Student Services Transformation (SST) Update

Faculty Senate
April 6, 2010

Agenda

1. Background
2. Timeline and Status
3. Some Benefits of the New System
4. Some Concerns about the New System
5. System Preview
6. Preparing for Change
Current operations tend to be in a mode of crisis management, rather than strategic planning.

Goals

- Improve service
- Manage institutional risk
- Ensure consistency between policy and practice
- Extend real-time access to integrated systems and data
- Implement a more flexible system
  - Current institutional needs
  - Planned institutional growth
**Scope: What’s in?**

- Academic Advising (Degree Audit)
- Admissions
- Financial Aid
- Student Financials
- Student Records
- Upgrade MyUB
- Upgrade to Scheduling (R25 and Schedule 25)
- Upgrade to GrAdMIT
- On-Line Training Tutorials (UPK)
- Document Management System
- Electronic Payment
- Data Warehouse
- Interfaces for enterprise systems

**Student Systems Assessment**

- Launched Spring 2007
- Project Teams formed
- External consultants hired
- Surveys and workshops held to:
  - Understand business processes and needs
  - Assess current system
- Identified opportunities to improve policies and procedures
- Assessed ERP options - selected PeopleSoft Campus Solutions
Guiding Principles

- Campus stakeholders need electronic access to real-time data, eliminating need for “shadow systems”
- **Provide outstanding customer service for every student-related process**
- Capture data **once**, then share campus-wide
- Use data & effective reports to drive decisions
- Develop common student processes, while supporting unique and compelling needs of schools
- Keep system customization to an absolute minimum
- Maximize **self-service** functionality

Guiding Principles

- Establish/utilize decision due dates to keep the project implementation on-time, and on-budget
- Project team work will be collaborative & “sil-o-free”
- **Campus stakeholders will be engaged in ongoing, two-way communication opportunities**
- Participation/engagement is expected, non-responsiveness implies agreement
- All student system-related changes/purchases must be CIO-approved
Governance

- Executive Steering Committee
- Project Directors Team
- Project Management Team
- Core Project Team
- Advisory Groups:
  - Campus Community Advisory Group
  - Data Access Advisory Group
  - Directors Advisory Group
  - Faculty Advisory Group
  - Student Advisory Group
- [http://www.buffalo.edu/ub2020/sst/membership.html](http://www.buffalo.edu/ub2020/sst/membership.html)

Campus-Wide Commitment

Core Project Team includes representation from:

- Academic Planning and Budget
- Academic Processing Services
- Academic Services, CIO Operations
- Administrative Computing Services
- College of Arts and Sciences
- Division of Athletics
- Enterprise Infrastructure Services
- Financial Aid
- Financial Processing Services
- Graduate Enrollment Management Svs.
- Graduate School of Education
- Graduate School Student Services
- International Education
- School of Dental Medicine
- School of Law
- School of Medicine and Biomedical Sciences
- School of Nursing
- School of Pharmacy & Pharmaceutical Sciences
- School of Social Work
- Student Academic Records and Financial Svcs.
- Student Advising Services
- Undergraduate Admissions
- University Communications
- Vice Provost of Undergraduate Education
**UB 2020** A collaborative future in progress.

**Student Services Transformation**

**Incremental Prototyping Methodology**
Expanding Functionality Incrementally

*User's knowledge expands as the system functionality expands*

- **Discovery**
  - Project Charter
  - Fit/Gap Sessions
  - Project Planning

- **Configuration**
  - Base Table Build
  - Basic Conversions
  - Model Tests

- **Complex Extensions**
  - Workflow
  - Complex Enhancements
  - Model Tests

- **Environment Adaptations**
  - Reports
  - Interfaces
  - Model Tests

- **Deployment**
  - User Training
  - Production Readiness
  - Parallel Testing
  - Go Live Support

**Timeline**
- Core Configuration began January 2009; Completed January 2010
- Complex Extensions and Environmental Adaptations began July 2009
- Go Live dates for the **Summer 2011 semester**: 

