

# Appendix C



California State University, Chico  
Office of the Vice Provost for Information Resources

## Enterprise Technology Briefing Book 2008/2009

August 2009

## **CMS Implementations/Upgrades/Committee Support**

CMS Finance modules were upgraded from v8.4 to v9.0 with move to production in March 2009. The upgrade began in May 2008 and the Finance teams worked to set up the upgraded system and determine process improvements that could be realized with the new version of the software. In addition to the Finance upgrade the HCM Absence Management module went live with centralized functionality in August 2008. Self-service functionality, including on-line timesheets, will be added according to the CMS Central production timelines (yet to be announced).

### **Committee Support**

Chico staff members participate on a number of Chancellor's Office CMS/PeopleSoft committees representing Human Resources, Student Administration, Financials, Technical, Project Director, as well as several ad hoc/topic specific committees. As in past years, the enterprise budget continues to support committee required travel to attend meetings.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
Functional Staffing	\$43,068	\$22,676
Training	\$67,821	\$51,283
Ad Astra Interface / Informed Decisions	\$13,000	\$4,000
Consulting	\$25,000	\$0
Add'l Development Costs	\$50,000	\$0
CO- Campus Mandated Costs	\$29,249	\$27,875
<b>Total CMS Implementation/Upgrades</b>	<b>\$228,138</b>	<b>\$105,834</b>

## **Knowledge Management/Enterprise Data Warehousing**

The campus Knowledge Management strategy is to merge data from a variety of sources (e.g. Financials, Human Resources, Student Administration, Housing, Alumni, Foundation, etc.) into an enterprise data warehouse model that enables ease and accuracy of reporting. INSIGHT, a web-based reporting service, has been rolled out to campus and DATA, a one-stop shop website for reporting from all areas of campus, was introduced late fall 2008. The Enterprise Data Warehouse (EDW) team upgraded Oracle databases which included table encryption for security. 2008/09 projects included consolidating the enterprise warehouse databases (HR/SA, Finance, and others) on new hardware, and supporting the Financials upgrade by rewriting current Brio reports as web reports in INSIGHT and then converting those reports to Finance 9.0 reports, building the new v 9.0 Financials databases, and investigating additional BI tools for power users ad hoc reporting. The EDW team is also developed tables and reports in support of the campus WASC review and regularly participated on KMIT.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Knowledge Mgmt (Enterprise Warehouse Initiative)</b>	<b>\$317,976</b>	<b>\$292,210</b>

## **Learning Management System Process Improvements (Blackboard/Vista)**

Bb/Vista implementation is complete and all WebCT CE courses have been migrated. The technical architecture (environment/hardware requirements) continues to be reviewed and storage and back up issues are being resolved. The Bb/Vista campus license cost and training were budgeted for 2008/09.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Learning Mgmt (Blackboard Vista)</b>	<b>\$85,524</b>	<b>\$107,080</b>

## Portal

No replacement hardware for the uPortal was necessary as the application is now utilizing virtual servers. A minimal amount had been budgeted this fiscal year for potential consulting or additional operating system licenses but expenditures in those areas were not necessary.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Unified Web Presence/Portal</b>	<b>\$5,000</b>	<b>\$0</b>

## Security

CSU, Chico was subject to a security audit of campus information systems this fiscal year. Twenty eight audit findings were addressed and the Chico audit response was completed by May 2009. The findings range from security governance issues to enhanced protection of campus data. Security projects continue to focus on identifying and securing systems and network resources, identifying and eliminating confidential data (SSN) on distributed computers, PCI DSS compliance, evaluating encryption solutions, vulnerability scanning for servers, secure storage solutions for confidential information used daily, and security training and awareness. The ISEC office is providing awareness and preparatory information about security expectations and standards.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Security</b> (Salaries currently in Enterprise Administration)	<b>\$87,863</b>	<b>\$29,179</b>

