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spectrum

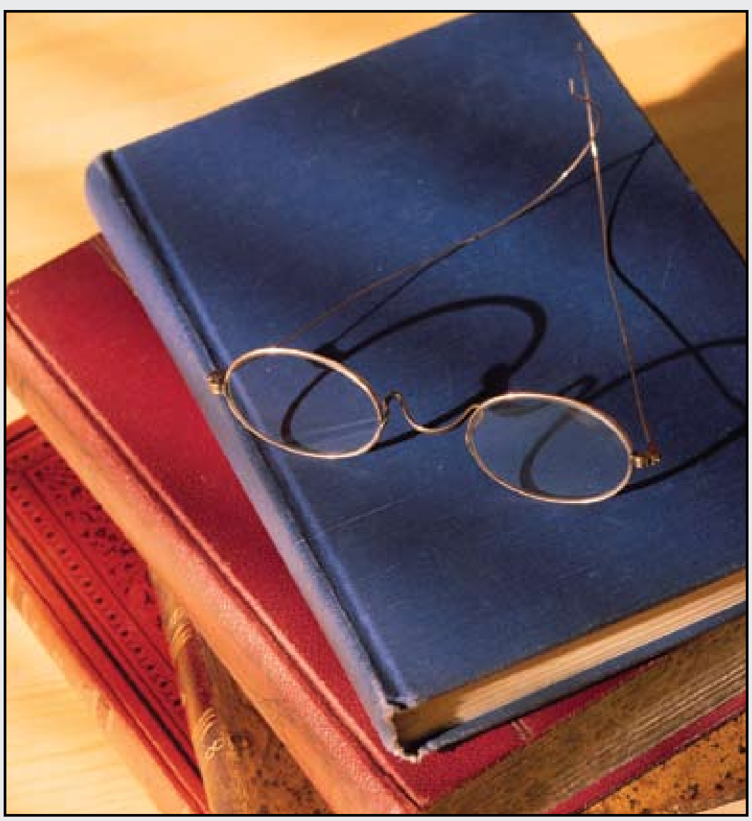
NEWSLETTER

The Student Module

The Student Module will be up and functional for the 2007 Fall semester at the University of Memphis.

Preparation for the student portion of Project Spectrum began in early 2005. Different pieces of the module have already been implemented as a part of a "rolling go-live" process.

"We have spent weeks in training and consulting while maintaining the current system," said Noel Schwartz, registrar and student team lead. "We began converting student data last August and our schedule provides three more major points of conversion prior to our beginning Fall 2007 in the new system."



The admissions section of the module was unveiled for 2007 Fall applications this past September, and all transfer credit will be converted in February. More than 2,000 applications have already been keyed in, and students are receiving admission letters from the new system, according to Schwartz.

The academic catalog was converted last spring and summer, and the tentative schedule of classes, which is approximately 6,000 course sections, was loaded manually. Each department has reviewed the course information for accuracy and will be finalizing the schedule by early March.

Registration for the upcoming Fall semester is set to begin on April 9. Summer registration is slated to be the last term used on the current system. After that, all systems will be shut down until the data can be converted to the new system. This will ensure that prerequisite checking will operate properly in the new system when Fall registration begins. Financial Aid will go live for Fall 2007 by February while Student Accounts is set for July.

"Timing is critical for all of the pieces to fall into place," said Schwartz. "Communications will be sent to students, faculty and staff as we begin to see that the dates are firm."

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Nenon named new co-lead

This past fall Dr. Tom Nenon was named co-lead for the Implementation Team of the Spectrum Project. Nenon replaced Marie Dockter, who is now serving as the Executive Administrator to the Provost at Saint Louis University.

As co-lead, Nenon assists John Wasileski with planning and overseeing the entire Project. He also communicates the needs of each Spectrum team to the University Executive Committee along with the Tennessee Board of Regents.

Nenon said that his new role has been quite challenging, but the transition has been smooth with the help of all the Spectrum teams.

"The past few months have been a real eye-opener," said Nenon on becoming co-lead. "I knew that there was a lot of work going on and had some inkling just how big and complicated the project was, but it is much bigger and much more complicated than I ever imagined. I can't say how impressed I am with organizational skills, the knowledge and the dedication of the people who are making this happen.

"I do appreciate the opportunity to support the work of the team leaders and the members of the teams who are all working so hard to complete this tremendous task in such a short period of time," continued Nenon. "I've enjoyed the opportunity to expand the range of things I know about, but am constantly aware that there is much more that I need to learn in this area to be as effective as I would like to be."

Nenon was a member of the Student Team prior to being named co-lead. His chief duty was to try to forecast the needs of academic advisers, faculty members and staff members in the colleges and departments. He also worked with the other team members to shape the system so that it may serve those needs as well as possible.

