Registrar's Advisory Committee
Monday, November 3, 2014
Walter Library, room 402 (East Bank)
Prepared by: Kess Knight

Present: Jennifer Bindner, Rhonda Bjurlin, Elena Brown, Richard Campo, Amber Cellotti, Beth Cunningham, Molly Diethelm, Sarah Dittrich, Tina Falkner, Tracy Fischer, Bonny Fleming, Michael Galegher, Laurie Gardner, Jamie Gearhart, Jennifer Hammer, Kevin Havard, Pam Hester, Jason Holscher, Emily Holt, Lisa Hubinger, Jill Johnson, Kess Knight, Jennifer Kroschel, Stephanie Lawson, Nicholas Loch, Rachel McKessock, Heather Micek, Mary Moga, Ingrid Nuttall, Margie O'Neill, Natan Paradise , Cindy Pavlowski, Kristina Pearson, Katherine Pederson, Heather Peterson, Julie Prince, Katherine Russell, Marjorie Schalles, Mary Ellen Shaw, Kate Sophia, Susan Suchy, Aaron Thompson, Stacey Tidball, Darlene Toedter, Sue Van Voorhis, Susan Westacott, Ellyn Woo, Robyn Zastrow

Common session agenda items

Introductions and approval of October minutes

There were no changes to the October minutes.

PeopleSoft Upgrade (ESUP)

Portal demo

William Dana reminded the group that the MyU header will follow the users throughout their entire experience. The faculty view of the MyU portal will have the following tabs in the left navigation:

- Announcements (6ish rotating images feature content related to specific campus)
- Teaching
  - Will show current classes being taught during that term, including total enrollment, location, time, link to class list ("Class Roster" in PeopleSoft), and ability to add class URL (related to Course Guide)
  - Ability to navigate through different semesters
  - Links to different resources (e.g., library, bookstore), Moodle, Faculty Center
- My Advisees: this will only show if you are a designated adviser to a student (based on security roles); will be able to see general contact information, holds, and milestones of advisees
- Research: If a person has research activities tied to themselves, they will see a message stating, "You are associated with X non-sponsored (or sponsored) activities." From there, links will direct the user to the Reporting Center.
- Faculty Career: colleges resources for tenured and tenure-track faculty (e.g., forms, information, processes, and service related links)
- My Time: Where faculty and staff can request time off, including vacation, personal holiday, or comp time. If you submit a request for time off, it will electronically go to

your supervisor or a delegate for approval (no more paper forms). Unit absence administrators can assist faculty with requesting time off. Training and other resources will be provided to faculty, staff, and unit administrators.
- My Pay: See your pay statements along with helpful links to Direct Deposit, W-2s, and more information. Every employee will see an expense reimbursement link at the bottom of “My Pay” if they receive an expense reimbursement. A link to “Traveling on University Business” will also be included here.
- My Benefits: Information and links to your Medical and Dental coverage, life insurance, and other benefits.
- Purchasing: Link to U Market and information on how to initiate and complete a purchase. This isn’t meant to imply everyone has been granted purchasing authority, but provided as a way to give information on how to appropriately buy things in case it is needed.
- My Info: Edit your name, address, phone, emergency contacts, and set your TXT-U notifications.

Summary of new features for faculty:
- Easier access to teaching and advising information
- Consolidated grade entry
- Research tab and Reporting Center
- Faculty Career: resources for tenured and tenure-track faculty
- Online approval of time and absence for faculty who supervise

Faculty will not be required to have DUO access; they will log-in with their x.500.

Class Search and Course Guide replacement demo
Ingrid Nuttall took the group through a demo of the class search and the class note feature that will replace Course Guide.

Class search results will feature the catalog long description and will be browseable through the Student center. ECAS and PCAS will still be available, but some of the links on the catalog website (catalog.umn.edu) will be directed elsewhere; meaning the overall look and feel will be changing. The team is still working on what the public view of the catalog will look like. Once finalized, it will be shown to RAC members. A communication plan to students will call-out the class notes feature so they will be aware of this change once it’s live.

Class search
- Student Center > Academics > Search for class
- Can filter by institution, term, course number, session, course attributes (lib ed requirements), meeting start/end time, days of week, instructor last name, units (credits), mode of instruction, and other keywords to the course

- Once a course has been selected, it will be added to the student's shopping cart; from here, they can see if the course is full and if so, can choose to waitlist at this time. They will not see where they are (number wise) on the waitlist.

Training plan/update

Heather Micek said that approximately 800 people attended the preview sessions held in October. A recording of these sessions will be posted to the ASR Training website: asr.umn.edu/upgradetraining. Two student systems training courses will be available and email invitations will be sent in mid-December. One will be an in-person course for CCS (previously known as ECS), and will include information on waitlisting, faculty center, and scheduling. There will be approximately 40 sessions to choose from (5 in Duluth). Another course will be offered online as a broad overview of what's changing. Training materials will continued to be added to the training website as they become available, so check back frequently.

