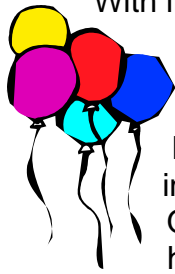




Cal Poly Pomona PeopleSoft Student Administration November 2003

Catalog & Schedule Moved to PeopleSoft



With little fanfare, our historical records for catalog and schedule were successfully converted to PeopleSoft on November 14 in preparation for Summer Quarter 2004. In less than 2 hours we converted 20,656 course catalog records and 127,450 class schedule records in less than 3½ hours.

Kudos goes to Lucy Carreras, Ashley Thai, Nancy Condosta, Nancy Hendricks, Teng Thumbutu, Abel Zamora, Mary Morley, Lino Barro, Tim Flood, Mauricio Calderon, George Trindle, and the PeopleSoft DBAs for an outstanding job in reviewing, validating and converting the data.

This is only the beginning of our new journey in PeopleSoft as we continue setting up the catalog and schedule with various enrollment requirements. Academic Affairs is continuing their setup of courses in production for the 2004/2005 year. For example, each course needs co-requisites (e.g., associated labs) and pre-requisites added, etc.

Catalog and Schedule will be initially rolled out to 2-3 people per college for Summer Quarter. The limited roll out will ensure adequate support and troubleshooting if necessary. This core group of schedulers will receive training on catalog/schedule in January, which is being coordinated by IRP and Academic Affairs.

How is data secured in PeopleSoft HRSA?

With all the recent press on security legislation, security has been an important element of our project implementation.

PeopleSoft's security offers flexibility in access to personal data based on the person's role (e.g., admissions analyst). Additionally, personally identifiable information such as SSN and DOB (date of birth) will be restricted, all or in part, at the person-level as required to perform the duties of their job.

As part of the prototyping process, the module teams design various "permission lists" for a given role. For example, a student's role would need permissions to view the course catalog, the course schedule, register for classes, etc. Each permission list actually includes the list of various screens that the role will need to see as well as whether the role can update or just view the information on the screen.

In addition to a user's role, each user will also be specifically restricted in their ability to search or view all or part of a SSN or date of birth. (Note: Searching on SSN or date of birth is needed in instances where identity must be confirmed such as in admitting students or offering them financial aid.)

Lastly, data viewed by a user can be restricted to a specific program (degree), plan (major), or organizational department. For example, in reviewing student worker time reports, a user would be limited to the only those student worker records within their department.

EUA Corner



Pictured left are Financial Aid Counselors, Christina Cruz (front) and Crystal Steele (second row), attending training on Financial Aid processing.

The EUA (End-User Assistance) Team, lead by Carin Ruiz, is responsible for coordinating the training and other assistance for the PeopleSoft SA users. The members of the EUA team in many cases are also the individuals who are helping to develop and test the new system. As part of the EUA Team they are responsible for providing business process guides for their area, forming training materials, setting up training, as well as training all end users that pertain to their area.

November has been a very busy month for the EUA Team. Many business process guides are being developed as well as many class sessions being conducted. Bob Hughes, who is training the Financial Aid staff, has been doing an excellent job. Since he was one of the first to kick-off training for SA, he was able to share feedback and documents from his sessions to benefit the other members of the team. Admissions and Outreach also started their training this month. The trainers for this area are Pachune Herrod from Admissions and Darlene Mims from Prospect.

Great job to all the EUA Team!

Student Assistants Make the Grade on the SA Project Team!

The PeopleSoft Project Office currently has two students who support the SA Project Team. The students have been a crucial part of the project implementation. Some of their duties include designing business process flow diagrams, documenting development/prototyping sessions, validating data, etc.

Winnie Wong, a Senior with a dual major in Computer Information Systems with an emphasis in Business Systems Analysis and Economics, started working with the Project Office in March 2003. She is also the current Co-President of MISSA (Management Information Systems Student Association). Winnie is also a Kellogg Scholar, has received Outstanding Student in the Business Systems Analysis Track for the 2002-2003 year, President's List 2000-2002 as well being awarded with a College of Business Scholarship in 2002.

Linda Tran joined the project in August 2003. Her major is Computer Information Systems. Linda has been on the Dean's List and Honor Roll 2002-2003, is a member of Golden Honor Society in 2003 and a member of Chi Omega Sorority 2002-2003.

The Project Office offers students an opportunity to obtain real world, hands on experience. Past students have been successful in finding employment after graduation. Recent graduate Nick D'Alessandro is currently working for Hitachi Consulting and Maribel Tomenis is working for KPMG! Not to mention our own Carin Ruiz who went off to work for Countrywide and is now back with us on End-User Assistance.



“I heard it through the Grapevine”...

Below is a list of recently asked questions regarding our implementation process or our new PeopleSoft student administration system.

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How was our implementation schedule determined?

Since PeopleSoft is an enterprise software product, it is recommended that the implementation schedule coordinate with the academic calendar. This enables people to learn and adjust to new processes, make the necessary adjustments, before other dependent processes are needed. At Cal Poly, our implementation schedule is meant to take the Fall 2004 class, which begins with applications in Fall 2003, and moves them through the university processes. As we go along, we pick up the continuing students for Summer Quarter 2004 so that by Fall 2004, all students are being processed in PeopleSoft.

Will I still be able to see historical data?

Absolutely! Technical and functional representatives of the SA Project Team are working closely together to extract data from Banner and the historical database and place it into PeopleSoft. The process includes comparing the requirements of the PeopleSoft data field with the data elements with comparable information in Banner. In some cases, data has had to be “cleaned” to ensure that the quality of the data is consistent once it is placed in PeopleSoft.

Are we benefiting and learning from the experiences of the other CSUs that have implemented before us?

Six campuses have gone before us: Maritime, Sonoma, Fresno, Long Beach, San Jose, and, most recently Northridge. Being at the “bleeding edge”, these campuses experienced and resolved many “out of the gate” issues. Also, all of our project consultants have assisted one or more of our predecessors with their implementations. As a result, we have experienced fewer challenges and have avoided many errors based on the experiences of our sister-campuses.

✂ Mark these dates!

The go-live dates for our new PeopleSoft Student Administration system are as follows...

Prospect.....	December 8, 2003
Admissions.....	January 20, 2004
Financial Aid	March 2004
Catalog & Schedule	March 2004
Transfer Credit	April 2004
Registration.....	April 2004
Tuition Calculation.....	April 2004
Cashier/Payments.....	April 2004
Student Fee Bill.....	May 2004
Disbursement:.....	June 2004
Grading	June 2004
Advisement/Degree Progress	Oct. 2004

📖 Where can I get more information?

The Project Office hosts a project website (www.csupomona.edu/psp) with information related to all of our PeopleSoft applications (HR, Finance and Student Administration). Information is available related to our project status, prototyping process and decisions, as well as archives of information related to our prior implementations. For any questions or concerns regarding Cal Poly Pomona’s PeopleSoft project or our current SA implementation, contact:

- Carol Heins-Gonzales, Project Director, at x6335 or Email at *cheins*
- Rose Kukla, Student Implementation Manager, at x6376 or Email at *rkukla*