



Bridging the Gap

Student Information Systems

Student Information Systems (SIS)

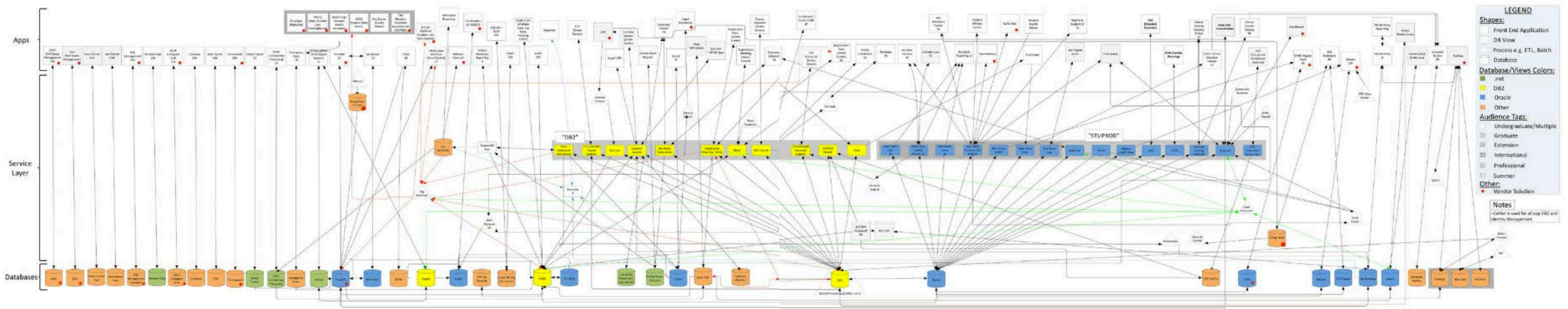
**“The future is now –
join us on the journey.”**

“Bridging the Gap” presentation
January 2016

Agenda

- **Situation**
- **Strategy**
- **Implementation**
- **Risk Management**
- **Transformation**
- **Discussion**

Legacy Systems Architecture



The journey ahead...

Oct 2014

System Planning & Discovery begins

Dec 2014

System Fit/Gap Analysis & Design begins

Jan 2015

System Configuring & Developing begins

May 2015

System Testing for Prospect

June 2015

User Acceptance Testing & Training for Prospect

July 2015

System Testing for Application Review

July 2015

Go Live for Prospect

Aug 2015

User Acceptance Testing & Training for Application Review

Sept 2015

Go Live for Application Review

Oct 2015

System Testing for Application Scoring

Nov 2015

User Acceptance Testing & Application Scoring

Dec 2015

Go Live for Application Scoring

Benchmarking the student experience



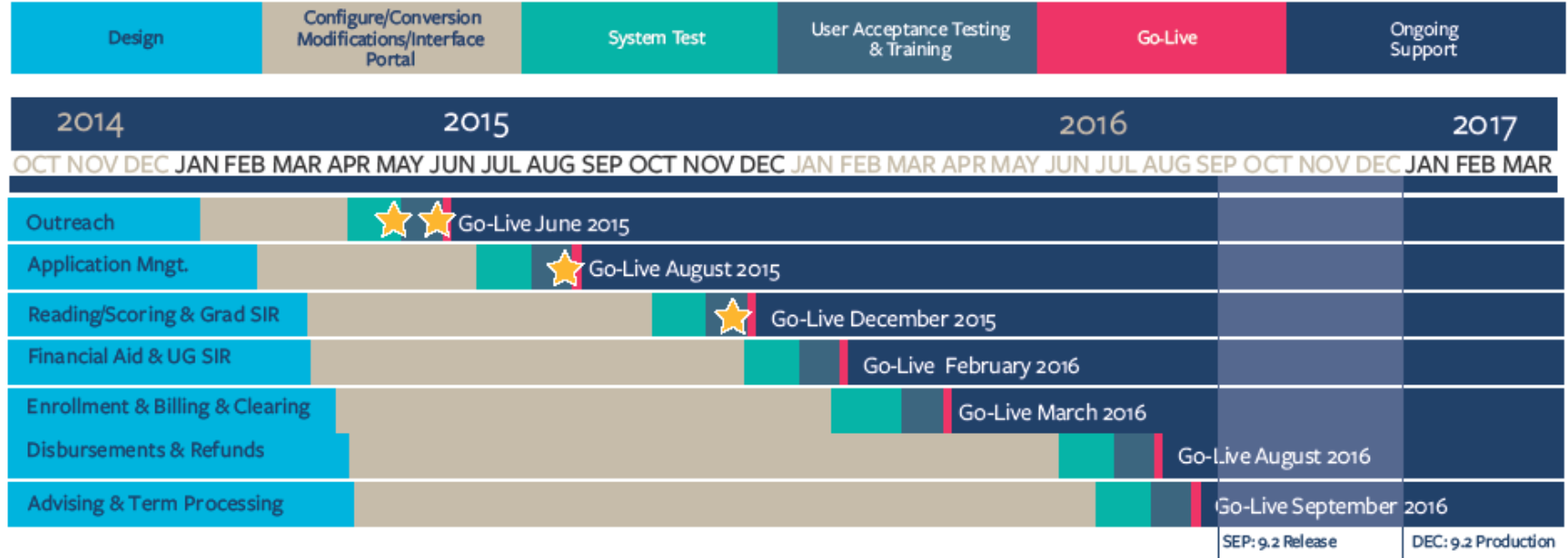
Go-Live Dates

- Go-Live 1 - June 2, 2015
 - Go-Live 2 - Aug 18, 2015
 - Go-Live 3 - Dec 15, 2015
 - Go-Live 4 - Feb 2, 2016
 - Go-Live 5 - Mar 22, 2016
 - Go-Live 6 - Aug 2, 2016 *
 - Go-Live 7 - Aug 29, 2016 *
- (* Projected Dates)

SIS Project High-Level Timeline

High-Level Timeline

First Draft: 1-26-15
Updated: 1-13-16



Go-Live 1 (June 2015)

- SLATE:**
- Outreach
- ★ Berkeley Summer Experience Live May 1, 2015
 - ★ Go-Live 1 June 2, 2015

Go-Live 2 (Aug 2015)

