

## **RAC/PRAC/AAN/CSAA**

**August 7, 2006**

**Present:** Gary Andersen, Shuji Asai, Diane Ashby, Jackie Carlson, Laurel Carroll, Grant Clavelle, Pam Cook, Dan Delaney, Laura Ericksen, Tracy Fischer, Marci Freundschuh, Michael Galegher, Kit Gordon, Sarah Groskreutz, Sarah Ihrig, Barbara Jensen, Kitty Jones, Charleen Klarquist, Pam Klopfleisch, Jennifer Koontz, Mary Koskan, Dave Krueger, Andrew LaChapelle, Margo Mueller, Jess Murra, Robert Nelson, Kathy Nolan, Ingrid Nuttall, Jan O'Brien, Cindy Pavlowski, Heather Peterson, Lonna Riedinger, Vickie Roberts, Genny Rosing, Alice Ross, Cindy Salyers, Jody Seiler-Peterson, Rebecca Simmons Clare Strand, Danielle Tisinger, Fran VanSlyk-Zaslofsky, Mary Vincent Franco, Kasi Williamson

### **Introductions**

**Announcements:** Sue Van Voorhis distributed a sign-up sheet for volunteers to work with Academic Support Resources (ASR) on the scholarship web site project. A review of the how scholarships are handled at the University was conducted this past year; a group was led by CLA Dean Rosenstone. Recommendations from that group are in the process of being implemented. Santiago Fernandez-Gimenez, Web Designer and Information Architect for ASR will be leading the scholarship web piece and would like input from all the colleges' scholarship administrators.

**Review of July minutes:** There were no changes to the July 2006 minutes.

**PeopleSoft upgrade wrap-up:** Mark Powell provided the group with an update of the PeopleSoft 8.9 upgrade. The upgrade project began in March 2005 with initial planning meetings with different business areas. A project charter was created in July 2005 which stated the purpose of the project was to upgrade to the new version in order to maintain PeopleSoft support; the upgrade was also conducted to coordinate with timeline of Enterprise Financials project so resources would be effectively utilized. Version 8.9 has more functionality, especially for Human Resources; the upgrade included an upgrade of the Oracle database as had been done in the past. A kickoff meeting for the project was held in August 2006 and the project team went through lessons learned from the previous upgrade. Based on the lessons learned, the 8.9 project team shortened the timeline of the upgrade; in retrospect, the timeline set for the 8.9 upgrade was too short.

The first full day for users to be on the system following the upgrade was Monday, July 24. System-wide problems were revealed early on. Some problems may have been attributed to folks being on the system, but didn't explain the extent of the problems that were experienced. Mark Powell noted it is difficult to understand why these problems hadn't been revealed in testing.

Other institutions who had upgraded had similar problems; OIT made contact with those institutions to see what solution was appropriate. Everyone was asked everyone to log off

PeopleSoft so OIT could reboot the server and so payroll could be completed. Recommendations were received from Oracle on how to compute statistics to fix the problem. Once these changes were made, immediate improvement was noted in terms of the immediate CPUs on the server. OIT did have to take web registration down several times during that week. Student Records was having problems printing transcripts and study lists. These issues were eventually resolved.

There are still concerns about overall performance, especially since traffic has been light and will increase with orientation and classes beginning. OIT is still hearing about individual problems and continued to monitor performance and look for errors. Sue Van Voorhis does have contingency plans in place for registration. There will be information going out on the DDD list regarding the issues with the upgrade.

Mark Powell noted that clearly, there are some lessons learned about what we need to do next time. However, the formal project is wrapping up; the project team is going through list of lessons learned.

Mark Powell asked how well the group thought the system was working now that these issues had been resolved. Jackie Carlson noted that things had gotten much better and people are able to get work done. Some users noted problems with getting kicked out of the system and wondered if it was a problem with what people had running concurrently on their system.

Jackie Carlson also noted that students were getting critical processing errors but registration was still going through. Sue Van Voorhis noted this is an issue that is being looked into; there are similar issues with Quick Enroll and Block Enroll.

