1. Support Services Report Template

Report Info
Name of the person completing this report: Manuel Saldanha
Title of the person completing this report: Associate Director Student Systems
Supervisor/dean reviewing report: Glen Perry
Service: Student Systems
Division/College: PEMSA
Name of second reviewer (if necessary): Linda Dalton

3. Mandated Service

Link to Scoring Rubric

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Any other: CSU policies and required procedures
Federal Law: FERPA

Provide a brief explanation, if necessary, in < 60 words.
This service is responsible for local implementation of the CSU Common Management System Student Administration modules.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

The primary function is to support all units that interact with PeopleSoft Student systems.

1. We provide expertise in system configuration and design modifications to meet CSUEB requirements.
2. We maintain PS which includes testing new updates and implementing new functionality.
3. We are the primary level of troubleshooting for technical issues.
4. We are responsible for supporting enrollment reporting requirements for the CO.
5. We provide production support for various student related units that includes all batch processing for Admissions, Student Records, Class Scheduling, Financial Aid, Student Financials and Academic Advisement
6. We provide data analysis for ad hoc reporting for system testing and development.
7. We generate and process various communications for student related units.

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

Students: 20%
Faculty: 5%
Administrators/staff: 61%
Colleges/Departments: 10%
Academic Senate and/or committees: 1%
Alumni: 1%
Community outside University: 1%
Other: 1%
2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).

<table>
<thead>
<tr>
<th></th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th></th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>We maintain configuration for CSU Mentor. We also configure and produce some of the communications (To Do lists, emails). We configure and maintain CSU wide programs (Early Start). We also maintain and configure admissions evaluation processes (test scores, transfer credit). These services directly affect students as they apply for admission and financial aid, and begin to use MYCSUEB, the student self-service portal which we configure to meet campus needs.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>We configure and maintain the degree audit system. We maintain and configure enrollment processing (appointments, class schedule maintenance) and end of term processing for all students (Grade Rosters, Disqualification, Honors etc.). Students use these processes directly for all of their transactions related to enrollment. We work with ITS to maintain a CSUEB MYCSUEB, the student self-service portal which we configure to meet campus needs.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>We configure and maintain student records (transcripts).</td>
</tr>
</tbody>
</table>

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th></th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Pre-college (helping students to enter the system)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CSU mentor is the primary method for prospective students to apply the University. Checklists and Communications helps students understand what they are required to submit. Processing test scores, electronic transcripts, auto admit allows admissions to evaluate students in a timely manner.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>During college (helping students succeed while they are at Cal State East Bay)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We maintain the system configuration and are responsible for all batch processes involved in student processing. Enrollment appointments, waitlist, grade processing, academic disqualification, class schedule, drop for non payment processing. Without this service, there would be a significant impact to staff efficiency and processing times.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We maintain the system that allows alumni to order transcripts as well as allow employers to verify degrees. This could be handled manually but would have an impact on staff workload.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Link to Scoring Rubric**

2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>If aligned or contributing, provide a description. (&lt;60 words for each SSC)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</strong></td>
</tr>
<tr>
<td>We contribute to serving students first, by providing tools to empower students in their educational experience. The Degree audit (CAAR) allows undergraduate students to navigate university requirements. Modifications like Learning Communities’ block enrollment allows General Education to better prepare students for the university.</td>
</tr>
<tr>
<td><strong>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</strong></td>
</tr>
<tr>
<td><strong>Serve students first, by expanding access and enhancing each student’s educational experience and prospects for success as a graduate and life-long learner</strong></td>
</tr>
<tr>
<td><strong>Foster a vibrant community through enriched student services and student life that support student engagement and learning</strong></td>
</tr>
<tr>
<td><strong>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</strong></td>
</tr>
<tr>
<td><strong>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</strong></td>
</tr>
<tr>
<td><strong>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</strong></td>
</tr>
<tr>
<td><strong>Demonstrate our continuing record</strong></td>
</tr>
</tbody>
</table>
of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)

2.5 How might the demand for this service change over the next five years? (Please choose one category below).

- Likely to increase

Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.

There are several factors that indicate a greater future need for this service. Our database system vendor has increased the pace of implementing new functionality to meet the changing requirements of higher education as well as to incorporate newer technology. In addition, large scale CSU system wide projects (Human Resources/Student split) are anticipated. The University continues to create new specialized programs (Online, Self Support) that are designed to meet the changing needs of students which has increased the complexity and number of modifications to the PS system. Finally, there is a continued need to become more efficient by increasing automation and batch processing.

5. Quality of Service

3.1 Do you assess the quality of the service you provide?

- Yes

If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

1. Projects
   a. Meet or exceed stated milestone timelines
   b. Implement with the least disruption to the overall functioning of the system

2. Maintenance
   a. Implement fixes prior to required end users’ required timelines
   b. Implement fixes with minimal impact to end user processing
   c. Implement fixes with no unexpected disruptions to other areas of student systems

3. Production Support
   a. Completion of all processes on time
   b. Troubleshoot and determine errors within specified time periods (depending on the scope and impact of the error)
   c. Provide training as needed for new hires and new functionality
   d. Provide clear documentation.