- ACADEMIC STRUCTURE:**
- Defining Basic Institutional Data
 - Defining Curricular & Enrollment Data
 - Defining Student and Programmatic Data
 - Creating & Maintaining Health Data
 - 3Cs for CC
- SLATE:**
- Applications*
 - Prelim Norming*
- STUDENT RECORDS:**
- Catalog & Schedule 2016
 - Defining and Maintaining Course Requisites

★ Go-Live 2 Aug 18, 2015

Go-Live 3 (Dec 2015)

- ADMISSIONS:**
- Reading & Scoring*
 - SIR Graduate
 - SIR Law
- CAMPUS COMMUNITY:**
- Entering & Maintaining Identification Data
 - Creating & Maintaining Organization Data
 - Entering & Maintaining Health Data
 - 3 Cs
- SELF SERVICE:**
- Graduate Onboarding
 - Profile
- STUDENT FINANCIALS:**
- SIR Deposit
 - General Ledger
- STUDENT RECORDS:**
- Room Scheduling (Series 25)

★ Go-Live 3 Dec 15, 2015

Go-Live 4 (Feb 2016)

- ADMISSIONS:**
- Admissions (Slate to CS)
 - Early Admissions (Slate & CS)
- FINANCIAL AID:**
- Aid Year Setup
 - ISIR Load
 - CAL ISIR
 - FA Term
 - Budgets
 - CAL Grant
 - Verifications*
 - Packaging
 - 3Cs for FA
- IMAGING**
- Imaging
- SELF SERVICE:**
- Undergrad Onboarding
 - Imaging

Go-Live 5 (March 2016)

- ACADEMIC ADVISING:**
- Dashboard*
 - Academic Planner*
 - College Scheduler
- ADMISSIONS:**
- Finalization (Clearing)
 - Imaging
 - SIR Undergrad
 - Yield
 - Decision Release (Selection)
- CAMPUS COMMUNITY:**
- Entering & Maintaining Participation Data
 - Delegated Access
- DATA WAREHOUSE:**
- Student Curriculum*
 - Student Person Party*

- FINANCIAL AID:**
- Loans
 - Awarding of Graduate Students
 - Graduate Student Hiring
 - Scholarships
- SELF SERVICE:**
- Financial Aid
 - Student Financials*
 - Student Records*
 - Faculty*
 - Advising*
 - Transfer Credit*
 - Extended Profile*

- STUDENT FINANCIALS:**
- Maintain Receivables*
 - 3rd Party Billing*
 - Tuition Calculation*
 - Billing*
 - Cashiering*
 - Payment Plans*
 - Payments & Charges for Grad Students
- STUDENT RECORDS:**
- Enroll Students
 - Maintaining Student Residency
 - 3Cs for SR
 - Transfer Credit*
 - Articulation
 - Managing FERPA
 - Student Indicators/Groups
 - Imaging

Go-Live 6 (Aug 2016*)

- ACADEMIC ADVISING:**
- Appointments
 - Shared Notes
- FINANCIAL AID:**
- Disbursements
 - Return to TitleIV Aid
 - Emergency Loans
- STUDENT FINANCIALS:**
- Refunding
 - Taxes

Go-Live 7 (Aug 2016*)

- ACADEMIC ADVISING:**
- Managing Advising (Degree Audit)
- ADMISSIONS:**
- Transfer Admissions
- DATA WAREHOUSE:**
- Student Financials
 - Student Applicant Data
- FINANCIAL AID:**
- Satisfactory Academic Progress
- SELF SERVICE:**
- End of Term Processes
- STUDENT FINANCIALS:**
- Collections
- STUDENT RECORDS:**
- End of Term Processing
 - Graduating Students
 - Enrollment Reporting
 - Processing Transcripts
 - Verifying Enrollment
 - Preparing for a New Term

* Functionality released in phases

Processes included in SIS

Admissions

- 1- Outreach
- 2- Applications
- 2- Prelim Norming
- 3- Reading and scoring
- 3- SIR Graduate
- 5- Selection
- 5- Yield
- 5- SIR Undergrad
- 5- Clearing
- 7- Transfer Admissions

Student Financials

- 3- SIR Deposit
- 5- Maintain Receivables
- 5- 3rd Party Billing
- 5- Tuition Calculation
- 5- Billing
- 5- Cashiering
- 5- General Ledger
- 5- Payment Plans
- 6- Refunding
- 6- Taxes
- 7- Collections

Financial Aid

- 4- Aid Year Setup
- 4- ISIR Load
- 4- CAL ISIR
- 4- Methodologies
- 4- FA Term
- 4- Budgets
- 4- CAL Grant
- 4- Special Aid Programs
- 4- Verifications
- 4- Packaging
- 4- Imaging
- 4- Scholarships
- 5- Loans
- 5- Satisfactory Academic Progress
- 6- Disbursements
- 6- Return to Title IV Aid

