

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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Financial Aid functional
training

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Financial Aid functional
training

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training

feature

Last but not least: Financial Aid tackles BANNER

After a false start or two, the Office of Financial Aid is in the midst of OPUS's final chapter: the implementation of BANNER's Financial Aid module. Originally scheduled for implementation last year along with the Admissions portion of the Student Records module, the Financial Aid team has been delayed by office turnover and project timing. But it looks like this time will be for real: the team has already had several training sessions this spring and summer with SCT Financial Aid consultant Steve Bellin, and is feeling ready for the Moment of Truth: going live this October.

In fact, the team is more than ready; there's been some impatience in the Financial Aid office and several other offices on campus to get the Financial Aid module of BANNER up and running. Members of the Financial Aid staff—and the Analyst/Programmers in the CIT who support the office—are looking forward to the time when they'll be on the same system as Admissions and the Student Accounts Office: managing the data feeds from those offices—which are already live on BANNER—to the FinAid legacy system is tricky and time-consuming. The staff in Admissions and

Student Accounts will also appreciate having financial aid data available to them through BANNER, rather than having to switch back and forth between BANNER and the legacy system. And speaking of the legacy system, the Networking folks in the CIT will also be glad to have Financial Aid live on BANNER, since it means the old VAX machine will be one step closer to retirement.

The Financial Aid implementation team consists of Brian Lindeman, Director of Financial Aid, Scott Juedes, Assistant Director of Financial Aid, and two Analyst/Programmers, David Foos and Jerry Coleman. In spite of the relatively short timeline for implementation, the team is optimistic that their hard work over the summer will pay off in a successful live date this fall.

the second time 'round

Of course, part of the reason for the optimism surrounding this implementation is that it's the team's second shot at BANNER. Before staffing shakeups put BANNER on the back burner last summer, the FinAid team had already accomplished a good deal towards setting up the system. "We did a lot of setup during our first attempt at implementation last year," says Lindeman, "and though we've had to rebuild a lot of that information, our understanding of how the system works was already in place when we began the current implementation in May."

Moreover, since Lindeman was a part of the Student Records steering team during the implementation of the Admissions and Registrar's pieces of the system, he had even greater insight into how the system might work in his office. So when Steve Bellin, the SCT Financial Aid

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At right: In the thick of it: Scott Juedes and Brian Lindeman are heading up the Financial Aid BANNER implementation.



Living at ground zero: ACS adjusts to Planet BANNER

Now that Oberlin College has both feet planted firmly on Planet BANNER, there are a number of changes taking place in the Administrative Computing Services group in the CIT. Just as BANNER has changed the way work gets done in the College's administrative offices, it's also changed the way the Analyst/Programmers are doing their day-to-day work. There's also been some shifting in terms of which BANNER modules the A/P's support vs. the offices they supported back in legacy land. Here's a rundown of what's new in ACS:

Jerry Coleman is the newest A/P to join the ACS staff. Having arrived in February of 2000, Jerry has been busy learning the ins and outs of the BANNER Finance module. He's now the lead coordinator for that module, taking the place of Dave Foes, who will act as Finance backup coordinator. In addition, Jerry is working on the BANNER Financial Aid module, which is currently in the implementation phase (see related story, page 1). Jerry will also help support the portion of the BANNER Student Records module used by the Student Accounts Office.

David Foes is currently in the midst of the implementation of BANNER Financial Aid; he's the lead coordinator for the Financial Aid module. He's also supporting the Student Accounts Office in their use of BANNER, having taken over those duties from David Waldron, who left ACS earlier in the year. Currently, Dave is also supporting the BANNER Finance module in the Controller's office; but those duties are in the process of being transferred to Jerry Coleman. Dave will continue to work on the Finance module as the backup coordinator.

In mid-June, the ACS group said a very sad farewell to **Vanitha Kotte**, an independent contractor from CompuWare. Vanitha had been "in residence" in the ACS group for the better part of a year, writing BANNER reports for a number of administrative offices. Vanitha wrote most of the Admissions in-house reports and also completed various Student Records reports, including the course summary report, the academic standing report, the student records graduation reports, grade sheets, class lists, the Phi Beta Kappa report, departmental GPA reports, and various statistical reports.

Millie Modic began her BANNER career with the very first module implementation in Human Resources and Payroll. She still supports

the HR module and the Payroll staff, and currently is also supporting several pieces of the BANNER Student Records module: she is the lead coordinator for the Registrar's office and for the Web for Students and Faculty product available through PRESTO. In addition, she is also the backup coordinator for BANNER database administration, helping Darrick Strange with Oracle support, BANNER software maintenance, and system security administration.



ACS on parade: from left to right: Vanitha Kotte, Monica Wächter, Cathe Radabaugh, Darrick Strange, Katie Styer, Jerry Coleman, David Foes, and Millie Modic

Cathe Radabaugh supports the numerous desktop applications used around campus in conjunction with BANNER. These include FAMIS, the system used in the Service Building for tracking work orders and other jobs; the system interfaces for the CBORD and AT&T systems, used in the Office of Residential Life to track student housing and dining; and the two reporting tools, FOCUS and BrioQuery, used by a number of administrative offices across campus to process reports out of BANNER. In addition, Cathe is currently working on rolling out the new Citrix setup for all BANNER users.

