

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

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The “G-Team”: A new era in the Registrar’s Office

Implementing a BANNER module is never a walk in the park, but for those staff members working on the Student Records module of BANNER, the job is particularly complex. The SR module of BANNER is immense—larger than any other module by far—and encompasses functions that affect a wide range of offices around campus, including the College and Conservatory Admissions Offices, the Student Accounts Office, the College and Conservatory Dean’s Offices, the Office of Student Academic Affairs, and a number of other student services.

At the eye of this storm is, of course, the Registrar’s Office. Not only is Registrar Lori Gumpf the team leader of the SR implementation team, but the conversion to BANNER impacts almost every single process within her office. When the SR module goes live, so will a host of new procedures for student enrollment, registration for classes, catalog production, storing academic history, monitoring degree progress, and processing graduation, to name just a few.

As a result, it’s been critical for the Registrar’s Office to carefully plan for the additional workload that the BANNER implementation has

produced. One part of that plan was the creation of a new A&PS position in the office to take some of the pressure off Gumpf and help the office stay on track during the next three years. And that’s where Ken Gilson, Associate Registrar, comes in.

the “G-Team”: Gilson and Gumpf

According to Gumpf, the Associate Registrar position (which has a three-year term) was created when she was designated the leader for the SR module: “The BANNER conversion is going to require at least 75% of my time over the next 3 years,” Gumpf says. “I’m coordinating team meetings, training sessions, and subcommittee meetings. All those meetings take up a lot of time! In addition, I’m going to be mapping all of our data elements from ARIS and SR [the two legacy systems in the Registrar’s Office] into BANNER. Not only do I have to figure out where each and every piece will live in the new system, I have to figure out how they’ll get there.”

All that doesn’t leave much time for the day-to-day operations of the office, which are in the process of being transferred to Gilson so Gumpf can increase the amount of time she spends on BANNER work. Since he came on board in January, Gilson has been gradually taking charge of student counseling, overseeing the staff in the Registrar’s Office, and dealing with correspondence.

Making the transition from “new guy on the block” to the point person in the office hasn’t been easy, but Gilson is taking it all in stride. “My goal as the Associate Registrar really is pretty simple: to help relieve Lori of as many of the day-to-day responsibilities in the office as possible,” Gilson says. “This means that I’m focusing on leading and motivating our staff, making sure that deadlines are met, running reports, and making sure policies

*The G-Team
at work:
Registrar Lori
Gumpf and
Associate
Registrar
Ken Gilson.*



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and protocols are followed. I'm also meeting with students, which is something I enjoy doing."

sharing the burden

Part of the challenge for Gumpf has been figuring which responsibilities she can pass off to Gilson—and then forcing herself to actually give those responsibilities up! Gumpf admits that "it seems very strange not having my hand in everything that is happening in my office," she says. "I have been the only A&PS person in here since I became registrar, so it is a bit strange to 'share' my work."

Gilson, however, thinks the process has gone smoothly: "Lori has done quite well 'letting go!'" Gilson says. "I must admit that I was a little concerned at first at how this would work, but quickly realized that she was anxious to get some help." He adds that there are "still times when I find myself reminding her to let me handle something for her. And there are times when I need to ask 'what's this report and what do you do with it?' But overall, the balance is working well."

Gumpf and Gilson agree that part of the challenge of bringing an Associate Registrar on board is getting the campus community used to dealing with a different person in the office. Gumpf points out that people around campus are used to talking with her and her alone, and she knows that convincing staff and faculty that Gilson is now the contact person will take some time. "The

hardest part of the transition is getting College staff and students to talk to Ken instead of me for the everyday things in the office," Gumpf says. "Yes, there are some situations that still require me being involved, but Ken knows which ones those are."

Certainly Gilson is aware of when Gumpf needs to be pulled into the mix, in part because the "G-Team" has been careful to make the transition as gradual and seamless as they can: "Lori and I have been working together closely to make the 'decision-making transition' as smooth as possible," Gilson notes. "She continues to pass more and more registrar's responsibilities to me, and we're to the point now where any registrar-type questions come to me first. Of course, we save all the BANNER-type questions for her," he says with a grin.

keeping spirits up

The transition to BANNER will affect everyone in the Registrar's Office, not just Gumpf and Gilson. The Registrar's staff is an integral part of the transition, and part of the reason for bringing Gilson on board in the first place was to make sure that the staff had a leader to keep day-to-day operations going during the move to BANNER. And so far, it seems that the Registrar's staff very much appreciates Gilson's presence.