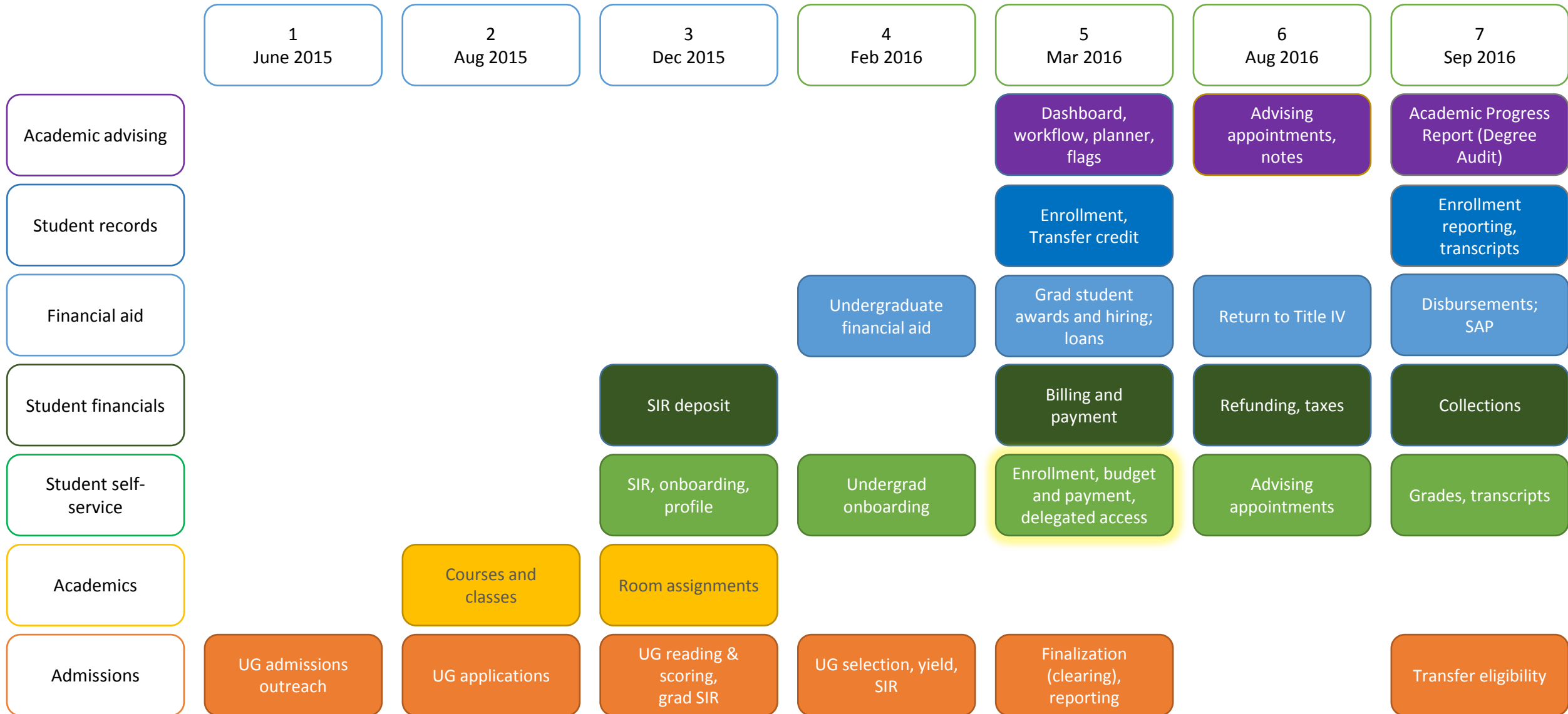
Students and Academics

- 2- Catalog & Schedule 2016
- 2- Defining and Maintaining Course Requisites
- 3- Room Scheduling (Series 25)
- 5- Enroll Students
- 5- Maintaining Student Residency
- 5- Transfer Credit Articulation
- 5- Preparing for a New Term
- 5- Managing FERPA
- 5- Student Indicators/Groups
- 7- End of Term Processing
- 7- Graduating Students
- 7- Enrollment Reporting
- 7- Processing Transcripts
- 7- Verifying Enrollment

Academic Advising

- 5- Dashboard
- 5- Student Planner
- 5- Workflow
- 6- Appointments
- 6- Shared Notes
- 7- Academic Progress Report (Degree Audit)

Timeline and methodology: Phased go-lives



Executive Steering Committee



Harry LeGrande
(Co-Chair)

Vice Chancellor, Student
Affairs



Cathy Koshland
(Co-Chair)

Vice Chancellor,
Undergraduate Education



Larry Conrad

Associate Vice Chancellor,
Information Technology and
Chief Information Officer



Rosemarie Rae

Associate Vice Chancellor,
Administration and Finance
and Chief Financial Officer



John Wilton

Vice Chancellor,
Administration and Finance

Steering Council



Fiona Doyle (Co-Chair)
Dean, Graduate Division



Bob Jacobsen (Co-Chair)
Interim Dean of Undergraduate
Studies in the College of L&S,
Professor of Physics



Lyle Nevels
Deputy CIO,
Information Services
and Technology
Project and Risk Management
PMO, Implementation Partner, External Quality Assurance



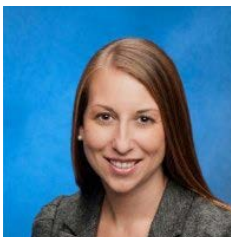
**Rachelle
Feldman** Assistant
Vice
Chancellor/Director,
Financial Aid



