

Hobart and William Smith Colleges Delivers Self-Service While Maintaining the Personal Touch



Hobart and William Smith
Colleges
Geneva, NY
www.hws.edu

Industry:

Education & Research

Annual Revenue:

US\$87 million

Employees:

675

Oracle Products & Services:

PeopleSoft Enterprise
Campus Solutions Warehouse
Customer Relationship
Management
Human Capital Management
Financial Management
eProcurement
Oracle Database
Oracle Application Server
Oracle Business Intelligence Suite
Enterprise Edition

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When students choose Hobart and William Smith Colleges (HWS) in Geneva, N.Y., they expect the personalized experience that comes with attending an institution with just more than 2,000 students, but they also want all the latest technology and online tools that students have come to expect of all institutions, no matter the size. As such, the HWS staff is tasked with delivering on that expectation, while working within the means of limited staff and resources.

In 2005, HWS leaders realized that the college’s legacy student information system (SIS) and database were no longer adequate. The system simply did not have the data capacity or functionality the institution required to meet its growing student populations’ needs.

With that in mind, the college embarked on a multiyear project to replace not only its SIS, but all of its enterprise systems—including human resources (HR), financials, and constituent relationship management (CRM), as well as its technology infrastructure. HWS turned to Oracle to meet this demand.

Today, the college has made dramatic improvements in admissions, registration, student records, e-procurement, and its overall technology infrastructure. It is well-positioned to compete for students in today’s tough economic climate and to face future challenges.

“At HWS, we are pulling in students that have the same expectations as those that go to larger institutions with bigger budgets. They are technology natives, and they expect that everything is available at their fingertips, online. They want to do what they want, when they want, not during office hours,” said Jeremy Trumble, director, enterprise solutions, Hobart and

Key Benefits:

- Delivered self-service tools for students, faculty, and staff that make the user experience more convenient and efficient, and improve data accuracy
- Eliminated 90% of manual data entry required for the admission process, saving hundreds of hours
- Supported a complex registration process
- Moved almost all of the college's 10,000 vendors onto an electronic procurement system
- Ensured system uptime with server virtualization and more Web servers

William Smith Colleges. “Oracle’s PeopleSoft Enterprise applications help us to make this a reality.”

Delivering User-Friendly Self-Service Tools

With PeopleSoft Enterprise Campus Solutions’ self-service tools, students now have access to a variety of activities in the online student center. This has delivered numerous results for the institution from simply reducing errors and data entry by enabling students to update their information online to streamlining previously manual processes such as admissions and registration.

“Our mantra throughout the implementation was that we want students to be online, not in line. With the self-service tools available via PeopleSoft Enterprise applications, the lines have diminished significantly. From a business perspective, we are able to concentrate more on service delivery, rather than manual processes, so we are able to be more strategic about how we interact with our constituents,” Trumble said.

Faculty also benefit from the “online, not in line” mantra at HWS. Prior to the implementation, faculty members often had to wait in line to drop off grades. Now, with the self-service faculty center, they can input them at anytime, from anywhere. This has significantly increased the number of faculty who enter grades on time, which, in the past, was very low.

While the self-service tools are in high demand and improve efficiency, the HWS staff has to ensure they protect the person-to-person relationship and contact that students expect. The PeopleSoft applications give them the flexibility to “insert people” into the process when they want to. For example, during the registration process, students are still required to meet in person with their faculty advisor before they can register online.

Streamlining Admissions

In the admissions process, PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Customer Relationship Management have proven invaluable in enabling HWS to capture more information about prospective students and then personalize communications with them to meet their needs and see them through the application process, and ultimately through to registration.

“Prior to PeopleSoft, when I wanted to know anything about the class, or the applicant pool, I had to make a request to one staff member in IT support who would have to create a manual report. Three days later, I would get it. By that time, the class had changed dramatically already. Today, I have a dashboard that I can check every morning to view up-to-the-minute information.”

John Young
 Director of Admissions
 Hobart and William
 Smith Colleges

Each year, HWS processes between 4,500 and 5,000 student applications. Prior to implementing PeopleSoft, each data element had to be entered manually.

