

## **AIS Report to our Customers**

### **Semiannual Ending June, 2005**

We are delighted to present you with the Semiannual Report to our Customers for the 3<sup>rd</sup> and 4<sup>th</sup> quarters of FY05. Starting with this report, we will move from a quarterly update on AIS' activities to a semiannual report.

In the Q2 FY05 report we announced the creation of the Architectural Review Board. The purpose of this group is to review all new systems either when they're being considered for acquisition, in development, or ready to go-live. This cross-functional OIT is charged with ensuring the integrity and security of new OIT-supported systems. Over the course of the last 6 months this team has conducted reviews for Badging, Vendor Direct Deposit Self-Service, Labor Accounting, and Princeton Receivables among others.

We eagerly anticipate the go-live of PeopleSoft Student Administration for the Undergraduate College, Office of the Registrar, and Undergraduate Admissions. The go-live is planned for an on-time implementation in early August.

## **CUSTOM SOFTWARE SOLUTIONS**

All CSS systems have migrated to a new environment, with updated, current software and new hardware. The increased machine capacity should result in better response time and more reliable systems.

### **Departmental Charges**

PSR II (Princeton Software Repository) went live as a DC user. CSS ran some training sessions to help users understand how best to use the system.

### **Merit Increase**

We added functionality for HR to securely publish excel spreadsheet passwords on the website. This system was used successfully by HR and DOF this year.

### **Demand**

Demand was retired as an AIS-supported system on June 30, 2005.

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

An ID card interface was added. Other than mandatory maintenance, we are trying to divert all Campus Receivables resources to Princeton Receivables development.

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

Two pieces of the new set of systems, Client and Security, are complete and signed off by the customers. They are awaiting go live of the Student system in August. We have reworked our original project plan to include two parallel tracks; billing and loans. We are designing a new interface strategy that will work for both systems and obviate the need for Constellar. We are gaining expertise in ReportNet, including the ability to write coupons in a highly specified way, and the ability to call a ReportNet report from a PR application webscreen. Current work is in Short Term Computer Loans.

### **Labor Accounting**

We have migrated to a new, supported Sybase and Oracle environment, which will mitigate risk in the current environment. Data cleanup continues. We continue to address only critical changes, allowing us to concentrate on the new system.

### **Labor Accounting Rewrite**

Because the design of new LA has led to so many business process changes and improvements, we revisited the project plan to make sure the major milestone deadlines will hold, and they will. We have completed grad school authorization and approval modules, distribution calculations, approval calculations, bookkeeping calculations, and the basic design for grad school screens. We are awaiting signoff from the grad school office.

### **Assets and Equities**

We added a new parameterized date routine to prepare for the data warehouse version of A&E.

### **Time Collection**

We prepared for migration to the new data warehouse. We addressed the few tickets as they arose, but in general, the Time Collection system continues to be very stable. MET (maintain employee task) is the only remaining piece of Phase II. We are delaying going live with this pending customer testing. The current plan is to run a parallel test this summer, then go live in September.

### **Undergraduate Admissions/Web**

UA/Web continued in production throughout the current admissions cycle. It contributed to the record number of applications for admission to the Class of 2009. Final numbers for UA/Web:

- 4,809 Applications entered;
- 2,960 Applications submitted;
- 725 of those requested Early Decision.

For Phase II (the next admission cycle that includes PeopleSoft), we have completed all coding and have obtained customer signoff on all pieces except Prospect. We reworked the summary sheet to better meet the operational needs of the admissions officers. We have separated the registration front end and the login process from Financial Aid to make the system more secure, and changed the code that manages printing to avoid performance problems.

For the coming year, we have begun requirements gathering for Common App Integration into the UA/Web. This will allow an automated load to PeopleSoft, saving the UA office weeks of data entry.

## **DATA WAREHOUSING AND INTEGRATION**

### **Campus Community**

Campus Community is involved with both the Student Records and Undergraduate Admissions Conversions projects on an ongoing basis. We continue to be involved in designing and implementing the duplicate checking methodology that will be followed when converting Undergrad Admissions data, loading Search tapes and test loads, as well as duplicate checking, during ongoing processing of applicants and prospects once Undergrad Admissions is live.

CC completed work on the customizations necessary to support these two new systems including a customization to address security requirements, changes to the SCORE address page, addition of a new address type of School, and the online processing rules around it.

Changes were also made to the Affiliation panel to support additional functionality to track Departmental Computer users. An “end” date was added and a nightly process will now run to change an active status to inactive when today’s date equals the end date.

Finally, address validation software was purchased from QAS. This software will not be implemented until the September–November time period. Once implemented, the software will be used to clean addresses stored in Campus Community on a regular basis.

### **Hub Interface**

Three major projects were completed during this time period. First, an interface to Student Health for the new Medicaat system that sends employee and staff data to Advance was made productional in June to coincide with the system going live.

Two new tables were created for the new Badging system that also went live in June, and the interface to Stripes was modified to allow for employee data to be sent on a nightly basis.

