

## **AIS Report to our Customers**

### **Quarter Ending June, 2004**

We are delighted to present you with this Quarterly Report to our Customers which also marks the last report of the fiscal year 2004.

As we reported last quarter, Princeton University hosted the Administrative Information Services groups from the Ivy+ universities in early May. AIS representatives from Brown, Columbia, Cornell, Dartmouth, Duke, Harvard, MIT, Stanford, University of Chicago, University of Pennsylvania, and Yale all convened on our campus for 2 ½ days of discussions and presentations. The meeting was very well attended and received. The group felt so much was accomplished and the value of getting together was so plainly seen, that we agreed to add a shorter Fall meeting to our annual agenda. We will meet at Columbia in November to continue to capitalize on our shared needs and experiences.

Our new Oracle license agreement is complete and in place. As of July 1<sup>st</sup>, Princeton University has unlimited use of the Oracle database engine campus-wide. This new agreement is a significant improvement over our prior arrangement and has no restrictions who, how, or how many can use the Oracle database engine on campus. We also have free, unrestricted use for off-campus users who access Princeton Oracle-based applications via the Web.

Complimenting the new Oracle DB agreement is our acquisition of Cognos ReportNet as the University's new enterprise reporting tool. This Web-based report development and presentation tool will take our data reporting capabilities to a new level. The Web-based nature of ReportNet will make it far more flexible than the tools we currently have in place. By standardizing on one tool, we will be able to give far better support than what has been available for the many disparate tools that are currently in place. ReportNet is also more powerful, while being more than anything we currently have on campus.

Once the tool is fully implemented, it will be the standard for the Princeton Data Warehouse, eventually replacing the current DataMall reports, as well as all of our custom applications, and substantial portions of our PeopleSoft environment. Initial training was held during the last week in June with additional sessions planned throughout the summer and into the fall. New database, application and web servers have been ordered to support the product. This will be a significant effort. The initial rollout of ReportNet in the Data Warehouse is planned for late fall 2004 and will continue for the next two to three years.

## **DATA WAREHOUSING AND INTEGRATION**

### **Campus Community**

Campus Community worked on the design, development and testing of a project to add Dormitory Codes to Campus Community and to modify SCORE to drive off this new dorm code. These modifications are scheduled to go live on July 28, 2004.

Campus Community worked on the design, development, and testing of a project to retire the Account Management Page. This included replacing that functionality elsewhere within

applications such as SCORE and eProfile. The replacement is scheduled to go live on July 28, 2004.

CC will be important to both the Student Records and Undergraduate Admissions Conversions and 'go-live' projects on an ongoing basis.

### **Hub Interface**

Both the ticketing and dining interfaces to send new employee data were moved into production. The library end dates for 2004–2005 were loaded into production prior to the freshman and new graduate students being processed. A change was made to send Loans and Receivables an employee row for each new graduate student that is matriculated because this application stores these students as both students and employees. The COEUS interface table and the nightly refresh code was altered to add area of study, highest degree, degree date, and school granting the degree for employees where that information is available.

A change was made to the interface hub to only accept address updates from Housing for people whose primary affiliation is Student. We will continue to accept address inactivations from Housing for everyone, but we will only inactivate housing addresses in Campus Community. A change was made to accept dorm codes from Housing and store in the interface hub. The rest of the dorm code changes (moving dorm codes from the interface to Campus Community) will be put into production in July.

In addition to hub-specific work, there were many annual feeds/loads run during this quarter for Campus Community data. The class of 2008 freshmen bio/demo data was loaded into Campus Community as was the freshmen parents' bio/demo and affiliation data. Both the parent and freshmen software required modifications due to the PS8 upgrades last August. Software was developed and run to create initial load files of undergraduates, employees and graduate students for Dining Services as part of the ID recarding effort. Files of addresses for the incoming freshmen and graduate students were generated for LDAP for use with annual mailings.

