

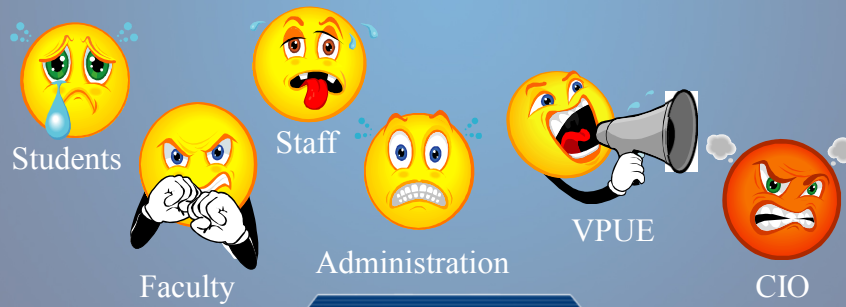
Student Services Transformation (SST) Update

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

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 & “silo-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

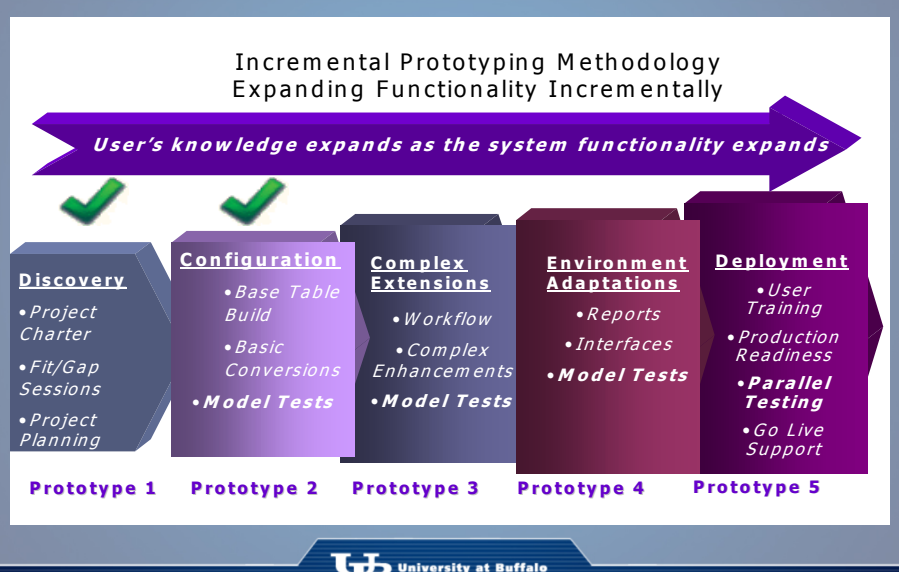
Governance

- 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>

Campus-Wide Commitment

Core Project Team includes representation from:

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



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**:

Go Live #1	Student Records - Course Catalog	February 2010
Go Live #2	Campus Community, Admissions, Student Records - Schedule of Classes, Portal	August 2010
Go Live #3	Financial Aid	February 2011
Go Live #4	Student Records-Registration	March 2011
Go Live #5	Student Financials	May 2011
Go Live #6	All remaining Student Records items and Academic Advising/Degree Audit	July 2011

Student Services Transformation

Detailed Timeline

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



Student Services Transformation

Detailed Timeline

Admissions	Decision processing for Summer and Fall 2011 applicants	January 2011
Admissions	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

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



Detailed Timeline

Student Records	Posting degrees	September 2011
Student Financials	1098T processing	October 2011