<table>
<thead>
<tr>
<th>Go Live</th>
<th>Functionality</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>Student Records - Course Catalog</td>
<td>February 2010</td>
</tr>
<tr>
<td>#2</td>
<td>Campus Community, Admissions, Student Records - Schedule of Classes, Portal</td>
<td>August 2010</td>
</tr>
<tr>
<td>#3</td>
<td>Financial Aid</td>
<td>February 2011</td>
</tr>
<tr>
<td>#4</td>
<td>Student Records-Registration</td>
<td>March 2011</td>
</tr>
<tr>
<td>#5</td>
<td>Student Financials</td>
<td>May 2011</td>
</tr>
<tr>
<td>#6</td>
<td>All remaining Student Records items and Academic Advising/Degree Audit</td>
<td>July 2011</td>
</tr>
</tbody>
</table>
## Detailed Timeline

### Student Records
- **Course Catalog** - Central Scheduling only Ahead of schedule and under budget  
  - **February 2010**
- **Schedule of Classes** - Department Schedulers  
  - **August 2010**

### Portal
- **Look and feel updates** - Students, Faculty and Staff  
  - **May 2010**

### Admissions
- **Applications for Summer and Fall 2011**  
  - **August 2010**

### Portal & Campus Community
- **MyUB: Biographic and demographic information for Summer and Fall 2011 incoming students**  
  - **August 2010**

### Financial Aid
- **ISIR Loads** - Summer and Fall 2011  
  - **January 2011**

### Academic Advising
- **Degree audit reports for Fall 2011 incoming undergraduate transfer students**  
  - **January 2011**

### Admissions
- **Decision processing for Summer and Fall 2011 applicants**  
  - **January 2011**
- **Matriculate students**  
  - **March 2011**

### Campus Community
- **New Student Information System becomes system of record for all UB students**  
  - **March 2011**

### Portal
- **Updates to MyUB for all Faculty, Staff, and Students**  
  - **March 2011**

### Financial Aid
- **Packaging for Summer and Fall 2011**  
  - **March 2011**

### Student Records
- **Registration for Summer and Fall 2011**  
  - **March 2011**

### Student Financials
- **Cashiering; refunding; tuition calculation; and self-service**  
  - **May 2011**
## Detailed Timeline

<table>
<thead>
<tr>
<th>Financial Aid</th>
<th>Direct Loan processing</th>
<th>June 2011</th>
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</thead>
<tbody>
<tr>
<td>Student Financials</td>
<td>Billing for Summer 2011; Late fee processing</td>
<td>June 2011</td>
</tr>
<tr>
<td>Student Records</td>
<td>Grade entry and grade posting; transcript generation; end of term processing</td>
<td>June 2011</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Disbursement of Summer 2011 aid</td>
<td>July 2011</td>
</tr>
<tr>
<td>Student Financials</td>
<td>Billing for Fall 2011; Collections</td>
<td>July 2011</td>
</tr>
<tr>
<td>Academic Advising</td>
<td>Degree audit reports for all undergraduate students; some graduate students</td>
<td>July 2011</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Disbursement of Fall 2011 aid; TAP certification</td>
<td>August 2011</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Records</th>
<th>Posting degrees</th>
<th>September 2011</th>
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<tbody>
<tr>
<td>Student Financials</td>
<td>1098T processing</td>
<td>October 2011</td>
</tr>
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</table>
Major Accomplishments

- Discovery Phase Complete
- Core Configuration Complete
- Course Catalog live for course changes and viewing
  - Training materials available at sistraining.buffalo.edu
  - Implemented ahead of schedule
- Document management live for Financial Aid (with legacy)
- Upgrade to ePay live (with legacy)
- Upgrade to scheduling software (R25)
- Identified data warehouse solution
- Implemented software to aid in back-end IT support
- Project currently on time and under budget

Some Benefits of the New System

- Overall - Increased integration
- **Academic Advising**
  - Interactive degree audit
  - Student planner
  - Goal of all undergraduate programs, plans, and sub-plans in the system
- Admissions
  - Application status in self-service
  - Coordination with Financial Aid
  - Track required transcripts for transfer students
  - Checklist for each stage of applicant
Some Benefits of the New System

