



SA Implementation Council Agenda

California State Polytechnic University Pomona

Meeting Logistics

Title	SA Implementation Council
Purpose	Discuss Status of CMS/PeopleSoft SA Version 8.0 Implementation
Date	Wednesday, October 8, 2003
Time	2:00 to 3:00 PM
Location	Financial Aid Conference Room
Participants	<p>Thomas Adamski, Zainab Al-Shabibi, Dr. George R. Bradshaw, Robert L. Charles, Stephanie N. Doda, Arleen Elseroad, Carol K. Heins-Gonzales, Brian K. Jenkins, H'Sundiata Keita, Walter Kisner, Rose Kukla, Carin Ruiz, Ann Overman-Scott, Melanie S. Saracco, Jane Self, Kathleen A. Street, George Trindle</p> <p>Jane Self, Rose Kukla, Walter Kisner, Thomas Adamski, George Trindle, Carin Ruiz, Kathleen A. Street, Robert L. Charles, Arleen Elseroad,</p>

Agenda

Topic	Led By
1: Action Item Review	Carol
2. Module Issues	Implementation Managers
3. Go Live Date Reminders	Rose/Walter
4. Various Updates <ul style="list-style-type: none"> ▪ BroncoDirect ▪ Reporting ▪ Security Setup ▪ EUA ▪ Database Coordination 	Carol, Walter, Rose
6. Atta Boys	Carol
5. Open discussion	
6. Future Meetings <ul style="list-style-type: none"> ▪ SA Implementation Council Meeting – 11/11/03 in Financial Aid Conference room ▪ HRSA Security Administration Meeting- 10/8 & 11/11/03 3pm 	

Action Items

Date Initiated	Activity	Responsibility	Target Date	Status
4/09/03	17. Evaluate PeopleSoft functionality related to Academic Standing.	Rose, Kathy and Walter	5/14/03	C
6/11/03	24. Review admission go-live dates	Rose Walter George	7/9/03	C
	29. Review admission changes and if they are reflected in baseline or if campus modifications are required	Walter Tom	10/8/03	
10/8/03	30. Research concern that EPOS will not support permission numbers (override tickets).	Z Tom		
10/8/03	31. Discuss pros/cons and future action plans related to electronic checks for admission fees, transcript fees, etc. George has talked to ZAP. Tom is researching more information w/TouchNet. Take to AVP council for discussion. Rose will coordinate with Brian and George to get the necessary facts.	Stephanie George Rose Brian		
10/8/03	32. Call a meeting related to the photo id and the key field, which is currently PIDM.. issuing new cards, effects on door access.	Stephanie Carol		
10/8/03	33. Need to resolve any unknowns with external org table.	George Bob C.		
10/8/03	34. The clearing and posting of degrees for Spring 2004. Identifying an alternative method. IRP also requires the need to reconcile for their reporting.	Rose Walter Arleen		
10/8/03	35. Time module and is relation to exam schedules needs to be researched and any gaps noted with associated alternatives.	Walter		
10/8/03	36. Discuss various training plans at SAIC. Address question for an overall student self-services class as well as for faculty.	Carin		

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

Parking Lot

Item	Description (date added)	Responsibility	Status
1.	Re-review student timeline for admissions orientation, and registration (7/9/03)	George & Zainab	
2	Need a business process in place for scheduling jobs and determining access		

Action Item Review

- There were no open action items.

Issues/Concerns

- Deans have expressed issue with one scheduler per College. IRP is working with the Colleges to identify two dept schedulers.
- I&IT Applications is doing changes related to Banner to change the Admission algorithms (academic criteria and qualitative factors). Concerns future mods. Are the qualitative measures going to be addressed. Walter/Tom will work to research this.
- Parking Citations. Carol is setting up management meeting to setup next steps.
- There will be new reports required to support impaction.
- Concern that EPOS will not support permission numbers (over-ride tickets).
- Transfer Credit in PeopleSoft requires a course title which we don't currently have in DARS. Following up with other campuses to see what they have as well as ASSIST.
- Admissions interested in electronic checks for admission fees (via ZAP). Will require an interface. It would require another product/service from Touchnet. Tom is researching more information. \$100/month and .75/transaction.
- CO has said that if someone implies at an impacted campus can get a gratis application fee if they apply elsewhere.
- What is the status on the photo id and the key field, which is currently PIDM. Collins and Eng use it for door access as well as other possible areas. This will require new cards.
- Complete external org tables will be needed to handle impaction to classify the tiers. Need to resolve "unknowns".
- Budget is tight and needs to be watched closely.

Various Updates

- IVR. Karin is coordinating with EPOS for necessary changes.
- Credit Card transactions: A server may be necessary and is being researched.
- Parking Citations. Carol is setting up management meeting to setup next steps.
- BroncoDirect: Development server is complete. Production server criteria is being configured.

- IRP is working to aggregate the reporting inventory.
- There is an interim manager of Student Accounts (Oliver).
- Finished prototyping for refund transactions.
- Student Financials are ahead of schedule.
- Student Financials will begin to visit reporting requirements.
- Finance 8.4 upgrade will begin in January 2004 and expected to be completed in November, 2004.
- Financial Aid is currently getting current with set up and testing it. Rose will check in at the end of the week.
- Cleaning up DARS data. Beginning data mapping for DARS into PS.

Go Live Date Reminders

- Walter/Rose distributed the go-live dates.
 - Arleen had a question regarding the degrees function for Spring 2004. The clearing and posting of degrees for Spring 2004. Rose/Walter are identifying an alternative method. IRP also requires the need to reconcile for their reporting.
 - Degree Audit go-live date needs to be added.

BroncoDirect

- Rose distributed and reviewed the BroncoDirect implementation dates. Direct any concerns to Rose so that it can be finalized. It does not include any go-lives that are outside of self-service. Paying online for certain related self service functions affects the ability to offer the self service.
- The exam schedule
- Development server is complete. A production-server criteria are being established and ready to order.

Reporting

- Cathy, Carol, Lino, Rose and Vickie will be meeting next week to finalize the reporting implementation plan which will also address data warehouse.
- PeopleSoft has been contacted through Cedar to implement RDS. The required computer configuration is currently being identified.

Security Setup

- The Core Team has met to begin the process of defining their security setup process for implementation recognizing that they will be affected by decisions made by the HRSA security group.

EUA Training Schedule

- Carin distributed the training schedule. Carin discussed the various differences in training approaches. Also, the list is not complete since some areas are still identifying and scheduling their training. Carin will discuss in more detail at next training.

Security Setup

- Carol discussed that the implementation teams are starting to develop security permissions and profiles. The Core Team has been instructed to consult with their implementation managers. The approval process will end up coordinating with the processes defined at the HRSA Security meeting.

Database Coordination

- Meetings have occurred to develop a process for coordinating database changes and usage. Weekly meetings have begun. Release 9 will be applied to production this coming weekend.

Atta Boys

- Please take a moment to recognize the effort and work of the people working on the project. Make an effort to come by the trailers to/from other meetings to pat the folks on the back to let them know you recognize the effort they are giving.