



California State University Long Beach

Student Administration Project Charter Highlights

The following excerpts are from the CSULB Student Administration Project Charter. The 76 page document was the result of workshops conducted during the Fall of 2001 including campus-wide participation.

Vision

“CSULB: the University of Choice”

To further the mission of the University, the CSULB CMS SA project will collaboratively implement the Student Administration System to build and support the following future environment:

- An enhanced educational and occupational experience through the delivery of innovative, timely, high quality services.
- An empowered student body, faculty and staff through easy access to information resources.
- A strengthened campus community culture through a personalized approach that is complemented and enabled by information technology.

Mission

The mission of the CSULB Student Administration (“SA”) Project is to implement, through a collaborative process, all SA modules of the California State University Baseline Common Management System (CMS) by Fall 2003. The implementation will be based upon common CMS standards and completed within the specified timeline and budget allotted for the project. The result will be a system that enables CSULB to achieve the following outcomes:

- High quality, efficient, and effective student-related services for its entire campus community that are based upon best practices and a personalized approach.
- Easy, flexible access to accurate information that supports the decision making process of the University to address current issues and adapt to future growth and innovation.

The CSULB Case for Action

A Case for Action provides a compelling business case or rationale for an initiative. The Case for Action for the CSU System is to implement common software at all campuses to take

advantage of economies of scale, respond to demand for services, and operate using common standards supported by state-of-the-art technology. Therefore, an assumed Case for Action for CSULB is that the University is required to implement the CMS software. CSULB's Case for Action extends beyond this CSU rationale to include the following reasons to implement the CMS Student Administration software:

1. Improve and enhance service to students.
2. Improve and enhance service to faculty.
3. Empower students, faculty, and staff through implementation of Web self-service capabilities.
4. Improve the implementation and enforcement of academic policies.
5. Build an information technology infrastructure that is state-of-the-art to accommodate future growth and innovation.
6. Provide improved and increased capabilities to achieve strategic campus goals that cannot be met with the current student information system (e.g. assessment, Cornerstone, and technology-mediated instruction initiatives).
8. The campus legacy student system will not be supported in the future by the vendor and has not kept pace with our campus needs. The CMS SA project is the most cost effective solution and timing to meet this challenge.
9. Improve and demystify campus processes.
10. Improve reporting capabilities for campus management and planning.

Goals and Objectives

Goal 1: Provide a collaborative, communicative and cooperative environment that enhances a sense of community by increasing access to information and services based on role.

Objectives to realize this goal:

1. Design the interface and business processes so that they are geared to serve and facilitate communication among all constituents.
2. Provide an easy-to-use web interface with comprehensive access to individualized information and services.
3. Adopt a strategy of flexibility in configuring the system in anticipation of future growth and change.
4. Maximize personal decision making and self service through direct access to information.
5. Provide easy access to information based on role.

Goal 2: Improve the educational and occupational experience for students, faculty and staff based upon best practices that support an enriched learning and service environment.

Objectives to realize this goal:

1. Fully integrate financial aid, admissions, records, advising, and other student data into a single, seamless system by configuring the system from a best practices perspective.
2. Adopt CMS standards that support best practices operations.
3. Accurately and appropriately reflect academic policies of the University in the configuration of the System.
4. Facilitate better time to degree by providing information for planning and decision making.

5. Facilitate increase in “non-capacity” FTE by increasing access to information and services and by providing system support for flexible and distance learning.
6. Enable key users to define report content and design requirements.

Goal 3: Become a more efficient organization by streamlining and simplifying campus processes to provide timely information and services.

Objectives to realize this goal:

1. Use process mapping and fit/gap analysis to identify ways to streamline campus processes.
2. Eliminate redundancies and non-value-added practices.
3. Maintain the integrity of archival data and currently live data during the conversion to the new system.
4. Simplify the process for developing new reports.
5. Provide efficient access to sources of information.
6. Develop the capability for one-stop service.

Goal 4: Successfully implement the SA system on time and within budget, by using an approach that expedites the decision making process and optimizes the expertise and talent of project participants.

