

## **Meeting Minutes: September 11, 2000**

**Present:** Kristeen Anderson, Deb Basarich, Teresa Baultrippe, Jackie Carlson, Reed Carpenter, Pat Coffey, Pam Cook, Anne Daly, Shelly Diers, Colleen Eberle, Tina Falkner, Carol Francis, Teresa Fruen, Bill Ganzlin, Laurie Gardner, Peter Haeg, Teesha Kirschbaum, Mary Koskan, Brian Lieb, Karl Lorenz, Rick Marsden, Keri Mauch, Cindy Pavlowski, Peggy Phan, Lonna Riedinger, Jan Reifseck, Vickie Roberts, Alice Ross, Jim Rowan, Cindy Salyers, Clare Strand, Terri Tuzinski, Sue Van Voorhis, Anne White, Amy Winkel.

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

**Announcements:** Mary Koskan announced that the regular transcript fee was increasing from \$4 to \$5, and rush transcripts were increasing from \$8 to \$10, beginning September 6, 2000. This is the first transcript increase in four years. Please recycle old transcript request forms. If new forms are needed, please contact Debbie Henderson at 625-9019. Only currently enrolled students can request transcripts via the web. All students, current or non-current, can request copies of their transcripts via mail, fax or in person.

Sue Van Voorhis announced that the Office of the Registrar was creating a Professional and Graduate Student Registrar's Advisory Committee. The first meeting will be October 3, 2000 from 1:30-2:30 pm in 140 Nolte.

There is a website listed on the OneStop student page where students can go to register to vote. The page is <http://beavoter.org>.

**Student Accounts Receivable Update:** Julie Selander from Student Accounts Receivable (SAR) provided an update.

Effective September 11, 2000 Student Accounts Receivable is fully staffed. It is hoped that these additional staff members will assist in keeping the lines in SAR moving quickly.

Billing scheduled for September 11, 2000 is delayed at least one week. It is likely that the due date will be changed as well. It was shared that SAR does have an installment plan for students. To qualify for this program, students must pay the minimum amount due by the first due date. The installment fee is \$20 per installment for fall semester. Beginning spring semester, a flat fee of \$35 will be charged to participate in the installment plan. If students fail to meet the minimum payment by the due date, the bill defaults back to being payable in full.

SAR has cleaned up over 12,000 bills. Due to this clean up, some students will be getting a bill for the first time (potentially for fall, spring, intersession or summer coursework). Their credit balance has always been on their account, however it did not show on the bill. SAR will work with these students to create payment plans.

Credit balance refund checks are running off of the PeopleSoft database and SAR is able to run the refund process in batch.

**Permission Numbers:** Departments and colleges are now able to print permission numbers via the web using the Data Warehouse. If problems are encountered in accessing or printing these numbers, please

contact Keri Mauch in the Office of the Registrar at 626-4561. Beginning spring semester 2001, OTR will no longer print and distribute permission numbers because departments and colleges are now able to print these via the web using the data warehouse.

To access class permission numbers (formerly known as Magic Numbers) via the web follow the following instructions:

1. You must have a version of Adobe Acrobat installed on the PC to be able to load forms from the web. To download a free Adobe Acrobat Reader, go to <http://www.adobe.com/products/acrobat/readstep.html>.
2. Go to <http://www.umreports.umn.edu/> to access the Data Warehouse management reports.
3. Click 'User Login' and enter your X.500 ID and password. Press the 'login' button. Once your login is successful, click on continue.
4. Once you have clicked on continue, you will be brought to your own user homepage. First time users are requested to supply some demographic information, but on subsequent logins you will not be asked the information again. The user homepage was designed for broadcast messages. Please check this page frequently for updated messages.
5. For Netscape users: In the upper left portion of the screen, click on 'Working' then on the right side of the screen, click on the button labeled 'With Instruction' and then choose the report from the list.
6. For Internet Explorer users: Click on 'Working' in the upper left (this will open a pop-up menu). From within the pop-up menu, select Enrollment Management and then the appropriate Class Permission Number report.
7. You can select the report using class number or subject, catalogue number or section/session.

