RAC Minutes
November 5, 2007
215 Blegen Hall

Present: Gary Andersen, Deb Basarich, Frank Blalark, Sheryl Bolstad, Jackie Carlson, Steve Carnes, Carla Claussen, Carolee Cohen, Pam Cook, Dan Delaney, Jennifer Engler, Tina Falkner, Tracy Fischer, Jennifer Franko, Teresa Fruen, Marei Freundschuh, Mike Galegher, Laurie Gardner, Kit Gordon, Carol Gross, Sarah Groskreutz, Lucy Hartel, Kevin Havard, Emily Holt, Pam Klopfleisch, Mary Koskan, Stephanie Law, Aileen Lively, Margo Mueller, Stephanie Nichols, Robert Nelson, Kathy Nolan, Linda Norcross, Matt Nuttall, Heather Peterson, Lonna Riedinger, Genny Rosing, Cindy Salyers, Mary Ellen Shaw, Pat Sherman, Alexa Trussoni, Terri Tuzinski, Kasi Williamson

1) **Introductions**

2) **Announcements**:
   - Frank Blalark is a new Associate Director in ASR. (Frank is introduced later in the meeting.)
   - Kasi Williamson announces current usage numbers for Graduation Planner. As of October 30, 2007, 6169 students had created plans; there were 7550 plans in the system.

3) **Minutes from October meeting approved**

4) **August system issues update**
   Tina Falkner updated the group in Sue Van Voorhis's absence. PeopleSoft performance seems to have improved. OIT is working to continue to improve performance issues. Registration begins on Tuesday, November 6, so please continue to call 1-HELP and report any problems or issues that you experience.

5) **Project Update: Carolee Cohen reports the status of current ASR-IT projects**
   OTR
   - Lifetime Internet ID: Efforts are underway to streamline and clean up the extract of student data between PeopleSoft and x.500 and to send data on a student without making a change in PeopleSoft. This means that it will be possible to make updates more quickly, eventually working up to running the extract several times a day.
   - Learning Abroad Prospect and Application Module: Business requirements are complete; we're looking to OIT for a technical resource.
   - E-degree for graduate and professional programs: Finalizing business requirements; will submit request to OIT at the end of 2007.
   - Engagement Planner: Going before STAT for approval; plan to submit business requirements to OIT by early 2008.
   OSF
   - Entrance and exit interview projects: Defining requirements and bringing data in from the old system.
   - EFS: Testing to begin week of November 12. OTR and OSF must make sure that the new and current systems mesh to attribute tuition properly and perform other essential operations.

6) **Probation holds report**, Cindy Salyers. Cindy asks for volunteers to talk about requirements for a new probation holds report, to see if there is a need to expand it to include adviser

holds, not just "P" holds. Note: this is a new report request, not a change to the existing probation report.

7) **Policy pdf discussion**, Kasi Williamson.
Kasi asks about reactions to the new policy pdf format, which breaks out important dates and deadlines into a new document. Overall, response seems to be positive.

Kasi also raises the question of removing the class location information from the pdf version of the class schedule. Concerns have been raised that too many students use an old print-out, and go to the wrong location during the first week of classes. Kasi will investigate having the location information removed.

8) **Student Veterans Appreciation Day event**, Mary Koskan.
Mary encourages everyone to attend the first ever University of Minnesota Student Veterans Appreciation Day event, which will begin at 11:30 a.m. on Wednesday, November 14.

9) **F, N, and I update**, Tina Falkner.
Efforts are moving forward with the request to add the last date of attendance for F, N, and I grades.

This will also be a part of the mid-term alerts system enhancements. The goal is to be able to use this revised alert system for different alert purposes, and to integrate the F, N, and I mid-term grade reporting component into it. Tina will continue to ask for feedback about language as this project is being developed.

Cindy Salyers asked to make sure that IMS is included in these conversations; Tina indicated that she will keep Cindy involved. An individual indicated that Laura Koch's group (the Student Support Advisory Committee) might be interested in how this would fit with similar efforts.

10) **Adviser portal/toolkit update,** Tina Falkner
The approach to this "adviser portal" is really as more of a dashboard or a toolkit. Could involve numerous tools. They haven't yet received a project charge letter; an advisory group will be included in the project charge and development. Please let Tina Falkner know if you're interested in participating in this advisory group. (Tina will involve Cindy Salyers from IMS.)

