

**1999 Planning Summary
for
Administration and Finance
Department: Bursar**

Goal	Indicators	Evidence
1. Support Student Systems (PeopleSoft) development. On-going 4 to 5 year project	<ul style="list-style-type: none"> • Product research • Component development and release. 	<ul style="list-style-type: none"> • Member assignments have been completed. • Teams have been established. • Review documents have been and will be continue to be created to address specific components and processes.
2. Year 2000 planning, reviewing, and testing. (Completion required by December 1, 1999).	<ul style="list-style-type: none"> • Program inventory. • Hardware and Software inventory. • Development of test plan. 	<ul style="list-style-type: none"> • Assessment and tracking of each mainframe module requiring review and testing. (Complete as of July 1, 1999). • Testing of mainframe modules. (Approximately 90% complete as of July 1, 1999). • Analysis of software upgrade and replacement requirements. (Approximately 70% complete as of July 1, 1999). • Analysis of hardware upgrade and replacement requirements. (Approximately 90% complete as of July 1, 1999).
3. Direct Deposit (to be released in the fall of 2000).	<ul style="list-style-type: none"> • Program design, review, and development. • Financial Management and Treasury coordination. • Banking arrangements. • Procedure design. • Forms and application design. • Communication mechanisms development 	<ul style="list-style-type: none"> • Program design has been completed. • Coordination with Treasury, Financial Management Services, and University Information Technology Services is underway. • General Banking concerns have been identified and are approximately 50% complete. • Procedures approximately 90% complete. This includes paper and electronic announcement and promotional material.

Goal	Indicators	Evidence
4. Bursar Electronic Cashiering interface with FIS.	<ul style="list-style-type: none"> • Program design, review, and development. • Financial Management and Treasury coordination. • Procedure design. • Forms and application design. • Communication mechanisms development • Training 	<ul style="list-style-type: none"> • Program design has been completed. • Coordination with Treasury, Financial Management Services, has been completed. • Procedures and announcements have been completed. • Training of all departments on campus has been completed.
5. Improved Customer Communications. (e.g., mass e-mail distribution, improved web tools).	<ul style="list-style-type: none"> • Identified services • Customer Feedback 	<ul style="list-style-type: none"> • Initial services have been identified. • Mass e-mailing to targeted populations has been tested and has been used in recent months. • Several feedback tools have been designed for use by customers. • Web-based "suggestion" box has been developed for customer feedback.