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

We have established weekly meetings with various stakeholders (Admissions, Student Records, General Education etc.) to address upcoming needs as well as determine what issues need to be addressed. We also established team meetings to review projects and
3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in <120 words.

We would like to establish a satisfaction survey for stakeholders and for other teams with which we collaborate. We would also like to establish a training satisfaction survey to determine the areas in which we could improve. We would like to create a map of the flow of data throughout the system.

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Additional personnel would allow us greater flexibility and increase the responsiveness of our service. For example, we would be able to customize our training sessions to the specific needs of a department and provide training on demand. We would also be able to assign more time for analysts to develop deeper knowledge understanding of the needs of our end users which would allow for proactive solutions.

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

The relevant business analyst meets with the stakeholder and determines what areas require improvement. The analyst develops a plan to improve (a process, a report etc.) and implements the plan. The analyst then meets with the stakeholder again and determines if the changes are satisfactory and if not repeats the process. One of our current projects is the integration of the American Language program into PeopleSoft. Our analysts have been making incremental changes in response to the needs of the end users (enrollment changes and reporting requirements) and the end users continue to report that they are satisfied with the process.

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

No survey data was provided.

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

If yes, please describe in <120 words. If no, please explain

We adhere to the university’s and PEMSA’s guidelines for communication. We also follow FERPA protocols in dealing with communicating data.
3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

No

If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

We do not have annual quality targets. Our quality targets are based on expectations for specific projects, maintenance, and production support which do not align with annual timelines.

3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?

Yes

If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.

We complete 4 major fixes with 10-15 minor fixes per year. We complete enrollment reporting for each quarter. We complete production support tasks during specified time periods each quarter. Our remaining projects are determined by stakeholder demand and mandates. Depending on the size and complexity of the projects, we aim to complete between 5-15 projects annually.

6. Efficiency of Service (cost effectiveness)

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

459953

Attach your allocated spreadsheet here.

PEMSA Technology-Student Data Mgmt-Imaging.xlsx

4.2 Using the spreadsheet provided, please distribute your department’s annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

3923

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

593

Attach your allocated spreadsheet here.

PEMSA Technology-Student Data Mgmt-Imaging.xlsx

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing
this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?

Yes

If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

We have focused on increasing our technical knowledge of the PeopleSoft product to reduce troubleshooting and solution delivery times. We have implemented a cross training program for each business analyst to develop stronger skills and knowledge within multiple areas of student systems. This will allow for a better balance of workload and reduce bottlenecks when dealing with high volume time periods that are concentrated within a single area. We have increased the automation of several batch processes so that the business analysts can increase their output without significantly increasing their workload. We have utilized the service desk ticketing system to centralize modification and project requests to allow for better tracking and resource allocation.

Link to Scoring Rubric

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

Our next step is to develop a workload volume 'heat map', an analysis of the most frequently needed services and the timeline for when service needs peak, for each support area to aid in a more strategic reallocation of resources to meet demand.

Link to Scoring Rubric

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Additional personnel would allow us to implement and complete projects at a faster pace. Access to additional training resources would allow us to explore and automate more work processes to increase the efficiency of our supported areas (e.g. Increasing automated communications to student). Additional funding for conferences would allow us to develop stronger networks and aid in obtaining developed solutions to upcoming problems. In addition, more resources would allow us to offer more competitive salaries to hire and retain skilled employees.

Link to Scoring Rubric

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

No

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

We are currently operating above our capacity.

Link to Scoring Rubric

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

We implemented a major upgrade to our Student System (PS8.9 to PS9.0).
We implemented a security overhaul for student systems.
We completed a testing cycle for a MyCSUEB portal upgrade
We updated and consolidated PS communications processes utilizing XML templates.
We tested and implemented 4 major maintenance packages and 18 minor fixes.
We completed 4 productions support cycles (Admission processing, Enrollment processing, End of term processing, test score
We completed 4 reporting cycles (APDB and ERS)
We provided 50+ training sessions (Faculty, Enrollment, Scheduling)
We implemented several configuration changes (17 unit limit, sessions, new degree programs, limiting graduation applications)
We implemented the Open University modification to allow for online applications.

7. Other

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

No

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

While ITS provides technical support for PeopleSoft as a whole; the PEMSA SA support unit provides all functional support and user training for the university.

5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

We are a service that is embedded within our supported units. In addition to our development roles, we also provide production support that allows our supported areas to increase productive capacity rapidly, in response to higher workloads. Additionally, the knowledge we have gained in our production support allows us to understand the changing requirements of our support areas and respond faster. We are better able to design solutions to more complex problems that span several departments because we understand how each of them works and how they interact with each other.

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

We believe we are an essential and unique service for the University. While we are often viewed as "PEMSA-centric", we serve the entire University by providing a technical backbone for student services. Our service provide the functional expertise and user training and ITS supports the infrastructure, manages the software upgrade installation, and provides technical support for modifications designed by the PEMSA business analysts.

Download PDF Version