11) **Instructor role and grade access**, Terri Tuzinski
The guidelines for how to grant access to individuals to input or modify final grades are being revised. From now on, the instructor roles of primary, secondary, TA, or proxy should be assigned only to those individuals designated as an instructor for the class. Other departmental staff members should request access through OIT data security.
This revision mitigates a risk related to the instructor role: instructor access to grades is given by EMPL ID. So if individuals not employed as instructors are later employed by a new department, their access to the grades would follow them. Assigning access through OIT Data Security will ensure that, when a person moves departments and a Change of Employment status form is completed, their access will be adjusted appropriately. For complete

information, see the attached handout: "November 5, 2007 – Instructor Roles and Grade Access."

The next steps involved with these revised recommendation will be data clean-up and exceptions to the policy.

Cindy Salyers clarified that there is no relationship between access to enter final/supplemental grades and instructor access to UM Reports.

12) **Course Guide: demo of student application**, Terri Tuzinski and Gary Andersen
Terri and Gary showed the group what the student sees when instructors enter complete information into the Course Guide. They also showed where instructors and staff can access the new system to enter their information. Instructor entry pages are available at: http://onestop.umn.edu/onestop/faculty/Course_Guide.html. Departmental scheduling coordinators access the pages in PeopleSoft, under "Curriculum Management."

The Digital Media Center is offering free consulting/advice related to the production of video clips (there is a fee for production assistance). CLA also has resources available.

Through the staff entry pages in PeopleSoft, Gary showed how to designate a "STAFF" course, and give individual access to instructors within a "STAFF" course.

In response to questions, Gary and Terri clarified that: the instructor pages are nearly identical to the staff pages; changes can be made to a course description through the end of a term; the Course Guide will become available for entry during ECS Period 2; information **will** roll forward from term to term for the same instructor; there is now a last-updated field, so that advisers and students can tell when information is old; one instructor had a difficult time uploading a photo (the team believes that this issue has been resolved); information about the new application was communicated through CUD in September.

Kasi Williamson summarizes the communications efforts to instructors so far, and asks the group to please contact her if they have any additional ideas for how to effectively get the word out.

13) **Course Guide reports**, Cindy Salyers
There are four new interconnected reports related to Course Guide implementation (these went live on Friday, November 9). Cindy walked through the reports:

- From UM Reports home page, search for "Guide"
- You can start with either "Course Guide Usage campus" or "Course Guide usage class detail" reports.
- Select term—term becomes available at Period 2 start date
- For "class detail" report: select a college, then select a department to see the class detail. This report shows you whether the class is published, pending, STAFF, or if there's a STAFF override.
- A class is eligible to for Course Guide entry only after a primary instructor is assigned.
- You can look at the Help docs for the report to see the related business rules.

- The question was posed as to whether "directed research" courses with faculty members attached to them "count" in the totals of usage. Cindy clarified that excluded courses do include thesis courses; however, directed research courses would be included in the usage statistics. One could manually calculate percentage without those courses, or call these courses "STAFF" in order to attach a generic description.
- The report contains instructor e-mail addresses, so a reminder e-mail could be sent to instructors who haven't yet entered information into the Course Guide.

14) **PCAS potential hole**, Margo Mueller
If there is a collegiate requirement change (ex: CLA requirement of 18 credits outside of major), there is currently no place in PCAS to enter that information. Since we get all changes to APAS through PCAS now, for the time being, collegiate changes will still need to be communicated directly to the APAS contacts (Jason or Margo) on the Twin Cities campus as soon as possible. These changes will have an effect on Graduation Planner and APAS. An enhancement to PCAS has been submitted to be able to include collegiate type changes.

15) **APAS update**, Margo Mueller
Graduation Planner generated a lot of changes in APAS; things are getting close to being in synch. With Graduation Planner, we're running almost 5000 APAS reports in a day. Last year, there was an issue was volume; since acquiring an unlimited license, we have not had that problem.