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

Some Benefits of the New System

- 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

Some Benefits of the New System

- **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

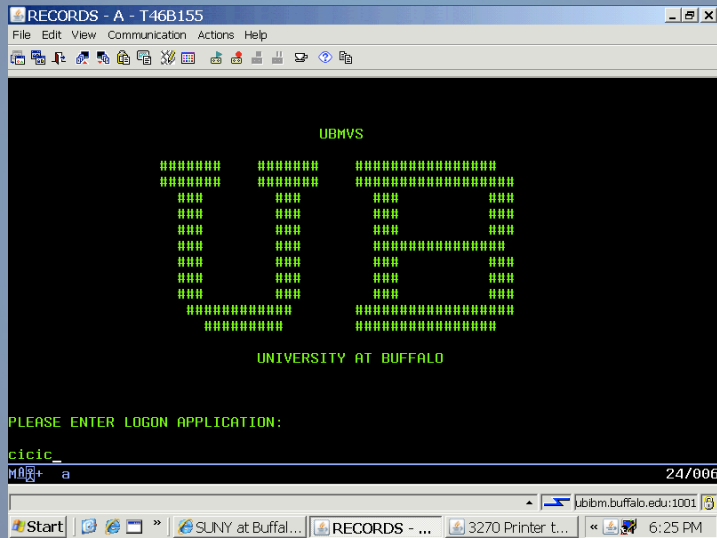
- Overall - More clicks
- **Academic Advising - Change**
- Admissions
 - International Admissions Database and GrAdMIT
 - Additional steps in processing students admitted to the major
- Campus Community - Need for collaboration, processes, and procedures
- Financial Aid
 - Substantial business process 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>



Student Services Transformation

RECORDS - A - T46B155

File Edit View Communication Actions Help

Hello Elizabeth Stone, today is March 15, 2010.

University at Buffalo System Menu Mar 15, 10 - 10:26
Page 1 (more..)

MN

Please select an Option below by number: --

1	Admissions Menu	(IMADM)
2	Course Menu	(MNCRS)
3	Employee	(IMEMP)
4	Entity Menu	(IMENT)
5	Entity System ACA Menu	(MNEAC)
6	Final Exam Schedule Menu	(MNEXM)
7	Grading Menu	(MNGRD)
8	Lookup Table Menu	(MNTBL)
9	Official Transcript System	(MNOFT)
10	Person Audit System	(MNPAT)
11	Person Menu - Auxiliary Access	(MNPAP)
12	Registration Menu	(MNREG)

01=Help 04=Mode 06=Select 07=Up 08=Down 10=MN
11=Clear 12=Exit

MAR 15 2010 05/057

Start | SUNY at Buffal... | RECORDS - ... | 3270 Printer t... | 6:26 PM



Student Services Transformation

Intro to the New UB Student Information System

Base Navigation Page - Windows Internet Explorer

https://se-prod.buffalo.edu/bsp/cn/90prd/EMPLOYEE/HRMS/WEBLIB_PTTP_SC_HOMEPAGE.FieldFormula.IScript_AppF?pt_fname=HCSR_CURRJI

Menu

- My Favorites
- Curriculum Management
 - Course Catalog
 - Enrollment Requirements
 - Set Up SACR
 - Tree Manager
 - Reporting Tools
 - My Personalization
 - My Dictionary
 - Return to MyUB

Course Catalog

Maintain course catalog information.

Browse Catalog Browse the course catalog by subject	Course Catalog Create, view and update courses, course offerings, and course components.	Print Course Catalog Produce the course catalog
Course Equivalencies Define course equivalency groups.	Catalog Summary View course catalog summary information.	Course Catalog Search Review the course catalog



Student Services Transformation

RECORDS - A - T46B155

Please continue processing.
Inquiry List of All Course Sections Mar 15, 10 - 18:27

TLSECCRS

Semester : 1/10
Division : I DIVISION OF UNDERGRADUATE EDUCATION
Department : 0167 ENG ENGLISH
Course No. : 101
Section ID : A 1