"Now that Ken has arrived, some of the day-to-day pressure has been taken off Lori's shoulders," says Sheila Harley, who has worked in the office for almost 30 years. Jan Simonovich, a Registrar staff member since May of 1997, agrees. "I think that because Lori's workload was so overwhelming before Ken got hired, you can just tell that she feels relieved to have some

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opus notes

The Score returns in August

The Score will take a publishing break for the months of June and July. The next issue of *The Score* will come out during the second week of August, and will focus on the Finance module's production cutover. If you have questions, comments, or suggestions for future stories in *The Score*, please contact opus@oberlin.edu. ■

Financial Aid begins training

Financial Aid, the last module to go live on BANNER, begins functional training the first week of August. The training will be conducted by SCT Senior Consultant Ginger Munion Gamberg, who has worked on the BANNER Financial Aid implementations of several institutions similar to Oberlin, including Smith College.

Howard Thomas, Director of Financial Aid, and his staff are more than ready to begin the implementation process: "Since Financial Aid has been involved in both the HR and Student modules, we have had something of a 'head start' in conceptualizing our own conversion," Thomas notes. "Now we're

getting anxious to start the real thing." The Financial Aid office will have approximately 18 months of training and preproduction support before going live in August 2000. ■

Finance informational sessions planned for June 9 and 10

In preparation for the production cutover of the BANNER finance module, the Controller's office is sponsoring two days of informational sessions on June 9 and 10 in Wilder 101. The hour-long sessions will help educate the campus about the new financial policies and procedures that will take effect once the Finance module goes live. A memo regarding the sessions and who should attend was sent to department heads in April.

According to Assistant Controller and Finance team leader Pearl Lin, the sessions will cover the basics of the new system; how to understand the new FOAPAL numbers, how to fill out the new forms for requisitions and purchase orders, how to follow the new procedures for doing business with local vendors and paying invoices, and interfacing between BANNER and the old FRS system will all be covered. In addition, Budget

Director Bob Knight and OPUS Project Manager Monica Wachter will be on hand to answer questions about budgeting procedures and the OPUS project as a whole. Additional sessions will be held in August for faculty and staff unable to attend the June sessions. ■

SCT techie provides on-site support for Analyst/Programmers

Jeff Michael, a technical trainer with SCT Corp. (the manufacturer of BANNER) is visiting Oberlin regularly to assist the Analyst/Programmers in the Computing Center with the details of the Finance module's conversion. Michael, who joined SCT this past summer, spends most of his time assisting A/P David Foos with the behind-the-scenes pieces that affect the technical workings of BANNER.

Michael's projects include writing computer programs which will run reports for the Controller's Office and researching specific data in the Finance module. "By having Jeff here, both Oberlin and SCT benefit," says Foos. "We're able to use him to help out with necessary work, and at the same time he's learning more about BANNER and the Finance module." ■

Data In, Data Out: Reporting Tools

As the folks involved can tell you, the conversion to BANNER means more than just new software to learn. It means designing a number of brand-new protocols for dealing with information: collecting it, organizing it, inputting it into BANNER, and ultimately, getting it out of BANNER in a form useful to users. The most common way to accomplish this is by creating reports to retrieve and analyze the info; the creation of such reports is a critical step in the migration.

The Administrative Computing Advisory Committee (ACAC) decided well over a year ago that a separate Reporting Tools team (made up of OPUS team members from around campus) should be formed to decide how the College would integrate reporting and reporting tools into the conversion to BANNER. The Reporting Tool team's job was to decide on a desktop reporting tool that users could use to extract data from BANNER on an ad hoc basis, since a standard reporting tool (one that would be used for reports generated on a regular basis) had already been purchased along with BANNER.