Gary Andersen noted the Training Team had received calls from users experiencing the problem with having multiple windows open and getting booted out of the system. Mark Powell noted that there had been some changes to the authentication module; this might have had an effect on this issue.

Jackie Carlson asked how much time users had in the system before it timed out. Mark Powell noted it should be 60 minutes. Gary thought it was less than that. Sue Van Voorhis noted it is supposed to be 60 for staff, less time for students. Mark Powell noted he is in communication with 1-Help and they aren't hearing this is a global issue.

There was concern expressed students returning to possible problems of this caliber. Mark Powell stated that OIT is monitoring the system to see if things are cropping up. Measures at this time indicate things are improving. OIT is continuing to look at the SQL list and will also continue to investigate the Oracle patch to see if that's an option.

Jackie Carlson asked if other schools who have upgraded have had problems. Mark stated that yes, this has been the case. It is unknown if others have used the upgrade to the Oracle patch. Dave Krueger noted that aside from these problems, many things went

perfectly with the upgrade. Mark Powell commented that a more thorough testing plan was executed during this upgrade.

Sue Van Voorhis noted for the record that Kasi Williamson was responsible for sending the e-mail updates from ASR. The group thanked Kasi.

Sue Van Voorhis specifically thanked Mark Powell, Data Security Director, for his work on the upgrade. The group thanked Mark as well.

**PeopleSoft training update:** Gary Andersen provided the group with an update on the training effort for the upgrade. Almost everyone is trained, about 1400 users. The few remaining users who haven't been training are receiving attention. Some users can't find things and the Training Team is directing them to the search function. For the most part, people can do what they need to do. There has not been a significant increase in the amount of calls. Jennifer Koontz asked if the Training Team would offer training for staff for new system. Gary stated that the Training Team is in the process of revising training for all classes, starting with Inquiry. Pre Registration will become Student Update, and training will be geared more toward helping users learn how to do specific tasks. A consultant will be working with the Training Team to help revise their documentation.

Someone asked if changes made to the class schedule go live immediately. Gary Andersen answered that certain things are updated immediately, but things such as the instructor name would be updated the next business day. It was asked when section status changes are updated; this is updated the next day. Dave Krueger noted that this change depends on how it is executed by the user. If a user changes the status, it is updated the next day. However, if the user zeros out the seats, the change is reflected immediately. If a user cancels a class, it will show up the next day in the class schedule but the student won't be able to register for the class immediately.

**U Planet:** Dave Krueger provided the group with a presentation and update on the Grad Planner, now called UPlanet, application. Dave reminded the group that both ECAS and PCAS had to be successfully implemented in order to provide information that feeds into graduation planner. A driving premise of the application is that we don't want the student to provide any information that is known somewhere in the University system. All requirements that are remaining for a student will be shown in UPlanet; Dave told the group that, if their department's requirements aren't in APAS, U Planet won't work for those students. It is critical that requirements are updated in APAS.

UPlanet will also provide students with sequencing information in order to help them make decisions about the best time to take a particular course. This is an integral part of the mission to increase the University's graduation rates. Letting the student know up front when they need to do things is an important facet of UPlanet.

The system knows based on who a student is what they have taken, and what they would need to do to complete what degree they're currently coded for in PeopleSoft.

“Checkpoint charts” will be used to give students a visual representation of when they should take a course. PCAS requirements don’t match exactly to APAS requirements; this issue is currently being reconciled. Functional design is 80 percent completed; the first round of usability will begin shortly. Then, a prototype will be built; then another round of usability will be conducted with students and advisers. If we have to change big chunks of functionality, this would affect when everything will be available. The final steps of the project are technical design, estimating the build, testing, and implementing a communication plan for rollout, as well as training for advisers and a presence at new student orientation. Socialization of the application is an important piece of the project plan.

Jackie Carlson asked when the application will be live. Dave Krueger responded that it depends on how long it takes to build. Until ASR can tell OIT what we want to build, we don’t know when the application will be available. The goal is to have a prototype available for UMD orientation in spring 2007. Part of our goal was to keep it simple. The team is pulling in a lot of data so when we want to add on things to this application, we have this data at the ready. The team is finding out from lots of people what information we need and what we can provide; we want to keep real estate on the page maximized to keep it simple. The project ideology is to keep the scope small but plan for big.

