

## **Meeting Minutes: March 6, 2000**

**Present:** Jane Anderson, Theresa Baltrippe, Deb Basarich, Pat Bathke, Josh Borowicz, Reed Carpenter, Laurel Carroll, Christen Christopherson, Anne Daly, Shelly Diers, Tina Falkner, Carol Francis, Teresa Fruen, Mike Galegher, Bill Ganzlin, Kit Gordon, Susan Grotevant, Andrew Haukebo, Paul Hesterman, Michelle Koker, Jennifer Koontz, Mary Koskan, Andrew La Chapelle, Karl Lorenz, Sarah Moe, Stephaine Nichols, Cindy Pavlowski, Peggy Phan, Lonna Riedinger, Vickie Roberts, Alice Ross, Jim Rowan, Cindy Salyers, Jan Schlueter, Ben Sharpe, Paula Swanson, Sue Van Voorhis, Amy Winkel, Stephen Young.

**Review Minutes from February Meeting:** There were no changes to the February minutes.

**Announcements:** Three of the four trainers who staff the PeopleSoft help desk will be at PeopleSoft training from March 7-10. As a result there may be slower response time to questions. Also, the trainers request that when calling, please leave a direct line phone number instead of a general line number.

**Early Registration:** Sue asked if there were any colleges that intended to conduct early registration. None of the colleges indicated that they were planning on doing this.

**Enrollment Cancellation Report:** The Enrollment Cancellation Report (a report that is run daily showing when a student cancelled their enrollment) generated by PeopleSoft does not produce the necessary information. The committee was asked how they use these reports. None of the colleges indicated that they use these reports.

**Required Major Declaration by 60 Credits:** OTR will not automatically be placing a service indicator on a student's record if they have not declared a major by 60 for fall term. Most of the colleges already have a procedure in place to handle this issue. OTR will be making a recommendation to SCEP (Senate Committee on Educational Policy) that will make the current policy more lenient and allow it to be deferred to the college. The recommendation that will be forwarded to SCEP will be presented at the April RAC meeting.

**I-Grades:** According to University policy, "I" grades will lapse to an "F" or an "N" (depending under which grading system the student had registered) one year after the "I" grade was given by the instructor (this policy only applies to undergraduate students). PeopleSoft is set up to have these grades lapse for "I" grades earned after fall 1999. "I" grades prior to fall 1999 will remain "I's" unless the student receives a grade. CCE courses have never lapsed to an "F" and will not on "I's" received before fall 1999. Beginning with fall 1999, CCE courses will follow the "I" grade policy. The document distributed at RAC is attached to this e-mail.

**PeopleSoft Update:** April 1 is the next implementation point.

**Web -** Improvements in the infrastructure are still on target for fall registration. Hopefully, with the use of several servers the web will not go down as frequently as it has in the past. Student's fall schedules will be e-mailed to undergraduate students in late August for fall semester. These will be sent to the student's official U of M e-mail address. Several members of RAC brought up the issue that many students use e-mail providers other than the U of M account and that these students would therefore not receive the class schedule e-mail unless they have forwarded their account. It was noted that most students do not know how to forward their account despite the fact that they receive training during orientation. One RAC member suggested that a link be placed on the registration website regarding how to forward an account

as well as why one would want to do so. OTR does not have any control over the web site any longer, but will follow up with the web team regarding this issue.

**Grades** - Several hours of programming are still required before spring, intersession and summer session grading occurs. If the programming is not completed before these grades need to be posted, all grades will need to be entered manually.

IVR is up and running for grade access, however, due to conversion only grades from fall 1999 are available. Registration eligibility and service indicators will be available via IVR for fall registration.

**Conversion** - 87,352 students have been converted on all four campuses.

Conversion continues to get delayed. The time estimated to start converting students with CCE coursework is now mid-April. It is an absolute must that current students are converted before degrees begin to post in the spring.

The list of transfer students with inaccurate GPAs will be sent out soon. OTR anticipates sending this list electronically to RAC members. A negative service indicator (GPM) can be placed on these records until conversion is complete. If a college wishes to use this service indicator, please e-mail Vickie Roberts at [v-robe1@tc.umn.edu](mailto:v-robe1@tc.umn.edu). If these students need an official transcript their records can be manually fixed in approximately one day. Unfortunately these changes will only last if transfer work is not evaluated again, which triggers the DARS backbridge to run.

**Transcripts** - The PeopleSoft transcript is being rewritten into an SQR to ease printing problems. This process is scheduled for April 30.