The schedule for permission number use is as follows:

**Week one and two:** Use class permission numbers to – override permission requirements; override class limit; and override requisites. All class permission numbers will expire at the end of the second week; print list of permission numbers from the web at <http://www.umreports.umn.edu/> students can register on the web with these numbers.

**Week three through week eight:** Use student specific permission to – override permission; override class limit; override requisites. Students can register on the web.

**Week nine through week fifteen:** Use student specific permission to – override permission; override class limit; override requisites. Students can add on the web, but can NOT drop on the web.

### **PeopleSoft Update:**

Just a reminder, all messages sent out on Student 2000 and HRMS listservs are posted at three Web sites listed below:

Enterprise listserv (most all messages posted): <http://www.umn.edu/enterprise> . The sites below can be reached for this address as well.

Student 2000 QA listserv (this listserv): <http://www.umn.edu/s2000>

HRMS listserv (HRMS-related listserv messages) <http://www.umn.edu/hrms>

**Registration** – Performance on PeopleSoft was very good for the beginning of the term. The exception to this was on August 28<sup>th</sup>, when an approved Financial Aid job ran during the day. This brought production to a standstill, but fortunately the web continued to operate. This had a big impact on Crookston and Morris, as it was their first day of classes.

**Web** – Performance has been excellent. Last week over 91% of the web add/drops occurred within zero to five seconds. An additional 5% occurred within five to ten seconds and the remaining transactions were over that level.

**Conversion** – We have placed historical student record conversion on hold in order to have cleaner data in production first. To meet this goal there are multiple necessary activities. These goals are:

1. Continuing to load current students into production. This week we are loading approximately 1200 current students into PCOM.
2. Modifying the 0998 term building process to insure more accurate data.
3. Improving Data Integrity (converted and non-converted students). Data Integrity reports Phase I:
4. Thirty some reports will move into production within the next two weeks. Clean up of converted and non-converted records will progress with the help of the service center staff.

Data Integrity Reports Phase II:

Determine which clean up can be automated. This involves working with the other student units and human resources.

5. Approaching completion of a fix for the graduate school records, so they will shortly be eligible for conversion.

**Student Financials** - See Student Accounts Receivable update. Implementation of major patches is moving through the system.

**Transcripts** - The rollout is underway. We have asked colleges and departments for the names of those who need access to print transcripts. We will roll out access in groups so that we can monitor the system.

**Reporting** - We continue to work with IMS to meet reporting needs. This fall we sent out study lists to students on all campuses. There were some errors in this process. We are working on resolving those issues with IMS, so that we will be more successful next time.

Some of the items that have been requested or are in progress with IMS:

Enrollment Cancellation

Degree Candidate report

Enrollment Count Summary

Graduating Students with Financial Holds

Enrolled Student Roster

Availability of Student Permanent Address

Multiple Program Report

To access management reports go to <http://www.umreports.umn.edu/>

**SPEEDE** - We are continuing to progress with going live with SPEEDE. We are still working with our vendor on a number of issues. We plan to go live with the University of St. Thomas soon. MNSCU is working on some issues prior to their future go live point.

**Web Update** - Registration facelift continues to move forward. There are several "quick wins" with the facelift project:

- A streamlined process for adding a class, which eliminates 2 unnecessary screens, thereby eliminating (we hope) students' frustration in having to confirm the addition of a class over and over before the PeopleSoft enrollment engine is run.
- A re-worked login/logout process, which hopefully, will eliminate student confusion over the role of the "Done" button, which appears on every Whistler screen. The revised functionality of "Done" will be to return the student to the page from which they first hit a secure function, meanwhile popping up the x.500 window, which allows the student to logout.
- Real-time seat updates on the class schedule and section status applications rather than seat updates that are 1-day old.
- An additional column on View Holds which informs student of the actual impact of a hold (which may or may not be registration-blocking; the lack of this column has caused confusion for students with certain types of non-enrollment blocking holds).
  