## Identity Management (IdM)

IdM projects provide on-going support of Chico's current environment including the Wildcat LDAP Directory (portal, modems, wireless, and library services) and the MS Active Directory (faculty/staff email). Development projects include upgrading OpenLDAP and the Calstate EduPerson schema, implementing Shibboleth (CO sponsored federated services to enable single sign-on with other campuses), and participation in the CSU IAM Technical Architecture Group.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Identity Mgmt</b> (Password management tool maintenance costs (Avatier/Password Station, student utility) are included in IdM category)	<b>\$48,940</b>	<b>\$9,023</b>

## Enterprise Hardware/Systems

Enterprise hardware and systems includes end of life hardware replacements, enterprise server operating systems licenses, data storage and backup, utilities for monitoring performance and logs, as well as training and maintenance costs. Projects include software licenses and hardware for the MS Systems Center, an application that provides enterprise server and desktop management tools for improved systems monitoring, software and hardware inventory, remote support, remote upgrades/installs, and application patching.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Enterprise Hardware/Systems</b>	<b>\$425,540</b>	<b>\$399,088</b>

## Business Process Improvement Projects

**Campus Activities for Facilitating Graduation** – Chico is working with other CSU campuses in the design, testing, installation, and implementation of modifications to CMS-delivered processes which support degree progress and transfer credit. This two-year implementation commitment had anticipated process improvements that included the elimination of some paper processes, less manual processing of transfer course information, better tracking of progress to degree, shorter turn around time for transfer admissions to improve transfer student yields, and increased staff expertise for ongoing advising support. This year's progress includes completion of the consulting engagement resulting in entry of all major/minor program course requirements through the 2007-2009 catalog year into the CMS module. Funding was continued to support staff salaries.

**Financial Aid Functionality Improvements** – A consultant was engaged to assist implementation of new, delivered Oracle/PS functionality that automates the process of determining eligibility and awarding of the Academic Competitiveness Grant (ACG) and National Science and Mathematics Access to Retain Talent Grant programs (collectively referred to as ACG/SMART) two student aid programs that Financial Aid & Scholarship Office has been processing manually.

**Imaging** - Additional functionality/seat licenses for ImageNow, the university standard for imaging, was funded to allow for use of workflow, digital signatures, enhanced security, and enterprise application integration. As part of the imaging project, the campus began EDI exchange with Butte CC. Additional imaging functionality is anticipated as part of several business process improvements in Academic Affairs and Student Affairs areas.

**Forms and Work Flow Functionality** – Many campus areas have expressed an interest in automating paper forms, automating the routing of documents for signatures and approvals, and storing and sharing documents to make them more easily accessible. EAPPs has done vendor research and determined a potential vendor solution (software application/hardware) to acquire for testing the viability of the technology. The outcome from the pilot process will result in a recommendation for next steps.

**Parent Portal** - Chico is designing and building a Parent Portal utilizing the CMS/PS self-service functionality. This will provide a technology based means to communicate with parents and other parties designated by the student (guests), that is paperless, FERPA compliant, and allows the student to grant access to their information as they see fit (e.g., account balances but not grades, etc.). This process is seen as a significant customer service improvement, while maintaining the campus focus on sustainability.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Business Process Redesign/Improvement</b>	<b>\$169,500</b>	<b>\$178,809</b>

### Other Projects

Other projects that were funded in agreement with the CISC or Cabinet was continuation of the Satori Address Verification license agreement for address cleansing.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Other Projects (Satori)</b>	<b>\$26,500</b>	<b>\$6,890</b>

### **Accessible Technology Initiative (ATI)**

The Chancellor's Office mandated a work plan and reporting deadlines for campuses to provide access to information resources and technologies to individuals with disabilities. As part of the Accessible Technology Initiative work plan from the Chancellor's Office, Chico teams developed guidelines, implementation strategies, tools, and resources to support these efforts. A Chico team identified and purchased a Web Content Management system to standardize the campus web presence. Pilot projects are underway and the tool rolled out to the campus units starting spring 2009.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Accessible Technology Initiative (ATI)</b>	<b>\$85,951</b>	<b>\$51,757</b>

### **Enterprise Administration**

Enterprise Administration includes staffing and the supplies and services (O/E) associated with the projects funded through the CMS/Enterprise budget. The project support staff provides enterprise project planning, budgeting, purchasing, travel support, staffing support, CMS project management, Chancellor's Office coordination, project assessment, etc. Technical support staff consist of the enterprise DBAs who support all centrally managed Oracle databases on campus and the security support staff includes both the technical and functional security analysts.

