

CALIFORNIA STATE UNIVERSITY, FRESNO

1911-2011



STEPPING INTO OUR NEXT CENTURY

## **Advancement Division Action Plans**

**FY 2010-11 and FY 2011-12**

# **Data and Information Services**



**CALIFORNIA STATE UNIVERSITY, FRESNO**  
**University Development      FY2010-11 / 2011-12 Action Plan Details**

**Department: Data and Information Services**  
**Date: September 2010**

<b>Priority / Product</b>	<b>Criteria For Success</b>	<b>Tactics</b>	<b>Special Considerations</b>
<b>Sybase Server</b>	<ul style="list-style-type: none"> <li>• Software maintained to most current release.</li> <li>• Minimal downtime.</li> <li>• Optimize system to run the most efficiently.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to keep server up to date with the most current version of Sybase to facilitate easy migration to Oracle.</li> <li>• Make sure error logs are checked every day and that all errors are dealt with in a timely fashion.</li> <li>• Install patches and updates in a timely fashion.</li> </ul>	<ul style="list-style-type: none"> <li>• Migration to Oracle is necessary but cost prohibitive in these financial times. With the discontinuation of Sybase support we must migrate.</li> </ul>
<b>Advance System</b>	<ul style="list-style-type: none"> <li>• Increase empowered users.</li> <li>• Quick turnaround for report requests (within 1 week).</li> <li>• Documentation for procedures and reports.</li> <li>• Documentation of data entry record procedures.</li> <li>• Implement system triggers to enforce record integrity.</li> <li>• Implement more overnight clean-up procedures.</li> <li>• Direct users to fill their own requests with existing reports where we can.</li> </ul>	<ul style="list-style-type: none"> <li>• Create more powerful reports.</li> <li>• Implement advanced lookup for power users.</li> <li>• Refine reports to have more useful variables.</li> <li>• Document all steps of record creation and record format.</li> <li>• Write triggers to help enforce business rules on data entered.</li> <li>• Also write overnight processes to clean and format data similar to the nightly address proc.</li> <li>• Train power users in proper use of the advanced lookup tool.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue to examine load balancing issues with Advanced Lookup.</li> <li>• Explore setting up separate reporting environment for lookup as we add users.</li> <li>• Continue to develop overnight procedures to focus staff time on projects we really need to work on.</li> </ul>
<b>User Support &amp; Training</b>	<ul style="list-style-type: none"> <li>• Get more people trained on advanced topics.</li> <li>• Provide training for new users.</li> <li>• Explore more advanced topics for advanced users.</li> </ul>	<ul style="list-style-type: none"> <li>• Continue monthly training sessions.</li> <li>• Develop “refresher” training materials to be sent out.</li> <li>• Training for tech/reporting staff to enhance their skills.</li> </ul>	<ul style="list-style-type: none"> <li>• Consider branching out training classes as we need more topics of interest for advanced users.</li> <li>• Possibly explore doing beginning training only once a month.</li> </ul>
<b>Call Center</b>	<ul style="list-style-type: none"> <li>• Provide continuing technical support for call center.</li> </ul>	<ul style="list-style-type: none"> <li>• Provide uploads by due dates and respond to other requests as needed.</li> <li>• Act as go between for RuffaloCODY and ITS.</li> </ul>	(continued)

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<b>Tech Support</b>	<ul style="list-style-type: none"> <li>• Minimum PC problems.</li> <li>• Upgrade All PC's.</li> <li>• All PC's running.</li> <li>• Develop help system request time estimation (you are #__ in queue).</li> <li>• Enhance the Advhelp System.</li> </ul>	<ul style="list-style-type: none"> <li>• Assure all patches of Windows are applied. Also make sure we have software up to date.</li> <li>• Stay in touch with campus techs in order to be apprised of developments campuswide.</li> <li>• Make sure we're in sync with campus policies.</li> <li>• Continue to share files through the file sharing support.</li> </ul>	<ul style="list-style-type: none"> <li>• As we implement the new Tech Support services model we need to make greater use of the support services they provide.</li> </ul>
<b>Gift and Pledge Processing</b>	<ul style="list-style-type: none"> <li>• Timely entering of gifts and accurate posting.</li> <li>• Accurate reconciliation with foundation.</li> <li>• Document all processes and procedures accurately.</li> </ul>	<ul style="list-style-type: none"> <li>• All gifts are recorded within 2 business days (per manual), except for the first week of January after the two-week break.</li> <li>• Daily batching and deposit with Foundation including credit cards and other transactions.</li> <li>• Continue Advance-based receipting and digital batch reconciliation with Foundation.</li> <li>• Continue to work with Athletics to record all athletic gifts.</li> </ul>	<ul style="list-style-type: none"> <li>• May need to make provisions on the policy of 2 days depending on work load and staffing.</li> </ul>
<b>Lost Alumni Project</b>	<ul style="list-style-type: none"> <li>• Locate information on unknown alumni.</li> </ul>	<ul style="list-style-type: none"> <li>• Wait for Admissions to scan paper records. Get access to those records and update advance.</li> </ul>	<ul style="list-style-type: none"> <li>• Need to pay for seat license.</li> </ul>
<b>Data Entry Processing</b>	<ul style="list-style-type: none"> <li>• Timely and accurate updating of records.</li> <li>• Quarterly meetings with individual staff to review records entered and performance.</li> </ul>	<ul style="list-style-type: none"> <li>• The entry of changes must be done in a timely fashion to make the greatest impact on data retrieval.</li> <li>• Develop quarterly review process of records entered.</li> <li>• Clean up the nightly error reports on a regular basis. Review reports weekly.</li> </ul>	<ul style="list-style-type: none"> <li>• Prioritizing work with less staff will be the most challenging aspect of this area. Overnight cleanup procedures will pick up some slack, but not all of it. We need people to review, research, and make intelligent decisions.</li> </ul>