Realizing UAB’s vision for a new system has been a long journey, involving multiple starts, stops and detours along the way. But soon, most of the administrative systems that we have grown to love, hate or simply rely upon will be replaced by state-of-the-art technology. HURS, PAPS, EFS and FAS transactions all will be handled through the new Oracle Administrative System (OAS). STARS may be slated for replacement in the future, but for now the student system will remain.

In August 2001, with its formal project kick-off, UAB reached the first milestone toward the goal of implementing a new administrative system. For those UAB employees chosen as project team members, STEPS Reps, or members of oversight committees, the formation of the Strategic Enterprise Planning Solution (STEPS) Project represented more than just an extension along the path to the target destination. The STEPS Project offered an exciting and challenging expedition into the unknown. Like all explorers seeking to conquer fairly unfamiliar terrain, it has been a project of discovery with many creative outcomes.

An element of discovery at the beginning of the project involved the way in which processes were handled within the new system. UAB’s legacy systems are more sophisticated than its users realized. To maintain that level of functionality, the team soon recognized that the Oracle software needed to be customized. The magnitude of the customizations required a longer timeline for implementation, but the goal of meeting the users’ needs outweighed the desire for earlier implementation. UAB’s vision for a new administrative computing system will soon become a reality for UAB employees.

This publication provides the UAB community with information about the new system and guidelines for preparing for the transition. Keep it for future reference.

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**Benefits of the Oracle System**

- System is Web-enabled
  - Users can get to Oracle from anywhere they can access the Internet
- More information on line
  - Eliminates need for a programmer or other middle person
- Better reporting capability
  - Integrated data and an Excel-like reporting tool makes customized reporting possible
- Enhanced data integrity
  - Data is entered into the Oracle tables only once, reducing errors and simplifying data updates
- Flexible workflow
  - System is built on customizable business rules
- Increased future capability
  - Oracle is state-of-the-art technology and provides UAB with significant system-expansion capabilities.

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**Details about the STEPS Project**

[http://www.uab.edu/it/steps] or e-mail [steps@uab.edu]
Human Resource Management (HR)

After July 1, 2003, all HR transactions will be handled using the new Oracle system. After the transfer, Oracle end-users will begin their individual journeys with a new tool that will cause administrative tasks to be handled differently. (A description of the support that will be available is on page 4.)

As an example of the changes you will encounter, instead of filling out turn-around documents on electronic or paper forms, administrators will enter the information directly into Oracle-HR using the ACT Form. ACT stands for Appointments, Changes and Terminations. An automatic, on-line approval process called Workflow is built into the new system to provide electronic routing and work queues. E-mail messages and notices will alert users to actions required for approvals, incoming reports and informational messages. Effort-reporting transactions also will be handled on line.

In addition to doing away with paper for data input, reports no longer will be mailed to end-users but will be distributed electronically. Users with more advanced skills will be able to create their own customized reports. A reporting tool called KBACE will be used to make this happen.

Self-Service HR is a new feature that is not available in HURS. Oracle offers end-users the ability to update personal contact information such as name and address or update W4 forms and on-line banking information from the computer desktop. Also, the use of employee numbers will replace Social Security numbers for identifying UAB employees.

Finance (FN)

On Oct. 6, 2003, three months following the implementation of Oracle-HR, another leg of the journey toward an integrated administrative system begins with the delivery of Oracle-Finance. Implementation of the Oracle General Ledger and Grants Accounting modules will introduce changes in the account string and format and changes in the transactions used for financial processing at UAB. This change affects all reports and interfaces for Finance modules and any system that uses the new account strings.

For Accounts Payable, a new Oracle customization will replace the current Check Request application that handles non-purchase-order expenditures, and in the Oracle Purchasing module users will have easier access to more purchase-order information.

Accounting for Grants also will be quite different in Oracle. Features of the Grants Accounting module include a work-breakdown structure based on Project, Task and Award. The Project segment of this feature can be used to bundle multiple tasks and awards. The Task element similarly is used to bind together scope accounts and sub-contracts, and the Award component can track the funding from sponsored awards. Today, the sponsored accounts-receivable process is manual—handled solely through a paper process. In Oracle-Finance, much more detailed sponsor-invoicing information for Grants and Contracts will be entered and accessible on line.

There also will be changes in the way in which requisitions are handled. Users will enter all requisitions on line.

The Oracle-Finance system will not be available until October; it is still in the design stage. Additional information will be published about the features of the new system in upcoming Reporter articles.
THE 5 STEPS TO STEPS

Getting ready for change

1 Have the right hardware
To ensure that your computer will support Oracle, check our Web site [http://www.uab.edu/it/steps], click on Getting Ready For Change and follow the links.

