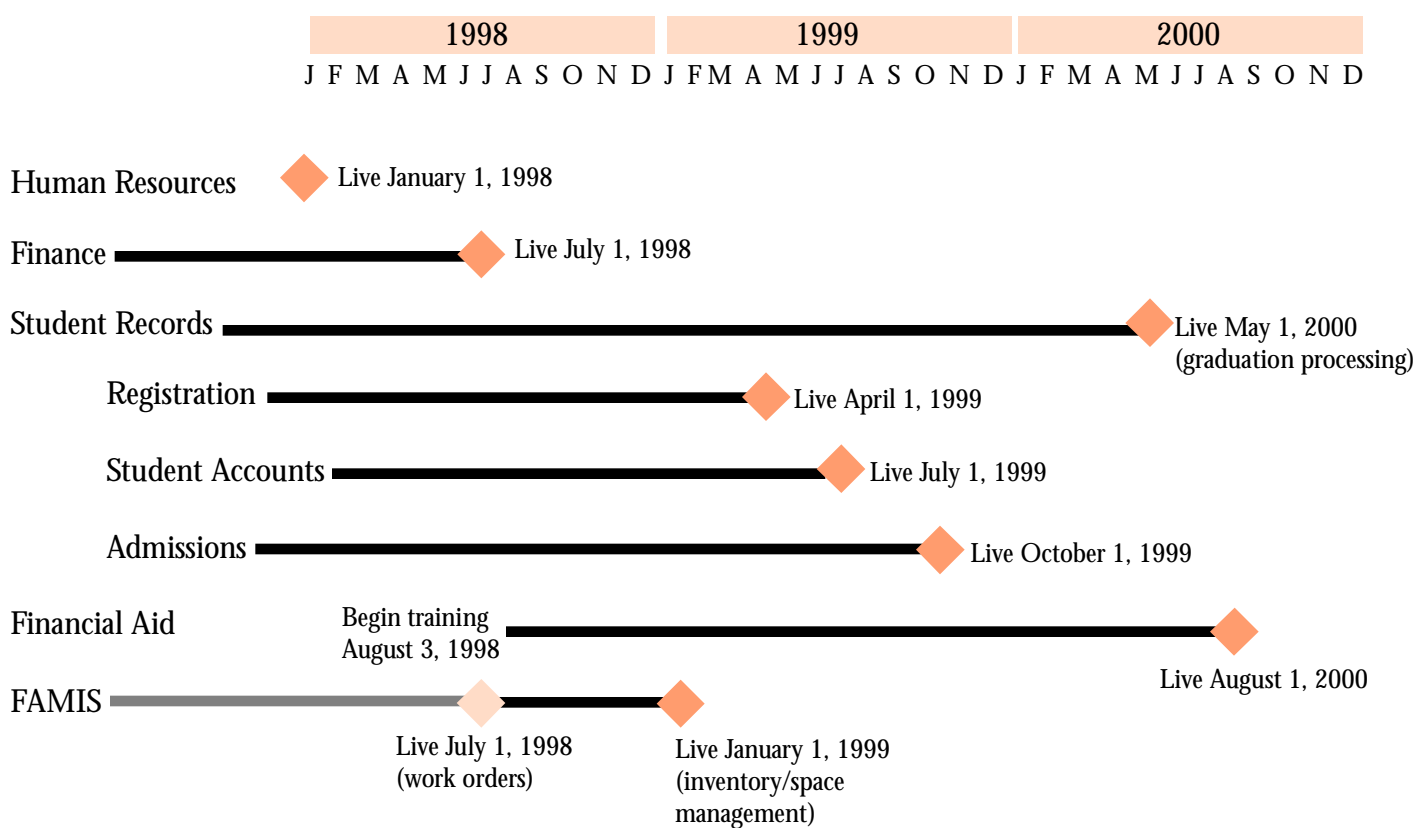
on the right track

The conference offered a number of tracks for each BANNER module, as well as a Technical track for the folks from the Computing Center. Maryann Stillwell, the Office Manager in the College Admissions office, notes that the sessions she attended were both "enlightening and scary," and noted that it was helpful to hear that "other Admissions offices are facing the same problems we are." A sampling of the sessions that Stillwell attended at Summit show that SCT tries to inject a bit of humor into the conference, especially when dealing with some of the stickier issues in the software: "Wrestling with Recruits," "A Day in the Life of an Admissions Office," "If We Only Knew Then What We Know Now!" and "Resolving Duplicates is Fun...and the Moon is Made of Green Cheese."

Registrar Lori Gumpf notes that the sessions were helpful in reminding her and her team to "keep it simple": "We can't afford to get caught up in every single little detail of BANNER," Gumpf says, "because there are just too many little details. Being at Summit reminded me that we should be working on bringing up only the pieces that we need at the time we need them. Keeping it simple is going to help keep this huge process a little bit more under control." ■

Changing with the times

Any project as huge as OPUS demands flexibility and the ability to adapt quickly to change. In the past few months, the teams working on OPUS have had a good deal of practice in being flexible and adapting to change, and the project timeline has seen some modifications as a result. This is not unusual or unexpected; from the beginning, the OPUS teams working on implementing BANNER and the other auxiliary software knew that there would be changes to the timeline of the project. Below is an updated timeline for the project, including a few "breakout" live dates that are included in the overall Student Records module timeline (Student Records is by far the largest and most complex of the BANNER modules). If you have any questions about the timeline or when in the project your office will be affected, please contact OPUS at opus@oberlin.edu.



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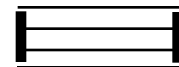
entire campus involved in the transition to BANNER, especially since so many people at the College will be working within the new Finance module. She is also eager to let people know the benefits of the new system. "It's not just a lot of changes that everyone will have to get used to," Lin points out. "There are also some good things that BANNER will let us do for everyone."

Those good things include long-hoped-for capabilities like having an "open year" system. With the old system, Lin notes, departments could not receive financial reports for June, July, and August because Oberlin's fiscal year doesn't end until September; the

"closed year" system prohibited running those reports. Once the office is live on BANNER, however, the Controller's Office will have the ability to run account statements and transaction reports for those summer months even though the fiscal year has not yet closed.

The BANNER Finance team, along with SCT trainer Evonne Walters, has been working hard to get ready for July 1. The entire Oberlin campus, however, will also have some work to do in getting used to the changes that the cutover will produce. If you have any questions about the new procedures and how they might affect you or your department, please let us know by e-mailing opus@oberlin.edu. ■

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