### **Data Warehouse/Data Mall**

The following enhancements to the Data Mall occurred:

- Converted the Financials stores to utilize the PeopleSoft 8.4 structures.
- Put the incremental extract for Ticketing into production.
- Created new course counts report for the Registrar.
- Created a summer draw browse for Undergraduate Housing.
- Created new available rooms zone reports for Undergraduate Housing to use for room draw.
- Created a new set of reports for the Registrar for the fall term.
- Modified the PAW mailing list extract script and migrated to production.
- Put the new Key Return and Pickup report for Graduate Housing into production.

The DataMall was tested with the new Windows operating system and Office suite that will be in the next DeSC image (XP). Oracle Reports 9i was tested and some minor changes are needed for the current 6i reports to work. A new webpage was created that lists all the Data Custodians and what stores they oversee, so users can contact them directly for access. A partition load test was tested successfully against a large financials table to determine if partitioning will speed up the nightly loads. A script was developed to create users and assign privileges in the Data Mall. This should significantly reduce the number of human errors previously associated with this process.

## **CUSTOM SOFTWARE SOLUTIONS**

### **Departmental Charges**

Changes as a result of the PeopleSoft Financials upgrade, the recarding project, and the new Tivoli charges are complete.

### **Campus Receivables (current system)**

Support for a critical business process was completed:

- ACH processing — accepting and processing direct debit banking transactions via the system.
- A new library interface is in production.
- McCosh interfaces for undergraduate health and graduate dental and vision are complete.

### **Princeton Receivables (new system)**

The new Princeton Receivables system is on schedule. All development for the client piece is complete. Designs and specs for conversion, security, and bridging have received signoff. Short Term Loans Computer (STLC) analysis has begun.

### **Labor Accounting**

Support for the production system included correcting payroll problems on 6/15 and 6/28. Continued work on work study enhancements.

### **Labor Accounting Rewrite**

Initial requirements gathering meetings are being held with various groups.

### **Assets and Equities**

Eight OPM tickets were closed in an attempt to stabilize the system and freeze it except for critical maintenance. Changes due to the PeopleSoft upgrades were incorporated.

### **Time Collection**

We set up secure file transfer to PPPL. We are working toward providing a 24x7 environment to get ready for Phase II.

### **Time Collection, Phase II**

Phase II is on schedule for deployment at the beginning of the new fiscal year. Student longevity, scheduling nonproductive time, scheduling overtime, and use of time clocks are all complete. Final acceptance testing is on-going for a July 21<sup>st</sup> deployment. Additional online reporting will be addressed after go-live.

### **Undergraduate Admissions/Web**

UA/Web development is complete and is currently in acceptance testing. During this quarter we moved from requirements to prototype to product. The system is on schedule to go live on August 9<sup>th</sup>, with a complete online application.

## **PACKAGED SOFTWARE SOLUTIONS**

### **SEVIS**

This quarter we completed the set up and testing of FSA Atlas version 6.6 in nonproduction environments. We will migrate this latest version to production early next quarter. We also completed the Business Continuity Plan which will be used in the event of an extended outage.

### **R25 / S25**

During the fourth quarter we upgraded R25/S25, including the WebViewer and PeopleSoft interfaces, to version 3.2. WebViewer was set up and moved from a server which had reached the end of its useful life to a new one. At that time we also applied the latest patches and fixes.

### **Telephone Management System**

In order to ensure greater reliability we rewrote and implemented the Start/Stop scripts. These scripts will bring the application up automatically if for some reason the server is rebooted. While continuing to support the Monthly Billing Cycle and the End of the Year procedures we also implemented a new inbound interface from Campus Community for EOY processing requirements.

### **ID card**

In June we successfully replaced ID Cards for all faculty, staff, and selected students. The new cards are encoded with the PUID rather than SSN, thereby requiring modifications to all of the systems that interface with the ID Card System. At the same time work was done to modify how the data is transmitted, changing from a telephone-based infrastructure to an IP-based infrastructure.

### **University Financials**

In May, the PeopleSoft University Financials system was successfully upgraded to version 8.4. This entailed a technology shift from client/server to the latest Web technology offered by the vendor.

