

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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feature

Human Resources tackles BANNER

When Oberlin's Office of Human Resources goes live on BANNER on January 1, 1998, it will begin a new era in administrative computing for the College. But the HR team's work and preparation for going live actually began a long time ago—eight months ago, in fact. It was then that the HR OPUS project team began the long process of analyzing their operations, mapping out how they wanted BANNER to work in their office, and training for the Moment of Truth on January 1.

A legacy (system) of frustration

Ironically, HR's Moment of Truth should have been the Finance module's instead. "Normally Finance would go before Human Resources," notes Monica Wachter, OPUS Project Manager, "but because of the timing of the project we missed the logical window for Finance to go live on July 1, 1997. We didn't want HR to wait an additional year until the next logical window, which for them means the beginning of the calendar year."

The Human Resources team also didn't want to wait. The system currently in use in the HR

office (known as the HRS system) was failing to meet staff needs and causing a great deal of frustration. Ruth Spencer, Director of Human Resources, realized the HRS system's limitations from the beginning: "When I first arrived," Spencer remembers, "I would ask for information, and then realize that I would be expending days or even weeks of my staff's time to secure the data. Being able to retrieve timely information in a form that is useful to HR will be an enormous asset to our operations."

Sandy Youngeberg-Fox, Budget Director in the Human Resources office and the team leader for the migration to BANNER, was also anxious to implement a new system. When OPUS was first announced, Youngeberg-Fox reports that she was "delighted! I have been clamoring for a new HR system since the day I got here!"

The problems HR has with their legacy system are certainly not unique. "The current system was purchased from Information Associates over a decade ago, and no budget was ever established for upgrades," Youngeberg-Fox notes. "Since the administration at that time supported in-house development of administrative systems, the budget module was developed at Oberlin and did not interface with the IA product very well. It has been very frustrating."

Members of the HR team share Youngeberg-Fox's frustration with the legacy system as well as her delight at moving to BANNER. "My first reaction when I heard about OPUS was relief," says Beverly Pycraft, HR Benefits Technician. "Finally, a new system that will be able to give us the information that we need. With HRS, we would put information in, but it was just about impossible to get it out accurately."

Moving ahead

After a few months of analyzing their operations, the HR team began functional training in May with Susan Jennings, SCT Senior Consultant (for

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Monica Wachter, left, Sandy Youngeberg-Fox, seated, and SCT Consultant Susan Jennings, right, all have a good laugh at the antics of BANNER on Sandy's screen

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more on Susan, see the "OPUS Profile," page 4). The training process, which will last through this December before going live, has both ups and downs. On the one hand, Pycraft notes that the training on BANNER and the work of setting up the data in the system provides staff with a feeling of control. "We program our own information into the system. We're creating our own data tables and organizing the system to do many, many jobs that we've had to do manually for years. Once we set up that data, the chance of errors will diminish significantly, and everyone is in favor of that!"

On the other hand, the functional training sessions are never perfect, and are often downright exasperating for the HR team. First of all, until a new server was purchased to handle the BANNER traffic on the Oberlin network, the software was painfully slow in the training lab; sometimes a full minute—an eternity when you're staring at a computer screen—would elapse before certain screens would come up. Secondly, it took some time for the team to become fully comfortable moving around the system. "We found that navigating around BANNER is not as easy as it appeared in the SCT demo last fall," says Youngeberg-Fox. "It is a very robust product, and with its numerous capabilities comes a certain amount of complexity."

Such problems, however, are par for the course in the functional training stage, and the HR team refuses to be discouraged. "Susan [the SCT trainer] assures us that these problems are natural at this stage of the implementation, and that these kinds of issues will disappear by the time our cutover date arrives," Youngeberg-Fox says. Her team is also taking the frustrations in stride. "The things that are difficult or challenging are also the most rewarding once you master the system," Pycraft observes.

"a sense of camaraderie"

Such an attitude is absolutely necessary for the success of any major change, and Youngeberg-Fox is grateful for the fortitude her team has shown. "I have been blessed with a wonderful implementation team,"

she says. "I am continually impressed by their knowledge and their commitment to the project." Spencer is also impressed with the team: "It's very rewarding when my staff tells me that we are making progress, especially when they've been so intensely committed to it," she says.

Monica Wachter agrees. "The HR team's greatest asset throughout the project has been their commitment to making it happen and their willingness to do what it takes," Wachter says, noting that "the reality of the volume of work can dampen the enthusiasm, but they are still excited about the new system."

That excitement and sense of camaraderie has extended outside of the usual "territory" of the Human Resources office. Several staff members in the Controller's Office are also integral to the HR implementation, since their payroll tasks overlap with those of HR. Marcia Miller, Accounting Manager in the Controller's Office, has been involved in the HR conversion from the beginning and is as enthusiastic for the change as her colleagues across the hall.

