

Persona



© Some rights reserved by Jodi Womack

Ida Bozwumon

Bursar

51 *"If we have an outage, I need to know about it. If there is a special case I need all the data"*

"It's important that I have a view that rolls up all the critical data... I need a dashboard that shows me what's going on."

Scenario

Support policy development

As a policy maker, the Bursar needs analytic information. Something specific for a one-time policy discussion in the morning then a dashboard for routine review for the remainder of the day. The Bursar would have a view that shows collection history by department current through the last month or last semester (to coincide with account practices). If there is an excessive delay, the Bursar can discuss remedial action with the department head.

Monitor cashiering performance

Each day the Bursar would have a summary of the previous day's activity showing the number of transactions and amounts for credits, debits, and deferments by department. After the first year the report would also show the monthly average daily values as a comparison. This view would separately show online, cashiering, and batch totals.

The supervising Cashier and Bursar should have a view that shows a list of batches during the current business day with the number and amounts for credits, debits, and deferments by batch. It would show whether the batch was open or closed and the person or source department responsible for the batch.

Resolve customer issues

Some customer issues will be escalated to the Bursar. When this occurs, the Bursar should have the same access to an account holder's records, including notes, as the cashiers and supervising cashier. The student system should also provide a profile of the student and previous notes related to the student that provides context for the dialogue.

Monitor KSA performance

As part of the information technology infrastructure, IT should provide a real-time screen that shows volumes of activity for public facing activity, source department activity and cashier activity and any periods of outage. The design of the online continuous monitor for KSA would be determined by the general design for all managers.

Objectives

- Provide information that will improve policy making participation
- Provide continuous monitoring of source department activity and collections.
- Provide monitoring of cashiering activity.
- Provide continuous monitoring of public-facing online activity.
- Provide levels of authentication and authorization consist with security and productivity.

Concerns

- The Bursar will need to know what level and timing of information provided to departments that are source of transactions.
- Business processes may need to be changing to improve productivity with the new IT capabilities.
- The cashiering system needs to be integrated with collections using standards-compliant message exchanges for possible future integration with the U.S. Department of Education collection activities and collection firms.
- The security required of student and financial data needs to be determined to guide both development and implementation of authentication and authorization.

