Cal State Monterey Bay and Sierra-Cedar Successfully Implement Robust Campus Solutions Self Service

CALIFORNIA STATE UNIVERSITY
Monterey Bay

BACKGROUND

The California State University, Monterey Bay (CSUMB), which was established in 1994, now enrolls 4,000 students. The University is located on the grounds of the former Army base at Fort Ord. The campus serves the diverse people of California, especially the working class and historically undereducated and low-income populations. The university is committed to multilingual, multicultural, and gender-equitable learning. The CSUMB curriculum meets statewide and regional needs, specifically those involving both inner-city and isolated rural populations, and needs relevant to communities in the immediate Tri-County region of Monterey, Santa Cruz, and San Benito.

CSUMB is part of the California State University's (CSU) Student Administration Collaborative, along with four other CSU campuses. The goals of the Collaborative were to replace the Banner Student Administration system with CSU specific Oracle/PeopleSoft Campus Solutions system, reduce risk associated with a single campus software implementation, and reduce costs by leveraging campus resources through collaboration.

Industry	Higher Education
Services	**Implementation** • Project Management • Functional Consulting • Technical Consulting
Application & Modules	**PeopleSoft Campus Solutions 8.9** • Academic Advisement • Admissions and Re-cruiting • Campus Community • Campus Self Service • Financial Aid • Student Financials • Student Records
Client Since	2007

CHALLENGES

CSUMB faced the challenge of a very aggressive schedule of go-lives. There were limited resources, both technical and functional, and the project manager retired, leaving a communication and knowledge transfer void.

SOLUTION

Sierra-Cedar brought in a team of on-site functional and technical consultants to address the challenges that CSUMB faced. The CSUMB functional staff was very supportive of the project, knowing that their business process needs could be addressed by the new software. Sierra-Cedar and CSUMB made adjustments to the project schedule, scope, staff, tasks and processes to help reduce the risk factors associated with the project schedule.

RESULTS AND BENEFITS

With an on-site team of full-time consultants from Sierra-Cedar, CSUMB was able to go-live on schedule, beginning with financial aid packaging in February, 2008. CSUMB was the first among the Collaborative campuses to issue financial aid awards. Advising started in March, 2008 for continuing students. Registration and enrollment were live in April, 2008 and Application Processing in June, 2008.

> *Sierra-Cedar was essential to the success of Monterey Bay's implementation. The functional consultants had extensive knowledge of higher education business practices which allowed us to streamline and enhance our processes despite an aggressive schedule. We are now able to better serve our staff, faculty and, most importantly, our students.*
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> **Sheila Hernandez**
> Registrar

Billing and Refunding was live in July, 2008 and Transcripts became available in September, 2008. Interfaces were developed and put in place to support over 14 ancillary systems.

The following examples illustrate some of the many accomplishments of the Project Team:

- Data conversion and incremental programs were developed to extract, transform, and load existing data into the new system.
- Self Service was brought on-line for students, faculty and staff. It includes the following functionality:
  - Financial Aid – students can see their Financial Aid information
  - Admissions – students can see their status and outstanding items
  - Advising – advisors and students can manage and seek advising
  - Records – students can create a wish list of courses, enroll in courses, add and drop courses
  - Faculty Center – faculty members can see their class rosters, schedules and student information
  - Web Schedule – the system automatically updates course catalog and class schedule changes

> *Sierra-Cedar consultants were organized, efficient, extremely competent, and had an excellent rapport with the functional users on campus. During our implementation, we met our target dates and were very pleased with the scope of the project as laid out by Sierra-Cedar. In summary, I would highly recommend Sierra-Cedar to other universities that are investing in such a project.*
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> **Dr. Ronnie Higgs**
> Interim Vice President for Student Affairs