



**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, May 15, 2003
<b>Time</b>	10:00 to 11:30 AM
<b>Location</b>	Building 13B
<b>Participants</b>	Mauricio Calderon, Irene Callaci, Lucy Carreras, Sheryl Cincush, Tim Flood, Bev Geuting, Bob Hancock, Nancy Hendricks, Robert F. Hughes, Rose Kukla, Bill Manes, Carin Ruiz, Karin M. Schott, Abel Zamora

**Agenda**

<b>Topic</b>	<b>Led By</b>
<b>1. Action Items</b>	Rose
<b>2. Module Status &amp; 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>• Advising (Rose)</li> <li>• Data warehouse &amp; Reporting (Walter/Lino/Rose)</li> <li>• End User Assistance (Vickie/Carin)</li> </ul>	FMLs & Cedar Leads
<b>3. Technical Status &amp; Issues</b> <ul style="list-style-type: none"> <li>• DBA Updates (George, Bill, May, Bev)</li> <li>• Conversion (Karin, Abel, George)</li> <li>• Interfaces (Mauricio)</li> </ul>	Technical Folk
<b>4. Project Management Update</b> <ul style="list-style-type: none"> <li>• HRSA Security Update (Burt/Rose)</li> <li>• SAFT Modification Review – Follow up (Rose)</li> </ul>	Rose
<b>5. Validating Data</b> <ul style="list-style-type: none"> <li>• BioDemo Data</li> <li>• Course Schedule and Course Catalog Data</li> </ul>	Bob/Tim
<b>6. New Topics</b>	
<b>7. Future Meetings</b> <ul style="list-style-type: none"> <li>• <b>Portal Demonstrations</b> for Core Team (&amp; invited guests)            5/28 4-5pm in 13C. PeopleSoft Demonstration            6/5 10-12pm in 13C. Cedar Demonstration (Long Beach crew)  <i>Executive-level presentations and technical presentations are also being planned.</i></li> </ul>	

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| <ul style="list-style-type: none"><li>• <b>Next SA Core Team Meeting</b> – 6/19/03 at 10am<br/>PROPOSED: 3<sup>rd</sup> Thursday of every month and as needed.</li></ul> |  |
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## Action Items

Date Initiated	Activity	Responsibility	Target Date	Status
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	IP
4/3/03	17. Identify what SA patches need to be applied to production  <i>This item is combined into item #18. It captures the concern for a documented procedure.</i>	Rose Walter PS DBA Burt	5/1/03	C
4/3/03	18. Develop process for documenting and coordinating changed (patches, data, etc.) between HRSA production and development  <i>Carol sent out an interim process. Now that implementation security issues have been defined, Carol will schedule some a meeting to reconfirm.</i>	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	<del>5/01/03</del> 5/5/03	C
4/17/03	20. Research if there is a Listserv for CSU SA campuses.	Carol (Rose)	5/1/03	IP
5/15/03	21. Provide discuss and establish a list of campus groups that would benefit from an information gathering dialogue.	Group	6/12/03	IP
5/15/03	22. Develop approaches and possibly guidelines for system access and use by student employees	Carol		IP

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

## Minutes

### 1) Action Items

- Issue #15: In progress
- Issue #17: Complete
- Issue #18: In progress
- Issue #19: Complete
- Issue #20: Karin S will follow up with Carol, In Progress

### 2) Module Status

- Academic Structure: Taken off list and bring back as necessary
- Campus Community: Called together to review bio-demo data, compared what had come over to what was in Banner. Most data came over ok but there were some minor issues and is being cleared up.

Document handed out by Bob: "Data Conversion Validation Script SAA Bio-Demo Date"

- Student Records:
  - Conversion: Tim has a plan to convert Extended Courses. Reviewed delivered reports
    - Catalog: Looks good
    - Course Schedule: Will need to be modified

Need to schedule a meeting with Rose and Kathy Bates. Identified list of testers. Next step- Validation Exercise May 27/28
- Admissions: Currently on the 3 C's. The first C, 'Comments' is complete and working on the next "C" which is Communication.
- Financial Aid: FA set up item types and budget formulas. Done with the requirement letter and gone through the verification process in Banner and how they can make PeopleSoft process better.
- Student Financials: Worked on item types, all the types are created. Majority of the info is created; still need GL's and scholarship. Started the tuition calculator and set-up one quarter Fall 2003. Also started with adjustment calendar.
- Advising: Jennifer Andelin will be the Advising Module Lead and Jason Shaw will be the new Transfer Credit Module Lead. Arleen Elseroad will be the Implementation Mgr for this module. Please make sure that these people are added to SA Team list.

- Reporting: Walter, Rose and Kathy will meet to define structure.
  - External: (Walter, Lino, Kathy) IRP's to Chancellor's Office
  - Internal: (Rose, Kathy and Module Leads) Operational fundamentals for departments. Will get together with module lead.
- EUA: EUA Plan is in the process of being reviewed by Project Management Team next week.

### 3) Technical Status

- DBA Updates:
  - Patches (Bill) 16 patches applied last week and 18 this week, on target. The approval process may need some work, would prefer more time, like early Thursday afternoon, to get materials ready.
  - Conversion (Abel) Class schedule is loaded. Various subjects selected ran 2000 39 kicked out. Contains day and time, but not room or instructor.  
  
(Karen) Did a Visa information run that had 10,000 errors due to a required field not being identified correctly. The documentation stated that this field was not necessary, but it is indeed a required field.
  - Interfaces (Mauricio) Meetings are scheduled, still in progress.

### 4) Project Management Update

- HRSA Security Update: Will know by end of July, what campuses will be chosen to test security. Modification to bio-demo data will provide three different levels of access to view SSN and Birthdates in inquiry mode.
- SAFT Modification Review: Rose must provide information to Baseline on the proposed mods discussed at last weeks phone conference.
  - Tracking Immunizations: we may use this mod in the future, it does not appear to be a critical item for CPP.
  - Franchise Tax Board: This mod is needed, with some changes included. It is necessary that campuses have the ability to attach a date and/or term.
  - Self-service: This mod will be used by CPP.

### 5) Validating Data: N/A

### 6) New Topics

## **7) Future Meeting: June 18, 2003 at 10am**

### **Topics for next meeting:**

- Rose proposed that the meeting be more interactive. Come prepared to the next meeting to discuss and establish a list of campus groups that would benefit from an information gathering dialogue. Who uses your services and/or who uses Banner now?
- Bob Hughes would like to discuss approaches and possibly guidelines for system access and use by student employees.