As the Database Administrator (DBA), **Darrick Strange** has the dubious distinction of supporting *all* the BANNER modules. Darrick is in charge of maintaining the Oracle database that runs BANNER, including applying and testing the upgrades to BANNER, maintaining BANNER security setups and access, generating and troubleshooting BANNER forms, and providing general maintenance for the software. In addition, he also provides backup support for Millie Modic on the BANNER HR module.

Katie Styer works exclusively with the BANNER Student Records module, by far the largest module of the four. During the implementation phase, she was the lead coordinator for the entire module. She now is the lead coordinator for the College and Conservatory Admissions Offices, and also provides backup support for the BANNER functions in the Registrar's office, including web functionality in PRESTO via the Web for Students and Faculty product.

Monica Wächter continues to manage the overall OPUS project, including project budgeting, organization, and planning. She is responsible for coordinating the work of the analyst/programmers, and made the recent shift in responsibilities to ensure that no A/Ps were overloaded while still ensuring that all BANNER modules were adequately supported. ■

BANNER Banter: Citrix Frequently Asked Questions

The CIT has been busily implementing the new Citrix setup in offices around campus since May, and for the most part, the transition has been successful: most users agree that the new setup is faster than the old one, and many find the Citrix screens easier to look at and work with. But as more campus offices get set up to use Citrix, a number of frequently asked questions from BANNER users have emerged. See if your favorite Citrix question is answered below!

Q: Okay, tell me again why we have to switch to Citrix?

A: The problem has mostly to do with Oracle, which is the database software the BANNER software uses to run. The next version of the Oracle software is written in a way that makes it unable to talk to Macintosh desktop machines. Why do we care about this? Because the next version of BANNER, release 4.0, uses that non-Mac-talking Oracle to operate. This means that we have the choice of a) tossing everyone's Macs or b) finding a technical setup that could translate between the new version of Oracle, the BANNER 4.0 upgrade, and the Macintosh. For all practical purposes, Citrix is that translator.

Q: How long will I be able to use the old BANNER?

A: The "old" BANNER setup will be available to users until the end of September 2000. At that point, all campus offices will move to BANNER 4.0, which requires you to use the Citrix setup. In the meantime, users are encouraged to use Citrix as much as possible, but if Citrix is temporarily unavailable (see below), you can use the "old" way to get into BANNER.

Q: Every so often when I log on to Citrix, it tells me that "BANNER cannot be found on the network." But everyone else in my office is already in BANNER just fine. What's going on?

A: What's going on is a technical snafu that right at this very moment, at least three people in the CIT are running around like crazy people trying to fix. Here's what's happening: there are two servers (big, huge computers that live in the CIT) that run the Citrix software. Each server has a certain user capacity—a limited number of people that are allowed to log on to the server at any one time. If one of those two servers goes down, the other one gets overloaded and starts refusing to let anyone else log in. When the error message tells you that BANNER can't be found on the network, that's sort of a lie; what's really happening is that the one server that is still up and running is feeling overcrowded and doesn't want any more users. If you get the "can't be found" message, it wouldn't be a bad idea to email the A/P that handles your BANNER module, but chances are good that the networking folks are already aware of the problem and are working on it. The occurrences of this

problem are already diminishing, and we're working to completely solve the problem by the fall so that once BANNER 4.0 is live, you won't get those messages at all.

Q: How do I get rid of that big black screen behind the BANNER forms when I'm using Citrix?

A: Unfortunately, you can't. Essentially, Citrix works because it allows your Macintosh to pretend that it's a PC so it can emulate a Windows NT session. When you log on to BANNER via Citrix, the black screen behind the forms is the evidence of that NT session; without it, you wouldn't be able to see BANNER at all. It is annoying at first, but I have it on authority from several experienced Citrix users that eventually you just get used to it and pretty much forget it's there.

Q: What are those little buttons in the upper-right corner of my forms with the X and the little dashes?

A: Ah, welcome to the world of Windows. Anyone who has worked with PCs before will recognize those little buttons, but to devoted Mac users, they will be unfamiliar. In the Windows world, those little buttons manipulate your screen: clicking the button with the single dash collapses your screen into a little bar in the lower left hand corner, and clicking on the button with the square (or two squares overlapping each other) will open that screen up again. That same button with the square will also maximize or minimize your screen, and the X button will close whatever screen you're currently in. If a form you're working in seems suddenly to vanish before your eyes, chances are you've clicked the X button or minimized your screen by mistake. If you have any questions about the Windows features of the Citrix screen, email Ami Berger at ami.berger@oberlin.edu.

Q: Why can't I print screens like I did before?