Today, 90% of applications are completed online, with the data feeding directly into the admissions database—eliminating hundreds of hours of manual data entry and improving the application accuracy. This frees up admissions staff to spend more time meeting and talking with students personally or working on strategic planning.

Another valuable feature is the ability for the admissions staff to track where they stand and how they are progressing towards goals by reporting on timely data from the PeopleSoft Enterprise Campus Solutions Warehouse, from any location, thanks to the Web-based tools available via PeopleSoft Enterprise Performance Management and Oracle Business Intelligence Suite Enterprise Edition.

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The project also enabled HWS to take a closer look at its entire admissions process to make it more standardized and streamlined.

“The implementation made us look at our processes and update or in some cases establish a process to make sure that everyone is on the same page. This was a valuable opportunity for us to improve our processes and train staff,” said Maureen Brown, admissions IT manager, Hobart and William Smith Colleges.

Managing a Complex Registration Process

HWS Registrar, Peter Sarratori, noted numerous improvements in the registration process as well.

“Registration has come a long way with PeopleSoft. Our registration process is complex with a great deal of prerequisites, including multilevel prerequisites, and PeopleSoft can help us

manage the complexity to ensure a smooth registration process,” Sarratori said.

Students benefit from a smoother process with user-friendly tools like the shopping cart feature in Campus Solutions.

“Students love the shopping cart feature because it is almost like running a preregistration, because it checks for conflicts and prerequisites before they actually hit that registration button,” Trumble said.

HWS also has a great deal of students studying abroad anywhere from Italy to France to New Zealand. The online registration features ensure that these students can register on time and get the classes they want.

The college has also integrated its room scheduling system with PeopleSoft Enterprise Campus Solutions to provide seamless visibility to improve classroom utilization.

Another process that is easier for students and staff is the unofficial transcript request. Previously, this required students to come in to the Registrar’s office and wait in line. Now they can request a transcript instantly online.

Reporting time has also decreased significantly. In the past, it took the Registrar two days working with a report writer to pull together the “14-day report” on enrollment and retention. Now, the Registrar can complete this report in less than one hour. Then, student financials runs the same query on the reconciliation side to make sure students are billed accurately.

“The manager of student financials called me this year and said as soon as their 14-day report was done, he had the billing ready 10 minutes later. This used to take about a week,” said Faye Stowell, senior solutions analyst, Hobart and William Smith Colleges.

Also, the Registrar’s office has created five new standard reports that faculty can quickly run whenever they want to view status updates during enrollment, such as section status summaries. In addition, the easy tools within PeopleSoft to write and build queries enable staff to quickly pull custom reports.

Flexibility is another key benefit when it comes to managing the college’s complex registration process. As the Registrar works with the Dean’s office and the Provost’s office to review and consider changes for the registration process, the IT staff knows it does not have to worry about making code changes, but instead

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the Registrar’s office can simply make configurations to the application on its end.

Moving Procurement Online

In addition to improving student services, HWS has streamlined its financial and HR processes—including payroll—to make the institution more operationally efficient. The college has made significant strides with e-procurement.

“We process more than 200 purchase orders worth more than \$340,000 in an average month. Our old purchasing process was what we call the ‘sneaker’ process, meaning people were physically running pieces of paper to the Business Office to wait for a type-written purchase order to authorize purchases. This simply was not sustainable,” Stowell said.

Today, the college manages almost all of its more than 10,000 vendors via the electronic procurement system, which has resulted in significant efficiencies.

Ensuring System Uptime and Performance

HWS has dramatically improved its technology infrastructure as well. With its old system, the server literally lived in one of the cubicles in the IT office. Today, the college has a secure data center and uses server virtualization to cut its physical server requirements.

To keep its systems running at a high performance, even during peak times, the college has added application servers to support key processes, such as registration.

“Initially for registration we started with one application server, and we saw it was being taxed too much, so we added more application servers without much effort. I cannot imagine how we would have been able to do that in the old system. Now we have four servers just for registration. Otherwise, they are not really used, but we can quickly switch them on using the virtual servers, when needed,” said Krishna Kanuri, IT services, Hobart and William Smith Colleges.