Someone asked if the application will tell students when two courses they’re planning on taking conflict. The answer is no, because we currently don’t have the class schedule built out that far.

Jackie Carlson asked if, at some point as students use this, will it eventually roll into Web registration? Dave Krueger noted this is a goal.

Sue Van Voorhis asked the group to keep in mind that though this has been going on four years and the team started over last fall. We’re on track and doing well. Dave Krueger noted that the team started over in order to look at what we had in APAS so we didn’t have to recreate work.

Margo Mueller noted that the team has tried to look toward the future to determine the best practice; no other institution has this tool and it is very complicated. Since we started over, it’s been a great direction to go in. When the application is available, it will be a good tool.

**Probation/Suspension:** Vickie Roberts opened a discussion with the group regarding how to proceed with students that have been suspended and want to be readmitted. Some students are being readmitted as non-degree and haven’t talked to the colleges that had originally suspended them. Vickie asked the group if they are getting these types of referrals of students who are not going through scholastic committee approval and going through non-degree instead. Jennifer Koontz stated that CCE is curious if there is some way to prevent this from happening again. Is there some way to indicate that a student hasn’t talked to his or her college and doesn’t want to return but wants to go through CCE instead.

Kitty Jones noted that GC noted there are issues with students who have been suspended, readmitted, and then transfer colleges but nothing tells the new college of their previous status. If that student gets suspended a second time, they have to reapply.

Pam Cook noted that adding an action reason would be really helpful. CLA would have to figure out how to handle it as they are decentralized. GC tries to train all the staff to ask the students when they take in the readmit forms and could check before they process the readmits.

Vickie Roberts asked if the group felt this suggestion will solve the problem or if a more thorough discussion was warranted. Dave Krueger noted the whole process should be mapped out before a decision was made.

Vickie Roberts said she would convene a group to sit down and map out the process. Pam Cook, Jennifer Koontz, Lonna Reidinger, Mary Vincent Franco, Dan Delaney, Cindy Salyers, and Laura Ericksen all volunteered to participate.

**Major/minor Roster Changes Demonstration:** Cindy Salyers provided the group with a demonstration of the upcoming changes in report functionality for the major/minor roster. This includes the non-degree or double major version, plus the bachelor's version. It is important users choose all the appropriate major codes so they get all students. The current roster has main report and sub report which includes gender, ethnicity and international student status. IMS thinks this will be an exciting feature that will give users a lot of functionality.

Someone asked if there is a limit to how many rows of data a user can pull up. There is no limit in this report.

Jess Murra noted that she likes to use this report for multiple majors; however this can only be done if there is a name or word in common between the majors so they can be found through the search function. Clare Strand noted that this would be very helpful functionality—the ability to pull several different majors. Cindy Salyers indicated she would look into adding this functionality.

**Changes to UMReports Security discussion:** Cindy Salyers demonstrated new report customization features that will be available at UM Reports ([www.umreports.umn.edu](http://www.umreports.umn.edu)) on Friday, August 15, 2006. Access the customization options by clicking on the Customize icon  next to the report title on your Home Page or above the report header once you've run the report to get to the Customize Home Page for that report. Click on the links to the left of the page to customize various report features.

- Select the Reports Columns link to hide certain columns on the report. (The option to hide report columns on some reports has been available for a while.)

- Select the Default Output link to change the default output of the report (e.g., change from HTML web page format to a PDF format).
- Select the Report Filters link to allow you to filter (further narrow) the data originally returned on the report.

The new functionality should be available on Friday. Not all types of customization are available on all reports and some reports do not allow any customization options.

Most reports that have more than one output available (web page, Excel, PDF, etc.) will allow you to select the output you want to have as the default for that report. The Major/Minor Roster and the Student Roster Detail List will allow you to select additional filters to use in the header of the report. For example, you could filter on expected graduation term and get just the students who have applied for graduation. IMS will be adding the filter functionality to additional reports as they go.