**Anne De
Luca** Associate Vice
Chancellor, Admissions and
Enrollment



Jenn Stringer
Associate CIO,
Educational Technology
Services



Andrea Dooley
Assistant Vice Chancellor &
Chief of Staff, Student Affairs



Joyce Sturm
Director of Financial
Operations

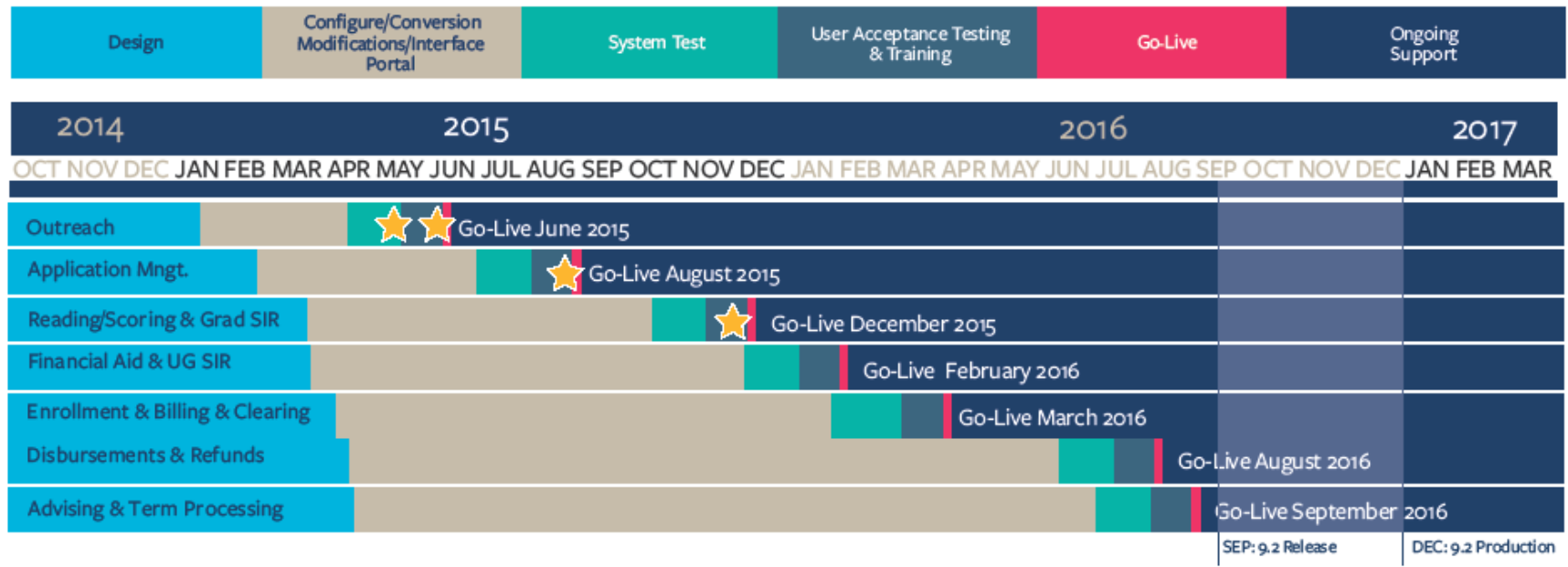
