

## **AIS Report to Our Customers Quarter Ending June 2003**

### **Report Summary**

The OIT Administrative Information Services (AIS) department is pleased to send you our fourth quarter, ending 6/30/2003, *Report to Our Customers*.

The report highlights our accomplishments, including efforts on the Administrative Systems Planning Group (ASPG) project slate, as well as statistics on resource utilization. These statistics provide an analysis of department effort as a result of tracking time worked and of problems/requests received through the Operational Problem Management (OPM) System. OPM is a tracking system that allows OIT to accept/route/track/resolve operational requests, production problems, maintenance/enhancement requests of less than one week. In order to deliver the service our customers expect, we must continually monitor the effort applied to the ASPG project slate and the effort required to respond to OPM requests.

Key accomplishments during the fourth quarter include:

- Development Advance has been integrated with the Events Management system.
- The Inteum system, replacing DEALS, has been implemented to provide proactive management of intellectual property and technology licensing.
- A new Coeus award budget module has been developed, which was presented at the Coeus Users Group, and is now being tested.
- The Accounts Payable module of PeopleSoft is now accepting direct deposits.
- The DEMAND uPortal upgrade to release 2.1 has been completed.
- Time Collection reporting is now available through the Data Mall.
- ECommerce “browses” for A-1 Limo, DHL and IBM have been implemented in the Data Mall.
- The PeopleSoft Human Resource / Student Administration upgrade to 8.0 will “go live” August 5. A comprehensive communication plan is underway providing users system-specific information sessions (also being video-taped for desktop viewing), “hands-on” training classes (optional), new and improved documentation, and a new online demonstration tool to learn the Web navigation right at your desktop.
- The new Centralized Ticketing system, Tickets.com, was installed and user training was provided. Athletics plans to begin to sell tickets in July, while an August “go live” is planned for Frist and Richardson.
- Both Salary Encumbrance reporting and the new NCAA Eligibility system are on schedule to “go live” in August.
- The new Financial Aid system continues to progress according to the phased implementation plan.
- The PeopleSoft Financials upgrade to 8.4 continues to progress according to plan.

**AIS Report to Our Customers  
Quarter Ending June 2003**

Below is a summary of the ASPG project proposals received through the off-cycle proposal process. One new project has been received this quarter.

<b>Sponsor</b>	<b>Request</b>	<b>Status</b>
Chris McCrudden	EZ Communication	Project completed
William Russel	Distribute GS Student Records	Project completed
William Russel	Develop GS Readmission	Project approved for FY04
William Russel	Develop GS Web Admissions Application	Based on the Cost/Benefit Analysis, project has been postponed
Chris McCrudden	Report Encumbrances on the Data Mall	Project underway
Joe Greenberg	Undergraduate Student Registration	Project underway
Janet Dickerson	NCAA Compliance	Project underway
Charles Kalmbach	Implement e-Benefits	Project proposed for FY04
Janet Dickerson	Centralized Ticketing	Project underway - Athletics and Richardson to be implemented initially
Robert Durkee Betty Leydon	Web Content Management System - NEW	Project reviewed and endorsed by ASPG; Necessary funding in place; Project underway

The ASPG was presented all the project requests submitted by administrative offices and academic departments. At the ASPG meeting in June, the ASPG endorsed a FY04 project slate for administrative systems. During the month of August, it is expected that projects endorsed by the ASPG that require funding, will be reviewed by the Senior Advisory Group for IT (SAGIT). The following projects are pending funding approval from SAGIT:

- Implement new salary planning/budgeting process
- Implement leave accrual processing )
- Implement eBenefits
- Re-initiate student records implementation
- Implement eProfile (kiosks)
- Electronic forms processing w/automated workflow
- Implement Brass Ring/eRecruit

Based on the results of the SAGIT review, the FY04 project slate will be finalized in September. It is planned that two projects will be presented to the ASPG in September – ID Re-carding and the new Parking system. It should also be noted, that key administrative projects for FY05 and FY06 have also been discussed by the ASPG.