A group is going to begin looking at adding an "excess" courses category to audits (these are courses taken beyond a program's requirements). Margo will begin pulling together volunteers to start meeting and to discuss the best approach on how to implement this information. Currently, this category is showing on athletes APAS reports and is used for certifying eligibility.

16) **Identifying students about to graduate**; update given by Tina Falkner in Sue Van Voorhis's absence
Tina read from the September RAC minutes, reporting the suggestions given at the last meeting: to list completed credit totals on adviser pages in UM Reports, and to note when there were 90 completed credits. The group had no additional comments.

17) **Rochester update**; update given by Tina Falkner in Sue Van Voorhis's absence
A committee is still looking at how to incorporate Rochester into the institutional structure. Mary Koskan's report on student services is complete. Additional reports were due in mid-October; updates will continue in the future.

18) **Probation schedule for Twin Cities campus**
Emily Holt distributed the probation schedule for the Twin Cities campus. That document is attached below to the minutes.

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Twin Cities Probation/Suspension schedule – fall 2007

December 20, 2007 (Thursday) – End of term, last day of finals

December 24, 2007 (Monday) – Holiday

December 25, 2007 (Tuesday) – Holiday

December 27, 2007 (Thursday) – Grades due (11:59 pm)

December 31, 2007 (Monday) – 1st probation/suspension report available in UM Reports

January 1, 2008 (Tuesday) – Holiday

January 7, 2008 (Monday) – 2nd probation/suspension report available in UM Reports

January 10, 2008 (Thursday) – P3 suspension holds need to be placed by 4:00 pm for Financial Aid SAP processing

January 14, 2008 (Monday) – 3rd probation/suspension report available in UM Reports

January 14, 2008 (Monday) – FA disbursement for spring semester

January 21, 2008 (Monday) – Holiday

January 22, 2008 (Tuesday) – Spring Semester begins

November 5, 2007- Instructor Roles and Grade Access

Revised recommendation:
The instructor roles of Primary, Secondary, TA or Proxy should be assigned only to those individuals designated as an instructor for the class. Instructors are those individuals that should retain access to add and change grades regardless of the department employing them. Any other departmental staff needing access to grades should be assigned access through OIT-Data Security.

Reasons for revision:
  1) Many departments are using Proxy role for instructor of the Lecture section of multiple component classes. Usually, the Lecture section is the non-graded section and these instructors needs access to view, add and change grades for these multiple component classes.
  2) The Instructor roles associated with Grade access have been in use since 2003 and making a change several years later disrupts established use and reporting needs. The risk, however, remains. Access assigned using any of the instructor roles is tied to the individual's EmplID. If an individual is assigned Grade Access using an instructor Role, and moves from one academic department to another, the access to update grades for the former department remains because the individual's EmplID does not change when he or she changes departments.

Each instructor role has the same values for (Grade) Access, we cannot remove or hide any of the instructor roles or values for Grade Access without affecting all of them.

Instructor	(Grade) Access Values
Primary Instructor	Blank, Approve, None
Secondary Instructor	Blank, Approve, None
TA	Blank, Approve, None
Proxy	Blank, Approve, None

Action Items to address the risk:

- Assign instructor roles only to those individuals designated as instructors.
  Note: Access for instructors is managed by staff with update access to Class Scheduling. Access for non-instructor departmental staff is managed by OIT Data Security.
- Review process to request grade entry and approval access to non-instructors.
  - For non-instructors, grade entry and grade approval access is currently granted by Academic Organization (department), the maintenance of this access is handled by OIT Data Security. This process grants access to BOTH Final and Supplemental grades.
  - Access is requested by using the form at http://www1.umn.edu/datasec/security/. This access restricts grade entry (both Final and supplemental) to the classes within the same Academic Organization that employs the individual. When an individual leaves the University or moves to a different department within the University, Data Security should be notified using the Change of Employment Status form on its web site. This will trigger the necessary changes in access.
- Maintain the historical records of all instructor roles assigned. The (Grade) Access value can be changed to None if the individual should no longer have access to grades.

Next Steps
- Academic Support Resources (ASR) will work with colleges and departments to develop a communication plan to help academic departments and colleges better understand how Grade access is granted and maintained.
- How to communicate that Proxy and TA roles should be reviewed each term, is grade access still needed?

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