The Score

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

in this issue

calendar of events

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feature

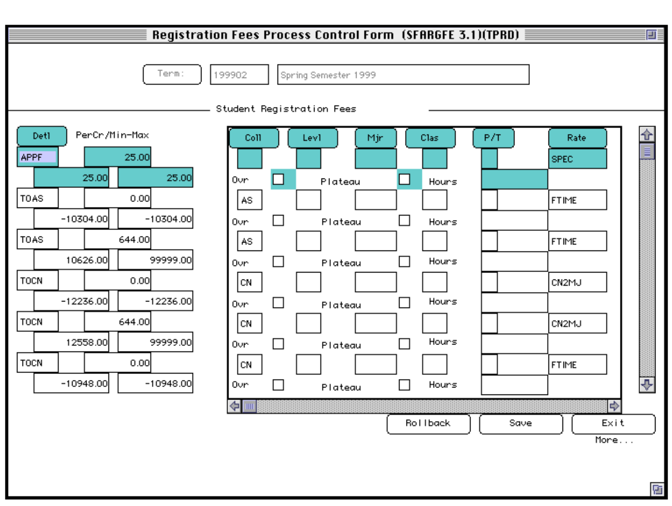
Show me the money: Student Accounts & BANNER

The Student Records module is the largest of all the BANNER pieces, since it comprises functionality for three separate student service offices: the Registrar, Admissions, and Student Accounts, as well as a number of related student services. The Score focused on the Registrar's Office in the May 1998 issue and on Admissions in the November 1998 issue; this month we focus on the Student Accounts Office and BANNER.

The official production cutover of the Student Records module of BANNER, which will occur during April registration, will mark the beginning of a series of live dates for a number of other student-service offices. The first of these will come in July, when the Student Accounts Office (SAO) goes live, producing the first set of student bills out of BANNER.

The SAO does not have its own module in BANNER, but instead comprises something of a submodule, according to OPUS Project Manager Monica Wachter. This is in part because the SAO is what the techies call a "swing" office, since the Accounts Receivable functions which the office performs affect several campus offices: the Registrar's Office, the Admissions Office, the Financial Aid Office, and the Controller's Office.

That means that the SAO's implementation involves not just one BANNER module, but three: Student Records (where primary student data is housed); Finance (where the Accounts Receivable data is housed); and Financial Aid (where eventually, all student aid data will be housed). And although the BANNER forms which the SAO staffers will use are located primarily in the Student Records module, there are numerous processes that need extensive input and information from the other modules as well. "The Student Accounts Office is heavily dependent on both Finance and Student Records and bridges much of the functionality between them," says Wachter. "As such, its implementation requires extensive communication among several offices to resolve issues and make decisions regarding policies and procedures."



At right: a screen shot of SFARGFE, the BANNER form that controls student fees, including tuition, application fees, and other College charges.

bridging the gaps

"BANNER is a much more complex system for the Student Accounts Office than our legacy system," says David Laczko, Assistant Controller for Student Accounts. Laczko, who is coordinating

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the implementation of BANNER in the SAO, acknowledges the challenges of the project but is also looking forward to the benefits that the new system will bring. He is particularly enthusiastic about the way in which BANNER will help to bridge the gaps between the SAO and the other campus offices with which it must interact on a regular basis.

"BANNER will afford us much more efficient use of the Student Records and Finance modules' data," Laczko notes, pointing out that since the records for both "persons" (such as students) and "non-persons" (such as banks) will already be established in these modules, the SAO will not have to create those records itself. "We'll be able to simply draw on the existing records," says Laczko, "and more of our information will be directly entered into the Finance module as well, avoiding double entry."