The new system also boasts dramatically improved integrations between applications that have streamlined key business processes. For example, integrations between admissions and registration processes have eliminated lags that previously existed between when students enrolled and when the Registrar’s office received their information.

“Now, the second that we change someone to a matriculated student, off they can go, on their way to register. It has made our life much simpler,” Young said.

Why Oracle?

When HWS realized it needed to replace its legacy system, the staff knew it needed something drastically different.

“There is an analogy we like to use when talking about the project. Our old student services software and database was like the old, reliable Volkswagen Bug that got us around, but we had outgrown it. We needed more space. We needed the SUV, so to speak,” Young said.

He explained that the college was not only limited in terms of the amount of data it could collect, but had also become stagnant as far as ways of thinking about processes and efficiency.

“The PeopleSoft applications seemed perfect for our needs and for really giving us the opportunity to rethink our approach. Not only was there tons of capacity in terms data storage, but it really pushed us and prompted us to look at how we did things, and that has been a huge benefit to all of us,” Young said.

Also, due to its limited IT staff and resources, HWS needed an application with robust out-of-the-box features that the college could easily build its processes around without much customization.

Trumble added that, compared to other enterprise software vendors, the college felt Oracle was “better positioned long-term for the environment from a technology perspective and from a functionality perspective in the sense that the technologies that Oracle develops would put Hobart and William Smith Colleges in a better place to evolve and change as the higher education landscape continues to evolve and change.”

Implementation Process

HWS began the implementation planning in 2005 and brought on its implementation partner and selected Oracle’s PeopleSoft Enterprise application via a detailed request-for-proposals process in 2006. The college then began rolling out the applications, starting with CRM and the student system and then moving on the HR and finance, throughout 2007 and 2008. The major go-live took place in June 2008, and the final rollout of registration wrapped up the project in November 2008.

Throughout the implementation, the college used Oracle User Productivity Kit to train users and ensure user uptake. For example, during the e-procurement implementation, HWS set up a series of focus groups with users from across the campus with a history of high purchasing volumes. The staff trained these users with materials designed in Oracle User Productivity Kit and secured their insight to refine the process. Staff then followed up with open-door sessions in the PeopleSoft learning center. This helped ensure that all users got up-to-speed quickly and took full advantage of the efficiencies the system offered.

Oracle User Productivity Kit was also useful in training students and faculty, particularly around the registration and online grading processes. The staff created tutorials that are available for students and faculty to review at any time.

Today, the college is in “operationalization mode,” with the project team getting the various users comfortable with the system, standardizing processes, and beginning to look at future improvements.

“There are certainly some areas within each of the applications where we are continuing to implement functionality that we had hoped to implement during our go-live, but for the most part, it has been just learning to live in our new environment,” Trumble said.

He added that the college is now looking at how to upgrade or implement new bundles over the next six to eight months to keep each of the applications current. It also continues to improve integrations between third-party systems, such as housing, library, and bookstore systems.

Advice from Hobart and William Smith Colleges

- Support from both the top down and bottom up is very important. Be sure to keep faculty and staff informed at each step and, for senior staff, demonstrate the business value of the project.
- Be careful to avoid getting “buried in the weeds.” It is important to constantly remind yourselves where the value comes in.
- Interdepartmental coordination is vital. Meet frequently with your implementation team, which should include representatives from various business offices.

- Try to keep the implementation as vanilla or baseline as possible. We had a review committee that had to approve all customizations, which ultimately cut down on the customizations.
- Do not try to go it alone. We found the experience of talking with other institutions through the higher education user group, and the help of our implementation partner, invaluable.
- Take advantage of nonproduction environments for development, testing, and training.

Hobart and William Smith Colleges is an undergraduate liberal arts institution in Geneva, N.Y. Founded as Hobart College in 1822 and William Smith College in 1908, the colleges eventually merged, and today the institution serves more than 2,000 students on its 188-acre campus on Seneca Lake.