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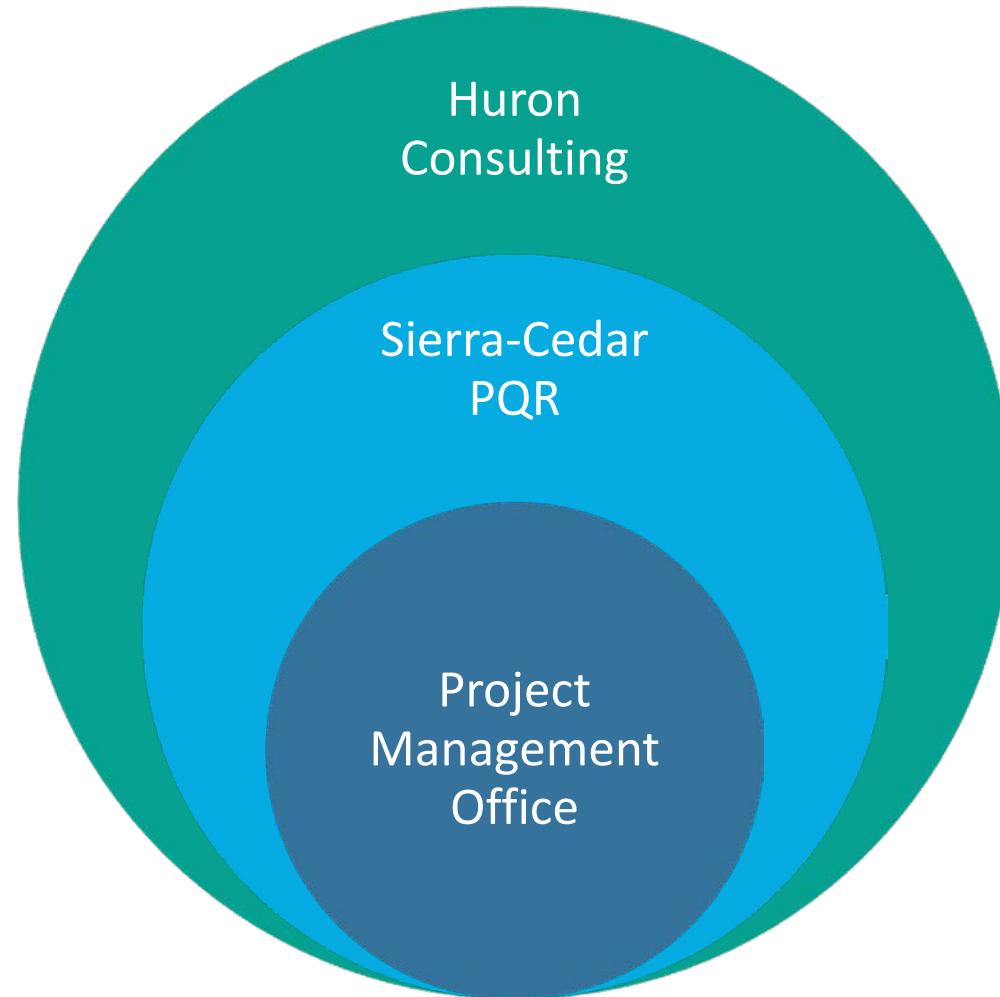
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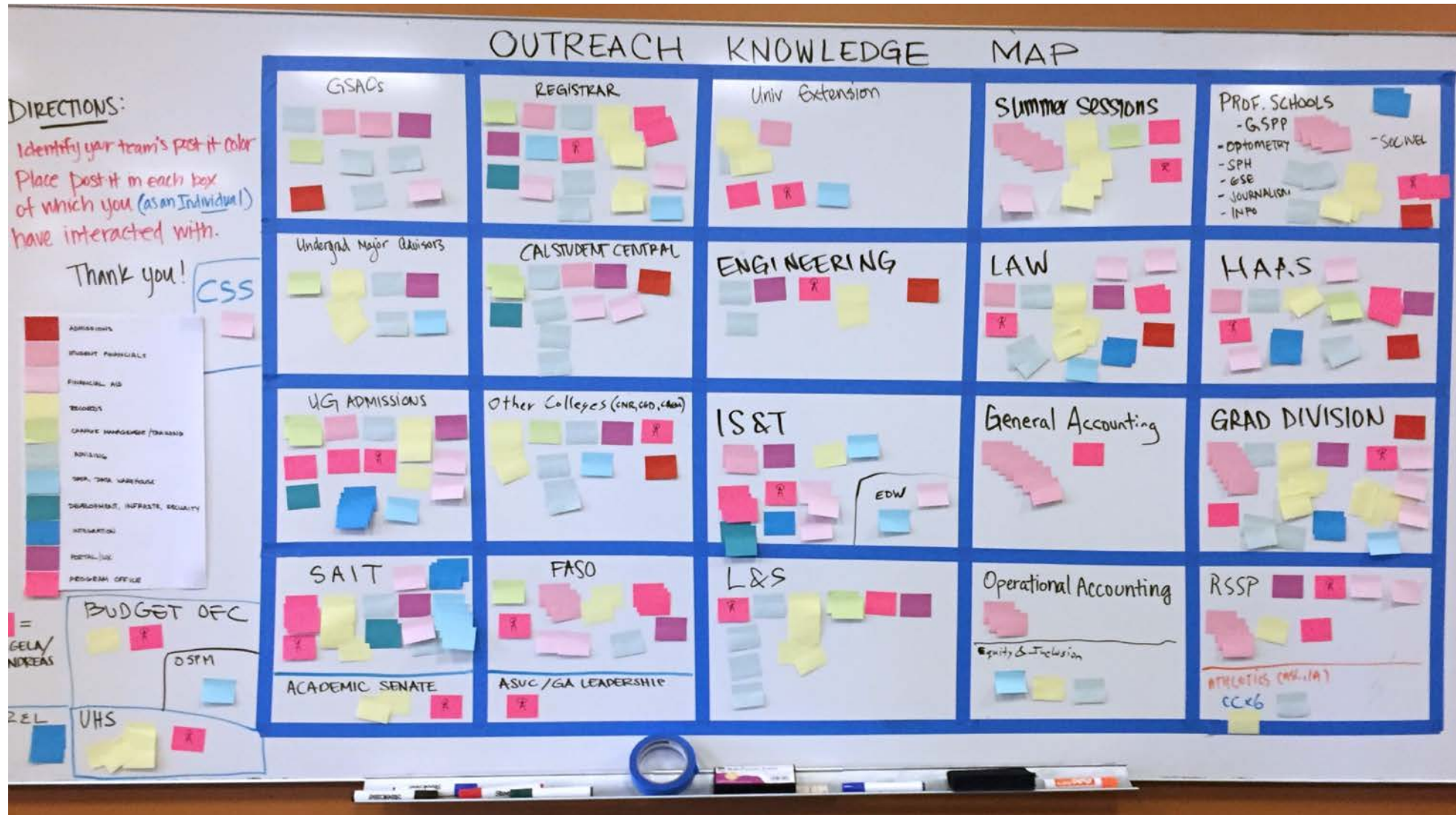
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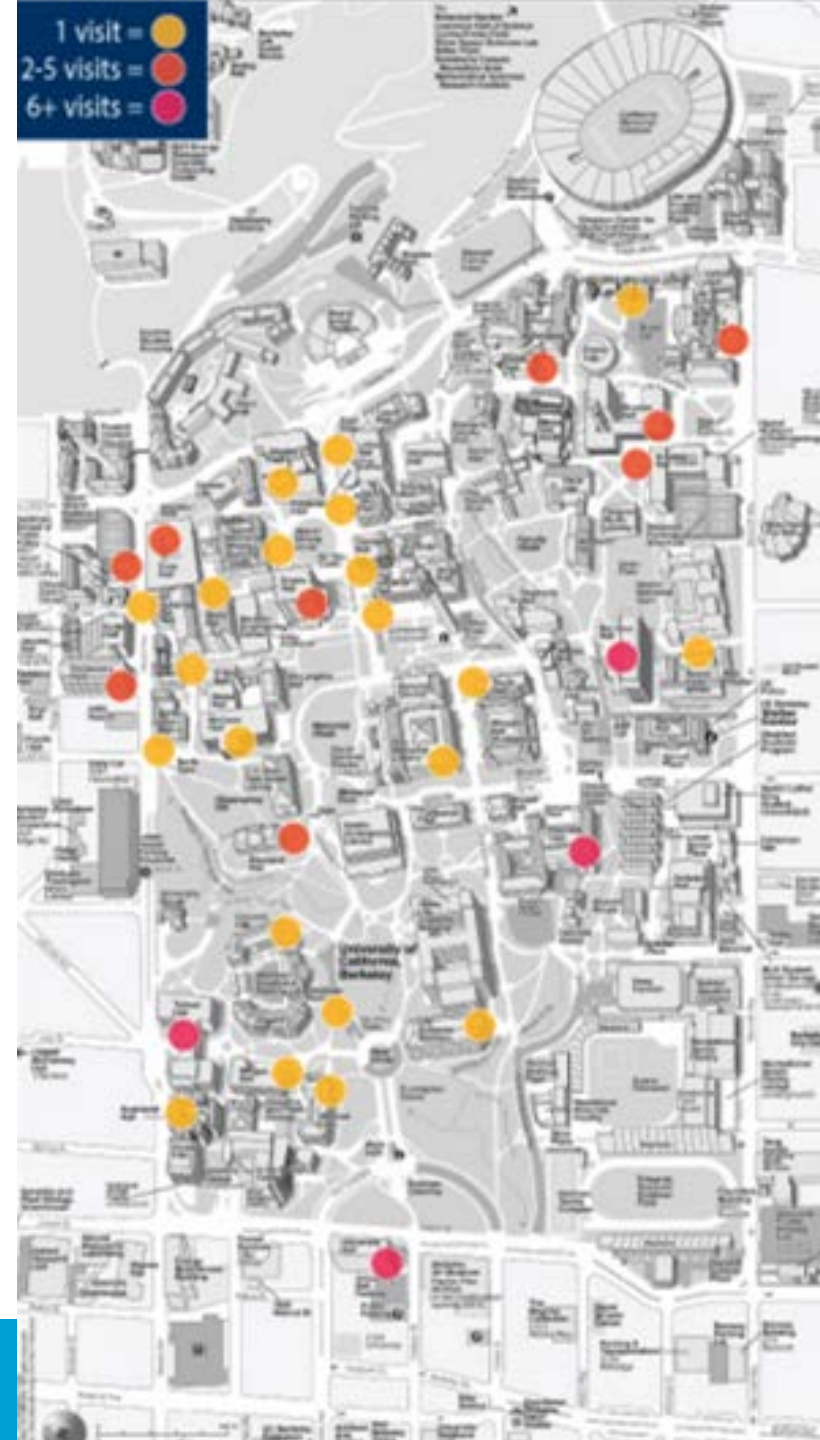
Risk Tracking and Risk Management