- Advising web site is currently in testing – please send feedback to Tina Falkner ([rovic001@tc.umn.edu](mailto:rovic001@tc.umn.edu) or 625-1064). A kickoff meeting for Web Portfolio for the Twin Cities, Morris and Crookston is planned for late-September.
- Paperless Financial Aid Office is still in progress.

### **Implementation Points:**

Last implementation points scheduled for August 12<sup>th</sup> included –

- Various fixes to Course software
- DARS/APAS fix
- 17 student records patches, that include fixes to grade roster, enrollment request, enrollment appointments, transcript and technical fixes
- A fix to the subplan panel
- Performance enhancement on the program plan panel
- First phase of fix to the batch transcript panel

Fixed after the August point -

- Transfer credit evaluation allows a student to be in DARS for two colleges

Targeted for the September 23<sup>rd</sup> implementation point –

- Discontinue Process Review
- Admissions Revocation Process Review
- Fix to Archive regarding Decedents
- Directory Suppress fix from x.500
- Conversion Problem Audit
- Course fixes
  
- FTP problem with Class Schedule Extract – AutoSys
- Schedule 25 FTP
  
- Returning Quick Enroll to Vanilla and Disabling
- UM Grading Process Enhancement
- Patches
- 11 Academic Advisement patches (we do not use this product, but do need to install and test patches)
  
- 19 Student Records Patches
  
- Enrollment sets FA load <>academic load
- Self-service/swapping classes/grading basis mapping occurs
- Consolidated statistics fields not populated in stdnt\_cons\_stat
- Term activation enhancements
- Program actions errors in student program/plan panel
- Repeat checking external transfer & manual transfer credit
- Prior term copy/reserve capacity
- Class roster problems; course topics/withdrawn students
- Enrollment request drop problem and error message
- Wait list processing/multi sections (not used)
- Unable to swap multi-component classes with auto-enroll
- Reserve capacity/wait list
- Performance schedule of classes panel
- Appointment panel session enrollment limit override
- Unable to compile SRPCRPT.cbl
- Bad course sequence global sequential restriction
- P freeze global sequential restrictions
- Requirement group detail of wild card course
- Student Career number and FA eligibility
  
- Transcript Problem fixes part 2/part 1 in off point
  
- Transcript Text Printing in Address Area

Other Items in Progress that will be moved into production when fixed and tested

- 0998 conversion fixes
- Grad Data Fix (26GRD)
- Add Action reason Values to Program Action for Discontinue
- College Name Change UC to CCE – waiting on authorization for final changes
  
- Update term activation statistics for FA
- DARS
  
- Revise DRSOUT01 Ext for Selective Updates
- CCE work – MAINFRAME
- Remove additional tables in PS/DARS extract
- "Transfer Course credit with 'I' grade MAINFRAME"
- PS/DARS Interface (SST032-term) MAINFRAME
- CAS Degree Audit Interfc (10/00 Point) MAINFRAME
- DARS Purge (APA012) MAINFRAME
- APAS 31 screen MAINFRAME
- Level Course/add leading O back on course MAINFRAME
- Grade problem/pulling grade information MAINFRAME
- APAS Printer Problem
  
- Grade Roster – Final Post Fix
- Mass Enroll Transaction number problem, cannot be replicated
- Performance Improvements
  
- Grade Processing Performance
- Official Grades Extract
- Distance Learning Registration
  
- SPEEDE
  
- Batch run error in EDI smart
- Translate values for EDI smart
- Fix from SCT for the 3 decimals (GPA)
- Start/End date issue
- External Org ID's
- Modifications to Transcript Production Process
- Operational Process for use of SPEEDE in production
  
