



Executive Update

# Student Information System CS9.0 Upgrade

Updated: April 8, 2008

## PROJECT DESCRIPTION:

Upgrade of Student Administration System Version 8.0 to Campus Solutions Version 9.0, database upgrade from Oracle 9i to Version 10G, PeopleTools upgrade from 8.21 to 8.48, Portal / LOCUS from 8.0 and reporting database from Student Administration 8.0 view to Campus Solutions 9.0 view

## STATUS (Healthy to Unhealthy - Green, Lime, Yellow, Orange or Red)

	Prior	Current	Remarks
Overall	Lime	Lime	Overall project health continues to be "Lime". Testing continues, but some areas are beginning to experience delays with their testing.
Academic Advisement	Green	Green	Continuing to test.
Admissions	Green	Green	Continuing to test.
Campus Community	Green	Green	Core team members are testing and documenting results. Plans identified to complete testing in UP4 as scheduled.
Database	Green	Green	100% complete
Financial Aid	Green	Green	At this time, customizations for the 2007-2008 academic year have been successfully tested. The next two phases are: 1) to create 2008-2009 customizations in SA8; and 2) migrate those customizations to CS9.0. Phase one is complete for this series of key customizations, so phase two is underway.
Graduate Enrollment Management	Green	Green	Continuing to test.
Reporting / RDS Interfaces	Green	Lime	Re-mapping the RDS to source from PeopleSoft 9.0 tables. Evaluating and documenting interface processes related to the BI area.
Security	Green	Green	Continue to meet with schools and departments to access security needs.
Student Financials	Yellow	Yellow	Re-running all of the customization processes in the UP4 environment.
Student Records	Green	Lime	Customizations scheduled for completion in the UP4 environment have not yet been completed and tested. However, the Student Records team met on April 7 and determined a schedule for implementation of the remaining customizations.
System Administration	Green	Green	Touchnet testing was delayed but significant progress has been made in smoothing the interface between the LOCUS portal and the Campus Solutions environments.
Training	Green	Green	A formal training plan has been developed consisting of a Welcome to 9.0 training week for all users of PeopleSoft followed by targeted specialized trainings for key offices including Academic Advisement and end users who are in various departments.

## **ASSUMPTIONS:**

- As part of Contingency Planning, the Project Management Team has identified an alternative "Go Live" date.
  - While all project activities are currently on track to meet the planned July, 2008 "Go Live" date, an alternative date has been identified. In the event that an unforeseen issue should result in delaying the July, 2008 "Go Live" date, the next available time frame for a "Go Live" is October, 2008. This date is based upon the Academic Calendar and availability of staff to support the production cut-over efforts.
- No budgetary concerns exist.
- ITS resources are available to support the development efforts.
- Functional Teams are actively engaged to complete their testing activities.
- Planning has taken into consideration the Academic calendar and student / staff activities.

## **HIGHLIGHTS (Accomplishments last 14 Days):**

### **Academic Advisement**

- Resource attended the HEUG Alliance Conference March 10-13, and gained insight from other schools that have already implemented Version 9.0 and are using the new interactive Academic Advisement Report. Schools that have gone live reported positive feedback from their institutions' users, and generally feel that the new interactive advisement report and related functions are preferable to what was available in v8, despite a few minor issues for which Oracle has planned to release fixes in future bundle releases.
- Oracle's known issue that Print Controls are not being obeyed in v9 as configured in v8 will not prevent us from deploying XML version at Go-Live. Resolution is targeted for a June bundle release. Reconfiguration of requirements may be needed post Go-Live.
- Executed several XML Advisement Reports in v9 to compare results with Crystal Reports in v8, and some discrepancies in content do exist, which will require investigation and resolution.

### **Admissions**

- None reported.

### **Campus Community**

- Testing occurred on 3/18 with Technical Lead, Functional Lead and Campus Community Testing Group
- Issues resolved involving history correction and preferred email addresses
- Attended HEUG Conference

### **Database**

- Clone CS90TRN database from the CS90UP04 database.
- Installed Oracle 10G client on application servers Sequoia5 on March 12, Sequoia4 on March 19 and Sequoia3 March 26.
- **Interfaces:**
  - Mapped LUWare to the new tables structures in CS90 and the new RDS.
  - Created a development CS90 LUWare database structure to be used for interface testing.

### **Financial Aid**

- With starting lineup of programs and batch packaging run in SA8 PRD, to begin awarding and communication with new students, ITS continuing to modify customizations to CS 9.0 versions.
- Batch repackaging for initial undergraduate student run in CS 9.0 (UP4 database) for the 2007-2008 academic year. Basic functions of PS continue to function correctly.

### **Graduate Enrollment Management**

- Transcripts and transfer credit reports successfully tested.
- Change of admit status successfully tested.
- Extensive testing of R+ interfaces done.