	<b>Projected 2008/09</b>	<b>Actuals June 2009</b>
<b>Enterprise Administration</b>	<b>\$805,380</b>	<b>\$686,517</b>

### **Training**

As part of the Chico model for enterprise systems, training continues to be funded for technical and functional staff on identified projects. This year the technical and functional staff attended security trainings, PeopleSoft training, Oracle training, CMS workshops, data warehouse training, and operating system training. Specific enterprise project training is included in the costs associated with the projects.

### **Desktop Memory Upgrade Project**

In conjunction with the Campus Computer Refresh program, enterprise funding was allocated to upgrade the memory of primary use desktop workstations with a viable lifespan for use (maximum 3 years old) to 2GBs of RAM. Additional memory will provide improved performance for newer campus applications, e.g., Office 2007 and Office 2008. **The 2008/09 cost allocation was \$12,059.**

### **Oracle Support**

Oracle licenses for the entire campus are funded through the Enterprise budget. These license costs are determined by the Chancellor's Office based on campus FTE calculation. While enrollment has increased at Chico, this years campus fees were allocated using the same formula as in prior years. **The 2008/09 cost allocation was \$140,285.**

## Enterprise Budget 2008/2009

	Projected 2008/09	Actuals 2008/09
<b>Enterprise Support Costs</b>		
Project Support Staffing	\$313,779	\$311,905
Technical Support Staffing	\$229,969	\$230,273
Security Support Staffing	\$127,623	\$130,675
O/E	\$45,000	\$13,663
<b>Totals</b>	<b>\$716,371</b>	<b>\$686,517</b>
<b>Enterprise Systems Projects</b>		
CMS Implementation/Upgrades	\$113,109	\$105,834
Knowledge Mgmt (Enterprise Warehouse Initiative)	\$281,976	\$292,210
Learning Mgmt (WebCT Vista)	\$109,524	\$107,080
Portal	\$0	\$0
Security	\$34,500	\$29,179
Identity Mgmt	\$18,940	\$9,023
Enterprise Hardware/Systems	\$429,800	\$399,088
Desktop/Memory Refresh	\$12,000	\$12,059
Oracle Support(campus licenses)	\$140,285	\$140,285
Other Enterprise Projects (Sequitor, Satori, Wireless, ITRP)	\$6,900	\$6,890
Add'l CMS modules (e.g. Budget, eProcurement, Grants&Cc)	\$0	\$0
Business Process Redesign/Improvement	\$207,900	\$178,809
Accessible Technology Initiative (ATI)	\$61,821	\$51,757
<b>Totals</b>	<b>\$1,416,755</b>	<b>\$1,332,214</b>
<b>EXPENDITURES</b>		
Campus Enterprise Costs	\$2,133,126	\$2,018,731
PeopleSoft Maintenance(Chancellor's Office Assessment)	<u>\$468,000</u>	<u>\$468,000</u>
<b>Total Expenditure</b>	<b>\$2,601,126</b>	<b>\$2,486,731</b>
PBX Loan(Trust Balance)	\$843,990	\$843,990
<b>FUNDING</b>		
Campus Baseline Funding	\$1,967,637	\$1,968,657
Compensation Allocations added to Base		
Budget Reduction	(\$98,382)	(\$98,382)
Additional Allocations	\$108,900	\$108,900
Off the Top Support	<u>\$468,000</u>	<u>\$468,000</u>
Repayment of PBX loan (Principle + Interest)	<u>\$201,161</u>	<u>\$201,161</u>
Adjustments		
<b>Total Funding</b>	<b>\$2,647,317</b>	<b>\$2,648,336</b>
<b>Gen'l Fund Delta</b>	<b>\$46,191</b>	<b>\$161,606</b>