- Study List Bad Address

Items targeted for the November implementation point

- Combined Sections Enrollment – Daily clean-up
- Enrollment Counter
- DARS
  
- Transfer Backbridge (UMSRI049 Error Rpt – sort problem)
- Transfer Backbridge Program Report
  
- Grade Lapsing BP for PeopleSoft

- Performance Enhancement
- Grade Post Performance
- Patches
  
- HTML Patches – 9 (we do not use their product, but their patches must be retrofitted and tested)
- Academic Advising Patches – 4
- Generate Class Roster – missing DMS
- Extraneous data printing on transcripts
- Effective sequence faults correctly but does not allow ADRV action
- Enroll Requirement Group – not recognizing some transfer credit
- Changing Units Taken does not correctly recalculate GPA
- DB2 OS/390 & DB2 unix errors in 7/6/00 database build
- Grade Change/Degree Change Audit Panels & Career/Program/Plan Security Change Audit
- ENH – Printed Enrollment Verifications
- Dynamic Dates run control (SRDYNADT) errors
- Block Enrollment Quality Initiative
- Transfer Credit Quality Initiative
- Operator language in search view CRSE\_CATLG\_SCTY
- Enrollment Panel: PeopleCode problem when a row is deleted
- Term Activation not using Academic Load Table correctly
- Term Activation problem with Custom selection criteria
- Course Catalogue printing duplicate classes in some instances
- SRPCERT.cbl from R-HBENSO-ZQ9RC fails to compile on Unix
  
- Change Student Career Number on Term Activation panel does not result in the FA\_ELIG flag
  
- Review of criteria for Probation List and Dean’s List
- PSEO Report
- SPEEDE Multiple Campus Issue
- Change Study Lists from Crystal to SQR?
- Term End Transcripts (part 2/part 1 in 8/12 implementation point)

Estimates Requested for the following fixes have been submitted to OIT

- Print Degree Information in Boldface on transcript
- Enrollment Request Audit
- Transcript Print/Negative Service Indicator

**Transcript Update:** Terri Tuzinski, Manager of Training and User Support from the Office of the Registrar distributed a guide for printing PeopleSoft Transcripts. As colleges or departments are granted access to print transcripts, Terri will send the guide to them. If you would like an additional copy of this documentation, please contact Tina Falkner at [rovic001@tc.umn.edu](mailto:rovic001@tc.umn.edu) or 625-1064.

Before college and department staff will be able to print PeopleSoft transcripts:

- The network printer or printers in your office must be configured for PeopleSoft printing. The

technical support person in your office will send a request to Central Computing Operations (CCO) using the CCO Printer Service Request form. There are instructions for locating and downloading this form (<http://www1.umn.edu/cco/PeopleSoft/psprinter.html>) from the University's web page.

- Staff given access to print transcripts will need to clear the cache in PeopleSoft to allow the change in access to be distributed to the PeopleSoft client.

**Advising Web Site:** The Advising Web Site is in test. Some links are not fully active yet, but will be available soon. Please visit the site and provide feed back to Tina Falkner at [rovic001@tc.umn.edu](mailto:rovic001@tc.umn.edu) or 625-1064.

The site can be accessed at <http://onestop.umn.edu/Academic/index.html>

**Class Lists:** The Office of the Registrar is in the process of evaluating if the Data Warehouse provides a more efficient and effective option for distributing Class Lists. The age of the Class Lists distributed by OTR is considerably older than that available in the Data Warehouse. Also, when OTR delivered Class Lists this fall, some departments complained that they had already printed theirs.

