

Let's Play Nice Together: Strategies for Welcoming and Integrating Members into Your SAS® User Environment

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Abstract

Each member of your SAS user staff brings a different level of experience and expertise to the workplace. New and less experienced users need a lot of help, training, and support. Seasoned SAS users and programmers need to be shielded from constant interruptions and requests for SAS help from all manner of other users. Every SAS user can benefit from sharing technical information, programming tips, and commonly used code within an organization. This paper describes a case study of how a small SAS user group within a larger corporate structure came together to identify their pockets of need and create and grow a SAS user support system for themselves.

Introduction

The goal of this paper is to describe the SAS user environment of a survey research data management unit within a larger corporate structure, and to detail the ways in which they came together to support themselves. From a small team of core SAS programmers, the unit grew into a staff of SAS users and programmers; they fostered and developed their own SAS user support group, and put into place protocols for integrating new users hired into the group. The outcome is a new SAS user who is quickly equipped with resident knowledge and tools to become a productive member of their team.

How It Was

Within the overall corporate structure at Abt Associates, Inc. is The Survey Group whose primary function is to implement survey research data collection projects for various clients, both internal and external. While the main office resides in Cambridge, MA, the Chicago satellite office is the location of a large telephone operations center, and thus, the center for all data collection efforts for the entire group.

Opened in 1992, the Chicago office was, for the first five years, primarily engaged in one large, multi-year government contract. There was a staff of eight application programmers using Clipper exclusively. There were four SAS programmers whose function was to extract data from Clipper databases, clean and edit data, produce files for delivery to the client, and run ad-hoc analysis for project directors. With all SAS users engaged in the same activities on the same project there was little need for extensive support.

Even though company-wide Abt Associates, Inc., was a 'SAS shop', Chicago SAS programmers rarely utilized any remote corporate SAS resources. In addition, the local IT staff was not SAS savvy, as often is the case. In their paper, *"Integrating SAS in Corporate IT"*, LaBore and Burger pose the question,

answer of 'very few' or 'none' decreases the probability that anyone in the IT organization has *experience* with the SAS system. "

SAS users were not allowed to run on the network, being told that "SAS uses too many network resources". SAS was only installed locally on users' machines. Each year they passed around the diskette with the new SETINIT. While this approach to the work suited the extant project, there was no SAS knowledge outside the small group of programmers, little motivation to improve skills, and support was primitive at best.

The Need Grows, The Staff Grows

The next few years marked fast growth in the Survey Group. More and varied projects were won and gradually the work mix changed from a front-end focus to a back-end focus, with new projects needing less application programming and more data processing, data manipulation, data management, and analysis. The work load became too much for the small number of SAS programmers already on staff.

The different projects began to hire their own SAS programmers and analysts who would need to use SAS to get their job done. Each project independently hired their own programmers and analysts. Because there are few academic programs that specialize in survey research, job-seekers in this industry usually don't develop the optimal skill set. The corporate hiring policy is to recruit bright college graduates from the social sciences and train them on site. Within 18 months SAS user staff increased from the original four to twelve, across all projects. Most of the new hires were also new SAS users.

Some of the new staff had SPSS® knowledge. Some had experience with SAS in an academic setting – often limited to running PROC REG in statistics class on a 'clean' data set given to them by the instructor. The growing pains were getting obvious, new staff needed to get up to speed. Some projects had funding to send new staff to SAS training, others did not. Often it took a week to get SAS software loaded on the machine of a new staff member. Any manuals that existed were scattered between the various project offices. Basically, there was no structured support, so users sought help where they could find it.

This influx of new SAS users posed quite a challenge to the experienced SAS staffers. Each project's staff was focused on their own data, their file specifications, their needs, their methods, their deadlines. It was well known who were the experienced SAS programmers able to provide basic knowledge and programming help. Very quickly, the same few people became the *go-to person* for SAS help. These disruptions could last from a few minutes to much longer, depending on the task and the users' level of SAS knowledge. In addition, users from different projects generally did not share knowledge due to the organizational structure of the work area. This led to many of the same

"How many staff in your IT organization have a scientific or applied academic background? An

types of questions and problems coming from many different people. Soon, the constant interruptions, duplication of effort, and increasing number of new users forced the core group of SAS programmers to look for a solution.

Modest Beginnings of User Support

By approaching the other experienced SAS users with the problem of *too many new users* and *too many interruptions for help*, they were convinced to be available on a rotating basis for questions from other less experienced users, in effect to spread the need for help around to more than just two people. Our goal was to benefit the new users and also to help ourselves, create a win-win situation.

We agreed that by imparting solid, basic skills and teaching them how to learn and apply SAS to their own work, the need for help and daily interruptions would eventually decrease. By taking the time to help new staff learn more about what they need to know to do their job and function in our environment (the network, file structures, data standards, programming standards) we would all benefit in the long run. Spreading the support tasks around gave each of us a break and fostered better interaction with help-seekers, who were often hesitant to “go back to the same person for help all the time”. Being more engaged in mentoring, we would be able to determine which junior staff would benefit from formal SAS training, and help their managers evaluate progress and skill acquisition. We called it our Peer-to-Peer SAS Help Desk.