Laczko also sees a benefit in the fact that once BANNER is implemented, the SAO will have the ability to produce much of its own output, rather than relying on external offices to do that production work. "One significant shift is away from the Center for Information Technology as our central production service," says Laczko. "For example, we anticipate printing the monthly statements and reports in the Student Accounts Office, rather than sending the job over to Production Services."

rolling with the punches

The production cutover for the SAO will take place on a rolling basis, with a couple of smaller live dates rather than just one big one. For example, one of the first functions in which the staff was trained was how to put holds on student records (for students with unpaid tuition bills, for example) and how to take them off again when the bills get paid. This was necessary so that the "hold" function could be used for this April's registration; a hold from the SAO is one of the things that can prevent a student from registering for classes.

The SAO staff's training will also be on a rolling basis. For example, during this past February's "biggie" mock registration, Laczko and Todd Rasmussen, Manager of Student Financial Counseling in the SAO, participated by putting "holds" on some CIT mockers' records, and then taking them off when the unlucky staffers trooped up to the BANNER training room in Mudd to "pay" their bills with Monopoly money provided by Registrar and BANNER SR team leader Lori Gumpf. The exercise was designed to familiarize Laczko and Rasmussen with the hold process so that their staff could be trained for April registration, when real students and real money will be at issue.

The next big event will come in July, when the SAO will run student billing out of the BANNER system. Currently, the BANNER billing process is being tested, and decisions are being made about how the bills will look and what information will print on them. Often, these are difficult decisions to make, since so many variables (and many people's opinions!) must be taken into account before the process is finalized.

Laczko agrees that all those variables–and the possibility of making a decision that doesn't fit everyone's needs–is the most difficult part of the process: "With BANNER, we have many more options from which to choose and about which to make decisions," Laczko says. "Some options provide one benefit but not others, which may be provided by other options. Taking these variables into consideration can be a daunting task at times. It's probably the most challenging aspect of BANNER, but is also its greatest benefit." ■

opus notes

Getting BANNER access

As BANNER makes its way across campus, more and more staff members will require access to the system. Getting access to BANNER is a three-part process: first, call the system administrator of the module you will be working with to discuss the kind of access you'll need; second, determine the capability of your current machine and whether you'll need a hardware upgrade; and third, arrange for a training session (or two) to learn how to use the system. The system administrator of the module you'll be using can help you with steps two and three, so be sure to contact that person first. The system administrators are as follows: for the Human Resources module, Sandy Fox in the HR Office; for the Finance module, Pearl Lin in the Controller's office; for the Student Records module, Lori Gumpf in the Registrar's Office. When Financial Aid goes live, Brian Lindeman in the Financial Aid Office will be that module's administrator. In order to gain access to the "live" database (the one where the real data, rather than test data, lives), all users will need to have at least one training session that covers basic BANNER navigation skills with Ami Berger, the OPUS Communications Manager. If you have questions about getting BANNER access, contact opus@oberlin.edu. ■

Logging out of BANNER

For staff already using BANNER, a critical item to remember is logging *out* of the system when necessary. In order to avoid security breaches, BANNER should never be left open on your machine when you are leaving your desk for any length of time, including lunch breaks and meetings. Always remember to log out at the end of the day, and keep in mind that on most Fridays, the system goes down at 4:30 p.m. for database maintenance. Several users recommend putting a Meeting Maker activity in your calendar that will remind you to log out on Fridays by 4:30. In addition, you'll want to make sure that any reports or other output that you're running have completed by the time database maintenance is scheduled to begin. ■

OC staff attends SCT Summit

About a dozen Oberlin staff attended this year's SCT Summit, the annual BANNER users conference, held March 28-31 in Orlando, FL. Conference attendees included staff from the Center for Information Technology, the Controller's Office, the Office of Human Resources, the Office of Financial Aid, and the Student Accounts Office. In addition to educational sessions, Summit also offered a "sneak peek" at some new SCT products, including the BANNER 4.0 release, web-enabled BANNER forms, and the BANNER Imaging product. ■

A “view” of the future: Reporting tools and BANNER

Even the offices that are live on BANNER and using the system on a day-to-day basis are still working on ways to integrate the new software into current business practices. This is especially evident when it comes to reporting: it’s one thing to understand how to get information into BANNER; it’s another thing entirely to successfully get it out.