2 Have the right software
The STEPS Project Web site provides the information on basic system software required to support Oracle on PCs. Internet Explorer and Netscape browsers may be used. Please see the Web site for details. Additionally, most end-users will need Oracle J-Initiator, and users who create ad hoc reports will need to have the KBACE Report tool installed. The installation of KBACE will use a phased approach, whereby those who create the largest number of ad hoc reports will have access to the tool at Go-Live, and others will be added in the following months. For most systems J-Initiator will be installed automatically the first time you log into STEPS. The AskIT Help Desk will work with your department to ensure that end-users have the right software to support Oracle before transitioning to the new system.

3 Have a BlazerID
To log in to the Oracle system, every end-user must have a BlazerID. A BlazerID is a computer login that UAB is deploying campuswide. A number of network and computer services around UAB accept or require a Blazer ID for login, and several more will begin using it in the future. Obtaining a BlazerID now will help you avoid the last-minute rush when the system goes live. When you obtain the BlazerID, confirm that you also have a strong (8-16-digit) alphanumeric password.

4 Have one or more Oracle responsibilities
The term responsibility refers to specified sets of data, menus and forms that are mapped to job roles. Responsibilities are related to data security and are linked to the organizational hierarchy. Through the assignment of responsibilities, end-users will be provided the appropriate access to their department’s information. Responsibilities for departmental and Central Administration roles across the institution have been defined. A coordinator from each school or department will work with The University Computer Center (TUCC) to set up end-users in the Oracle system based on their responsibilities.

5 Have the skills you need
With Oracle, administrators will do their jobs differently, and everyone will need training in Oracle areas of responsibility. Since the level of computer knowledge varies among users across the institution, UAB Training and Development is offering basic, intermediate and advanced computer-skills training. Below is a guideline to help you decide the training you should consider taking prior to learning Oracle-HR. Go to [http://www.hr.uab.edu/Training&Development] to enroll.

Differences in system platforms
Oracle is classified as an integrated Enterprise Resource Planning (ERP) solution that is built on a Web-enabled, client/server platform. The Oracle program runs on a large UNIX box and the databases and application are accessible by users through an Internet browser on PCs using software such as Windows or MAC OS. The current legacy systems contain customized programs running on IMS databases stored on mainframe computers.
UAB Training and Development is offering basic, intermediate and advanced computer-skills training. Below is a guideline to help you decide the training you should consider taking prior to learning Oracle-HR.

Go to [http://www.hrm.uab.edu/Training&Development] to enroll.

### IF YOU...

Handle human resource tasks such as turn-around documents, timesheets, etc., using paper forms and have little or no computer experience

### YOU SHOULD TAKE...

- Intro. To Computers
- Internet Basics
- Outlook e-mail
- Excel Basics

### IF YOU...

Handle human resource tasks such as turn-around documents, timesheets, etc., using electronic forms and are proficient in the basic computer skills as noted above

### YOU SHOULD TAKE...

- Excel Intermediate
- Access Basics

Except for navigation training, your Access and Training coordinator (ATA) will assign a time for you to attend training sessions. For your information, below is the tentative training schedule, which is subject to modification. If you have not taken navigation training, please enroll now [http://www.hrm.uab.edu/oracletraining].

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**Oracle Departmental Training At A Glance**

<table>
<thead>
<tr>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Navigation Training</strong></td>
<td>8 hours</td>
<td>Instructor-led, online</td>
<td>1000</td>
<td></td>
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<tr>
<td><strong>ACT Form Training</strong></td>
<td>8 hours</td>
<td>Instructor-led, online</td>
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<tr>
<td><strong>Overview of Finance</strong></td>
<td>4 hours</td>
<td>Auditorium style, online</td>
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<td><strong>General Ledger</strong></td>
<td>8 hours</td>
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<td>700</td>
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<tr>
<td><strong>Requisitions</strong></td>
<td>700</td>
<td>Train-trainer, online, videos</td>
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</table>

**Audience:**
- Everyone using the new Oracle System except Self-Service Users Only
- HURS and Turn Around Document Users Note: Special 2-Hr Session for VPs/Deans
- GL/GA Users
- Initiators/ Approvers of PO Requisitions
- Initiators/ Approvers of PO Requisitions
- Workflow Officers
-飲酒者

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**CLASSES:**

- **Oracle Navigation** - Now in Progress – This is an open enrollment course. Teaches end-users how to maneuver through the Oracle screens. You will need this class prior to taking all Oracle classes except HR Self-Service, so please sign up now.
- **ACT Form** – The main HR form used to appoint, change and terminate employees
- **TEL** – The payroll application for bi-weekly employees. Demos will be provided with detailed training for each school/department’s Train-The-Trainer program.
- **Overview of Finance** – Teaches the account string structure
- **KBACE** – Demonstrates use of UAB’s ad hoc reporting tool
- **Requisitions** – For initiators and approvers of PO requisitions
- **Grants Accounting (GA) and General Ledger (GL)** – For end-users with these responsibilities. GA includes Effort Report Certifications
- **Self Service HR** – For updating certain personal information on line. This course will be taught in New Employee Orientation, on line and through Train-the-Trainer process.