"I can already see the benefits of moving to BANNER," Miller says, and ticks off at least five tasks that she currently does manually that will be done by BANNER in the future. For example, BANNER can handle special calculations that presently must be downloaded from the legacy system into Microsoft Excel in order to be manipulated. BANNER also has extensive payroll history views which will make Miller's research easier. And the benefits to payroll operations aren't all Miller's: eventually, BANNER will allow College employees unlimited direct deposit options, including a combination of fixed dollar and percent of pay.

a new year, a new system

Enthusiasm for what BANNER will be able to do are still tempered by anxiety as January 1, 1998 looms ever closer. Despite her enthusiasm about BANNER, Pycraft has some reservations about production cutover: "I'm afraid I still don't feel like we are almost ready to go live," she admits. "Never having gone through a system

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opus notes

Financial Aid timeline delayed

The BANNER Financial Aid module, originally set to begin operations analysis this November and go live in Summer '99, has been delayed for a year. The new timeline puts Financial Aid's operations analysis in November 1998, with a production cutover date of August 2000.

The cause for the delay is the intense workload of the analyst/programmers who support the software, according to OPUS Project Manager Monica Wachter, who points out that the a/p's would not be able to devote the necessary time to Financial Aid given the other modules (HR and Finance) going live at the same time. As the current Financial Aid system can handle the Year-2000 problem already, "delaying our conversion does not present a problem for us," says Howard Thomas, Director of Financial Aid. "We're

disappointed that we'll have to wait another year, because we think BANNER will help us with some thorny issues," adds Brian Lindeman, Associate Director of Financial Aid, "but we'll profit from the learning experiences of other offices." ■

A new Chair for ACAC

After chairing the Academic Computing Advisory Committee since its inception in 1995, Director of Institutional Research Ross Peacock is stepping down as head of the committee. "ACAC is far and away the most productive and enjoyable committee I have ever worked with," says Peacock, "but I felt the time was right for some new blood to guide us into the implementation phase of OPUS."

That new blood belongs to John Jacobson, Assistant Dean of the Conservatory and new ACAC chair. Jacobson was

nominated by Peacock and unanimously voted in as new chair by the committee. "John Jacobson has the organizational skills, knowledge, temperment and political savvy to help Oberlin achieve a successful migration," says Peacock. ■

BANNER gets its own server

Due to some performance problems, OPUS has purchased a new, dedicated server for the BANNER software. The new server, which will be called OCNS4, will be a welcome addition to BANNER's infrastructure, since the HR, Finance, and Student Records teams are already training on the software. Because of network traffic, the machines in the training labs sometimes took up to a full minute to bring up BANNER screens. The new server will store the forms BANNER uses; the data itself will continue to live on BRAVO. ■

I can't understand what you're saying! Part II

Below is the continuation of last month's OPUS Glossary. If there are OPUS terms that you've heard around campus that don't sound like English to you, let us know at OPUS@oberlin.edu.

Interfaces are computer programs that are specially written to allow old computer systems and new computer systems to talk to each other. During the lifespan of *OPUS*, there will be periods of time when some offices (like Human Resources) will be using *BANNER* and other offices (like Financial Aid) will still be using their *legacy systems*. An interface will help HR and Financial Aid communicate with each other despite the difference in computer systems.

Legacy systems refer to our current (or "inherited") computer systems—ones which are already in place, but are outdated and in need of replacement.

A **module** is a piece of computer software within the larger administrative system. For *OPUS*, we have purchased four modules from the *SCT Corp.*: the Human Resources module, the Student module, the Finance module, and the Financial Aid module. Additional modules include *FAMIS* and other *auxiliary software*.

Operations analysis is the process of defining, evaluating, and recording the steps involved in a particular task. This exercise helps to clearly define what is involved in a task in order to transfer the process to the new computer system. All offices migrating to *BANNER* will complete operations analyses.

OPUS stands for the Oberlin Project for Unified Systems. *OPUS* does NOT refer to a particular computer or software package; it is a global term used to refer to the entire system migration. *OPUS* includes the migration to *BANNER*, *FAMIS*, and other *auxiliary software*, as

well as each department's *operations analysis*, *functional training*, and *user training*.

Parallel processing occurs in the months before the final move to *BANNER*. During parallel processing, the office in question runs both their old system and the new system at the same time. This allows the office to get their work done on the old system while looking for any problems in the new system before *going live*.

Production cutover is another term used to describe *going live*, when an office begins using the new system for all its day-to-day business.

SCT Corp. stands for the Systems Computer Technology Corp. *SCT* is the company that makes, installs, and trains people on *BANNER* software.

A **server** is a computer that stores data and can be accessed by "client" computers. This is what is meant by a "client/server" setup, where a client machine (like the computer on your desk) is connected to a server so that you can access information that resides on the server when you need to. *BANNER* is a client/server system.

Systems migration is the term used to describe the move from one computer system to another one. In the case of Oberlin, "systems migration" is used synonymously with the term *OPUS*.

User training is the second part of *functional training*, when the team leaders go back to their offices and teach their colleagues how to use the features of the system that they'll need to do their work.

No need to worry! The OPUS Glossary Parts I and II are available on the OPUS Web Site at www.oberlin.edu/~acs/opusglossary.htm.



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change before, the amount of work ahead of us still seems like an impossibility. Susan from *SCT* says that we are on target and doing fine, but the light at the end of that tunnel still seems a long way off to me."