"I have had an opportunity to get to know and work with the outstanding people who work in admissions, the registrar's office, financial aid and IT who do all the things necessary to support students and the academic work of the University," said Nenon. "Through my work on the Spectrum Implementation Team over the past couple of years, I have also gotten to know the staff of the other areas of our University who have implemented the Finance and HR Modules in Banner, and those who will be implementing the Advancement Module as well."

Nenon's own contributions to the development of the project have not gone unnoticed either.

"Tom is a great co-lead on the Spectrum Project and has been instrumental in bringing clear, logical and carefully articulated observation to many of the issues and processes with which we must deal both on the U of M campus and at TBR," said Wasileski. "We work together very well, and I am very happy with the leadership Tom brings to our deliberations and presentations."

Nenon has been a philosophy professor at the U of M since 1985. His research and teaching interests include Husserl, Heidegger, Kant and German Idealism, Hermeneutics and the philosophy of the social sciences. Nine years ago he accepted a position in Academic Affairs that has developed into Vice-Provost for Undergraduate Programs. In his administrative role, he provided support for the SIS Student/Financial Aid Team and Administrative Systems Management Team.

Nenon received his PhD from the University of Freiburg in Germany, where he later served as an instructor and editor for the Husserl-Archives.

Banner training produces more efficiency

U of M academic business representatives from each college were trained in the Banner Human Resources system last fall. The session focused on the forms the representatives will use through the HR module allowing them to execute their jobs more effectively.

"The individuals attending would be able to walk away from the session with knowledge of some additional forms and functionalities that could assist them in their jobs should an issue arise," said Dean Franklin, the assistant director of Academic Affairs Finance in the Office of the Provost.

Several of the forms the group focused on were NBAJOBS (Employee Jobs), PEAEMPL (Employee Information) and NBAPBUD (Position Budget). The objective of the NBAJOBS form is to store data about an employee's assignments within the institution. The PEAEMPL form maintains an employee's status at the University and is used to collect information about an employee's term of employment. The NBAPBUD form includes information on a particular position's budget.

The training session also was used to advise the representatives of data that is critical when entering new employees. The group ended the session with a question-and-answer session for tips related to each representative's specific job functions.

"Having this group trained together is very helpful since many of the individuals perform similar job functions within the different colleges," said Franklin. "The University benefits by having employees that are able to be aware of issues in advance as well as having the knowledge of how to solve an issue efficiently."

The Student Module

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Training sessions for faculty and advisers will begin in February. The sessions will focus on the new tools for advising and issuing permits. Patsy Krech and Dr. Cathy Serex are coordinating the training efforts.

"It is critical that the various administrative offices on campus get trained on report-writing tools so that when we go-live they will be able to generate the hundreds of reports that were previously available on the current system," said Schwartz.

The Student Module will also contain student records at the U of M dating back to 1988. The student team is currently transferring this data to the new system, which has been a challenge, according to Schwartz.

"Keeping the data in sync is a major effort," said Schwartz. "The snags that we have run into are related mostly to the way we do business as opposed to the way the system functions and to how to get over four million course records from the current system to the new one."

In implementing the project, the student team must also have the system set up to follow state regulations regarding student information and records.

"Tennessee has a number of state regulations related to how we calculate grades and how many repeats of a course are included in the GPA, high school deficiency requirements, lottery regulations, etc. that must be programmed for the new system," said Schwartz. "This is taking a lot more time than expected. Learning a new system and trying to modify it at the same time is very time consuming."

Once completely implemented, the Student Module will manage student enrollment related data from the point at which a student applies for admission to graduation, and Phase II of the project plans to even track prospective students.