After a number of committee meetings and recommendations, a strategy was decided on by both the Reporting Tools team and ACAC. College administrative offices will eventually have the use of two tools. The first is called FOCUS, the tool that was purchased along with BANNER to be used for standard reporting. For example, if there's a report that you need every day, every week, or every month without fail, that report would most likely come out of FOCUS. For ad hoc reporting and more complicated data analysis, the tool chosen by the team is called BrioQuery. FOCUS is a much larger, more robust tool (it will live on the database) that can handle more complicated queries, but BrioQuery is much more intuitive for the user.

testing, testing 1-2-3

Cathe Radabaugh, the Analyst/Programmer responsible for supporting desktop tools, was one of the main players on the Reporting Tools team in figuring out how to get administrative data out of BANNER efficiently. "BANNER comes with some delivered reports," Radabaugh notes, "but we realized very early on that those 'canned' reports were not sufficient for Oberlin's reporting needs." Radabaugh has spent a good deal of her time over the last year assessing and testing a number of desktop reporting tools to determine which ones would be sufficient.

It's a process that has taken an enormous amount of time, since reporting tool software is extremely complex. Before Radabaugh could even begin testing the various tools, she had to figure out how to get the software to connect to the BANNER database and set up models of potential reports using test data. Then she began the long and arduous task of running test reports and comparing the results to see which tools worked best. The decision to purchase BrioQuery was based largely on her exhaustive testing.

It's important to keep in mind, however, that with both FOCUS and BrioQuery, a lot of work needs to be done before you ever load the software on your machine. In order to create reports out of either tool, you'll need to have a fairly good understanding of your data and

how it works in BANNER, since you'll want to create the report to fit your needs as specifically as you can. "Users need to decide what kind of data they'll need and how they'll need it," says Monica Wachter, OPUS Project Manager, "and they'll need to make those decisions before attempting to use any sort of reporting tool. We'll need to analyze, design, and test report models in order to make effective use of staff time and to minimize any potential impact on transaction processing in BANNER."

controlling your data

Wachter also notes that much of the responsibility for reporting will be shifting to individual offices and away from the Computing Center. The advantage to that shift is that offices will have much more control over their reports and the way their data is organized. The challenge will be to make sure that offices have the knowledge and comfort level to provide themselves with adequate reports. Wachter recommends that offices who are migrating to BANNER pay particular attention to the following factors, which will affect their reporting strategies:

Report accuracy and accountability: each office should appoint a designated staff member who will be the "point person" for reporting. That point person should have a very clear understanding of

the data the office uses and be willing to communicate with co-workers about what data elements mean and where they come from. That person also will be responsible for verifying that external and executive reports contain accurate information; now that data is shared across campus, it will be extremely important to have a designated staffer who will keep a close watch over information that leaves the office.

Report security: since desktop reporting tools mean that more and more information will live on people's desktop computers (as opposed to a database in the Computing Center), it will be more and more important to make sure that security is tight.

Report processing: since BANNER is an integrated system, users will have to be careful about when they process their reports—especially if the report is a big hog that takes twelve hours to run and pulls information from every possible data table. You don't want to be running such a report at the same time that, say, the Controller's Office is running paychecks or updating the general ledger.

Report efficiency: staff need to make sure that their reports are designed well from the outset; remember, doing it right the first time is a lot easier than having to do it over. Also, offices need to communicate with each other to make sure that they're not wasting time creating the exact same reports to retrieve exactly the same information. Sharing reports is a lot more efficient than creating the same one eight different times in eight different offices.

As always, the key word here is "communication." In BANNER, your data is my data is our data, so creating reports that will work well means keeping the larger campus community in mind. In August, training begins on FOCUS, the database reporting tool. We'll be communicating plenty more information about reporting tools in the next issue of *The Score*. ■

Making the (up)grade: BANNER 3.0

At the most basic level, learning to work with BANNER includes learning to work with vendor-written software. Sure, we've all worked with Excel and Word, but using a vendor's package for database work is an entirely different creature.