To access the class lists:

1. You must have a version of Adobe Acrobat installed on the PC to be able to load forms from the web. To download a free Adobe Acrobat Reader, go to <http://www.adobe.com/products/acrobat/readstep.html>.
2. Go to <http://www.umreports.umn.edu/> to access the Data Warehouse management reports.
3. Click 'User Login' and enter your X.500 ID and password. Press the 'login' button. Once your login is successful, click on continue.
4. You will be brought to your own user homepage. First time users are requested to supply some demographic information, but on subsequent logins you will not be asked the information again. The user homepage was designed for broadcast messages. Please check this page frequently for updated messages.
5. From your homepage, click on the link for Class List Reports
6. Select the type of class list you need:

Class lists for instructor

Class lists for departments

Class lists for colleges

Class lists with grades

One RAC member voiced a concern that in-house printing of class lists may be disastrous for large departments, especially those that are not web savvy. OTR will entertain the idea of printing class lists for these departments and having these lists available for pick up.



It was also mentioned that for departments to embrace this change, it must come from the Dean's level.

**Program Plan Action Reasons:** Some additional Action Reason values to be used with the "DISC – Discontinue" Program Action or Student Program panel. Program Action of DISC is being used for many reasons (e.g., ICT, multiple active programs) and can, therefore, be confusing to others. The addition of an action reason would clarify why a DISC action was taken.

Values to be added:

SUS1 – Suspension; to be used by collegiate staff when a student's program is being discontinued due to suspension for the 1<sup>st</sup> time.

SUS2 – Suspension; to be used by collegiate staff when a student's program is being discontinued due to suspension for the 2<sup>nd</sup> time.

IUT – Intra Collegiate Transfer/Inter University Transfer; to be used by OTR staff when a student transfers into a new program.

DUAL – Dual Active Careers; to be used by Professional/Graduate School staff when a student is admitted to more than one career. Although they are eligible to enroll in either career/program, policy states that registration must be done in one program per term.

DACT – Deactivate/Non-enrollment; to be used by OTR staff when a student is being discontinued due to non-enrollment for two consecutive terms.

2PLN – Completed 2<sup>nd</sup> plan; to be used by OTR staff when a student finishes their second plan after their degree has been posted. The 2<sup>nd</sup> plan will be posted as transcript text and the program will be discontinued.

MULT – Multi Institution; to be used by OTR staff to prevent a student from continuous enrollment as a Multi Institution student.

STRQ – Student Request; to be used by collegiate staff when a student requests to be discontinued from their program.

If collegiate staff need to have an admission revoke processed due to poor academic performance, call admissions and speak with the supervisor on duty.

OTR also brought up a question regarding automatic deactivation of students who do not enroll. According to policy, automatic deactivation only applies to degree-seeking undergraduate students. Collegiate staff were requested to bring the question, of whether or not non-degree seeking students should be included in the automatic deactivation, back to their colleges. Discussion would continue at the October RAC meeting. If the policy needs to be changed, OTR will bring it back to SCEP.

OTR brought a draft proposal regarding proposed program actions. College staff were asked to review the proposal and forward any concerns to Vickie Roberts at [v-robe1@tc.umn.edu](mailto:v-robe1@tc.umn.edu). The draft noted: In an effort to be in compliance with AACRAO guidelines which state that academic misconduct or dismissal, which interrupts the student's continued enrollment should be reported on the official transcript. The term *Suspension* should connote separation for a definite period of time, with permission to return certain, or

virtually so. On the other hand, *Dismissal* connotes either permanent separation or separation for a very long period of time, with readmission only upon review. *Dismissal* usually results when a suspended student re-enrolls but does not improve his or her academic performance.

Program Actions Program Action Reasons

SUSP – Suspension SUS1 – First Suspension from College

DISC – Discontinued IUT – Intra Collegiate Transfer

DUAL – Dual Active Career

DACT – Deactivate/Non-enrollment

2PLN – Completed 2<sup>nd</sup> Plan

MULT – Multi-Institution

STRQ – Student Request

DISM – Dismissal SUS2 – 2<sup>nd</sup> Suspension

Others to be determined

**Contact Lists:** Sue Van Voorhis distributed additional copies of the Central Student Services Contact List. This list was also distributed via e-mail in early September. If you need a copy of this list, please contact Tina Falkner at [rovic001@tc.umn.edu](mailto:rovic001@tc.umn.edu) or 625-1064. Updated lists will be distributed before each semester.