Engagement with campus community



Advising Team Outreach to gather degree requirements



Student experience: Design studio workshops



Academic
Planning and
Enrollment

Funding and
Paying for my
Education

Transforming the student experience



Bear Facts

University of California Berkeley

Students
The Bear Facts login for students to review information such as their grades, registration, class schedules, and financial aid, etc. Login here to sign up for the WarnMe Campus Emergency Alert Service.

Student Resources
This section provides general information on student services including registration, billing, and financial aid.

[e-Bill/e-Check Access for Parents and Others \(Non-Students\)](#)

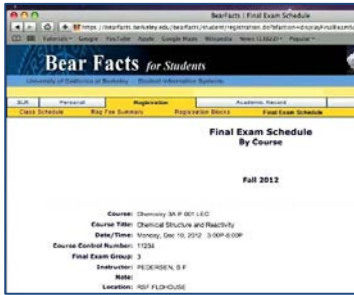
Degree Audit Report (DARSweb)
Students and staff may now access Degree Audits online via DARSweb



Faculty
The Bear Facts student information e-mail for students more.

Staff
The Bear Facts information such as schedules, and financial aid.

Access Request
The Bear Facts Facts access.

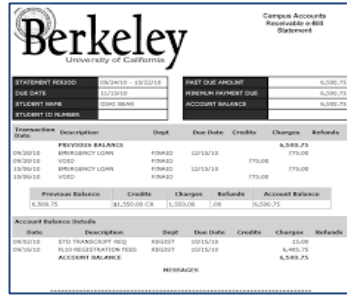


Bear Facts for Students

Final Exam Schedule By Course

Fall 2012

Course: Chemistry 1B P. 801 LECT
 Course Title: Chemical Structure and Reactivity
 Date/Time: Monday, Sep 16, 2012 3:00P-6:00P
 Course Catalog Number: 1234
 Final Exam Group: 3
 Instructor: PEDERSEN, S.F
 Mail:
 Location: NSF FIELDHOUSE



Berkeley University of California

Account Summary

Statement Period	First Due Amount
10/01/11 - 10/31/11	6,500.75
Due Date	Minimum Payment Due
11/15/11	6,500.75
Student Name	Account Balance
JOE BLANK	6,500.75

Previous Balance: 6,500.75
 Credits: 0.00
 Charges: 0.00
 Account Balance: 6,500.75



ScheduleBuilder

Welcome to ScheduleBuilder

Scheduling
Pick your classes and we'll give you the best schedule. Prefer less time between classes? Like to sleep in? We can accommodate that and more!

Textbooks
Find the books you need for each class.

Grade Distribution
View the distribution of assigned grades in a course over the last 5 years. Refine the list by selecting only certain terms or instructors.

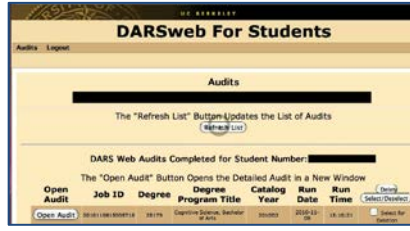
Maps
NEXT Locate classes on a campus map, courtesy of Google Maps. See one class on your entire schedule with one click.



MyFinAid

Category	Amount
Books & Supplies	\$1,200.00
Tuition and Fees	\$12,872.00
Health Insurance	\$2,700.00
Living Expenses	\$8,200.00
Other Expenses	\$50.00
Total UC Berkeley Costs	\$25,722.00
My Gift Aid	\$19,000.00
My Net Cost	\$6,722.00
Program Stipend	\$0.00
Student Loan	\$4,000.00
Total Resources to Meet My Net Costs	\$4,000.00
Unmet Need	\$2,722.00

"It would be great to go to one place for everything..."



DARSweb For Students

Audits

The "Refresh List" Button Updates the List of Audits

DARS Web Audits Completed for Student Number: [Redacted]

Open Audit	Job ID	Degree Program Title	Catalog Year	Run Date	Run Time
[Open Audit]	[Redacted]	Chemistry, Bachelor	2010	11/20/11	



Tele-BEARS

Home | Fall 2012 | Summer 2012 | Contact

General: 1 Class Calendar, 2 Class List, Enrollment: 3 Add Class, 4 Change Units, 5 Switch Sections, 6 Add to Wait List, 7 Change Grade Option, 8 Drop Class, Class Search: 9 Time and Location, 10 Restrictions, 11 Open Sections, 12 Enroll/Waitlist, 13 RAC or A/C, Registration: 14 Degree List

CCN	Course	Section	Units	Grade
27603	ENGIN 7 01 LEC	4		Letter
27609	ENGIN 7 101 DIS			
27615	ENGIN 7 11 LAB			

Purchase Books

Total units: 4



Berkeley Academic Guide

UNDERGRADUATE | GRADUATE | COURSES | ARCHIVE

FILTERS

DEGREE PROGRAMS

NARROW YOUR RESULTS

DEGREES: Majors, Minors



Berkeley University of California

Statement Name	Statement Date	Net Amount
UNCLER	10/31/11	\$0.00
UNCLER	11/30/11	\$0.00
UNCLER	12/31/11	\$0.00
UNCLER	1/31/12	\$0.00
UNCLER	2/29/12	\$0.00
UNCLER	3/31/12	\$0.00
UNCLER	4/30/12	\$0.00
UNCLER	5/31/12	\$0.00
UNCLER	6/30/12	\$0.00
UNCLER	7/31/12	\$0.00
UNCLER	8/31/12	\$0.00
UNCLER	9/30/12	\$0.00
UNCLER	10/31/12	\$0.00



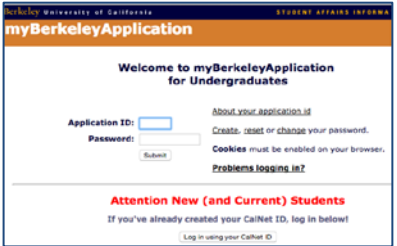
online.scholarship.org

online.scholarship.org

fall 2015
 Search Schedule of Classes
 Search Midterm Exam Schedule
 Open and Suggested Courses
 General Interest Courses
 Final Exam Responsibilities
 Final Exam Calendar
 Printable Undergraduate Schedule
 Printable Graduate Schedule

spring 2015
 Search Schedule of Classes
 Search Midterm Exam Schedule
 Search Final Exam Schedule
 Final Exam Responsibilities
 Printable Undergraduate Schedule
 Printable Graduate Schedule

related information
 Using the Online Schedule of Classes
 Mobile Schedule of Classes
 UC Cross-Campus Online Courses
 Berkeley Academic Guide
 Academic Calendar
 UC Berkeley Home Page
 Office of the Registrar
 Educational Technology Services