Since BANNER is such a huge and relatively complex system, there are a number of decisions which users and offices need to make about how they want their reports to look and behave. Those questions include:

What questions will this report answer? The first decision users need to make is determining what questions they’re trying to answer by running the report. Although this sounds like a “duh” issue–just gimme the report!–it’s not as self-evident as you might think, especially if what you really need is the summary data on the last page of a report rather than the hundred pages of details that come before it, or “exception” data that requires hours with a highlighter.

In addition, much of the data that was only available from the old systems on paper may be available for online lookup in BANNER. This might make some reports unnecessary, and with BANNER, ideally you’ll be able to answer some questions that you’d never been able to answer before at all. Taking the time to develop a list of the data elements that you truly need for a given report (and getting rid of all those columns that you never use and don’t understand) will serve you much better in the long run than simply duplicating the reports you use now.

A view is basically a way of using the database to see preselected pieces of data in BANNER, in a way that simplifies the data structure. This makes the data easier to use, shortens the amount of time it takes to construct a query, and promotes consistency.

Which fields in BANNER do I need to report from? Once you’ve figured out what data you want to see in your report, you need to identify the fields in BANNER where that data lives. Sound scary? It’s really not, and the Analyst/Programmers in the ACS group in the Center for Information Technology are happy to help with this step. In fact, they can even help you develop what techies call a “view,” which will be a lot of help in future reporting. Basically, a view is a way of looking at certain pieces of data in BANNER without having to understand complex techie-type things about the database. For example, let’s say you always need a report with five specific pieces of information in it. You could develop a view that has only those five data elements in it that would be reusable for any number of reports for any number of users across campus.

Monica Wachter, the OPUS Project Manager, notes that “a view is basically a way of using an Oracle database feature to see preselected pieces of data in BANNER, in a way that simplifies the data structure. This makes the data easier to use, shortens the amount of time it takes to construct a query, and promotes consistency.” Also, since views have been pretested, the chances are lowered of someone submitting the “query from hell” (i.e., a report hitting on dozens and dozens of data elements; even a short report can do this) that would gobble up the system and make it difficult for others around campus to access the database. Odds are good that there’s no one on campus who wants a query from hell hitting the system while payroll is running, for example.

Which tool will generate the report? Another important issue is deciding which tool to use to generate the report. Currently, the reporting tool called FOCUS is being used by several offices on campus who are live on BANNER. FOCUS is a powerful tool which is mostly used for “standard” reports–reports that you run over and over again on a regular basis. The ACS group is also working on implementing another reporting tool called BrioQuery, which will eventually be used for ad hoc reporting (Brio is a more user-friendly tool than FOCUS which can involve some techie-type work on the part of users). There’s also an option in BANNER called job submission (or “jobsub” to its friends). Jobsub can be used for “canned” reports that come delivered with BANNER, or for reports that the Analyst/Programmers have written and put into jobsub themselves.

What format will the report have and how will I distribute it? You’ll also want to decide what the report needs to look like, who will be running it, and who will use it so you can distribute it appropriately. Will it be laser-printed? Continuous-feed printed? Labels? Card stock? Or will you be downloading the report to your desktop and plopping it into Excel or Word?

It sounds like a lot of front-end work to do just to run a couple of lousy reports, but doing that work at the front end (especially the creation of your views) will actually save you loads of time later on. “A view is very much like an assembly kit,” says Wachter, who compares using views versus using the base tables directly for reporting to using a kit to build a model airplane vs. finding all the parts on your own: “when you’ve got that assembly kit, you’ve got all the parts in front of you ready to put together,” she notes. “Otherwise, you’d have to search out each of the parts every time you wanted to build the model.” Views are especially helpful since they can be used over and over again, for any report that uses that particular grouping of data elements. And different views can be created for different sorts, totals, or groupings in a report.