A: Yeah, it's a problem. The ACS and Networking staff in the CIT are still working out some of the bugs in Citrix, and printing screens is one of them. In the old BANNER setup, it used to be that you could just choose "Print Screen" from the Action pulldown menu and the current BANNER screen would print out, right as rain. In Citrix, that happens...sometimes. Other times, it seems that the print queues in Citrix get all confused and won't print the right thing to the right printer. We've also had reports of it taking for-EVER to print screens from Citrix. In any case, we're working on it, and we will have a solution to the problem by the time we go live with BANNER 4.0 in the fall. In the meantime, here's a workaround: use the Shift + Apple + 3 key command to take a snapshot of your screen. This will put a "picture" file of the screen shot on your hard drive, and you can print it from there. Again, contact Ami Berger if you have questions; we'll keep you posted on other solutions. ■

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consultant, arrived on campus this time around, the team was more than ready to dive in again. "We were able to complete the system overview and most of the setup during Steve's first trip," Lindeman reports. "In the following sessions, we've been able to get right to work setting up the guts of the Financial Aid module."

According to Lindeman, those "guts" of BANNER Financial Aid will change office operations significantly. "All of our functions will be completely different in the BANNER world," he says. For example, in the past, the office has performed financial aid need analysis using a program in Excel, and then re-entering the results into the legacy system on the VAX; in BANNER, all need analysis can be performed online within the system. The same is true for corrections to students' Federal Student Aid applications: in the past, corrections were written out by hand and then given to a staff member for entry into the Department of Education's stand-alone, PC-based software. But once the office goes live, "all corrections will be automatically created and prepared for transmission to the Department of Ed. in BANNER," Lindeman says. The office's loan program will also benefit, since BANNER's student loan module will allow the office to transmit loan application data using a commonly-accepted file format called Commonline. "This will eliminate the need to use multiple computer systems in the loan program," Lindeman notes.

Assistant Director of Financial Aid Scott Juedes is enthusiastic about what BANNER will do for the office, especially in terms of student service. "After working with BANNER during our training, I can already see the very positive impact it will have on the Financial Aid office, in several areas," Juedes says. "We are going to be able to serve our students with much greater efficiency once we make the big move to BANNER."

In the future, Lindeman hopes that much of that student service will take place over the Web via the PRESTO system. "We hope to offer our students web-based access to information about their financial aid applications and packages in PRESTO," says Lindeman. "Eventually, we want students to be able to look up what's missing from their aid applications and, later in the cycle, what their actual financial aid package includes."

and on the technical side...

In the meantime, Analyst/Programmers David Foos and Jerry Coleman are working hard to keep the technical side of the Financial Aid module running smoothly. That's not always easy: bugs and other technical glitches in the system always rear their ugly heads during training sessions, and the FinAid module has been no exception to that. For the most part, though, the technical side of the implementation is going smoothly. "Training is going well so far," says Foos. "Steve Bellin is a good trainer. He really knows the system and also knows how a Financial Aid office works."

Foos, the lead A/P on the Financial Aid implementation, points out that part of the reason that this implementation has encountered relatively few bumps is because of the nature of managing financial aid. "In a lot of ways, there are a lot of similarities between the FinAid legacy system and BANNER," Foos says, "just because financial aid itself has to be done in a fairly standard way." But Foos also sees the ways in which the new system will benefit the office. "BANNER has a lot more flexibility built in," he notes. "All the major functions, such as budgeting, packaging, etc., are driven by rules that the end users

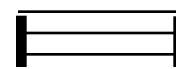
define. They can update them as needed from year to year, with no programming changes required."

Jerry Coleman, the backup A/P on the team, also stresses the independence that the office users will have with BANNER. "Much of the set-up and operation of the system is in the hands of the users," Coleman notes, "and Brian and Scott are very knowledgeable in both areas." In the meantime, Coleman is working to familiarize himself with the Financial Aid processes—everything from "receiving an application, assigning it to tracking groups, allocating funds, and initiating loans through packaging and sending out award letters," Coleman says—and helping fix the inevitable system glitches. "Our test case processing was not without problems," Coleman observes, noting that both he and David Foos have spent some time researching these problems.

One thing that has been very different for both the techies and the users is the use of BANNER 4.0 for this training period. Since the Financial Aid office will go live on 4.0, it made sense for the team to train on the new version, but the new look of the upgrade took some getting used to for the technical staff. "The 4.0 version looks pretty different, and some things aren't where they used to be," says Foos, "but it doesn't take too long to get used to." Foos likes the fact that the Options Menu, which used to be in a pull-down menu, is now always visible in the left window of the BANNER screen. And although the move to 4.0 was a non-event for the Financial Aid staff since they were not used to using earlier versions, Lindeman is looking forward to some of the new benefits of 4.0, including the ability to run some processes directly from BANNER rather than from the Bravo server.

"All in all, we're very happy with BANNER and how it will work for our office and our students," Lindeman says. He points out, however, that the October live date won't be the end of the work associated with the project: "There's no way to make this transition easy," he says. "We know that our first year with BANNER will be full of learning experiences. But we can also see a lot of potential efficiencies for the future and we know that our students will see real benefits from BANNER." ■

The
Score



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