One of the differences in using BANNER is how the system is upgraded. In the old days of the legacy system, upgrades were hardly an issue; when a change was needed, a user picked up the phone and called their handy-dandy Analyst/Programmer in the Computing Center. With BANNER, that will no longer be the case. SCT delivers upgrades on a regular basis, and users, not the Computing Center, will be responsible for testing the upgraded system to see what changes have been made to the system and how their processes, procedures, and documentation might need to be adjusted.

In fact, several Oberlin administrative offices are dealing with their first Banner upgrade now. At the beginning of the migration, the HR staff was using BANNER 2.1 (SCT numbers releases much like Microsoft does with Word 5.1, Word 6.0, etc.), and that's the version they went live on. Now, all the Banner modules are being upgraded to BANNER 3.0, and that means a full round of

testing for the Human Resources staff, the Payroll staff, and the folks working on the modules that are still in training and preproduction (Finance and Student Records).

So why the push to upgrade now, especially since we're all just getting used to being live on BANNER in the first place? A major factor is that presently SCT only provides technical support for the current release and one release back. At this moment, that's okay, since the current release is 3.0 and the one release back is 2.1, which is what Oberlin has. But in about six months, SCT will release BANNER 4.0. That means that in six months, SCT will stop answering questions about 2.1; they'll only provide support for 4.0 and 3.0 at that point. Therefore, it becomes pretty important for Oberlin to be up and ready on 3.0 by the end of 1998. Of course the most important factor is that we certainly want whatever improved functionality comes with a new version that accommodates the way we want to do business. For example, in the Student Records module, there are some fields and forms available in 3.0 that don't even exist in 2.1.

Being up and ready means checking out the new release and making sure staff is comfortable with any changes. For any new

release, there will be an upgrade test schedule where offices can look at the new release in a training database that doesn't affect live data. For example, the current upgrade test schedule gives the HR and Payroll staff a little over a month to look through BANNER 3.0 and identify any problems before the upgrade is applied to the live database. The Finance and Student Records teams are busy getting familiar with features in 3.0 that may not have been part of their initial training sessions on 2.1, since those modules will be going live on the 3.0 version.

It's a tight schedule, but as OPUS Project Manager Monica Wachter points out, it's better than the alternative: "If we were to wait until the fall to upgrade to 3.0, we'd catch the Payroll staff and Controller's Office in the middle of the auditing season and the end of the fiscal year," Wachter says, "and we certainly don't want to find ourselves in the position of using a version of the software that's unsupported. Because BANNER is integrated software and data elements are shared across modules, upgrades are necessarily campus-wide and affect every office simultaneously. One of the challenges in the future will be to find an ideal window where no office is impacted during their busiest time." ■

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help." Simonovich says that "Ken is a bright, energetic person, and is 'phenomenally nice,' as one student called him. He gives everyone a fair chance and students really like him."

all about attitude

The staff in the office is also determined to make the BANNER project successful, knowing that the key to success is keeping a positive attitude. "I won't go so far to say that I'm looking forward to BANNER because I know that it will bring an incredible amount of work," says the ever-pragmatic Harley, "but I'm not dreading it either. I've worked here for almost 30 years and have survived a lot of changes. It will all boil down to attitude and will be only as awful as you think it will be."

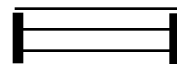
For her part, Simonovich is moderately enthusiastic about the changes the new system will bring. "I am looking forward to the BANNER project," Simonovich says. "I've heard a lot of negative things about it, but having to use two separate systems, SR and ARIS, is no picnic either. It will be aggravating at first, so you just deal with it and go with the flow."

Going with the flow will also be important for both Gumpf and Gilson, who are facing their own challenges in regards to BANNER.

"My biggest challenge will be staying sane while trying to satisfy the Oberlin community, the BANNER folks, and my family at home," Gumpf says. "My family already hates the hours I put in!"

Meanwhile, Gilson is working on understanding his new role in the office at the same time as he adjusts to Planet Oberlin: "Without question, the whole process of learning and understanding Oberlin is the biggest job," Gilson says. "Every institution has its unique policies and procedures, and Oberlin is no exception. As a newcomer to the community, I'm enjoying the challenge of learning who on campus does what, when they do it, how they do it, and why they do it." ■

The Score



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