Objectives to realize this goal:

1. Apply a strategy of assigning dedicated expert resources to this project.
2. Optimize the expertise and talent of project participants.
3. Apply effective project management.
4. Develop a comprehensive training strategy to offer timely training to project team members and end users.
5. Freeze development and investment in any system that will be replaced by the CMS SA system with the exception of externally imposed requirements.

Goal 5: Communicate CMS benefits effectively with the campus community as well as project costs and implementation progress (*from CSULB Strategic Planning Mid-Range Goals*).

Objectives to realize this goal:

1. Communicate the benefits of the system based upon constituency needs and roles.
2. Establish benchmarks to measurably evaluate the improvements resulting from implementation of the system.
3. Schedule regular communication on project progress.

End User Training Goal and Objectives

The goal of end user training on the Student Administration system is to equip end users with the prerequisite skills and knowledge they will need to successfully perform all SA-dependent tasks including full utilization of SA-provided self-service.

End User Training Objectives

The following specific objectives have been established to meet the end user training goal described above:

1. Communicate with end user organizational units and role-based constituencies to determine their training needs.
2. Provide end users with system training centered on specific campus processes and designed to meet different audience learning styles.
3. Apply hands-on classroom, one-on-one lab, or self-directed training methods as appropriate to meet specific learning needs.
4. Apply a just-in-time scheduling strategy to offer training when most practical for end users yet as shortly as possible before they need to use the knowledge and skills they will gain.
5. Provide ongoing training for new end users as well as experienced users who need reinforcement or advanced training.
6. Develop and maintain campus process-based training and reference materials.
7. Improve the ongoing effectiveness of training and reference materials through feedback from participants and assessment.

Scope

1. The scope of the SA Implementation project includes implementation, configuration, testing, and training for the following modules of SA:
 - Admissions
 - Student Records
 - Academic Advising
 - Student Financials
 - Financial Aid
2. CSULB will implement the PeopleSoft Portal as the front end to the SA system.
3. The following are included in the initial implementation scope and will be brought up with each module and phase:
 - PeopleSoft SA version 8.0, including full web-based self service features (includes credit card payment)
 - PeopleSoft Portal
 - Interactive Voice Response (at least 'speak' – the value and feasibility of update functionality will be evaluated)
 - 3rd Party room scheduling product
 - Reporting Data Mart (RDM)
 - JetForms Forms Pak (Document output software)
4. The following key interfaces are in scope and should be completed during the implementation:
 - CashNet
 - Imaging
 - CSU Mentor (XAP)
 - Blackboard
 - One Card, Library, Health Center

Timeline

The project leadership is building a Project Work Plan. As part of this process, they are analyzing and validating the milestones shown in the High Level Timeline below. A detailed Project Work Plan identifying all known project tasks, resources, and dependencies will be completed in January 2002. The functionality listed will be implemented for the Fall 2003 cycle. Summer 2003 or prior semesters will continue to be processed in the legacy system.

High Level Timeline

MILESTONE	TARGET DATE
Planning Phase	
Complete Project Charter	December 2001
Legacy Code Freeze	December 2001
Complete official CMS Readiness Assessment	January 2002
Detailed Project Plans	January 2002
Implementation Phase	
Project Team Training	February 2002
Project Team Orientation	February 2002
Facility Move-in	February 2002
Baseline Access	February 2002
HR 8.0 Upgrade	September 2002
Production Phase	
Go Live # 1	
- Recruitment	October 2002
- Application Processing	October 2002
- Transfer Credit	October 2002
- Advising Transfers	October 2002
- Course Catalog	October 2002
- Class Schedule	October 2002
Go Live # 2	
- Financial Aid - Start w/ISIR Loads	January 2003
- Financial Aid - Verifications	January 2003
- Financial Aid - Term Build	January 2003
Go Live #3	
- Financial Aid Pre-Disbursement	March 2003
- Financial Aid Award	March 2003
- Matriculation	March 2003
- Tuition & Fee Calculation	March 2003
- GL Interface	March 2003
- Academic Advising	March 2003
- Registration	March 2003
Go Live # 4	
- Financial Aid Disbursements	July 2003
- Academic Transcripts	July 2003
- Grades	July 2003
- Degree Audit for Graduation	July 2003
Post Implementation Phase	
Project Assessment	October 2003
Legacy system Shutdown	December 2003
Facility Move-out	December 2003