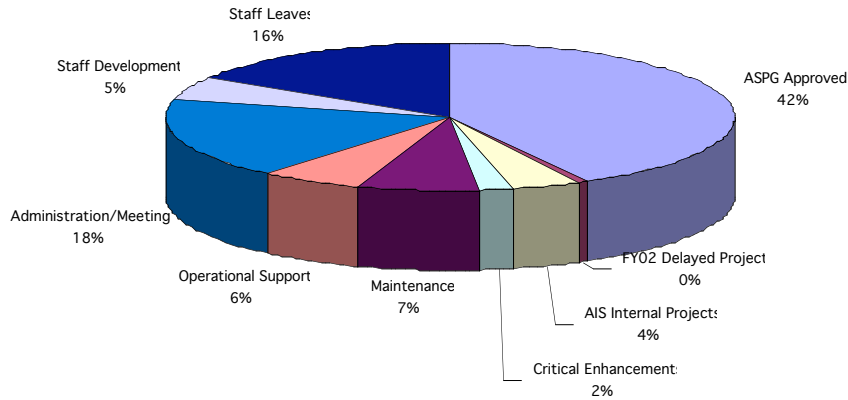
Working with the Office of the Senior VP for Administration and the Academic Managers Group, standard business models (SBM) for Financials, Human Resources and Student Administration have been drafted. The SBMs document the roles of departments and central offices in performing key business processes. The goal of this effort is to validate current business practices and to identify areas of improvement.

## AIS Report to Our Customers Quarter Ending June 2003

### Resource Utilization

Below is a graphic summary of resource utilization for the AIS department during the third quarter. Effort applied to ASPG projects increased slightly from 40% last quarter to 42% this quarter, with 16 ASPG projects completed.

**Administrative Information Services  
Resource Utilization  
Fourth Quarter, FY03**



Effort applied to operational requests, production problems, maintenance/enhancement requests of less than one week are tracked through OPM. The number of OPM requests received were 192 as compared to 113 requests last quarter. This was generally due to year-end activity. The breakdown of OPM activity is listed below:

Department	Activity
University Financials	23%
Registrar	14%
Human Resources	10%
Academic Departments	8%
Campus Receivables	8%
Development	5%
Graduate School	5%
ORPA	5%
Environmental, Health, Safety	3%
Housing	3%
Investment Administration	3%
UG Admissions	2%
UG Financial Aid	2%
Athletics	1%
Dean of the Faculty	1%
Frist Campus Center	1%
Woodrow Wilson School	1%
Other	5%

## **AIS Report to Our Customers Quarter Ending June 2003**

### **Accomplishments**

#### **Alumni Development:**

Advance Web Community Version 2.1 went live with online credit card giving at the end of May. Almost 3000 gifts have been processed to date using this new facility.

The Events Management system went into full production status in June. This included a bi-directional feed with STRIPES to keep bio/demo data and events tracking data in sync between the two databases.

The enhancement to the reporting system to accommodate a wider scope of stewardship categories (e.g. fellowships, professorships, etc) was implemented in June.

#### **Departmental Systems:**

##### **Campus Community**

As part of the PeopleSoft 8.0 upgrade, all Campus Community customizations were migrated and tested successfully. Training sessions were provided for all Campus Community users with “view only” access.

##### **Data Mall and Relational Data Store**

Several enhancements to the Data Mall were implemented during the past quarter.

A long awaited capability to view data definitions (i.e. meta data) for data mall stores has been implemented.

Time Collection reporting is now available in the Data Mall, which includes reports, browses, meta data and quick reference cards. ECommerce browses for A-1 Limo, DHL and IBM were also implemented in the Data Mall.

Additional functionality was implemented to existing data stores in the Data Mall:

- Created an upper-class room draw rooms browse for the student DataMall
- Added a Grades browse and report for Registrar
- Added a Security browse and report for Registrar
- Added a Course/instructor and class list for fall for Registrar
- Student information now spans 9 terms for Registrar
- Added a Credit date range report for STRIPES
- Created 02-03 history files with browses for Undergraduate and Graduate Housing
- Created an ODBC connection for MoBio so they can connect to financial views for downloading
- Created Financial Aid views

## **AIS Report to Our Customers Quarter Ending June 2003**

Finally, Cognos catalogs migrated into the development Data Mall.

### DEMAND

A new version of DEMAND, including the uPortal 2.1.2 framework, was put into production. Additional channels, including one to display the standard business models, have been added. We are now positioned, after user training, to deliver personalization within DEMAND.

### Grants Management

The Inteum system, replacing DEALS, has been implemented to provide proactive management of intellectual property and technology licensing.

A new Coeus award budget module has been developed, which was presented at the Coeus Users Group, and is now being tested. The module was well received and will eventually become part of the base product. The module is now undergoing rigorous testing within ORPA. After this testing, it will be presented to a limited group of departmental users for further testing.

### Resource25

Work focused on analyzing the needs of the Office of the Dean of Undergraduate Students and their student event registration process. Currently, various solutions are being researched.

### SEVIS

The Graduate student upload was implemented. The Undergraduate student load is now being developed. New Front has released fsaAtlas release 6.5. After careful evaluation, it has been decided to delay the fsaAtlas upgrade until after the completion of the Undergraduate student load.

### Ticketing

The new Centralized Ticketing system, Tickets.com, was installed and user training was provided. Athletics plans to begin to sell tickets in July, while an August "go live" is planned for Frist and Richardson. Data conversion of historical data is underway.