S	Reg No	Course No Sec	Title	Days	Time	Frc	Sec	Seats Avail	Instr
-	366192	101 A 1	WRITING 1	LEC M W F	0800 0850	N	0	0	0 STAFF
-	257065	101 B 1	WRITING 1	LEC M W F	0900 0950	N	0	0	0 STAFF
-	435470	101 C 1	WRITING 1	LEC M W F	1000 1050	N	24	24	0 1 WILLIAMS
-	360710	101 C 2	WRITING 1	LEC M W F	1000 1050	N	0	0	0 STAFF
-	031201	101 D 1	WRITING 1	LEC M W F	1100 1150	N	24	24	0 0 HAMPTON,
-	007438	101 E 1	WRITING 1	LEC M W F	1200 1250	N	24	24	0 0 HAMPTON,
-	134396	101 E 2	WRITING 1	LEC M W F	1200 1250	N	0	0	0 STAFF
-	067305	101 F 1	WRITING 1	LEC M W F	1300 1350	N	24	24	0 0 BRESLIN,

01=Help 02=Memo 03=MNSECCRS 04=Mode 06=Select 07=Up
08=Down 10=MNSECCRS 11=Clear 12=Exit

Student Services Transformation

UB University at Buffalo The State University of New York

Home Add to Favorites Sign out

Menu

- Search:
- My Favorites
- Curriculum Management
 - Course Catalog
 - Browse Catalog
 - Course Catalog
 - Print Course Catalog
 - Course Equivalencies
 - Catalog Summary
 - Course Catalog Search
 - Enrollment Requirements
 - Set Up SACR
 - Tree Manager
 - Reporting Tools
 - My Personalization
 - My Dictionary
 - Return to Menu

Course Catalog Search

Catalog Search Results

University at Buffalo | Chemistry [Return to Search](#)

CHE 101 - General Chemistry

Course Detail							
Units	3 units						
Grading Basis	Graded						
Course Components	<table border="1"> <tr> <td>Recitation</td> <td>Required</td> </tr> <tr> <td>Lecture</td> <td>Required</td> </tr> <tr> <td>Laboratory</td> <td>Required</td> </tr> </table>	Recitation	Required	Lecture	Required	Laboratory	Required
Recitation	Required						
Lecture	Required						
Laboratory	Required						

Description

Introduces fundamental concepts of chemistry, and surveys important chemical elements and their compounds. Three hours of lecture plus one four-hour recitation/laboratory period weekly.

[Return to Search](#)

Faculty Schedule

Katie Advise

- Faculty Center
- Advisor Center
- Search
- Learning Management

- my schedule
- class roster
- grade roster
- gradebook
- class assignments

Faculty Center

My Schedule

2010 Spring | University at Buffalo

[View Personal Data Summary](#)
[My Exam Schedule](#)

Select display option: Show All Classes Show Enrolled Classes Only

Icon Legend: Class Roster Grade Roster Gradebook Assignments Learning Management

My Teaching Schedule > 2010 Spring > University at Buffalo

Class	Class Title	Enrolled	Days & Times	Room	Class Dates
ENG 101-A.1 (13927)	Writing 1 (Lecture)	7	MoWeFr 8:00AM - 8:50AM	Clemens Hall	Jan 11, 2010 - Apr 26, 2010

[View Weekly Teaching Schedule](#) [Go to top](#)

My Exam Schedule > 2010 Spring > University at Buffalo

You have no final exams scheduled at this time.

[Go to top](#)

- Faculty Center
- Advisor Center
- Search
- Learning Management

- My Schedule
- Class Roster
- Grade Roster
- Gradebook
- Class Assignments



Class Roster

[View FERPA Statement](#)

2010 Spring | Regular 15 Week Session | University at Buffalo | Undergraduate

ENG 101 - A 1 (13927) [change class](#)

Writing 1 (Lecture)

Days and Times	Room	Instructor	Dates
MoWeFr 8:00AM-8:50AM	Clemens Hall	Katie Advise	01/11/2010 - 04/26/2010

