



## Student Administration Core Team **Minutes**

California State Polytechnic University Pomona

### Meeting Logistics

<b>Title</b>	SA Core Team
<b>Purpose</b>	Discuss CMS/PeopleSoft SA Version 8.0 Implementation
<b>Date</b>	Thursday, September 4, 2003
<b>Time</b>	10:00 to 11:30 AM
<b>Location</b>	Building 13B
<b>Attendees</b>	Jennifer Andelin, Lino R. Barro, Mauricio Calderon, Irene Callaci, Lucy Carreras, Burt Casey, Sheryl Cincush, Tim Flood, Carol K. Heins-Gonzales, Bob Hancock, Nancy Hendricks, Reed Kofoed, Rose Kukla, Carin Ruiz, Jason Shaw, May Tang, George Trindle, Melissa Young, Abel Zamora

### Agenda

Topic	Led By
<b>1. Action Items</b>	Carol
<b>2. Database Procedures – Need for future meeting</b> <ul style="list-style-type: none"> <li>• Database Signup Sheet</li> <li>• Change Control of Databases</li> </ul>	Carol/Rose/Walter
<b>3. Module Issues</b> <ul style="list-style-type: none"> <li>• Academic Structure (Walter/Rose)</li> <li>• Campus Community (Bob Hancock/Irene)</li> <li>• Student Records (Tim/Nancy)</li> <li>• Admissions (Bob Hancock/Ru/Pachune)</li> <li>• Financial Aid (Dennis/Bob Hughes)</li> <li>• Student Financials (Reed/Sheryl)</li> <li>• Transfer Credit (Jason/Melissa)</li> <li>• Advising (Jennifer/Melissa)</li> <li>• Data warehouse &amp; Reporting (Carol)</li> <li>• End User Assistance (Carin)</li> </ul>	Various
<b>4. Technical Issues</b> <ul style="list-style-type: none"> <li>• DBA (George, Bill, May, Bev)</li> <li>• Conversion (Karin, Abel, George)</li> <li>• Interfaces (Mauricio)</li> </ul>	Various
<b>5. Project Management Update</b> <ul style="list-style-type: none"> <li>• HRSA Security Update (Burt/Rose)</li> <li>• SAFT (Rose)</li> <li>• Project Directors (Carol)</li> </ul>	Various
<b>6. New Topics</b>	
<b>7. Future Meetings</b> <ul style="list-style-type: none"> <li>• <b>Bronco RoundUp</b> – 9/10 11:30am</li> <li>• <b>SA CheckPoint Meeting</b> (mandatory) – 9/18 at 10am</li> <li>• <b>Fall Conference</b> – 9/23 2-4pm</li> <li>• <b>BroncoFusion</b> – 9/24 4-6pm</li> <li>• <b>End-User Assistance:</b> Sept. 11, 3-4:30pm (2<sup>nd</sup> Thursday of every month)</li> <li>• <b>Next SA Core Team Meeting</b> – 10/2/03 at 10am</li> </ul>	

**Action Items**

<b>Date Initiated</b>	<b>Activity</b>	<b>Responsibility</b>	<b>Target Date</b>	<b>Status</b>
3/6/03	15. Walter will coordinate with Lino to develop a cohesive strategy/approach for reporting.	Walter/Lino	<del>3/20/03</del> 5/9/03	C
4/3/03	18. Develop process for documenting and coordinating changed (patches, data, etc.) between HRSA production and development	Rose Walter PS DBA Burt (Glendy)	5/1/03	C
6/12/03	24. Need process for ownership for reviewing duplicates in Banner	Nancy		IP
7/17/03	26. Review new patch/fix policy with Rose/Burt	Bill/Walter		
7/17/03	27. Develop database usage/coordination procedures and notification process	DBAs Rose Burt		IP
9/04/03	28. Mauricio thinks that there will be a way to use one number. He will follow up w/Tom Adamski.			
9/04/03	29. Follow up w/Charles Holtz regarding parking citation options	Rose/Carol		
9/04/03	30. Schedule joint IDP to discuss transcript fees and processing	Reed/Sheryl		
9/4/03	31. Need date for when the Dean's Council will finalize the list of majors.	Jennifer/Melissa		