**Training Update:** The schedule for October, November and December PeopleSoft training is now available. Please contact the Student Records Training Team at [techteam@sossgw.stu.umn.edu](mailto:techteam@sossgw.stu.umn.edu) for more details. We are now using a smaller 8-person lab so it is important to sign up early and attend the session for which you are registered. A special training/information session regarding the program for non-degree seeking students wishing to take graduate level course is scheduled for Wednesday, September 27 from 2-4 pm in the Nolte Library. If you are interested in attending, please contact Terri Tuzinski at [t-tuzi@umn.edu](mailto:t-tuzi@umn.edu).

**IUT Deadlines:** A chart was distributed regarding Change of College Deadlines for Spring 2001 and Fall 2001.

### **College Spring 2001 Fall 2001**

Ag., Food, and Environmental Sciences Oct. 2 March 1

Biological Sciences Oct. 2 Contact College

Dental Hygiene ----- March 1

College of Continuing Education Oct. 2 March 1

Ed and Human Development Contact college Contact College

Human Ecology Oct. 2 March 1

IT

Undergraduates Oct. 2 March 1

Non-degree seeking students Jan. 16 Sept. 4

Liberal Arts

Undergraduates Oct. 2 March 1

Non-degree seeking students Jan. 16 Sept. 4

CSOM

Undergraduates ----- Contact College

Non-degree seeking students ----- Sept. 4

Medical Technology ----- March 1

Mortuary Science Oct. 2 March 1

Natural Resources Oct. 2 March 1

Nursing ----- March 1

There was a discrepancy in the published dates for fall 2000 degree applications. They are due September 18. Degree applications for Intersession will be due June 18; the same date as summer term applications. The degree confer date will be the end of summer term date.

**Issues List for PeopleSoft:** Sue Van Voorhis distributed an Open Issues List from colleges regarding PeopleSoft. She asked collegiate representatives whether or not the issues had been solved. If issues were still unresolved, she asked for collegiate staff to investigate the status of these issues.

**Old Fee Statement:** The Office of the Registrar is working with Student Accounts Receivable to create a new study list that will display fees. To print a study list including the account summary, please use the Extract button, wait 10-15 seconds then print using the Print button on the far right of the Enrollment Request panel.

To access the Enrollment Request panel:

Go

Manage Student Records

Manage Academic Records

Use

Enrollment Request (Add or Update/Display)

The information printed on the bottom of the study list/fee statement is currently inaccurate and will be removed. We are no longer required to display this information on the study list/fee statement.

**Helpline:** The PeopleSoft Student Records number is 625-2803. Staff in 200 Fraser are currently answering this line 2 days per week, other days are answered by the training team. Soon, staff in 200 Fraser will take over this entire function. Please let Mary Koskan know if you encounter any problems with the Helpline. This Helpline is a system helpline, please do not call about records maintenance, etc.

**Data Warehouse** - The Data Warehouse worked with the Office of the Registrar in distributing Study Lists to registered students. Overall, the response was positive, however some problems were encountered due to how the addresses were pulled from the system. To hopefully alleviate these problems in the future, IMS will only look for "umn.edu" addresses. There were over 49,000 e-mail Study Lists sent and only 1400 bounced back as undeliverable (only about 3%).

One problem noted was multiple listing of classes with unusual meeting times (i.e., two different meeting times during the same week). This will be fixed by the next mailing in January. To notify students of the Study Lists, the Office of the Registrar will publish information in the spring class schedule, and run several ads in the Minnesota Daily (Coordinate campus newspapers too?) close to the end of classes fall term.

OTR staff is meeting with the Data Warehouse to examine the Business Process related to graduation clearance. They will determine what pieces are missing currently to assist with graduation clearance, and how IMS can assist in meeting these needs. Please contact Linda Miza ([l-miza@umn.edu](mailto:l-miza@umn.edu) or 6-7214) with suggestions.