Business Assessment & Technology Services

A Snap-shot of Our Team’s FY09 Accomplishments, Vision Elements, & Future Goals
Scorecard At-A-Glance
Outcomes & FY 09 Goals

**S1. Maximize Service Quality Services***
- Enhance dashboard reporting system
- Explore capability of implementing reporting writing tool & other technology projects
- Provide high quality technology support services
- Improve quality, quantity, & alignment of business technology course offerings

*Dimensions of quality include: accuracy, consistency, and responsiveness

**IB1. Utilize Effective and Efficient Processes**
- Develop and maintain efficient technology support processes
- Maintain user-friendly and efficient class registration system
- Increase awareness of and participation in business technology courses

**IB2. Optimize Technology**
- Enhance technology to improve information sharing and services
- Expand use of technology enhancements in business technology training courses

**SLG1. Attract, Retain, and Develop the Best Possible Staff**
- Encourage and provide staff with access to training & development opportunities

**SLG2. Achieve Staff Satisfaction**

**F1. Exercise Effective Financial Management**
- Operate within allocated resources

**F2. Provide Cost-Effective Programs and Services**
<table>
<thead>
<tr>
<th>Area</th>
<th>Objectives</th>
<th>Indicator</th>
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</thead>
</table>
| Assessment & Reporting  | • Enhance dashboard reporting system  
• Implement Discoverer for FAMIS  
• Partner with EA Group to research and develop implementation plan for launching Discoverer for Banner                                                                                                                                                                                                 | • Dashboard reporting tool enhanced to allow for ease of reporting and usage  
• Discoverer implemented as reporting tool for FAMIS; validated data and analysis  
• Steps taken to implement Discoverer for Banner                                                                                                                                                                                |
| Technology Projects     | • Conduct initial and ongoing meetings with unit directors/managers to identify key technology projects  
• Support business units in the assessment of business processes and/or systems/applications needs & requirements  
• Partner with EA Group and key managers to complete technology priority projects                                                                                                                                                                                                                           | • Introductory meetings completed with each Division unit, including on-going meetings  
• Increased in the number of technology projects completed – number to TBD based on priority projects selected by business units and available resources                                                                                                                                 |
| Technology Support      | • Conduct an inventory report on Division technology equipment, beginning with computers  
• Configure Window Vista compatibility system for testing  
• Establish and implement naming conventions for uploaded documents in CMS  
• Utilize new administrative homes page for key Division web pages  
• Enhance Division specific web pages  
• Providing on-going training and support in CMS, Dreamweaver, and Adobe.                                                                                                                                                                                                 | • Complete inventory of Division’s technology equipment, beginning with computers  
• Complete testing for Windows Vista, including plan for appropriate implementation  
• Naming conventions established and utilized to improve access to key documents  
• Administrative pages utilized, facilitate sharing of information and improving accessibility  
• Training and support provided to content authors                                                                                                                                                                               |
| Support Services        |                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                     |
| Technology Training     | • In partnership with HR, complete staff training needs assessment, including action plan for meeting needs  
• In partnership with HR, hold staff training open houses  
• In partnership with HR and OIT, launch the online registration system  
• In partnership with HR, support Career Path program via training  
• Establish on-going support meetings with subject matter experts  
• Expand technology course offerings to include MS Office and other Banner modules, specifically Banner Finance, for all three campuses                                                                                                                                 | • Staff training needs assessment and action plan completed  
• Staff training open house held in SF and SAC  
• Online registration system launched  
• Subject Matter Experts Team assembled  
• Increase in the quantity and quality of tech training for all three campuses                                                                                                                                                         |
Assessment & Reporting

- Enhance dashboard reporting system *(Maximize Service Quality)*
- Explore capability of implementing reporting writing tool & other technology projects *(Maximize Service Quality)*

- Allows users to directly input operational data
- Provides automated one-page summary reports by month, quarter, and year-to-date,
- Incorporates color-coding to draw attention to areas of success, progress, or challenges.
- Resides on the Division’s shared drive
**Completed.** Dashboard reporting enhanced

**Completed.** Discoverer implemented as report writing tool for FAMIS

**In Progress.** Exploring the possibility of implementing Discoverer for Banner
Technology Projects

- **Completed.** Introductory meetings with directors and key managers; 15 projects identified

- **Completed.** 6 databases, 1 website conversion, and 4 analyses completed;

- **In Progress.** People Admin for HR, Signature Authorization Database for Controller’s Office, Division Website - Phase 2 & 3, Central Document Repository, Dynamic Webpage for Polices, Procedures, & Forms