One other important announcement is that the Help link will have new functionality on many PeopleSoft pages. There will be two options: Print it mode, to view/print a PDF documenting the business process steps, or, with the help of UPK's (User Productivity Kits), you can use the See it mode, to watch a walk-through of the business process.

Communication update

Kate Sopha presented some changes to the overall look and feel of The Upgrade brand. It was mentioned in a previous RAC meeting, but repeated as a reminder, that it will no longer be referred to as ESUP, but rather The Upgrade, or PeopleSoft Systems Upgrade.

- **Imagery:** The team has been working with University Relations to create a promotional campaign. There are new templates to be used when presenting information to stakeholders and will feature a gold fish jumping from a smaller bowl to a larger bowl, as this represents the move from one environment to another and the overall effort involved. New templates will feature blue hues, and images will be related to the work we are doing.
- **Timeline:** A simplified timeline communicating testing, training, communications, operational readiness, cutover, and enhanced support periods.
- **Key messages:**
    - In February, we are doing a systems upgrade that will affect nearly everyone at the University. To be successful, we need your support...and patience.
    - The upgrade will:
        - Support ongoing infrastructure efficiency, supportability, stability, and compliance.
        - Provide several benefits to faculty, staff, and students, including a personalized MyU portal, real-time information, automated processes, and consolidated reporting.

    - The upgrade will take one to two weeks. During that time, you won't be able to use some systems. For example, some systems will have view-only information that is not "live." You will need to prepare - we will help you.
- **Website** (upgrade.umn.edu)**:** Audience-focused pages are now live (staff, faculty, students). There will be sub-sections for staff (advisers and schedulers) and Faculty Go-To information will also be included on this site. The student page will have more details once the larger awareness campaign starts at the end of the semester.
- **Student experience:** One Stop will be holding Student Experience Preview Sessions throughout November and December. Information can be found on the website.

Questions

- Will there be a place where you will be cataloging the messaging going to students? Yes, it will be housed on the advising webpage (to be created).
- What is the timeline that it will be unavoidable for students to start noticing this? The start of spring semester.

Some additional questions came up at this time that related to the portal, not necessarily communications. They were:

- Will we be able to customize the MyU portal? No.
- How do you see the teaching tab? You must be listed as a proxy on a course; the person who does the class scheduling would be able to set someone up.
- Will you still be able to get class lists in the reporting center? Yes.
- Will faculty members be able to work-around Faculty Center, or will they have to use it? They will have to use it; it's where they will get work done.

<u>Student Experience Preview Sessions overview</u>

Richard Campo announced that One Stop will be hosting several Student Experience Preview Sessions throughout November and December. The framework will be similar to the preview sessions hosted by the ASR Training Team, and they will be open to the public with no need to RSVP. One Stop counselors will be walking through the student experience and will explore the new features (e.g., registration, financial aid, paying bills). In addition, they will be talking about changes to the One Stop website, which will still be customer service focused, but the business processes will be moved over to the MyU portal. Students will see the biggest change with The Upgrade, and we will need your help getting this information out to advisers.

<u>Application for Degree</u>

Emily Holt said the Application for Degree pillar application will be going away, and this process will be moved to the MyU portal. Students must be active in their program/plan to see the application, and undergraduate students must have over 89 credits to access the link to apply for degree; OTR will continue to have date ranges that students must apply by (certificate plans will have no restrictions). Graduate Education must have completed the following milestones in order to access the application: 0828 (Final Exam Committee) or 0829 (No Committee Required); this is for all degree and certificate plans.

To find and submit the application:

- Once in the Student Center, click on “My Academics” then “Apply for Graduation”
- Can be customized by institution, year, and term (“Select Different Program”; “Select Different Term”)
- Select term from drop down by “Expected Graduation Term” > “Continue” (or “Submit Application”)
- Will see a screen that says, “You have successfully applied for graduation.”
- To view the status, go to “My Academics” > “Graduation” > “View my graduation status.” From here, confirm name and mailing address (can also select a date when these changes will take effect).

Students expecting to graduate in May session will not be able to select May as an option from the drop down. OTR will run queries for students that anticipated summer graduation and have registered for only May classes (nothing further), and will add an attribute to the student’s record stating May as the intended graduation term.

Graduate students will still apply month-to-month. If a student applies to graduate during a certain month, but ends up not graduating and not re-enrolling, they will be discontinued and their application will be void. Students who later return and are ready to apply to graduate must contact OTR.

To split degree terms with multiple programs, a new career number will have to be created and the student will have to apply separately. OTR will go through and look at these students ahead of time.

Students will no longer be able to defer or delete plans - they will have to consult with their program or college to do so. A message will be sent to students with 70 or more credits asking them to review and confirm their plans and their intention to graduate. It will be crucial to maintain contact with students intending to graduate, as they will have to have ample time to update their record if need be (can’t wait until the last day).