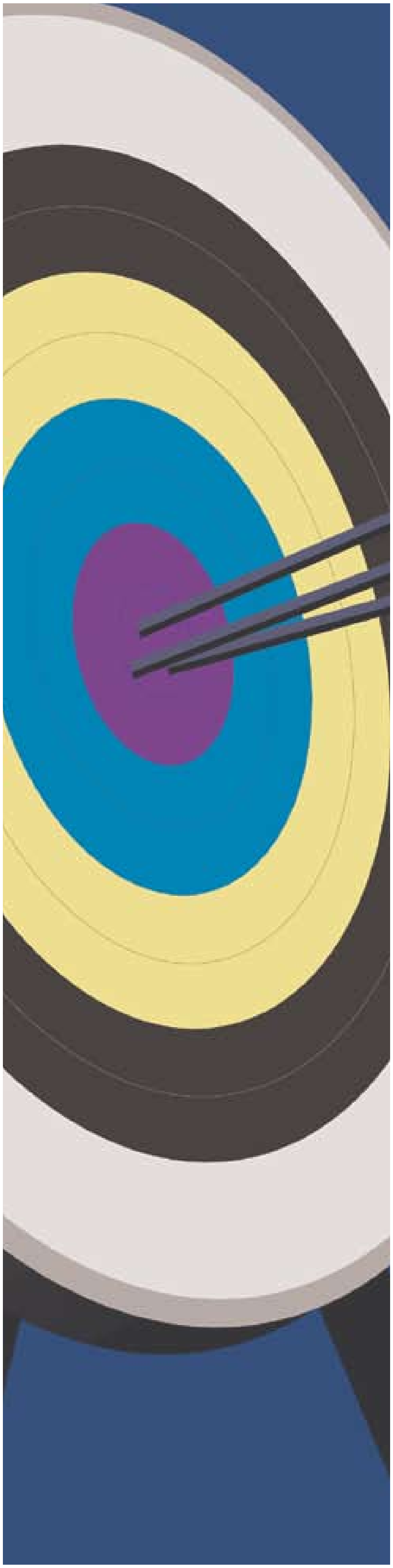
The student project has been constructed into four major areas, including admissions, financial aid, student records and student accounts. With admissions, the system stores a student's high school history, prior college history, transfer credit evaluation, test scores, applications and decision making on admission. Financial aid, student records and student accounts modules will likewise store information concerning a student's history in each particular area.

Other modules under the student portal include: catalog, scheduling and registration; degree audit; grading; and academic history and transcript. The Catalog, Scheduling and Registration modules support the processes for enrollment in classes including: course/catalog inventory, term schedules of classes, prerequisite checking, enrollment management, registration, drop/add and enrollment certification

Degree Audit will provide students with data related to which courses are required for a degree and the student's status toward achieving these goals. This will continue to be available under the current system through summer and will not be available for student use until later. Grading processes include attendance reporting, class lists, grade entry and reporting. The Academic History and Transcript modules provide complete tracking of all course work by term, degree seeking status, graduation information and the ability to produce electronic and printed transcripts.

STUDENT MODULE TIMELINE

- **Catalog/Course Inventory** – May 2006
- **Schedule of Classes** – June 2006
- **General Person** (for students) **Initial Conversion** -(name/ssn/gender/date of birth/etc.) – August 2006
- **Applications for Admission** – September 18, 2006
- **Developmental Studies and High School Deficiency Tracking and Admission Decisions** – December 2006
- **Financial Aid for the 2007-2008 Award Year** – January 29, 2007
- **General Person** (2nd)/General Student/Academic History/Transfer Credit Conversion – data through Fall 06 – February 2007
- **Faculty Load** (instructor and adviser roles) – February 2007
- **Advising and Assigning of Permits for Restricted Classes** – February 2007
- **Law Admissions Interface with Law Services** – February 2007
- **Payment Gateway for Application Fees** (Self Service Web) – March 2007
- **General Student/Academic History/Transfer Credit/Holds Conversion** – data for Spring and Summer 07 – March 2007
- **Registration and Enrollment Processes** (drop/add/withdrawal) – April 2007
- **Classroom Assignment/Location Management Interface with Resource 25** – May 2007
- **Student Accounts/Bursar/Payment Gateway for Tuition and Fees** – July 2007
- **SEVIS/fsaAtlas/International Student Reporting** – August 2007
- **General Student/Academic History/Transfer Credit/Addresses Conversion** – grades for Spring and Summer 07 – August 2007
- **Enrollment Verification** – August 2007
- **Tutor Trac Interface for Athletic Academic Services** – August 2007
- **Degree Conversion** – September 2007
- **Grading and Transcript Production** – October 2007
- **CAPP/Degree Audit** (allows student/adviser to determine requirements for degree) – November 2007



Advancement Module targets July for start-up

The Advancement Module in the Banner system looks to meet its "go-live" date in July of this year. The Advancement and Alumni team will undergo continual training up to the time the system is up and running.

According to team lead Michelle Hussey, the training sessions have played an important role in maintaining the July target date.

"The training has been valuable and various members of the Advancement staff as well as other areas such as Finance, Human Resources, Athletics and Student (teams) have attended," said Hussey. "Honestly, the only difficulty is trying to stay on top of it and get your "regular/daily" duties complete while taking on such a massive project. The Advancement team has been great about stepping up to the plate and putting in the extra work to attempt to stay on schedule."

The Advancement Module will enable enhanced and integrated database management for all constituents important to the University, including donors. This portal in the Spectrum project will include integrated pledge and gift processing, prospect management, event management and tracking of constituent information, which is vital to successful donor cultivation and fund raising.

Alumni and friends of the U of M will be able to maintain and update their information in the self-service area of the Advancement Module. They will also have the ability to make online donations. This area also allows Advancement Officers (Directors of Development) a place to access information on donors to their areas remotely.