- Budget Forecasting Database
- Budget Reserve Fund Database
- Claims Management Database
- Applicant Tracking Database
- Division Inventory Database
- Division MS Office 2007 Cutover Database
- Division Website – Phase 1
Technology Support Services

- Provide **high quality technology support services** (Maximize Service Quality)
- Develop and maintain **efficient technology support processes** (Utilize Efficient & Effective Processes)
- Enhance **technology to improve information sharing and services** (Optimize Technology)

### FY09 TECHNOLOGY SERVICE REQUESTS

**Number Submitted**

<table>
<thead>
<tr>
<th>Month</th>
<th>Number</th>
</tr>
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<tbody>
<tr>
<td>Jul-08</td>
<td>55</td>
</tr>
<tr>
<td>Aug-08</td>
<td>82</td>
</tr>
<tr>
<td>Sep-08</td>
<td>71</td>
</tr>
<tr>
<td>Oct-08</td>
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<tr>
<td>Feb-09</td>
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<tr>
<td>Mar-09</td>
<td>45</td>
</tr>
<tr>
<td>Apr-09</td>
<td>65</td>
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<tr>
<td>May-09</td>
<td>59</td>
</tr>
</tbody>
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**YTD Average Number Submitted Per Month: 63**

**YTD Number of Technology Service Requests Submitted: 692**
FY09 TECHNOLOGY SERVICE REQUESTS
Resolved in a Timely Manner
YTD Resolved by Targeted Days

- Average monthly carryover of open requests is 9%, with lowest at 4% and the highest at 16%
- 43% of requests are software-related issues, followed by hardware-related issues at 24%.
- Highest number of requests were from the Controller's Office at 22% (153), followed by Support Services at 18% (123) and Treasury Management at 16% (111)
Snapshots of Division’s Inventory Database
Technology Training

Improve **quantity, quality, and alignment of business technology course offerings** (Maximize Service Quality)

Maintain **user-friendly and efficient class registration system** (Utilize Efficient & Effective Business Processes)

Increase **awareness of and participation in business technology courses** (Utilize Efficient & Effective Processes)

Expand use of **technology enhancements in business technology training courses** (Optimize Technology)

FY09 TECHNOLOGY TRAINING SESSIONS

All Campuses

Number of Training Sessions

<table>
<thead>
<tr>
<th>Month</th>
<th>Jul-08</th>
<th>Aug-Sep-08</th>
<th>Sep-08</th>
<th>Oct-08</th>
<th>Nov-08</th>
<th>Dec-08</th>
<th>Jan-09</th>
<th>Feb-09</th>
<th>Mar-09</th>
<th>Apr-09</th>
<th>May-Jun-09</th>
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<tbody>
<tr>
<td>Number</td>
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<td>2</td>
<td>2</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>7</td>
<td>0</td>
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**Total Number of Training Sessions Delivered: 24**

FY09 TECHNOLOGY TRAINING PARTICIPANTS

All Campuses

Number of Participants

<table>
<thead>
<tr>
<th>Month</th>
<th>Jul-08</th>
<th>Aug-Sep-08</th>
<th>Sep-08</th>
<th>Oct-08</th>
<th>Nov-08</th>
<th>Dec-08</th>
<th>Jan-09</th>
<th>Feb-09</th>
<th>Mar-09</th>
<th>Apr-09</th>
<th>May-Jun-09</th>
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<tbody>
<tr>
<td>Participants</td>
<td>12</td>
<td>20</td>
<td>13</td>
<td>19</td>
<td>30</td>
<td>38</td>
<td>41</td>
<td>30</td>
<td>38</td>
<td>41</td>
<td>8</td>
</tr>
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</table>

**Total Number of Participants: 191**

- **Classes:** Banner Fundamental, Intro to Tech @ Pacific, MS Word, MS Excel, MS Outlook, MS Powerpoint
- **Registration:** Staff registration for classes via InsidePacific and receive confirmation via email
- **Advertisement:** E-News, Technology Training Webpage, Staff Advisory Council meetings, and targeted listservs
- **Seating Capacity Filled:** 73%, on average at least 7 of 10 available seats are occupied
Evaluation Rating of Technology Training Classes

- Developed based on best practices and validated by campus survey experts and other professionals.
- Rated on a Likert type scale; participants express level of agreement with statements -1 to 5, 1 as strongly disagree and 5 as strongly agree.
- Completed online via Survey Monkey.