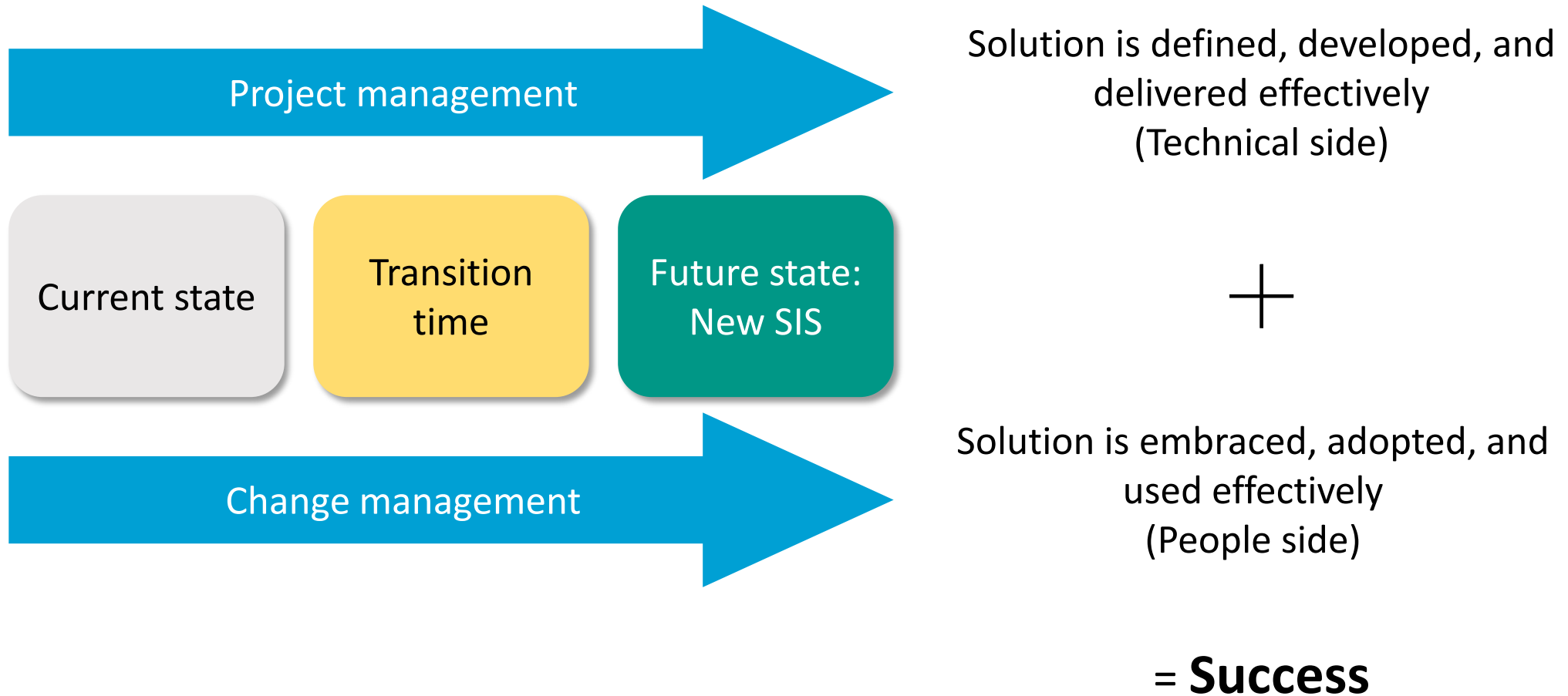
myBerkeleyApplication

Welcome to myBerkeleyApplication for Undergraduates

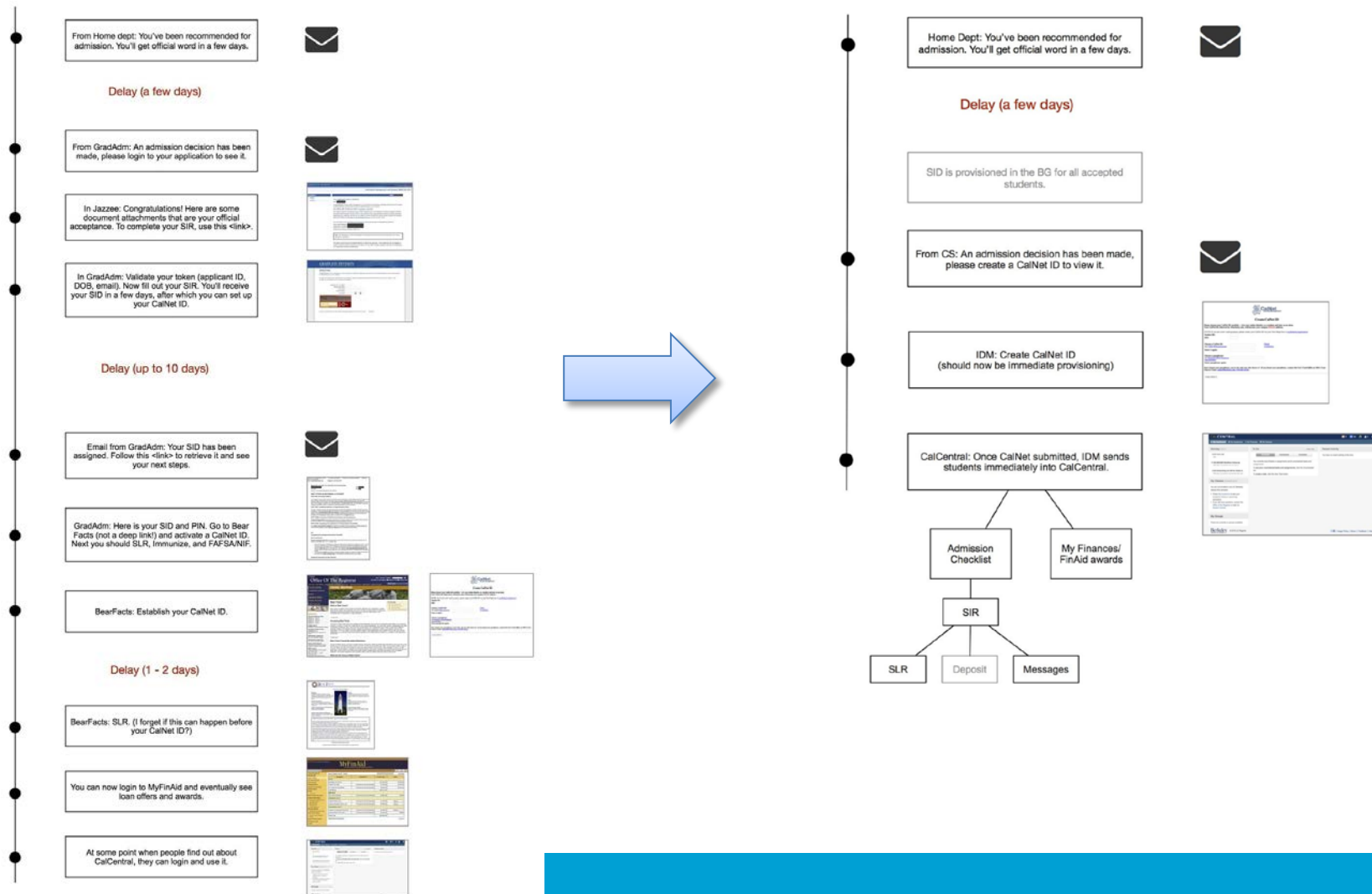
Application ID: [Input]
 Password: [Input]
 Submit