In addition to the training, the Advancement team has created work groups to improve on various areas such as data clean up, validation tables and reporting needs.

"In my opinion, the work groups are "crucial" to the success of the conversion," said Hussey. "The work groups include functional and technical staff that can bounce ideas (and the reality of data conversions) off of each other. This is crucial to be sure that continued best business practices are thought about including how the historical data will map over/crosswalk from the old system to the new. It is important to see the big picture of not just what's been done in the past, but how you want it to work moving forward."

Hussey said that the goal of this project is to allow the Advancement team the ability to find new and better ways to meet the department's goals as well as providing the University's constituents with superior service.

"With this project/conversion, we are afforded the opportunity to review our business practices and policies; asking how do we want to do it and how do we want it to work," said Hussey. "By upgrading and improving the database system, it allows for much more advanced options such as population selections, letter generation and better tracking of the donor's wishes and areas of interest. Our goal in Advancement is to be donor-centered and anytime that a system can help us do that, it is very welcomed."

Spectrum Finance & HR/Payroll teams honored

The University of Memphis honored the Finance and HR/Payroll teams for completing the implementation of Banner HR and Banner Finance last September. U of M President Shirley Raines presented each team member with a plaque. The ceremony began with a buffet-style lunch, followed with a presentation by Steve Terry and Dr. Raines. The Spectrum Executive, Implementation, Finance and HR/Payroll teams all attended the banquet.

(From left to right) Charles Lee, Dr. Shirley Raines, Margie Stoever and Dr. Doug Hurley.

HR Project Team: Margie Stoever, Pam Jenkins, Christine McDonald, Deanna McMillian, Danny Linton, Amanda Clarkson, Mary Mansour, Dr. Shirley Raines, Donna Beene, Margaret Anne Jarred, Deborah Becker, Bonnie Briggs, Harriet Montgomery, Martha Bowman, Debbie Wooddell, Beverly Cook, Senese Duhart and Russ Teague.

Finance Project Team: *Row 1* - Margie Stoever, Melissa Ramage, Angela Fair, Dilpreeti Kubal, Ann Cavagnaro, Reza Chowdhury, Dr. Shirley Raines, Natalie Davis, Chuck Paslay, Kim Josh, Sharon Hayes, Lorrean Lim and Barbara Farrar. *Row 2* - Jim Womack, Lynda Shelton, Fred Stewart, Colette Williams, James Nabors, Kathy Cook, Ed Antoniak, Melvin Horton, Dean Franklin, Canty Robbins, Heidi Kendall, Linda Heide, Betty Bowman, Deborah Keeney, Connie Diffee, Jackie Fitts, Danita Macon and Jennifer Perry.

Brushing up on Banner

Want to get to know the University's Banner system better? Well, the U of M offers a variety of training sessions in Spectrum's Human Resources and Finance systems. Any University employee with access to Banner INB is eligible for this training, and several sessions are even available online.

The available training, which runs periodically throughout the year, includes Human Resources/Payroll, Purchasing, Budget Revisions, Travel Purchase Orders, Web Time Entry and Banner to Excel Reports.

Through the HR/Payroll training, employees will become familiar with Banner forms, how they are named and with the different components that make up each form. This training will also provide the information and practice needed to accurately navigate through Banner INB.

The purchasing process at the U of M will be fully automated through Tigerbuy, the University's eProcurement and online marketplace system. This system is expected to be implemented by the summer of 2007. Training for employees responsible for ordering goods and services will begin this spring. With this system, users will have one-stop shopping for all purchases through the Internet and will receive automatic e-mails regarding the status of requisitions and orders. Purchases will also download directly into the Banner database. Tigerbuy supports browsing and direct comparisons of products, services, vendors and prices in a shopping cart while maximizing purchasing power, reducing transaction costs and increasing process efficiencies.

The Budget Revisions session teaches users how to review their financial data online as well as modifying and approving current budgets.

U of M employees can also learn how to complete travel purchase orders through the Banner system while being introduced to the Self Service module. In this session, users will receive hands-on experience of creating and approving travel purchase orders along with reviewing current travel policies and FOAPAL.

Participants in Web Time Entry training will learn to log into the Spectrum Portal and identify Portal channels. Users will be taught how to enter time for bi-weekly employees and enter leave for monthly employees. The session will also provide information on how to approve time and leave as a proxy or superuser.

In order to register for the Banner to Excel Reports training session, users must already be actively using SSB/INB. The goal from the session is to teach employees how to extract information from the Banner system and import the information into Excel to create or update customizable reports.

To register for a session or to just find out more information, visit *http://bf.memphis.edu/spectrum* for Finance and *http://bf.memphis.edu/spectrum/hr/index.php*.

If you have any other questions, contact the Spectrum Helpdesk at 678-8888.

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