### **Reporting / RDS Interfaces**

- The construction of the RDS 9.0 has been completed with performance and tuning options incorporated,
- An environment for running preliminary tests against the RDS 9.0 has been created.

### **Security**

- Continue to meet with schools and departments to access security needs.

## **Student Financials**

- Continue a weekly Functional Leads/Bursar/ITS hands-on testing.
- Continue to update Issues log, Regression Testing Scripts, Executive Updates, Customization Status Updates.
- Completed a review of where student links to e-Bill, Parent/Guest Access and SIS TDET History should be placed for viewing by students through the Portal and the Student Center as well as by Staff members through the CS Application and forwarded same to ITS for action.
- Continue the Regression Testing scripts in the UP4 environment.
- Completed a status review of Customizations in the UP4 environment with other members of the Student Financials Team.
- Sent finalized WebFocus Reports list to Reporting Database Team. This is a list of current reports in the Student Financials domain that are still needed and those that are no longer being used / obsolete.

## **Student Records**

- Executed Regression Test scripts in the Test Plan and reviewed the Appointment setup.
- Completed testing the At Room Capacity customization and the Class Search customization.
- Determined timetable for completion and testing of remaining customizations.

## **System Administration**

- Campus Solutions now on same patch level as current production system.
- Created Training Environment for Student Focus Groups and training activities planned for April.
- TouchNet interface installed and initial tests conducted.
- Have identified problem with Application Messaging.

## **Training**

- Welcome to 9.0 Training Materials drafting will commence as well as a preliminary registration announcement.
- Attended the Alliance conference.
- Hosted Student Focus Groups concerning the student center and enrollment processes.
- Intermediate training sessions are scheduled for May 12 – May 16 at both campuses.
- Training Announcement for 9.0 welcome week was distributed and responses have been received.
- [www.luc.edu/locustraining](http://www.luc.edu/locustraining) was updated with the 9.0 training dates as well as an announcement.
- Camtasia software was ordered.
- Resource from Campus Community Team agreed to assist with Training Sessions.
- CS90TRN was set up.

## **SIGNIFICANT EVENTS PLANNED FOR THE NEXT 14 DAYS:**

### **Academic Advisement**

- Continue comparing content of Advisement Reports in v8 vs. v9 to analyze and resolve outstanding issues prior to moving to UP5 on April 5.
- Complete remaining test scripts in UP4.

### **Admissions**

- None reported.

### **Campus Community**

- Types (phone, address, email) are being configured by Technical Staff.
- Testing will continue to complete all testing scripts in UP4 on April 1, 2008 testing session. If scripts are not completed with group, any remaining scripts will be tested in a session with Technical and Functional leads.
- Service Indicators will be analyzed to see which service indicators can be purged. (For ex: holdovers from Contributor Relations).

### **Database**

- Make changes to interface applications views, procedures and tables that are impacted by the CS90 upgrade.

## **Financial Aid**

- Testing of batch repackaging function to be completed (currently running with abends).
- Testing of email communications (FA18) to be run from CS 9.0.
- Transmission of loan certification file.
- Transmission of Pell payment file.
- Testing of Query Manager using Scheduler for reports run on a daily basis.

## **Graduate Enrollment Management**

- Further testing of student records functions.
- Identification and minimal testing of key WebFocus reports.

## **Reporting / RDS Interfaces**

- Functional areas identification of key reports.
- Functional areas preliminary test of key reports with RDS 9.0.
- BI Admin and DBA to construct RDS 8.0 & 9.0 comparison environment.

## **Security**

- Continue to design, set-up, and test LU9 security.
- Assess Student Center security vs. set-up to accomplish Student Center to deploy detailed in Recs / Regs Campus Solution Student Center Implementation Assessment.
- Student Center was configured & secured in CS90UP2 and CS90UP4 (after Recs / Regs approval of student center in CS90UP2.)
- Create a spreadsheet of table access needed for each crystal report so that access to tables can be given as sparingly as possible.

## **Student Financials**

- Touchnet eCheck and Credit Card processing is still being set-up and technical issues still being worked out between LUC and Touchnet. Testing in CS 9.0 will begin when the technical, communication issues between servers are resolved.
- Setting up tuition assessment rules in SA8.0 for the summer 2008 and fall 2008 terms so that they can be part of the UP5 testing environment slated for April 5.

## **Student Records**

- Analyze the use of the Planner to record Discover Loyola advising.
- Continue our testing sessions twice per week
- After Registration preparation has been completed, we will increase our testing sessions to three times per week.
- Review WebFocus Reports needed in CS 9.0
- Review Security Roles for members of the Registration and Records Staff

## **System Administration**

- Work will continue on testing the TouchNet interface.
- Work will start on resolving Application Messaging problem.
- Next development database, UP5, will be started.
- STAT product for migration control will be updated to current release.