Major/Minor Roster changes: The current roster has main report and sub report which includes gender, ethnicity and international student status. The new report combines this information onto one page. Information on who has temporary or permanent exemptions to the 13 credit policy has been added for Twin Cities undergraduate majors. Remember, it is important users choose all the appropriate major codes (the non-degree or double major version in addition to the degree version) so they get all students.

Someone asked if there is a limit to how many rows of data a user can pull up. There is no limit in this report.

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**Changes to UMReports Security discussion:** Cindy Salyers announced that effective September 18, IMS will change report security. Access to the UM Reports site is based on employee status in PeopleSoft. The biggest change is that IMS will be looking for instructional staff 31 days out into the future so they can get access sooner, especially to class lists, before the term begins. The security changes mean that a small number of people won't be able to get in. Effective August 17, any users who can get in now but won't be able to get in under the new rules will get a warning message every time they log in until the new rules take effect, September 18th.

Sue Van Voorhis asked if employees who have retired will still be able to get in. Cindy Salyers replied that, if they are coded as instructional staff, they will still have access.

Mike Galegher asked if a note will go out telling users who did not previously have access that they now have access. Cindy Salyers replied that no; IMS would rather not encourage people to go in if they don't have to.

It was asked if retired faculty who are still teaching will have access to enter grades. The answer is no; they will have proxy access only. (Grades are entered through One Stop and access is not affected by the change to UM Reports.) Cindy Salyers noted that IMS would like to thank Central Authentication for working with IMS on this project.

**Enrollment Verification fact sheet:** Mary Koskan informed the group that she would distribute the Enrollment Verification fact sheet at the September meeting. This sheet provides guidelines for students regarding requirements for full-time and part-time status. Each college was contacted over the summer to get an update for this document.

**Tuition Refund Appeal form:** Mary Koskan reminded the group of the recent revisions to the tuition refund appeal form. One Stop Student Services added a supplement for medical reasons; a student's physician can complete this part of the form to assist One Stop in understanding a student's extenuating medical circumstances. This also helped One Stop streamline the process of reviewing medical letters from clinics while maintaining HIPAA compliance.

One Stop is now asking all departments and colleges to toss any old tuition refund appeal forms. A new change has been added to the form which includes language advising students to consult with Disability Services if they have, or believe they have, a disability. New forms are available in One Stop Student Service centers and [onestop.umn.edu](http://onestop.umn.edu) under "Forms Online."

**Financial Aid 101** Deb Pusari presented the group with a PowerPoint presentation outlining key financial aid information. As students are facing sticker shock with rising cost of education, it is important that everyone who works with students assists them with utilizing their financial aid resources. Deb Pusari provided the group with a historical outline of financial aid. PELL continues to be the main program through which students receive financial aid. Tax credits provide additional financial support for education. The amount of financial aid from a federal level has significantly increased over the last decade. There are more efforts underway to help students in financial need understand they can get college paid for. Still, most financial aid comes in the form of loans. Minnesota has a strong state grant program in comparison with other states. Over 90 percent of students who apply for financial aid are applying online with the FAFSA. Financial aid staff encourage students to apply early but also don't want to discourage students from applying if they're applying late. Financial need is usually a requirement, as well as certain educational requirements. If a student is suspended, that student can't receive financial aid. The feds require OSF check each term that a student has appropriate GPA and number of credits in order to receive aid.

To the extent that a family is able, it is their responsibility to pay for higher education though many of their assets are protected. Usually, the cost of attendance determines the maximum amount of financial aid a student can receive. Also, two new grant programs will be operational for the 2006-07 award year: The Academic Competitiveness Grant

program (ACG) and the National “Science and Mathematics Access to Retain Talent Grant” program (SMART). Both programs require eligible students to be U.S. citizens, enrolled full-time, and Pell Grant recipients.