*Enrollment Status: 8

Enrollment Capacity: 20

Select display option: Link to Photos Include photos in list

Enrolled Students Find | First 1-8 of 8 Last

Notify	Photo	ID	Name	Grade Basis	Units	Program and Plan	Level
<input type="checkbox"/>		00000220	Travelote,John	Graded	3.00	Arts & Sciences Bachelor - Art History BA	Freshman
<input type="checkbox"/>		40000012	SFTEST,NEWSTUFEE	Graded	3.00	UGRD Education Bachelor - African - American Stds/Media Study	Freshman
<input type="checkbox"/>		40000025	NEWSTUSFTEST,International	Graded	3.00	UGRD Education Bachelor - Art History/American Studies	Freshman
<input type="checkbox"/>		40000046	SFTESTNEWSTUFEE,Domestic	Graded	3.00	UGRD Education Bachelor - American Studies/American Studies/American Studies	Freshman
<input type="checkbox"/>		40000047	NEWSTUFEEII,SFTEST	Graded	3.00	UGRD Education Bachelor - American Studies	Freshman
<input type="checkbox"/>		40000050	SFTEST,Freshman	Graded	3.00	UGRD Education Bachelor - American Studies	Freshman
<input type="checkbox"/>		40000051	SFTEST,Freshman	Graded	3.00	UGRD Education Bachelor - African - American Stds/African - American Stds	Freshman
<input type="checkbox"/>		40000052	SFTEST,NotRegistered	Graded	3.00	UGRD Education Bachelor - American Studies	Freshman

Select All Clear All [Printer Friendly Version](#)

UB TESTING

Grade Roster

[View FERPA Statement](#)

2010 Spring | Regular 15 Week Session | University at Buffalo | Undergraduate

ENG 101 - A 1 (13927) [change class](#)

Writing 1 (Lecture)

Days and Times	Room	Instructor	Dates
MoWeFr 8:00AM-8:50AM	Clemens Hall	Katie Advise	01/11/2010 - 04/26/2010

Display Options:
 Grade Roster Type: **Final Grade**
 Display Unassigned Roster Grade Only

Grade Roster Action:
 *Approval Status: **Not Reviewed** [save](#)

Student Grade	ID	Name	Roster Grade	Official Grade	Grade Basis	Program and Plan	Level
<input type="checkbox"/>	1 40000047	NEWSTUFEEII,SFTEST	F		GRD	UGRD Education Bachelor - American Studies	Freshman
<input type="checkbox"/>	2 40000025	NEWSTUSFTEST,International	A		GRD	UGRD Education Bachelor - Art History/American Studies	Freshman
<input type="checkbox"/>	3 40000050	SFTEST,Freshman	C		GRD	UGRD Education Bachelor - American Studies	Freshman
<input type="checkbox"/>	4 40000051	SFTEST,Freshman	B		GRD	UGRD Education Bachelor - African - American Stds/African - American Stds	Freshman
<input type="checkbox"/>	5 40000012	SFTEST,NEWSTUFEE	B		GRD	UGRD Education Bachelor - African - American Stds/Media Study	Freshman
<input type="checkbox"/>	6 40000052	SFTEST,NotRegistered	A		GRD	UGRD Education Bachelor - American Studies	Freshman
<input type="checkbox"/>	7 40000046	SFTESTNEWSTUFEE,Domestic	C		GRD	UGRD Education Bachelor - American Studies/American Studies/American Studies	Freshman
<input type="checkbox"/>	8 00000220	Travelota,John	A		GRD	Arts & Sciences Bachelor - Art History BA	Freshman

View All | [Download](#) | [Print](#) | [Rows 1 - 8 of 8](#)

[Select All](#) [Clear All](#) [Printer Friendly Version](#)

[add this grade to selected students](#) [notify selected students](#) [notify all students](#)

Student Services Transformation

Intro to the New UB Student Information System - Student View

MyUB MyPage [Help/Feedback](#) [Logout](#)

Welcome MyUB Guest to the Student Demo [Change](#) [Settings](#)

Student Center

Visit the Student Center

Visit the Student Center for Admission Application Status, Financial Aid, Residency, Course Enrollment, Class Schedule, Grades, Tuition Account Summary/Make a Payment, Personal Contact Information, and more!