Using an electronic bulletin board on our internal Lotus cc:mail system, it began with posting a simple calendar of who was the assigned *SAS Help Desk Person* for a two week time slot. A primary and a back-up person were assigned. As with all new system implementation, we struggled to keep interest high and the system on track. The word spread about the new help desk system and the help desk staff was encouraged to be firm about directing help-seekers to the current person of the week.

The next obvious step was to formalize the new system and let all SAS users know of its existence. A lunch hour meeting was scheduled and SAS users of any level from any project were invited. We described the details of our help desk plan and distributed the first month's calendar. The plan was welcomed and very well received. Who would turn down help? Our Peer-to-Peer SAS Help Desk started to work.

Give Us More!

In talking to help desk people and gathering information about common questions or problems posed, some universal issues emerged. We moved to the next step – regular, informal meetings, which we called SAS brown-bag lunches, where we would present a short tutorial on a subject of interest to all our novice users. These announcements were posted to the bulletin board area along with the help desk schedule. Presentations are similar to the kinds of things you would find in the **Coder's Corner** or **Beginning Tutorials** but focused on the type of work we do, with real project examples. Some past presentations have included topics like “Updating and Merging”, “The Format Library”, “Moving to SAS V8”. and “Efficient Programming Tips”.

These monthly gatherings, which still continue today, were the spark that was needed to launch our group. Simply

networking with other SAS users in an informal setting opened up the junior staff to the potential for using SAS. They discovered that problems encountered every day were shared by other staff with similar challenges who had already developed working solutions. They were not intimidated and thus able to ask that *‘stupid question they are sure everyone knows but them’*. Everyone learned something.

SAS users started to talk to each other. By sharing information and experience, the real power of The SAS System could be applied to their project work, often transforming a disjointed task using two or more software packages into a cohesive data processing system, which reduced time and resources. Momentum was building; immediate benefits realized.

Seasoned SAS programmers started to share tips and tools.

Due to the lunch groups, SAS users across all projects now understood what others were working on. They started to **help each other** and help desk duty became very light. This was the original goal – to make them self-sufficient. The first area-wide project was a shared format library stored in a central location on the network. Everyone was able to benefit by pooling resources to eliminate a repetitive task.

Welcome New Users

We were on our way. The area grew with more new SAS users, more work. To get new users up to speed fast we developed a 2-hour “SAS 101” seminar, which was given to a class of 8 new users and other interested parties. The SAS seminar assumed no knowledge of SAS and covered such basic topics as:

- ◆ General overview of the program and options
- ◆ Introduction to PROGRAM EDITOR, LOG, and OUTPUT windows
- ◆ The elements and purpose of the DATA step
- ◆ The elements and purpose of the PROC step
- ◆ How to read in an external text file containing data
- ◆ How to write a simple program in the PROGRAM EDITOR window
- ◆ How to read an existing SAS data set and output reports
- ◆ How to import data from other software into SAS and output reports

This class material is now permanently resident on our network and is rolled out for all new users. New employees who are not novice SAS users are invited to monthly meetings, briefed on using SAS in our network environment, and assigned a ‘buddy’ to guide them through the first few weeks.

Tie It All Together

We needed a central place where all the support resources we had developed would be easy to access. We migrated from the mail bulletin board to our corporate intranet. This is the newest piece in our suite of home-grown SAS user support modules. Functional but still under construction, our web site has these features:

- ◆ Link to SAS Institute's Knowledge Base and Technical Help
- ◆ On-Line SAS V8 Help Documentation

- ◆ Listing of all titles in our SAS Manual library, including Books by Users
- ◆ SAS 101 Seminar Materials
- ◆ Especially useful papers from SUGI 24, 25 and 26 proceedings
- ◆ Monthly meeting and topics schedule
- ◆ Material from topics presented at past monthly meetings
- ◆ Peer-to-Peer Help Desk monthly schedule
- ◆ Information about how to apply for SAS Institute training classes
- ◆ Information on local and national SUG conferences

Outcomes and Lessons Learned

To date, many benefits have been realized by SAS users and the corporate area in general. Most importantly, management now has a better understanding of the power of The SAS System and fosters our local support efforts. Corporate IT has become more sophisticated - SAS now runs from a network NT server, and the standard desktop configuration for a programmer or analyst includes SAS. With structured on-site support in place, new users and new employees are more productive, faster. All staff capabilities are known between users and projects, which contributes to better-fit for task assignments; now there is more balance in the work load across all SAS users. Users and projects share code, often SAS programmers are shared across projects, taking advantage of existing skill, and reducing start-up time. New staff, fully supported, seek more challenging project assignments. Our local support efforts have fostered an open atmosphere of information sharing and technical skill dissemination. Released from the onslaught of new-user-questions all day, staff are motivated to be innovative, and to improve their SAS knowledge and skills.

Plans for the Future

At press time, the survey group in Chicago had 21 SAS users and programmers. Future activities include plans to liaison with corporate management to facilitate more SAS users' (not just SAS programmers) attendance at local and national SUG conferences; encourage all SAS users to attend and participate (by presenting or volunteering) in local and national SUG conferences; invite SAS users corporate-wide to participate in our brown bag lunch meetings; promote formal SAS training and develop corporate protocols to facilitate registration.

Finally, we all continue to encourage users to share in and benefit from our collective SAS knowledge.

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