In addition to this work, changes were made to the Interface Hub to restrict the propagation of Applicant and Prospect information and to correct mismatched affiliations.

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

Final testing has been completed on five new packages that will be added to the Information Warehouse (REPORT). These include Time Collection, the Student and Employee telephone booths, Undergraduate Admissions, Student Records and BlackBoard. Development work continues on the Investments and COEUS packages.

The home page for the Data Mall continues to be modified to allow users to navigate to either the existing Data Mall or to the new Warehouse. Test drives of the new Warehouse were conducted every other Friday morning during February, March and April to introduce the new environment to the Princeton community.

Additional training, conducted by an outside consultant, was held to support data modeling for both the Financials and Labor Accounting packages that will be available during the next fiscal year. The consultant has also started work on creating “Princeton-specific” user guides that will be available during the latter part of August.

## **PACKAGED SOFTWARE SOLUTIONS**

### **STRIPES**

Over the last 2 quarters the Stripes team upgraded to version 8.1, which also included an upgrade to Advance Web Community. Production cutover took place on May 9<sup>th</sup>. We also developed and implemented an overdue pledge reporting function. Source Based Totals Tracking system was enhanced for new delineation between Corporate Foundation and ORPA Giving. Also, more specificity was implemented to further define ‘friends’ giving.

We completed a project to load beneficiary data and the account cross reference scheme for Mellon Bank and new query tools were created to facilitate searches on beneficiary data. Also,

new entity profile reports and query tools were developed for the Art Museum as a first step toward having their donor membership tracking needs met via the Stripes Application. We are currently awaiting further requirements to address specific reporting needs.

We developed increased audits for the batch proofing subsystem and also improved the runtime performance. End-user feedback indicates this audit system has dramatically improved data quality and reduced reconciliation time among Gift Records, Annual Giving, and the Treasurer's office. Two improvements to data integration were completed; the load Faculty and Staff from Campus Community, and the load data collected from ReunionAid. And finally, during the last 6 months we were able to close 71 maintenance tickets.

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

There were several areas of emphasis for ORPA these past 2 quarters. For CoeusWeb, we completed the analysis and coding of the required changes for subcontract module. This module simplifies the routing and approval for payments of subcontract invoices. We also began the analysis of required changes for the award module.

For the main Coeus application, we installed the latest Java release, Coeus 4, to begin testing in our environment. We plan to install the database changes to production, but keep the current Coeus 3.8 client interface for a while. Only the Institute Review Board (IRB) module will be setup to run using Coeus 4.

For the Institute Review Board, we finished mapping the data from their Access database to the Coeus database. This system will be going into production during the upcoming quarter.

For the Conflict of Interest module, we wrote a Java application to allow faculty and staff to enter this information next year. After final testing by faculty, staff, and library personnel, the COI module will be put into production next quarter.

Finally, for the interfaces with the Treasurer's Office, we created more controls on data being transferred and new reports that can be used for auditing purposes. During the next quarter we will be working with MIT on conversion of the Award Budget Module from PowerBuilder to Java. When this is completed and tested, we will plan to move away from the Coeus 3.8 client.

### **Housing**

For the graduate housing office, we created several new reports that allow them to track information about their students and buildings more efficiently. In addition, we worked with Campus Community to develop a view for newly admitted graduate students that proved to be a major timing improvement for this information.

For undergraduate housing, we completed a project to mass-update address information allowing for the renaming of Ellipse Hall to Bloomberg Hall within Diebold. We needed to create this functionality since it was missing from the vendor product.

We are the midst of an upgrade to the Diebold CS housing product. Initial testing of the new release revealed several system flaws. After extensive communication with the vendor, we now have a new release to install and test.

Finally, we continued meetings to discuss future housing requirements in anticipation of beginning the enhanced housing web room draw project. To that end we developed a project initiation plan. Concerning enhancements to the current system we wrote an automated update

procedure that reads the meal plan from freshmen's scan forms and updates Diebold. This saves data entry for over 1,000 students.

### **SEVIS**

To solve a problem with opening the interface XML file in MS Word on Win XP, a new program was developed to replace special characters for Graduate, Undergraduate Students and Scholars. We also added a third nonproduction environment for testing upgrades by using Virtual machine technology.

During the fourth quarter we successfully tested and upgraded fsaAtlas from 6.6 to 7.0.1. The operations to up/download events in batch with newly upgraded SEVIS were also successfully tested and implemented.

### **R25 / S25**

During the 3<sup>rd</sup> quarter we successfully setup and completed the functional testing of R25, Interface, Schedule25 and WebViewer for the Oracle upgrade to 9i and R25 XP version. We also finalized the R25 client install procedures with the Software Support group and successfully completed the Production cutover to WinXP including an Oracle upgrade to version 9i. We also completed the server side R25 XP install, interface configuration and end-user desktop re-imaging to XP DESC image and R25 client installs.

To enable more reliable testing we isolated the Schedule25 environment by creating an instance on the Development server. In the past, in the absence of the Development server both Production and Test environments were implemented on the same server.