## **Financial Systems:**

### Assets and Equities

Ongoing maintenance is being done in an attempt to stabilize the system. Time is being spent improving the system with better error detection and user-friendlier messages. New database tables have been created to replace real time access to Accounts Payable and Development data, improving the performance of the system.

## **AIS Report to Our Customers Quarter Ending June 2003**

### Campus Receivables

Parental access to Student Account Web Billing as well as ACH processing for Student Loans were implemented. The Sallie Mae interface was automated. More than 25 files were manually processed for housing damage billing (automated interface planned for FY04).

### Labor Accounting

The remaining focus for the Labor Accounting system is to increase reliability, specifically with regard to the interface to PeopleSoft Human Resources. To that end, we completed coding and testing which allowed us to close 11 OPM tickets. The testing for an interface to the Data Mall, which will allow salary encumbrances to be reported via the Data Mall, was successfully completed.

### University Financials:

A new check format and related reports were implemented in PeopleSoft Accounts Payable. This enhancement will accommodate the pre-sealed check and mailing envelope stock that replaces the old style envelope stuffed with a separately printed check.

Another PeopleSoft Accounts Payable enhancement delivered is the ability for the Accounts Payable module to accept direct deposit to bank accounts, bypassing the need for a hard copy check.

The project to upgrade PeopleSoft Financials from release 7.5 to release 8.4 continues to progress according to plan. The major tasks this quarter are the first pass at running the vendor supplied upgrade process against a copy of production and the re-application of Princeton customizations.

Salary Encumbrance reporting also continues to progress according to plan with an August "go live" planned.

### **Human Resources, Benefits, Time Collection:**

#### Human Resources and Benefits

The PeopleSoft Human Resource / Student Administration upgrade to 8.0 will take place during August 1 through 4 with an August 5 "go live". A comprehensive communication plan is underway providing users system-specific information sessions (also being video-taped for desktop viewing), "hands-on" training classes (optional), new and improved documentation, and a new online demonstration tool to learn the Web navigation right at your desktop.

#### Time Collection

Time Collection reporting is now available through the Data Mall. In addition, several enhancements were made to the transactional system - added a link to the student rate menu item to allow the Time Collection Administrator direct update capability, prior period unapproved time cards were made viewable in the

## **AIS Report to Our Customers Quarter Ending June 2003**

current time period, improved navigation between approval summary screen and to individual screen, improved messaging was provided to make it more user-friendly.

### **Student Systems:**

#### Athletics

The NCAA Eligibility project is on schedule to be deployed in August.

#### Graduate School

In June, the Graduate School managed the graduation of students and publication of the degree lists using PeopleSoft Student Records. A total of 260 Ph.D.s and 435 master's degrees were awarded.

#### Student Records:

In late April, Undergraduate Students enrolled in Fall 2003-2004 courses using SCORE, the Student Course Online Registration Engine. Once again, access to SCORE was granted based on appointments by class year. A total of 619 rising seniors enrolled on the first day; 961 rising juniors enrolled on their first day; and 1079 rising sophomores enrolled on their first day. Freshman will enroll in courses in September during the registration and orientation period.

#### Housing

Extracts to Campus Community were re-designed to ensure better quality for student address information, to update additional information within Diebold, and to send student data in a timely fashion for the creation of the University Directory this year. Several modifications/additions to the Data Mall extracts were implemented. A new database view for Development was created to electronically load roommate information. Finally, the Campus Receivables interfaces for leases and undergraduate rooms, fees, meal plans were implemented.

#### Dining Services:

The Dining Services system is a stand-alone HP Unix system. In the past, interfaces to the Housing were done using mainframe data and manipulating Excel spreadsheets. This past quarter, procedures to automate the initial load with data from Housing, Campus Community, and the ID Card offices were developed. For the first time, all bio/demo data will come from Campus Community. This project required extensive data cleanup to ensure accurate data transfer.

#### Registrar

Most efforts were concentrated on the PeopleSoft Human Resource / Student Administration upgrade to 8.0. This work includes testing all business processes, customizations, reports and processes, security, data conversion, interfaces, and

**AIS Report to Our Customers**  
**Quarter Ending June 2003**

updating all documentation and training materials in time for the August 5 “go-live”.

Undergraduate Admissions/Financial Aid

Undergraduate Admission has been closed for the entire fourth quarter. We have made some minor improvements to the system, but are awaiting the new Dean to determine what enhancements, if any, are appropriate.

Undergraduate Financial Aid continues to be on or ahead of schedule. We supported renewal applications for returning students this quarter. Two more components of the system were completed – Financial Aid Banker (maintenance of scholarship information), and the Student Accounts and Bookkeeping interfaces.