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**FY09 TECHNOLOGY TRAINING EVALUATIONS**

*All Campuses*

- Percentage of Evaluations Submitted
  - Submitted: 97%
  - Not Submitted: 3%

**FY09 TECHNOLOGY TRAINING EVALUATION RESULTS**

*All Campuses*

- Percentage of Sessions Rated 3 or Higher
  - Rated 3 or higher: 94%
  - Rated 2 or lower: 6%
Other Key Accomplishments

- **Completed.** Implemented Discoverer for FAMIS.
- **Completed.** Performed compatibility testing and configuration of Windows Vista
- **Completed.** Performed compatibility testing of MS Office 2007
- **Completed.** Performed testing of wireless networking for thin-clients
- **Completed.** Provided 10 CMS training sessions to content authors
- **Completed.** Introduced and implemented naming conventions for Division documents
- **Completed.** Developed Division’s central document repository
- **Completed.** Completed a university-wide staff training needs assessment, including the issuance of comprehensive report and action plan
- **Completed.** Launched staff online registration system for course enrollment
- **Completed.** Held staff open houses at all three campuses, with a total 168 participants
- **Completed.** Established subject matter experts for all Banner modules, including on-going meetings for support and knowledge sharing.
- **Completed.** Supported enterprise-wide projects such as Quality Address System implementation and consultation on Ad-Astra, Pacific’s class scheduling system
- **In Progress.** Evaluating Discoverer for Banner Finance, HR, and Payroll
- **In Progress.** Cutting-over to Windows Vista
- **In Progress.** Cutting-over to MS Office 2007
- **In Progress.** Launching Division Website – Phase 2 and 3
- **In Progress.** Continue collecting and reviewing Division’s internal and external forms, policies, and procedures, with consideration to convert to interactive documents
- **In Progress.** Holding Info-Mapping course in early August
WHAT NEXT?
• Technology is leveraged and utilized to meet and advance key business requirements, especially in the area of assessment, reporting, streamlined business processes, and electronic and interactive forms and website

• A dynamic technology environment supports and advances employees’ skill-sets to meet current and future business needs

• A computer environment that minimizes downtime, technical issues, and costs

• Enhanced collaboration and knowledge sharing with other university groups around technology
## FY 2010 & 2011

<table>
<thead>
<tr>
<th>PR 15 SAP</th>
<th>Vision Elements</th>
<th>Objectives</th>
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</table>
| 5.18.1    | Technology is leveraged and utilized to meet and advance key business requirements, especially in the area of assessment, reporting, streamlined business processes, and electronic and interactive forms and website | • Advance transition to new Dashboard for Treasury and Support Services  
• Review and implement Sightlines  
• Evaluate and implement Discoverer for Banner Finance, HR, and Payroll  
• Explore and implement software for deploying interactive forms to reduce costs and streamline administrative processes  
• Complete assessment of PeopleAdmin for Human Resources  
• Complete Division Website Project, phase 1 and 2  
• Complete Division Dynamic Webpage for forms, policies, and procedures  
• Complete Division Central Document Repository Project  
• Complete Signature Authorization Project |
| 5.18.2    | • A dynamic technology environment supports and advances employees' skill-sets to meet current and future business needs | • Deliver Banner 8, MS Office 2003 & 2007, and pilot a combo “soft and hard” skills training classes  
• Equip training room with SMART Board technology  
• Revamp technology curriculum to be responsive to need  
• Advance technology class evaluation from Level 1 to Level 2 by including pre and post test questions  
• Clarify purpose and continue to provide support to Subject Matter Experts  
• Enhance technology training terminal server environment to utilize “locked down” user profiles by setting up enforced policies |
| 5.18.3    | • A computer environment that minimizes downtime, technical issues, and costs | • Provide responsive technology support services  
• Develop guidelines and processes for evaluating need and budget for new technology equipment, beginning with personal computers  
• Evaluate SMART board technology for training and Division-wide use  
• Purchase and configure terminal server environment to support the roll out of thin-clients |
| 5.18.4    | • Enhanced collaboration and knowledge sharing with other university groups around technology | • Participate on appropriate committees and working groups  
• Create a training advisory board  
• Conduct a focus group with supervisors and managers to understand the training needs for their staff |
| 1.2.4     | • A computer environment that minimizes downtime, technical issues, and costs | • Provide responsive technology support services  
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| 2.5.5     | • Enhanced collaboration and knowledge sharing with other university groups around technology | • Participate on appropriate committees and working groups  
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Thank you!