ACG is available to first and second year students enrolled in a two- or four-year degree program. Eligible students must have completed a rigorous secondary school program of study; eligible programs must meet at least one of the following criteria: state designated high school program; successful completion of AP or IB courses and tests; successful completion of specified curriculum. Specified curriculum includes all of the following:

- 4 years of English;
- 3 years of math;
- 3 years of science;
- 3 years social sciences;
- 2 years foreign language

For the first year of eligibility, the student must not have been previously enrolled in degree-seeking program of undergraduate education. For the second year, the student must have a GPA of at least 3.0. Grant funding is \$750 for the first year and \$1,300 for the second year.

SMART is available to third and fourth year students enrolled in a four year degree program. Eligible students must be majors in science, computer science, technology, math or certain designated foreign languages. Students must also have a cumulative GPA of at least 3.0. Grant funding is \$4,000 for each year.

More information regarding these new programs is available online at [http://onestop.umn.edu/onestop/Financial\\_Aid/grants.html](http://onestop.umn.edu/onestop/Financial_Aid/grants.html).

Each state has worked with the federal government to determine what a rigorous program of study is; at the University, the requirements are the same as our admissions requirements.

The Founders Opportunity scholarship is designed for students to think about the University as an option when they’re still in jr. high and high school. There are strong community service and tutor programs at the University, as well as community service job options for students; all of these can help students pay for school. ASR is working toward increasing literacy for loans online to better inform students of options. There is always loan money available for students even if they don’t meet the need-based qualifications. Students should decline loan money if they don’t need it. All staff can contribute to providing students with more information to make sound financial decisions about their education.

Pam Cook asked if a work study applicant says they have \$3000, is that for the year? Yes, it is for the entire year.

Clare Strand noted that under the policy for repeating classes, last grade counts, and OTR goes through a process of bracketing first course; this has an impact on the cumulative GPA. For the awards that require the GPA be tracked, will OSF track the GPA after the repeat checking process is complete? Deb Pusari responded that whatever the institution uses as their GPA is what we can use. OSF won't have a separate GPA to include a repeated class. It was further asked if OSF will intentionally wait until process of checking repeated courses was complete. Deb Pusari responded that OSF has to do the check before disbursement each term for SMART; for ACG, OSF is planning on checking at the time they become a sophomore, at the end of the term.

Kitty Jones asked how student services staff can help students who can't pay enough because their parents can't or won't pay. Deb Pusari noted that there are private lenders, and trust fund loans. The feds aren't willing to pick up the family's contribution unless there's a severed relationship.

Danielle Tisinger asked how the ACG grant accommodates students who enter the University with previous credits. Deb Pusari responded that OSF has to include those credits.

Mike Galegher asked what happens if a family income changes drastically from one year to the next. Students have to reapply each year and their package is redone. OSF has a special circumstance form if something happens in the aid year.

Kitty Jones asked if a student brackets a grade and retakes, does the previous one get treated as a non-completed course? The answer is no. If they pass, it still counts.

Jess Murra asked if there will there be coordination between OSF and the office that runs the grade bracketing. Sue Van Voorhis responded that the problem is getting grades turned in on time. OSF has to disburse 10 days prior to the term starting. Between fall and spring, there may be an issue. Deb Pusari noted that the rules for disbursement may be reviewed for next year. Sue Van Voorhis noted that it is because these rules can change that ASR wants student services staff to be aware of the importance of understanding financial aid.

**ASR Project update:** Sue Van Voorhis discussed the list of project priorities for the student administration side. These are projects for the fiscal 07 year. Sue noted that the Address Verification will be run through the PMO office since it is system-wide. For the Course Guide rewrite project, the business analysts have taken a step back to possibly utilize existing tool from CSOM. ASR has been asked to go into maintenance mode because of the Enterprise Financials project. ASR cannot afford to go into maintenance mode.

**Credit card update:** Sue Van Voorhis stated that, not that the PeopleSoft upgrade is complete, ASR can move forward with implementing the credit card project. John Printz continues to lead this project and the next phase should go much more quickly. Infinet

will be used as a vendor; ASR hopes to have things ready to go for spring term but this may change. The University will be able to accept VISA.