“What we’re trying to accomplish with this reporting strategy is a comprehensive and consistent way of accessing data,” Wachter says. “Our goal is to make sure that every office has the information necessary to support high-level decision-making in addition to doing effective daily business.”

All aboard CBORD: Res Life prepares for a new system

As the Student Records module prepares to go live with web registration, another student services office is preparing for its own conversion. The Office of Residential Life is getting ready for a new system, but it's not BANNER. Res Life is training on a software package called CBORD, a database product specifically designed to store data related to housing, dining, and other residential information.

Sandy Hougland, the Assistant Director of Residential Life and Services for Assignments, is spearheading the implementation of CBORD. Although she's excited about the move to the new system, she has few complaints about the old program (a homegrown system that lives on the VAX). "The VAX program was really pretty good," she says, "especially in comparison to what I hear about from other schools. It did what we needed it to do, and whatever else I needed went into an Excel spreadsheet. A lot of Excel spreadsheets," she adds.

The move to CBORD means that the housing and dining staff will have access to a good deal more functionality, Hougland says. "CBORD is just so much more flexible than the old system," she points out. She notes that this is especially true when it comes to querying the database and running reports. "With the VAX, I have certain reports that I always get," she says, "and unless I go over [to the CIT] and bug folks that are already up to their ears, I really can't get anything else. With CBORD, I can query the system, I can massage the data, I can get a lot more out of the stuff that's in the system." Hougland says she will also appreciate the ability to respond to other departments' needs for housing- and dining-related reports.

That flexibility isn't going to come automatically, however, since running CBORD will require more technical knowledge than running the old system does. Hougland is aware of this, but says that the trainers from CBORD are a big help in explaining the system's functionality. "The CBORD people are great," she says. "I'm really delighted with them. Plus, they have a users group that is very involved–the users are helping to write the new CBORD users manual and helping with the next upgrade to the software." In addition, Hougland says, CBORD will help write some Oberlin-specific queries that Hougland will use to view her data.

automating tasks

Aside from the ability to query the database, one of the major features of the CBORD product is that it will allow Res Life staff to automate some of the tasks that are currently done manually. Monica Wachter, OPUS Project Manager, notes that CBORD was chosen in part because it met the functional requirements for automating room assignments.

Currently, all rooming assignments for first-year students are done by Hougland, by hand, every summer. "It's a huge job, and really takes up most of the summer," Hougland says. The room assignment process for first-years involves around 800 files, which Hougland must literally arrange into piles on the floor to do matching. "First, we date stamp every file," Hougland says, "and then I make stacks for every dorm, for men and women, separate the smokers from the non-smokers, do room and hall preferences." That process breaks the files down into manageable bunches, but it's a time-consuming exercise.

"CBORD has the capability to do that initial breakdown for me," Hougland says. "I'll still do plenty of it by hand, since I think Oberlin will always want to keep the personal touch when it comes to matching people up, but CBORD will really help with the sorting in the beginning."

interfacing CBORD

Presently, Hougland, along with a few other staff in Res Life, is in the training period of the CBORD implementation; CBORD trainer Eric Kirch has been on campus to familiarize staff with the product and may return for another visit this spring. In addition, the ACS group in the CIT is working on the technical underpinnings of the system, including interfaces with both the AT&T system that generates OCIDs and with BANNER.

"I think we'll have a much better ability to interact with the Registrar's Office when CBORD comes in," Hougland reports. Since housing and dining assignments depend in large part on a student's current status, Res Life and the Registrar must often be in contact about student statuses: what they are, if they're changing, and what they're changing to. "Hopefully, our status information will be much more up-to-date once BANNER and CBORD can interface with each other," Hougland says.

There's a good deal of work ahead, but Hougland "isn't panicking," in her words. "I'm a little nervous about the timeline, since we're supposed to be done with all this in June," she says. "But I've gotten great support from both CBORD and from the CIT. Everyone is very competent. It'll happen." ■

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