



Student Administration Core Team **MINUTES**

California State Polytechnic University Pomona

Meeting Logistics

Title	SA Core Team
Purpose	Discuss CMS/PeopleSoft SA Version 8.0 Implementation
Date	Thursday, April 17, 2003
Time	10:00 to 11:30 AM
Location	Building 13B
Participants	Mauricio Calderon, Irene Callaci, Lucy Carreras, Burt Casey, Sheryl Cincush, Tim Flood, Carol K. Heins-Gonzales, Bob Hancock, Nancy Hendricks, Pachune Herrod, Robert F. Hughes, Bill Manes, Carin Ruiz, Karin M. Schott, May Tang, George Trindle

Agenda

Topic	Led By
1. New Attendees	Carol
2. Action Items	Carol
3. Module Status & Issues <ul style="list-style-type: none"> • Academic Structure (Walter/Rose) • Campus Community (Bob Hancock/Irene) • Student Records (Tim/Nancy) • Admissions (Bob Hancock/Ru/Pachune) • Financial Aid (Dennis/Bob Hughes) • Student Financials (Reed/Sheryl) • Data warehouse & Reporting (Walter/Lino) • End User Assistance (Vickie/Carin) 	FMLs & Cedar Leads
4. Technical Status & Issues <ul style="list-style-type: none"> • DBA Updates (George, Bill, May, Bev) • Conversion (Karin, Abel, George) • Interfaces (Mauricio) 	Technical Folk
5. Project Management Update <ul style="list-style-type: none"> • Long Beach Successes (already distributed) • HRSA Security Update • Data Confidentiality of Personal Data 	Carol
6. Reviewing Converted Data	Cedar
7. New Topics	
8. Future Meetings <ul style="list-style-type: none"> • Next SA Core Team Meeting – 5/1/03 	

Action Items

Date Initiated	Activity	Responsibility	Target Date	Status
2/6/03	11. Send additional IDP schedules	Carol	2/7/03	IP
3/6/03	15. Walter will coordinate with Lino to develop a cohesive strategy/approach for reporting.	Walter/Lino	3/20/03	IP
4/3/03	17. Identify what SA patches need to be applied to production	Rose Walter PS DBA Burt	5/1/03	IP
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	IP
4/17/03	19. For Bio Demo data, we need a meeting to identify standards and process for reviewing bio demo data.	Carol	5/01/03 5/5/03	IP
4/17/03	20. Research if there is a Listserv for CSU SA campuses.	Carol (Rose)	5/1/03	IP

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

1. Module Status & Issues

Academic Structure. No change in status.

Campus Community. No change in status.

Student Records. Working on enrollment requirements (prereq and coreq). Mapped current processes for course catalog and schedule. Speaking w/ Faculty Affairs regarding identifying faculty advisors. Working with Faculty Affairs. Burt gave some information to Lino. Tim will be following up w/Lino. Started preliminary work on setup guides for course catalog. Abel/Tim have been working on converting course catalog. Started with one dozen subjects. Will be doing a preliminary conversion of course schedule next week for the selected courses for a few terms. Nancy Condosta will be retiring in July. Tang has been identified as her replacement.

Admissions. Setup test tables. Started on application. Setup in action reasons. Setup student response. Still working on the application process, such as CSU Mentor.

Financial Aid. Worked with Student Financials to setup item types. Loaded some student aid records. The load had some issues. Checklists seem to be working well. Talked to Tom regarding having access to past financial aid data to do the fed report out of legacy. Need Banner. Tom and the DBAs are talking about the impacts with regard to required Banner upgrades.

Student Financials. Working on item types with Financial Aid. 80-90% complete with preliminary item types. Setup some preliminary tables. Some will be revisited as they go forward.

Data Warehouse & Reporting. Carol provided a summary of the recent Data Warehouse meeting. A proposal has been drafted. A short-list of products are being research. Follow up meetings are scheduled. A Cedar person will be coming on campus to talk about Portal within the next 2-4 weeks. Bill saw a demo at San Marcos.

End User Assistance. Karen is working on the 1st draft on EUA plan, which is based on a template from Long Beach. She is working on the schedule that will be presented later. The plan will have high level Roles & Responsibilities defined. She is currently looking at trainers.

4. Technical Status & Issues

DBA updates. Nothing to report.

Conversion. In Financial Aid, had problems with ISIR load. Discovered in the Test database. The SSNs were missing for students. Only those students who are employees worked. Dennis worked with George to evaluate. The data was migrated from CNV to Test using a data mover script. The script seemed to be completed so they just retyped the script and it worked. George is evaluating the missing data. Reed asked when the

student enrollment records will converted so that it coordinates with the converting final balances. Financial Aid wants to be included. **

Interfaces. EPOST meeting set up for next week. Schedule 25 presentation is next Monday. Admissions will be meeting with the Math department regarding their interfaces or if they can use PeopleSoft.

5. Project Management Update

SA Implementation meetings. Carol shared her and Rose's participation in a SA implementation group meeting. We will have the meeting weekly with the group assigned. Rose is following up to get us involved on the Module group. ** Listserv for CSU SA campuses. Establish contact list for different modules at other campuses.

6. Reviewing Converted Data

Who will be reviewing converted data. ** We need to identify what type of access in test database is needed, controls necessary. The DBAs will provide updates to the SATeam list regarding updates to data and setups in the databases. Procedures are needed to review converted data. It is handled within the IDPs for specific modules. **For Bio Demo data, we need a meeting to identify standards and process for reviewing bio demo data.