*Legend: N-new, IP-in progress, P-pending, C-completed*

1. Database Procedures. There is a need for a future meeting to discuss the various database procedures. It is related to several of the action items, the need for coordinating refreshes, patch/fix migrations, etc. Tuesday afternoon 2-4pm.
2. Module Issues.
  - Academic Structure. Irene is writing the Intro to Academic Structure Guide. Working problems with repeat and academic standing.
  - Campus Community. Conversion signed off.
  - Student Records. No big issues or concerns. Moved to student activation. Records will take the new number and Admissions for the current number. Mauricio thinks that there will be a way to use one number. He will follow up w/Tom Adamski.
  - Admissions. Focusing on documentation. Working on recruitment. Beginning work on conversions.
  - Financial Aid. Resolving minor issues w/academic structures.
  - Student Financials. Finished setup for cashiering and testing. Issue with resolving parking software. Losing Albert Sims this week. Need joint IDP scheduled for transcript
  - Transfer Credit. No issues. Testing w/files provided by Melissa. Testing and loading data.
  - Advising. Scope is being referred to Dean's Council. Deans are selecting which majors. The Advising team provided them the limit of 15 plans with some minors attached. The Dean's agreed that they would be entire colleges... Collins, Business and a portion of Engineering.
  - Data warehousing and reporting. Carol provided
  - End-user assistance. Lots issues resolved. Workshop beginning on business process guides. Irene finished the Intro to SA. Carin will research PDF utilities to help capture text from PDF files.
  - Portal. We kicked off the portal teams. We expect to use Portal. HR is willing to be a pilot. The name will be BroncoDirect.
3. Technical Issues.
  - DBA. Issues with timing upgrades. We currently have tool upgrades.
  - Conversion. Student career data mapping and credential information. After 1998, updating only one rows and not updating history. There appears to be a separate form. Specific data mapping decisions need to be made. Tim voiced concern regarding differing procedures over

time for entering data and its impact on conversion as well as the data in general. In the PeopleSoft world we will need some quality assurance and auditing procedures. Title inconsistencies with converting history. The clean up effort is under way.

- Interfaces. The decision for Citation is becoming critical. We also need decisions related to FSA Atlas. Schedule25 implementation will be postponed until after the SA implementation.

#### 4. Project Management Update.

1. SAFT. Last meeting was on August 20. Sonoma had problems with transfer credit. Got a fix but it impacted academic levels. Long Beach added functionality to Financial Aid to make it paper-less. Long Beach uses XML to interface w/Black Board. They also decided that PeopleSoft is the owner/source for Bio/Demo data. They use JetForms to send Emails to students. They also use CSLinks and reporting solutions to send Emails on-the-fly. Bolt on for impaction criteria. Built transfer impaction rules w/baseline. Northridge is live w/Records. Everything else is live on October 20. They closed their offices for 2 hours a day for 6 months for training. They provide for 2 years of training. Will be live on Portal at the end of September. Other campuses have chosen to bring up only one audience at a time in Portal (students, faculty, advisors). San Jose have 5 people dedicated to training. The pilot campuses successfully submitted system-wide reports. They reinstated term-by-term reporting. The security for Bio/Demo data (SSN, DOB) has been tested. Regression testing is still due. PeopleSoft released it in 8/29. CMS will release it in release 10 in October. Rose has a CMS document on database triggers for auditing. To implement these audits, a help desk ticket is required. Rose will share w/Tim and Walter. Fresno sends Email when an address is changed.
2. Linda Tran will be a new student assistant working in the Project Office. Team members are welcome to ask students for any help they need. Review any data entry requests with Rose.

#### 5. New Topics

#### 6. Future Meetings.

- SA CheckPoint meeting. Walter described the purpose of the of the check point meeting which is to review status and dependencies. Walter will provide a list of issues that are planned for discussion. There will be others added as well. Carol will send out the formal announcement with the list attached.
- Fall Conference. We will have some presentations during open house.
- BroncoFusion. We will host a table during the club fair.