Academic & Financial Need to Knows

- Are you in a controlled enrollment course? Find out how this may affect you.
- Jan 22: School Counseling with session
- Jan 23: Transfer Education with session
- Last day to drop/add a spring 2010 course is 11:59pm, January 22
- For Jan 22 is the last day to drop a course without financial liability as long as you are at 12 credits or less.
- Get involved this spring with the Undergraduate Academies - seats available in our seminars!

Campus Need to Know

- Buffalo weather can be unpredictable. Be ready to receive a snow alert text message. Sign up now!
- FREE virtual Wed. 1/22 11-1pm. Be Social! Meet - read more About It

UB University at Buffalo The State University of New York

UB 2020 | A collaborative future in progress.

Student Services Transformation

UB DISCOVERY

Home

Jesse's Student Center

Academics

Search
Plan
Enroll
My Academics

You are not enrolled in classes.

enrollment shopping cart ▶

other academic... ▼

Finances

My Account
Account Inquiry

You have no outstanding charges at this time.

Financial Aid
View Financial Aid
Accept/Decline Awards
Report Other Financial Aid

Personal Information

Demographic Data
Emergency Contact
Names
User Preferences

other personal... ▼

Contact Information

Permanent Address 3455 Hacienda Drive Pleasanton, CA 94568	Billing Address 3455 Hacienda Drive Pleasanton, CA 94568
Home Phone 510/925-0000	Personal E-mail jmartinez@yahoo.com

Admissions

Request Information
Apply for Admission

You do not have any pending applications at this time.

SEARCH FOR CLASSES

Holds
No Holds.

To Do List
No To Do's.

Enrollment Dates
Open Enrollment Dates

Advisor
Program Advisor
Edward Litman
818 9202248
Scholarship Review Committee
details ▶

News and Alerts

Search Engine
Yahoo
Google

Other Links
Admission

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Student Services Transformation

Change Acceptance vs. Performance Curve

Acceptance

Future Performance

Ability

Go Live

Physical Tryout

Self-Concern

Desire

Mental Tryout

Awareness

Current Performance

Performance Dip

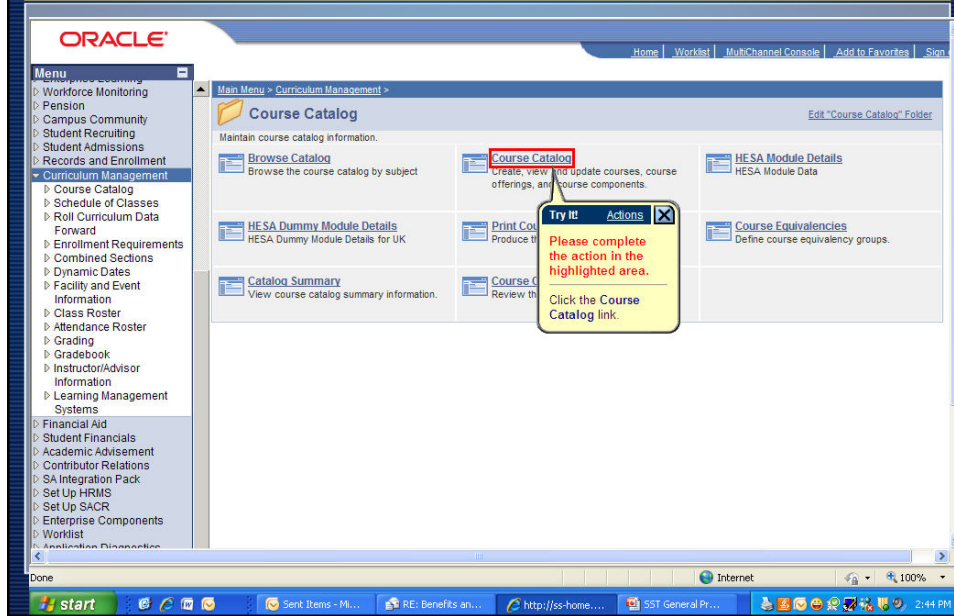
UB University at Buffalo
The State University of New York

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>