**Strategic positioning update:** Sue Van Voorhis announced that the single enterprise group is finished and has put forward recommendations. The best practices group will combine with the single enterprise group in order to create one process. They are looking at a form where one can submit a project idea; projects will be prioritized and funded appropriately. The group does not want a mechanism where people can just submit things with no action. The Office of Continuous Service and Improvement is creating a database to help with cost benefits analysis. The student services group will continue to meet; Laura Koch will lead this and they look into implementing the recommendations.

**SISWG update:** Cindy Salyers provided the group with an update of the Student Information Systems Working Group (SISWG). The SISWG committee submitted their final report with recommendations to Craig Swan in mid-July. A summary of the recommendations is as follows:

- Develop single sign-on access to electronic tools;
- Integrate UMCAL with college on-line appointment scheduling;
- Increase use of UCard swipe systems to facilitate monitoring traffic and follow-up work with students
- Create an electronic notes tool for advisers that is integrated with other electronic tools;
- Expand the use of ImageNow and its workflow capabilities;
- Expand the use of CLA's Midterm Alerts monitoring/communication system;
- Implement Web-based forms that can be submitted online and are entered into a workflow queue;
- Develop a policy database that is searchable by topic or keyword;
- Expand the use of CLA's auto grade review for sequenced courses;
- Create an advising syllabus for students and advisers that services not only as a "contract" of the advising relationship for both parties; but also incorporates the University's commitment to developing "engaged" students;
- The committee will serve as an advisory board and "owner" for advising reports in UM Reports;
- Explore using instant message/chat system for drop in "office hours" for advising

Tina Falkner met with Laura Koch to discuss the recommendations. Laura is responsible for implementing the strategic positioning recommendations that relate to students and advising. Tina will also be discussing the report at the August CUD meeting. The next steps are still under discussion. The group will continue to meet once the next steps are determined. If you want a copy of the reports, please contact Tina Falkner at [rovic001@umn.edu](mailto:rovic001@umn.edu) or 612-625-1064.

**Admissions update:** Paula Brugge provided the group with an update on how Admissions has progressed with the processing of transfer credit. As of July 28, there were 1,892 transfer confirmations received from 2,509 offers. 3766 track reports were

sent and about 75 percent have had updates made to their track reports. Admissions is working off of college office reports for orientation. Many students are admitted and then a week later they're receiving track reports; this is a great improvement from last year. Regarding AP scores: in July, 7,611 scores were received for 3,168 students. Of these, over 2,000 were NHS or enrolled from 2006 and they have received track reports. A lot of students are coming in with a lot of credits.

Paula Brugge noted there will be a new counselor look-up feature on Admissions Web site. Prospective freshman students will be able to look up their admissions counselor based on the high school they're assigned to, ethnicity, or college they're interested in. Admissions would like to have a similar feature, "Meet your transfer specialist," in the future.

**Faculty/Staff update:** Ingrid Nuttall provided the group with an update on the faculty/staff Web site. Two years ago, Ingrid met with a group of advisers to look at enhancing advising information on the One Stop Web site. Arlene Carney contacted Sue Van Voorhis about revamping the faculty page on One Stop. Ingrid stated she hoped this would lead to improvements in the staff site as well. More information on this project will be provided at future RAC meetings.

**Record distribution:** Ingrid Nuttall announced that the Record newsletter will be moving to an electronic-only version beginning September. There have been challenges with compiling an electronic mailing list. In order to ensure everyone who was on the paper mailing list continues to receive the Record, University Relations has agreed to assist with distributing the Record via a link in Brief for the 2006-07 year. Over the next year, Ingrid will work to create a complete mailing list. All University staff receive the Brief; there will be a lead story highlighted in Brief with a link to the Record online. All those who are currently on the Record listserv will continue to receive the Record via email.

Laura Ericksen noted that she does not always read Brief and would prefer to receive the Record directly.

Cindy Salyers suggested that Ingrid send a mailing to folks on the paper mailing list to try and get them to send in their addresses. Ingrid said she would investigate this and would promote through the August Record that staff should send an email address ASAP to get added to the listserv.