### **STRIPES**

This quarter we implemented a new Solicitation Tracking Metrics system which provides the ability to track Principal Prospect capacity rating. This allows the highest tier of capital prospects (5 million and above) to be further qualified and segmented, thus enabling more finely targeted solicitation plans. Fund raising measures reporting capabilities were expanded to improve tracking of project commitment and revenue, as well as optionally invoking alternate totaling mechanisms to monitor fundraising office performance. Also, a shared contact report credit model was developed with new selection and reporting features. This will enable the Development Office to record multiple University staff members who have a meaningful effect on any key events, meetings, or conversations with prospects and potential prospects. Previously, only the author of the filed report was recorded, which did not accurately reflect the many collaborative efforts among fundraising colleagues.

This quarter a great many data integrity improvements were achieved in the gift recording area due a new automated data audit system. This relieved data entry operators of numerous manual sorts and cross checking in search of potential errors. It improved speed and workflow so that gifts can be entered into the system for fundraiser review much earlier in the day. This is a major benefit during peak gift volumes at year end. New balancing and summary reports were

implemented to more quickly and accurately provide Annual Giving daily statistics on new donors, and to better support JV reconciliation with the Treasurer's office.

We also implemented a process to check valid project grant IDs from University Financials to improve the data quality of the Stripes gift feed to PeopleSoft. Another interface was created to feed student sports participation from the NCAA eligibility database so that it may become a permanent part of the future alumni's bio history. This replaces labour-intensive manual checking of athletics books, and staff data entry of the findings.

### **Office of Research and Project Administration (ORPA)**

The COEUS Web application e-mail function was modified to meet ORPA's needs. It is currently in test. We are working on mapping the Institute Review Board data from the Access system currently being used by ORPA, to the MIT COEUS Web version.

### **Housing**

This quarter we worked with the Facilities Department on graduate housing electronic leases which will be sent out during the first week of July. We also created two new DataMall stores for graduate housing to communicate with superintendents and building services. For undergraduate housing, we wrote and implemented new uploads and reports to capture freshmen housing preferences.

### **Dining Services**

During the fourth quarter we modified the data transfer programs from housing in order to switch to ID number from social security number and to support the many new meal plans defined by Dining Services for next year.

### **Student Systems**

The code to produce the CAFSIS and Course Evaluation is complete and is being tested in development. All Student Records fields have been converted to PeopleSoft. We are currently validating active undergraduate records manually and verifying the custom Princeton transcript. We are coding online customizations, interfaces and SQRs for Student Records, and participated in Student Records fit gap.

The SA team participated in Undergraduate Admissions fit gap. We have defined the scope for Historical data conversion and have defined a strategy for conversion. Detailed data mapping continues for Admissions.

We coded several changes for Graduate Reenrollment and upgraded to Tools 8.2

### **HR/Benefits/Payroll**

This quarter we participated in testing and supported PeopleSoft Tools upgrade to version 8.20 including reestablishing the connection between PS HR/SA and PS CRM in the Development, QA and Production environments.

We added an anniversary date to the employment table, which was a field required by Time Collection. By adding it to the table which is already copied to Time Collection, we provided necessary information with minimal changes to another system.

To enable us to enhance our testing environment we set up Maestro, our scheduling tool, in the development environment which will allow us to schedule our testing in all environments. We

also set up a development environment for Workflow to allow for testing Workflow changes in an environment that mirrors production completely.

To keep up with our vendor's changes, we downloaded and applied to the Demo environment all the PS fixes issued prior to May 27, 2004. There were more than 100 bundles and individual fixes. We produced compare reports and began working on applying these fixes to the Development environment.

Lastly we modified an interface program from Campus Community to HR to add new logic for undergraduate student hire date, and added graduate student cases to the error report.

### **PeopleAdmin**

Last quarter we participated in the initiation and implementation process of the new applicant tracking system. PeopleAdmin is will host a Princeton site and the data necessary for posting positions and accepting applications. In support of this effort, we wrote three interfaces from PS HR to PeopleAdmin to pass job codes, positions and department data. We researched and set up manual secure FTP transmissions of Princeton data to PeopleAdmin. Before going live, an automatic secure FTP process will be set up.