



# UNIVERSITY AT BUFFALO STUDENT SERVICES TRANSFORMATION PROJECT ORACLE/PEOPLESOFT CAMPUS SOLUTIONS 9.0

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## STUDENT SERVICES TRANSFORMATION PROJECT CHARTER

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*Abstract: This document describes the business case, objectives, scope and potential risks for the Student Services Transformation (SST) project at the University at Buffalo. It is the primary output of the Discovery phase for this project, and should be updated to reflect significant changes in project scope, resources or direction.*

The Measures of Success (MOS) below were derived from the interviews conducted in preparation for this project charter. Summary objectives are re-stated here, with supporting measures for each noted below.

In general, Measures of Success should:

- relate to the overall goals of the project,
- be measurable in both the legacy and proposed environments,
- be achievable, and
- are useful to explain to others why the project is important, and what benefits the project will provide.

Measures of Success are typically measured in either a “yes/no” or incremental fashion. **At this time the MOS outlined below are drafts.** For each MOS listed below, CIBER and UB will define metrics as part of the Performance Measurements exercise during the Discovery phase. Some metrics contain placeholders at this time.

**Objective 1: *Improve service to students, faculty and staff through both process and technology enhancements including expanded self-service and better system integration.***

- Reduce the number of systems used to support student information from X to one integrated platform consisting of PeopleSoft Campus Solutions, Portal and perhaps CRM. Discontinue the use of SIS, DARS, BIRD and others.
- Provide the ability for students to:
  - view and accept or decline Financial Aid Awards online,
  - view their bills online,
  - view and model transfer credit online, and
  - update more of their biographic and demographic information online.
- Provide the ability for faculty and staff to:
  - extract and disseminate information in a silo-free environment,
  - quickly assess the progress of a student in one system location,
  - email students and advisees via delivered self service,
  - utilize common tools for customer service eliminating the need for independent service workarounds or shadow systems, and
  - generate portal content and submit for approval/publication, reducing creation-to-publication turnaround.
- Provide the ability for students to view their academic standing online.
- Improve system availability by X percent.

**Objective 2: *Manage institutional risk and support consistency between policy and practice.***

- Provide the ability to assign multiple instructors to specific courses.
- Provide enhanced enforcement of course pre-requisites.
- Improve compliance with Standards of Excellence for Financial Aid, including the ability to:
  - meet federal regulation requirements for the distribution of Title IV funds, and

- meet federal requirements to demonstrate separation of responsibilities between the awarding and disbursing of financial aid funds.
- Reduce manual exception handling by conforming system and policy. Specifically target the following highly manual processes for automation and better conformance to policy.
  - Provide separate tuition refund schedules for different careers to eliminate manual adjustments.
  - Provide the ability to bill students correctly for a mix of summer session courses, on campus and study abroad sessions with less manual intervention.
  - Improve PCI Compliance, by improving the manner in which student credit card information is processed and stored.
  - Provide automated waitlisting functionality for course registration.
  - Provide batch assignment and removal of service indicators (formerly called check stops).
  - Create a family of approved design elements for the Portal to present a unified image while offering the opportunity for different areas of UB to distinguish from one another
- Provide the opportunity to integrate the Graduation process with degree audit rules.
- Allow transfer credit to be housed in the same system as degree audit, which will increase consistency of data between these two areas.
- Enter all application data and all application decision data into one system

***Objective 3: Provide extended real-time access to better quality, easily understood information for all users of the system.***

- Improve system availability by X percent.
- Provide improved access to real-time data for students, faculty and staff. Specifically, provide real-time access to:
  - the student bill,
  - admissions application status,
  - service indicators (check stops),
  - degree audit information, and
  - enrollment indicators during drop-add periods.
- Begin to implement common metadata in conjunction with the SIRI project.
- Provide access to Degree Audit and Financial Aid data in the data warehouse.
- Provide enhanced information tracking student interactions with staff in both the transactional system and data warehouse, including storing advisor comments in a consistent fashion within the system.
- Implement tools that support more flexible, friendlier output, including:
  - all system output can now be routed to multiple printers or other output destinations,
  - the student transcript output will be visually enhanced and more readable,
  - the student bill will be more readable,
  - targeted or fine-grained messaging can be provided to students using system delivered processes, and
  - a student Checklist or To Do list can be provided.

***Objective 4: Implement a flexible system that supports current institutional needs, and planned institutional growth.***

- Reduce technical constraints on time to delivery for new or upgraded functionality, and for regulatory updates.
- Reduce paper processes, including those listed here.
  - Provide a real-time student bill, and the ability to print current bills, reprint bills or modify billing online.
  - Provide an online transcript request / degree certification and application for a degree.
- Improve the management of service indicators (check stops) by automating the placement of check stops for the following specific functions:
  - orientation,
  - academic advising,
  - delinquent payment, and
  - missing application information.
- Provide an electronic record of degree required non-curricular academic milestones, such as:
  - Graduate Comprehensive Exams,
  - theses and dissertations,
  - research experience,
  - internships, and
  - external certifications.
- Provide automated ability to support the unique needs of the schools and programs through configuration allowing for:
  - different definitions of full-time status,
  - differing tuition rates,
  - additional term fees as needed,
  - separate academic calendars, including dynamic calendaring,
  - multiple transcripts and transcript formats,
  - the use of milestones to satisfy non-course requirements, and
  - differing rules for registration by program.
- Increase the ability for functional areas to configure the system without technical involvement in the following ways:
  - change billing dates,
  - change registration windows,
  - calculate and change tuition and rates,
  - run the late fee process,
  - manage configuration for all term fee adjustments,
  - manage adjustment calendar (refund calendar) refunds,
  - manage the collections process,
  - choose the Primary Plan in a “What If” audit when more than plan exists, and
  - designate different printers (or output destinations) for system output.