## **Training**

- A Camtasia script will be developed for using the Faculty Center. The Camtasia presentation will be secured inside of LOCUS.
- Welcome to 9.0 Training Materials drafting will commence
- End Users will be registered for Welcome to 9.0 week.

## **Other**

- Completion of UP 4 (Still available for testing.) UP 5 activities scheduled to begin.
- Core Team will begin meeting every 2 weeks for remainder of project to enhance communication with all Functional and ITS Teams.

## KEY DATES / MileStones

ACTION ITEMS/TASKS	OWNER	RESOURCES NEEDED	DATE	STATUS	COMPLETION DATE
Completion of UP2	Project Mngt Team	ITS / Functional Teams	2/15/08	Complete	2/15/08
Student Focus Groups	Training	Training Team	3/25/08 3/26/08	Complete	3/25/08 3/26/08
Core Team Mtg (March)	Project Mngt Team	ITS / Functional Teams	3/18/08	Complete	3/18/08
Completion of UP4	Project Mngt Team	ITS / Functional Teams	4/7/08	Complete	04/07/08
Core Team Mtg (April)	Project Mngt Team	ITS / Functional Teams	4/08/08	Complete	04/08/08
Faculty Focus Groups	Training	Training Team	4/10/08 4/11/08	Scheduled	
Welcome to 9.0 training - Students - Faculty	Training	Training Team	4/14/08 5/30/08	Scheduled	Ongoing Ongoing
Completion of UP5	Project Mngt Team	ITS / Functional Teams	5/06/08	In Process	
Core Team Mtg (May)	Project Mngt Team	ITS / Functional Teams	5/13/08	Scheduled	
Additional UPs (TBD)	Project Mngt Team	ITS / Functional Teams	TBD		
Completion of final Acceptance Testing	Functional Teams	ITS / Functional Teams	6/10/08	Scheduled	
Core Team Mtg (June)	Project Mngt Team	ITS / Functional Teams	6/13/08	Scheduled	
Go / No Go Decision	Project Mngt Team	ITS / Functional Teams	TBD		
Go Live	Project Mngt Team	ITS / Functional Teams	7/11/08	Scheduled	

## ISSUES

NBR	ISSUE	ACTION	AWARENESS
OWNER	RISK	STATUS (Green, Lime, Yellow, Orange, Red)	TARGET COMPLETION
11	On CS9.0 Student Center, students should see a different view of their Account Summary than what is delivered.	SSR has been prepared describing the issue and ITS will be beginning Requirements Doc and plan.	2/26/08
ITS	Potentially "high" due to the complexity of the request.	Lime	Still open
12	On CS9.0 Student Center, the presentation of payment, credit and refund activity should reflect the actual manner in which these items are applied to charges.	SSR has been prepared describing the issue and ITS will be beginning Requirements Doc and plan.	2/26/08
ITS	Potentially "high" due to the complexity of the request.	Lime	Still open
14	Conversion of Service Indicators in UP4 environment does not reflect "active dates". This issue crosses various functional areas and impacts enrollments, transcript holds and diploma holds.	CC Technical is investigating a solution	3/28/08
CC	High	Yellow	TBD

<b>NBR</b>	<b>ISSUE</b>	<b>ACTION</b>	<b>AWARENESS</b>
<b>OWNER</b>	<b>RISK</b>	<b>STATUS</b> (Green, Lime, Yellow, Orange, Red)	<b>TARGET COMPLETION</b>
<b>15</b>	The Faculty Center allows access to the Services Center for all students. Recommendation is to remove this link. - Faculty Center would only display the Student Services Center for a faculty member's advisees. Other students would only be available thru: Campus Community>Student Services Center. This access would only be assigned thru the LU9_STDNT_SRV_CNTR role so that the portal link would be assigned	Waiting for the Faculty Center assessment.	<b>3/24/08</b>
<b>Security</b>	<b>Medium</b>	<b>Lime</b>	<b>TBD</b>

**Project Team Members – All Components**

John Pelissero, Vice Provost  
Susan Malisch, CIO

Executive Sponsor  
ITS Stakeholder

Clare Korinek, Registrar  
Diane Hullinger, Registration & Records  
Kevin Smith, ITS

Project Manager  
Project Management Team  
Project Management Team

John Campbell, Bursar  
Eric Weems, Student Financial Assistance  
Paul Roberts, Graduate and Professional Enrollment  
April Hansen, Undergrad Admissions  
Lisa Kerr, Academic Advisement

Functional Area Management  
Functional Area Management  
Functional Area Management  
Functional Area Management  
Functional Area Management