### **Telephone**

During the 4<sup>th</sup> quarter we implemented the corrected housing data load program that addressed the data inconsistency generated across tables by its previous version. Also the Interface HUB specifications were updated and logic was developed to include additional details and report deleted records to the HUB so that they can be further propagated to LDAP.

### **Badging**

During the 3<sup>rd</sup> quarter a badging vendor was chosen and we completed the Architecture Review. All OIT tasks have been clearly identified and the status is updated and tracked. During this process a better understanding of Project interdependencies and stakeholders were identified, and a timeline was developed among team members. The project completed on schedule and the implementation is currently in shakedown.

### **Parking**

During the 3<sup>rd</sup> quarter we completed project initiation and submitted the project to the Architecture Review Board. A detailed project plan was developed for OIT scope of work and interdependencies to develop a better understanding of the project interdependencies, stakeholders and timeline among team members. The project is currently on schedule for July end installation/go-live.

### **Financials**

As is always our goal with the University Financials system is to stay current with respect to the vendor-supplied patches and fixes. Work was completed on the capture and reporting of restricted funds and distributed investments within the General Ledger system. Fixes to incorrect extracted-data for the DataMall, which is due to inaccurate updating by PeopleSoft's commitment control processes from the GL, continues.

The terms and conditions have been removed from purchase orders and a reference to a web page where terms and condition may be referenced was put into production. This modification has saved one page per printed or faxed purchase order.

During the 4<sup>th</sup> quarter an interface with the Coeus system to accept an automatic feed of project grant information into Financials was moved into production. The primary purpose of this modification was to reduce manual data entry and increase accuracy. This was realized and a further useful byproduct has been that the Treasure's department can now make mass changes to project grant data without technical assistance. The software to interface funds transfers to PNC bank was updated and moved into production, replacing the Pinnacle system.

And finally, the Maximo inventory interface to Financials project has completed its development stage and is slated to move into quality assurance early the first quarter of FY 2006.

### **PeopleSoft Student Admin and Legacy SR and Admissions**

In preparation for the August go-live we developed a number reports and interfaces for Student Records and Undergraduate Admissions. While the majority of development work is complete for Undergraduate Admissions and Student Records, conversion continues for both. We are currently comparing transcripts between legacy and PeopleSoft. In addition, we are testing the interface from UA web to PeopleSoft Quality Assurance instance.

### **HRMS**

During the third quarter we applied the PeopleSoft patches and fixes that were issued from June of 2004 through December 1, 2004. Because it requires a great deal of effort to apply the fixes and perform full regression testing, we hold this process to twice a year.

In order to complete W2 and 1042 processing, we applied Payroll Tax updates 04 -F to production. We participated in testing and applied the necessary modifications to support the PeopleSoft tools upgrade. We are now on People Tools 8.21, which is the latest supported PeopleSoft tool for our HR/SA application version. In conjunction with the tools upgrade we were required to upgrade to Crystal version 8.5.

To support modifications to the University's benefit package we made several modifications to the programs that create interface files to benefit providers to reflect the new rules and new codes.

On the payroll side we modified the program that prints pay checks to suppress a signature for zero amounts and to move "NON-NEGOTIABLE" phrase to a new location.

To reduce the amount of email our customers receive, we modified Maestro scripts to add a new option. Users can now request to receive email notification only if the job failed. The option to receive email on every execution of the job is still available.

To facilitate better testing we created two new processes that allow Payroll office to load Time Collection data and Graduate School data for ANY pay period to a non-production environment.

To satisfy a requirement from the U.S. Department of Labor, Bureau of Labor Statistics we wrote a new report that produces data regarding paid employees, including paid students on a monthly basis.

To help our customers manage their online session we added a sound alarm to the warning message that appears on users screens when they are not active in PeopleSoft for preset period of time before they are disconnected.

And finally, we supported DOF and HR users during the conversion from PS queries and ReportNet reports and also converted over 2 dozen PS queries to the ReportNet.

## **STUDENT SYSTEMS**

### **Graduate School**

Changes were requested to the interface from PeopleSoft to the Labor Accounting system, and those changes are now in production. Milestone data for graduate students will be available in the RDS, and necessary changes to the milestone pages were completed. Enhancements were made to the Graduate Reenrollment contract as well as the Graduate Financial Support contracts.

### **Registrar's Office**

Changes were made to the course information system in preparation for the roll-out of PS student records in August 2005. The minimum/maximum units fields are now only available to Registrar and Dean users. Enhancements were made for the course approval process when end-users add a cross-listed course. Due to problems with transcript titles in the course catalog, the printing of this field was added to the Course Offerings Proof and the Dean's proof to ensure the transcript titles are correct. In addition, changes were needed in preparation for the rollout of web grading. Some defaults were put into place to make it easier for the system to be set for use of the online grade rosters.

For security purposes, the UserID is now displayed on the student records page, so it is now possible to see who has made changes to student records.

Changes were made to enhance the interface between PeopleSoft and Blackboard. In addition, enhancements were added to the interface between PS and the Registrar's website to enable new course searches.