- **Campus Community** - Available to all areas
  - Increased flexibility of service indicators
  - Checklists
  - Comments field
  - Communications attached to student record
- **Financial Aid**
  - Financial aid self-service on-line, including Checklist items
  - Document imaging and expedited processing
  - Improved compliance
  - Electronic award letters
  - Tools to prevent over-awarding

- **Portal**
  - Gateway to increased self-service
  - Improved/updated user interface
  - Streamlined channels
- **Student Financials**
  - More detailed student account on-line
  - Electronic billing, including international students
  - Automated refunds and direct deposit for 90% of refund types
  - Meets SUNY collection requirements
  - Additional means of collecting via ACH payments
  - Integration with Financial Aid
  - Increased flexibility, including differential tuition
Some Benefits of the New System

- **Student Records**
  - Multiple instructors
  - Unique academic calendars
  - Prerequisite checking
  - Registration features
  - Disallow self-registration for multiple repeats and R grades
  - Improved tracking of student status, including academic standing
  - Classlists in real-time, display Resigns
  - Final exam scheduling

- **Transfer Credit**
  - Prerequisite checking
  - Transfer articulation “locked” until change of major
  - Complete real-time sharing of data

- **Reporting**
  - Increased functionality of the data warehouse
  - More extensive, higher quality data available
  - Ability to leverage existing data/reporting services
Some Concerns about the New System

- Overall - More clicks
- **Academic Advising - Change**
- Admissions
  - International Admissions Database and GrAdMIT
  - Additional steps in processing students admitted to the major
- Campus Community - Need for collaboration, processes, and procedures
- Financial Aid
  - Substantial business process redesign
  - Complexity of processes requires extensive testing
- Portal
  - High level roles
  - Transition period between two systems

Some Concerns about the New System

- **Student Financials** - Business process redesign, including less automation for Student Accounts office processes
- **Student Records**
  - Security and Business Process Redesign
  - INT major changes no longer self-service
- **Transfer Credit**
  - UB’s complex articulation rules
- **Reporting**
  - PeopleSoft terminology, need to understand “new” data
  - Definition of data for UB’s needs
  - Reports will need to be rebuilt
Intro to the New UB Student Information System

- Terminology
  - Divisions are careers
  - Majors and minors are plans
  - Concentrations are subplans
  - Semesters are terms
  - Credits are units
  - See list at http://sistraining.buffalo.edu/pdfs/glossary.pdf
Intro to the New UB Student Information System
Change Acceptance vs. Performance Curve

Acceptance vs. Performance Curve:
- Self-Concern
- Desire
- Awareness
- Ability
- Physical Tryout
- Mental Tryout
- Performance Dip
- Future Performance
- Current Performance

Acceptance vs. Ability vs. Performance:
- Self-Concern
- Desire
- Awareness
- Ability
- Performance Dip
- Future Performance
- Current Performance
Communications

- SST This Month Email
  - Project Updates
  - Module Updates
- Reporter and Spectrum Articles
- Specific Go-Live Communications
- SST Website at www.buffalo.edu/ub2020/sst
- Two-Way Communications
  - Change Readiness Assessment Surveys
  - Feedback to us at ub-sst@buffalo.edu
- We would love to present to other groups!

Training

- Materials and sessions developed based on job roles
- For Faculty and Staff:
  - Delivered as close to go-live as possible
  - In-person training sessions
  - Train the Trainer approach
  - For staff, system access will be provided at training session
- For Students, Faculty and Staff
  - On-line interactive training and job aids
  - sistraining.buffalo.edu
- We’re looking for help - Let us know if you are interested!
Faculty Engagement

- Presentations like this one
- Presentations to existing groups
- Faculty Advisory Committee
- Lunch and Learn sessions
- Workshops at critical times
- Suggestions?
See the SST Web site for:

- Guiding Principles
- Project Charter (goals, process, procedures)
- Organization and Governance
- Strategies:
  - Communication
  - Data Access/Reporting
  - Data Conversion
  - Database Instance
  - Organizational Change Management
  - Training
- Communications - Current and Archive
- FAQs

http://www.buffalo.edu/ub2020/sst

Thank you!

Questions and Discussion

We welcome your feedback!
Email us at:
ub-sst@buffalo.edu

http://www.buffalo.edu/ub2020/sst