Linda Wejs, Registration and Records  
Tom Catania, Financial Systems  
Kevin Ahern, Enrollment Management  
Kimberly Nicosia, Enrollment Management  
Nick Jones, Training  
Kris Daggett, Registration and Records  
Rich Heath, Graduate and Professional Enrollment  
Neil Mac Cannell, Undergrad Admissions  
Erin Melody, Undergrad Admissions  
Michael Martin, ITS  
Jennifer Huntley, Registration and Records  
Larry Adams, ITS  
Walt Slazyk, ITS  
Paul Zolnierczek, ITS  
Bob Klein, ITS  
Charlotte Pullen, ITS  
Conrad Vanek, ITS  
Sandy Voorhies, Provost Office  
Ray Pauliks, ITS

Functional Team  
Functional Team  
Functional Team  
Functional Team  
Functional Team  
Functional Team  
Functional Team  
Functional Team  
Functional Team  
Functional Team  
Technical Team  
Functional Team  
Technical Team  
Technical Team  
Technical Team  
Technical Team  
Technical Team  
Technical Team  
Technical Team  
Technical Team  
Functional Team  
Project Administration

## ISSUES ARCHIVE

NBR	ISSUE	ACTION	AWARENESS
OWNER	RISK	STATUS (Green, Lime, Yellow, Orange, Red)	TARGET COMPLETION
1	Coordinate Web-Focus testing to include Standard and Ad-hoc Reporting with Student Administration 8.0 and Campus Solutions 9.0 environments	ITS will confirm with key functional users which reports should be validated and which reports are obsolete. Identified reports will be tested in CS9.0.	02/07/08
ITS	Low	Green -Closed (This is an activity that has been planned and is part of the Project Plan).	04/04/08
2	R25 Reservation System may not have a Campus Solutions 9.0 Interface	ITS research confirmed that an R25 interface does exist for CS9.0.	02/07/08
ITS	High	Green – Closed	2/29/09
3	Self Service Account Summary – Evaluation and Decision	Student Financials has submitted to SSR to ITS to address this issue. Listed as issues #11 and #12.	02/07/08
ITS	Medium	Green – Closed	2/26/08
4	Determine specific configuration information that is transferred during the upgrade to UPx environment	ITS determined that new configuration tables transfer. Existing tables with new fields do not transfer. Functional Areas will address their specific configuration set-ups for each UP.	02/07/08
ITS	Low	Green – Closed	2/22/08
5	Slow response times reported by functional testing staff; analysis and tuning required	ITS completed research and made configuration changes to address this issue.	02/07/08
ITS	Medium	Green – Closed	2/22/08
6	Consulting assistance required to implement Financial Aid customizations in Campus Solutions 9.0	ITS confirmed that an additional resource will not be required to support this effort. This work effort can be completed with our current resources.	02/07/08
ITS	Medium	Green - Closed	2/22/08
7	Bundles need to be applied to UP4 database so that CS 9.0 programs can be run using the same PeopleSoft/Oracle releases as SA8 Production database.	ITS to apply these bundles once the UP4 database is stabilized.	2/26/08
ITS	Low	Green - Closed	3/5/08

<b>NBR</b>	<b>ISSUE</b>	<b>ACTION</b>	<b>AWARENESS</b>
<b>OWNER</b>	<b>RISK</b>	<b>STATUS</b> (Green, Lime, Yellow, Orange, Red)	<b>TARGET COMPLETION</b>
<b>8</b>	Need ability to run WebFocus reports against UP4 data for result verification of certain tests.	Identified reports will be executed utilizing both 8.0 and CS9.0 data. Results will be compared to confirm the integrity of the information. Enhancements will be made for the CS9.0 reports, if required.	<b>2/26/08</b>
<b>ITS</b>	<b>Low</b>	<b>Green – Closed (This is an activity that has been planned and is part of the Project Plan.)</b>	<b>04/25/08</b>
<b>9</b>	Course History displays equivalent courses, such as those set up as “dummy courses” for prerequisites (e.g. MATH MDT17). This may be acceptable to users.	AA plans to obtain feedback in focus groups.	<b>2/26/08</b>
<b>AA</b>	<b>Low</b>	<b>Green – Complete (Not a Show Stopper. Does not require a fix before Go Live.)</b>	<b>04/08/08</b>
<b>10</b>	When attempting to search for existing Student Exceptions by Student, receive the error message “There are no prompt values currently available for this field.”	ITS is investigating purpose and set-up options for Student Exceptions	<b>2/14/08</b>
<b>ITS</b>	<b>Low</b>	<b>Green – Closed (not an issue)</b>	<b>04/04/08</b>
<b>13</b>	Student / Faculty / Staff communication roll-out activities.	Initial discussions and planning are underway to determine how best to communicate the pending enhancements and changes to the University community.	<b>3/01/08</b>
<b>Reg / Rec</b>	<b>Low</b>	<b>Green – Closed (Ongoing project activity)</b>	<b>4/4/08</b>