**Reporting** - Student Records staff and Data Warehouse staff are working together to make several of the reports available via the web. Generating reports from PeopleSoft is resulting in too many problems, so an increasing number of reports will be run from Data Warehouse. Be aware that data in the warehouse can be up to 48 hours out of date.

Both IMS and Student Records staff are compiling a list of requested reports. Input and requests will be gathered from all campuses. Currently, the IMS staff continues to work on shifting the PeopleSoft reports to the data warehouse. The data warehouse website is located at <<http://www.umreports>>.

**Data Clean up** - Staff continue to work on data clean up. OTR is finding that as implementation of the Financial Aid components of PeopleSoft increase, more problems arise in the student record area resulting in more data clean up.

### **Program/Plan Change -**

**Importance of Effective dates** - There have been several problems with the Program/Plan area in the last few months. It is important to know that program actions (e.g., plan changes, data changes) that effect term activation or tuition calculation must be effective dated before or equal to the first day of the term in order for them to be recognized for a particular term. Actions that occur within the same effective date are sequenced, starting at "0," using the Effective Sequence field.

**Data Change vs. Plan Change** - A Program Action of "DATA--Data Change" is used when adding or changing a sub-plan or noting that a student has applied for degree. The applied for degree data change

effective date is the date that the degree application was received in OTR.

A Program Action of "PLNC--Plan Change" is used to add or change a plan. Plan changes **MUST** be effective dated to the first date of the term for which they are effective. The plan change action allows all necessary corrections to be made to a student's plan and/or sub-plan panels (e.g., remove previous plans, add an honors sub-plan). All changes must be made to the panels before the panel is saved.

**Other Program Actions** - A program action of "COMP--Completion of Program" is entered when a student is awarded a degree. This action will stop activity for that career and program. A new career must be created to allow the student to enroll after a completed term.

A program action of "DISC--Discontinue" is used to stop activity in a particular program. Because PeopleSoft will allow a student to be active in more than one program, the discontinuation must be entered manually. Allowing a student to remain active in multiple programs is problematic for term activation and tuition calculation. For example: when a non-degree student moves into a degree-seeking program/plan, their term activation must be updated. If both programs are left active the student may be incorrectly term activated as non-degree, which will cause problems for financial aid and calculation of tuition and fees.

**Term Activation** - Most of the errors received in the Term Activation panels are due to errors in the Program/Plan panel group. For example: If a student is term activated in a program that is then discontinued the corresponding term activation row becomes invalid. An error message is received when trying to save any subsequent changes to the term activation panel--until the program/plan error is corrected. OTR (or Help Line) staff can make corrections to the program/plan panels if necessary.

**Viewing Program/Plan information** - Update/Display ("3 " icon) access allows access to most current information only. Use the Update/Display All ("3 +" icon on the toolbar) to see all effective dated rows on a record -- not just the most current.

**No Values Found when Trying to do a Plan Change** - Check Operator Defaults. In most cases, defaults need only be set to the Institutional level.

**Error Message:** "Student cannot be admitted to this Academic Plan until..." - This error occurs when trying to add a 'new' plan to an 'old' student. A fix is coming that will correct the problem by validating such changes based on the following logic:

**Admit Term Check** - The program/plan panels will use the admit term to validate. If the admit term is equal to the first term valid, or later, the plan will be accepted for any effective date. Of course, the normal rule applies that the effective date must be before or equal to the first day of the term in order for term activation to recognize and use the plan.

**Effective Date Check** - If the student's program admit term fails the admit term check, the Program/Plan panel logic will check the effective date. If the program admit term for the student is less than the first term valid on the plan, a second check is done to compare the effective date of the row being added to the first valid term. In this situation, the effective date of the plan change must be the first day of the first valid term of the plan or after.

### **Second Majors:**

Degree and any major/minors in the same program completed at the same time - Program is "COMP-

Completed" and second major is noted on the transcript as text below degree notation.

**Second major/minor in the same program not completed** - The incomplete plan is deleted prior to saving the completion. The current program is "COMP-Completed." A new career is created using the same program and the unfinished plan. Term activation is adjusted to reflect the new career and the continuing plan. The added career is "DPSC--Discontinued" upon completion and the second major/minor is noted on the transcript as text.

**Second major/minor in a different program not completed** - A new career is created using the same program and the continuing plan. Term activation is adjusted to reflect the change.

**Second degree from a different program completed** - Both programs can be "COMP-Completed."

**Student wishes to enroll after completing their program** - A new career is created using the same program and a non-degree plan (formerly Adult Special). Term activation is adjusted to reflect the change.