Youngeberg-Fox also acknowledges the challenges of getting it all done. "The most difficult aspect of the process is keeping all the balls in the air without dropping any of them," she observes. "At the same time all of the implementation work is happening, the College and our office must continue to function." Youngeberg-Fox points out that "many of us have been working 12-14 hour days and weekends for what seems like months. Not only are we anxious for this process to be finished, but our families are too," she says wryly.

The best way to prepare for this onslaught, according to the HR team, is to attack it head on. "Start early. Don't procrastinate, and go full guns right off the bat or you will never meet your deadlines,"

advises Pycraft. "This is not something you can do in your spare time. What is spare time?"

Youngeberg-Fox echoes that sentiment. "Be prepared to be exhausted, and know that your team members will be as well. Having that expectation may help you to keep your perspective," she says. A sense of humor helps too: "Infuse your activities with levity...a sense of humor can be therapeutic. And remember, there IS life after a *BANNER* implementation," Youngeberg-Fox says with a laugh. "At least that's what they tell me...we're not there yet!"

Spencer also emphasizes the importance of a little levity. "Humor is the essential ingredient," she says, "but managers also need to pay attention to how hard their staff is working and let them know you appreciate them." Spencer says that she is kept up at night trying to figure out how to reward her staff for their work on the implementation. Her staff, however, has already made some suggestions: "I hear they want to go to Aruba for some R & R when all this is done!" ■



Susan Jennings (standing), SCT Senior Consultant, assists Payroll Clerk Linda Amburgy during a BANNER training trip

BANNER trainer tells all!

*Susan Jennings, a Senior Consultant with SCT Corp., is the trainer for the Human Resources module of OPUS. She has been coming to Oberlin once a month for the past six months to train the HR staff on BANNER, help define priorities for the project, and lead the HR team into the brave new world of "going live". Recently, **The Score** sat down with Susan to get her perspective on OPUS, the HR team's progress, and what it takes for a systems migration to be successful.*

Score: Not to start out on the negative side of things, but what's the biggest obstacle for schools migrating to BANNER?

Susan: There are two main obstacles, the first of which is the loss of expertise. Before an implementation, employees know very well what tools they need to do their job, what processes and procedures must be completed, and what steps they must take in order to be successful in their jobs. During the implementation, that expertise is stripped away. Employees who knew their jobs and were considered experts are now beginners again. It can be very disconcerting.

The second obstacle is the loss of staff time. When SCT comes in to any school and informs administration that the implementation will be a lot of work and will take a lot of staff time, administration has faith that the existing staff will have the ability to absorb the additional work load of the migration and continue to provide the current level of service in their regular jobs. Usually, no one on campus will say "oh, my staff can't meet that expectation." The result is that implementation teams end up working, in essence, two jobs: their regular job and their piece of the implementation work.

Score: That said, what do you see as the biggest obstacle for Oberlin College's implementation specifically?

Susan: The lack of staff time available for the implementation. Like most staffs at institutions of higher ed, the majority of the HR staff was not released from their current job duties, so they had to assume the additional work of the implementation as well as their regular work load. Now, this is not at all unusual, since there are not many colleges or universities that have enough staff or resources to replace key employees for nine to twelve months while the regular staff works on the implementation. It also does not mean that the migration won't be successful, as many, many colleges and universities have proven.

Score: What has Oberlin's HR team done to make this period of transition and training a success?

Susan: The most important thing they have done is to be open to new ideas. There is no hesitation amongst team members to get rid of "the way we've always done things" attitude, which can be extremely dangerous when it comes to implementating change of any kind. Their acceptance of new methods and ideas not only helped make their training less of a hardship, it also gave them some broader options for their system adaptation—some choices of how they wanted their new system to look and operate.

Also, after each training session, the HR team members forced themselves to find the time to practice on BANNER. They made sure to complete their homework—the tasks required between each training session. Truthfully, they did not get everything accomplished every single time, but they always had enough done that they could move to the next training session with very little difficulty.

By the way, the experience of the analyst/programmers supporting the HR team helped tremendously. The technical folks are an integral part of the implementation team.

Score: What's the most important "piece" of the implementation process? Operations analysis, training, system adaptation?

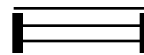
Susan: Every piece builds on the one before it, so one really can't be more important than another. I sometimes compare the implementation process to the process of moving to a new house. The operations analysis is the foundation of everything, the part that defines what you are currently doing and what tools you use to do it. This piece is similar to packing up your house when you're preparing to move.

Next is the functional training, when teams decide how they are going to use BANNER in preparation for actually using it. This is similar to putting all the boxes in the moving van. Then the systems adaptation allows you to take processes in BANNER that you have designed and test them with your current data. Teams will often find that they don't like the way something looks or operates, and this stage gives teams the chance to move things around. This is like arranging the furniture in your new home to see if you like what you're doing .

Score: Is there one concept that you wish every team would understand and appreciate at the beginning of an implementation?

Susan: I can't list only one, but here's a sample list: Understand that you have to plan. An implementation is a lot of work and takes a lot of thought, but the process works, it really does. You will survive! ■

The
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