Attention New (and Current) Students
 If you've already created your CalNet ID, log in below!

Change Management & Project Management



Example: Simplified Graduate SIR & Onboarding



Benefits and opportunities for departments

- **Curriculum management**
 - More accurate information on class demand
 - Ability to finalize schedule later
- **Enrollment management**
 - Class sequencing
 - Prerequisites
 - Wait Lists
- **Student information visibility**
 - Appointment and funding visibility for graduate students
- **Advising**
 - Campus-wide advising records, including status and notes
 - Degree planning
 - Degree audit

Key department-level policies to be defined

Processes:

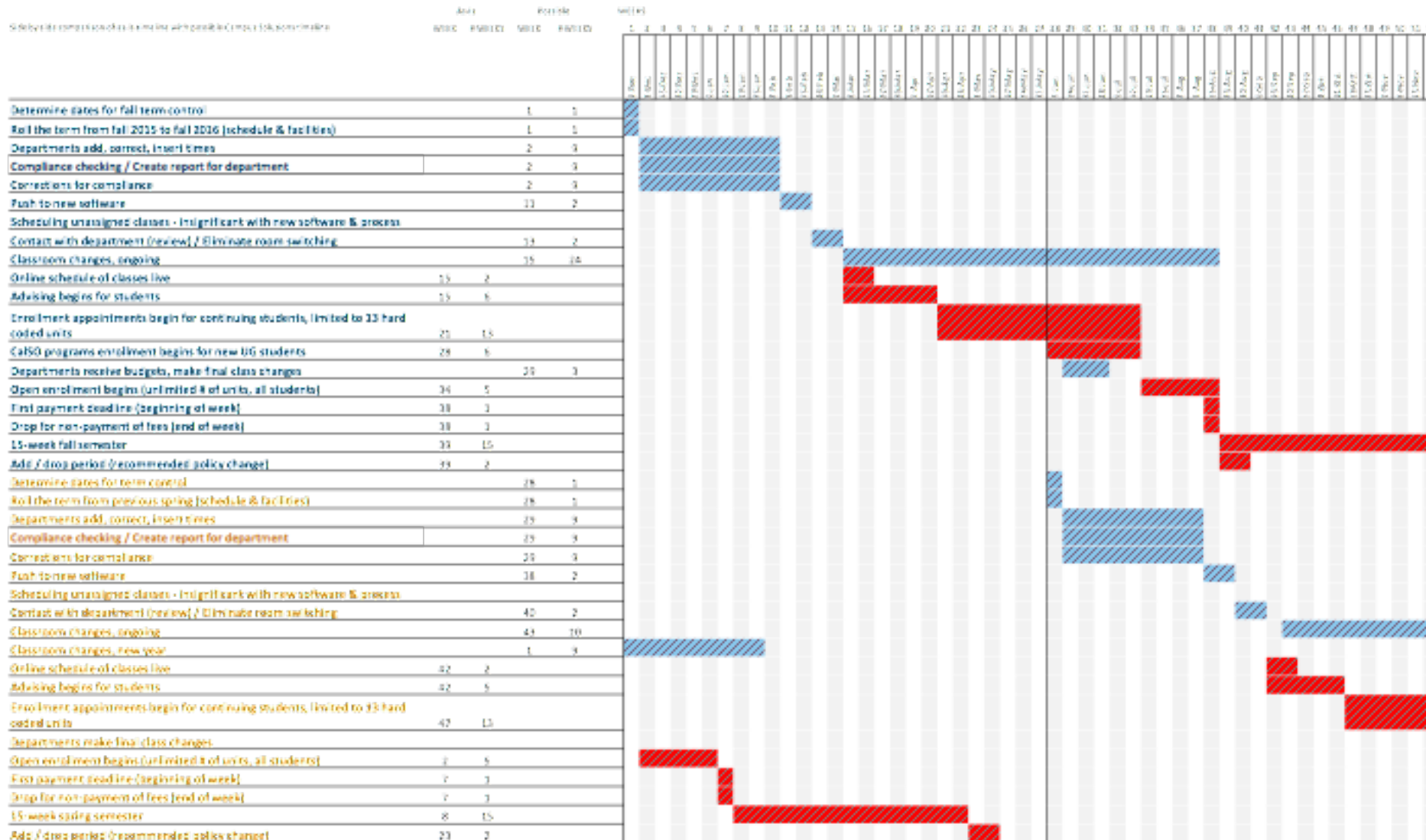
- Waitlist management
- Prerequisite enforcement
- Exceptions to degree plan

Questions:

- How strictly are these enforced?
- Who makes the decisions for exceptions?

Scheduling & Enrollment

■ Scheduling Activities
 ■ Enrollment Activities



1. All unmatriculated units will have a single enrollment period before open enrollment begins
2. Once a student has had their appointment, they will have access to the cycle through the end of the add/drop period.
3. Students will be limited to enrolling in 13 units (hard limit) and placing themselves on the wait list for up to 4 units until the open enrollment period.
4. Departments will be able to ensure distribution of wait in a class, e.g. for new freshmen, through the use of the reserved capacity function in Campus Solutions Enrollment (revisions and course restrictions (requires analysis and testing year))
5. The use of prerequisites in Campus Solutions will restrict class into those eligible to enroll in them.

First budget call, then schedule classes

Discussion

Planning for departmental readiness

Discussion

Identifying additional needs of departments

Discussion

What metrics are meaningful to you?

Other slides