**Add second major/minor in a different program** - Primary (degree granting) program adds the second major plan (e.g., 036400017 = German major; 0364MIN17 = German minor) When completed, the second major/minor is "DISC--Discontinued" and noted on the transcript as text.

**ISSUE** - Entering a PLNC after the student has Applied for degree (DATA row is in the way of colleges entering a retro-dated PLNC). Should OTR contact the college when a degree application comes in with a different plan/s? Should OTR be entering plan changes when trying to enter DATA/Applied?

**PROPOSAL:** If the plan code/s on the degree application do not match program/plan panels OTR staff will send the application to the college office. College will verify the information and, if applicable, enter a "PLNC--Plan Change" on the student's record. Application is then returned to OTR for "DATA/Applied" row to be added. It was also agreed that a RAC subcommittee will meet with OTR staff to discuss a business process for student records with 2<sup>nd</sup> degrees and 2<sup>nd</sup> majors from another college.

**Probation** - OTR is pulling together the subgroup to revisit the probation policy change on the TC campus. The recommendations will be presented at the RAC meeting and then to CUD.

The PS probation reports are being rewritten to come from the data warehouse for all campuses. The information generated from the data warehouse will also create a batch file to upload into the academic standing PS panel. This will eliminate the data entry currently required.

**Upgrade to 7.6** - The upgrade to 7.6 was completed on Monday, February 21.

**SPEEDE** - Phase I is scheduled for June 2000. Phase I is the sending of the transcript to Universities that are EDI recipient ready. The University of Minnesota will be one of the first institutions in the state with this capability.

**Web Priorities** - 1) Stabilize infrastructure for Whistler City (April); 2) Phase II: Registration Evaluation (July); 3) Advising information via the web (no date); 4) Grade entry via the web (no date); 5) APAS/DARS (no date).

**Grade Deadline for fall 2000:** The FCC (Faculty Consultative Committee) is challenging OTR's

authority to set grade deadlines. The faculty voiced a strong desire to have grades due a week before the start of spring term. Sue encouraged RAC members to talk with their faculty about the end of term challenges faced when grades are due so close to the start of spring semester.

**Discontinue Process:** RAC members were given the opportunity to comment on an earlier e-mail regarding postponing the discontinue process until fall 2000. This process is in regards to students who have not registered for two consecutive terms. No members voiced concern over waiting until fall semester to implement this process.

**Repeat Courses:** SCEP is currently examining the wording of the repeated course policy. RAC members were asked if any of their colleges did not allow repeating courses. College representatives brought up that there are certain college stipulations regarding repeating courses (e.g., grade below a C-), but no one believed their college didn't allow repeating.

**Degree Clearance:** Colleges should expect to have DARS available in mid-April for use in degree clearance.

**SDB Transcript Issues:** One day while running SDB transcripts, two issues arose (these errors only happened this one day). First, some student's who had the previous college code of "031-999" (Credit by Advanced Placement - College Board) showed twice the amount of transfer credits for that previous college on their SDB (legacy) transcripts in January 2000. It did not affect every student with a previous code of "031-999" and it did not affect any other transfer work. It is not related to the typical AP work on the transcript, but only shows as transfer work at the top of the transcript. The following illustration is an example of the error:

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From Cr by Adv Plcmt-Col Board

Spring Quarter 1997

Total Credits Transferred: 10.0

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The total credits may only be 5.0 instead of 10.0. The problem cannot be recreated, and if there is a concern a new SDB transcript can be run on-line to reflect the correct credits for this work.

**Transfer Work and Transcripts:** If transfer work was entered into DARS as "semester" work for any term prior to fall 1999, the transfer work will show and count as quarter credits on the SDB (legacy) transcript. They are reflected accurately on the PeopleSoft transcript, but not on the SDB transcript. This affects a small number of students, and will not be a problem once all the students are converted into PeopleSoft.

**Data Warehouse:** A trial version of the Major Advisor Report, capturing all active majors and minors, was handed out to several colleges. This report should go into production before the end of March. Colleges could run these reports as often as they needed.. The Data Warehouse is looking at ways for colleges to create their own reports via the web and selection criteria. RAC members were asked to share what selection criteria were useful to them. Examples included: Major, GPA (top 10%, top 7%; ability to

specify %); class; credit range; Course number; and I's as graded credits vs. non graded credit. The Data Warehouse web site can be accessed at <http://www.umreports.umn.edu>

Please forward any comments, suggestions, or problems with the Data Warehouse (or their reports) to Reid Carpenter at [r-carp@tc.umn.edu](mailto:r-carp@tc.umn.edu) or Shelly Diers at [diers005@tc.umn.edu](mailto:diers005@tc.umn.edu).