ACADEMIC ADVISEMENT V.9.0

GRADUATE EDUCATION

IMPLEMENTATION WORKBOOK

UNIVERSITY OF MINNESOTA

Table of Contents

Upgrade Overview

Congratulations! An upgrade on your campus is underway! You are part of the "Miracle" that happens during an upgrade. An upgrade involves great coordination between the technical and functional users to ensure a smooth transition during the go live. This Workbook is designed to help track important those tasks during your upgrade project.

How to Use this Workbook

- Review and understand new functionality available in the new version of PeopleSoft. The first part of this manual reviews some new functionality.
- Complete the tables in this workbook for Customizations, Interfaces, Reports, Testing Plan, Go Live Checklist, etc.
- Maintain the various tables in this workbook and update with new information that is identified with each upgrade test move. These tables should continue to evolve throughout the upgrade cycle.
- Store this Upgrade Workbook on a shared drive so both Technical and Functional resources can have access to update with new notes and findings. Depending on your organization, it might be necessary to designing a versioning/revision procedure.

Plan and Discover will validate previous fit/gap sessions and document recommendations for the Analyze and Design Phase.

Upgrade IDP sessions are facilitated workshops that review current business processes and use of software as well as reviewing new functionality with the new versions of software. During the IDP sessions specific areas of discussion may include (1) Current Functionality in Use; (2) Business Process Review; (3) New Functionality Review; (4) Customizations; (5) Interfaces, Reports, Queries Review; (6) Setup Table Configurations; and (7) Listing of Test Plans.

The result of the Upgrade IDP sessions enables the project team to develop a working, upgraded environment that reflects your specific rules, processes, and data. This environment is leveraged in management demonstrations, training development, and testing.

During the Plan and Discover and the Upgrade IDP the team will review:

- Enterprise Component Changes
- Module Changes
- Menus Review
- Customizations Review
- Interfaces Review
- Reports Review
- Queries Review
- Additional Setup Requirements
- Security Review
- Test Plan
- Fit/gap Validation

Additionally, issues and their recommended solutions are captured during the Plan and Discover sessions. Changes either to the system or to business processes are documented to be addressed later in the implementation. Once a comprehensive list of issues and gaps is finalized the following will be completed: (1) Preparation of final presentation material; (2) Key findings and deliverables; (3) Education of project sponsors, executives, and core project team through the final presentation of key findings and issues

Timeline

- Understand the Timeline for your project
- Once critical dates are determined for your project, use the chart below to document timing for Initial Pass, Test Moves, and Go Live dates
- Identify critical unit testing periods after each test move
- Identify critical integrated testing periods after each test move

Additional Notes about Timeline/Test Moves:

Academic Advisement Changes Summary of Elements Requiring Configuration, Design or Decision

SUMMARY OF ELEMENTS REQUIRING CONFIGURATION, DESIGN OR DECISIONS	
BUSINESS PROCESS	**ISSUE**
Degree Plan	Provide a tool to automate a portion of the degree plan (degree clearance) process. A decision will need to be made if Academic Advisement will use the Degree Audit Report or the Program Enrollment and Activity Management or both to assist in automating the degree plan.
Student Exceptions (Petitions)	Provide a tool to document a student exception within the Campus Solutions system. Student exceptions in Campus Solutions is delivered and requires no additional setup to use this functionality.
Curriculum Requirements Build	A decision will need to be made if Academic Advisement will build all the Graduate Programs in Campus Solutions or if Academic Advisement will build Graduate Programs in a phased approach (already know that Law, Dental, Medical and Pharmacy are out of scope for go-live).
Catalog Years (or Term Changes)	A decision will need to be made about how many curriculum changes need to be built into the system for go-live.
Student Population	A decision will need to be made about who are target audience is when Academic Advisement has their go-live. Is this new functionality going to serve all current students and leave of absence students or is this new functionality going to serve Summer 2014 students going forward.
Manual Conversions	Depending on the decision made about student population, there may be a need to manually convert a portion of the Graduate Degree Plan form, student exceptions and transfer credit into Campus Solutions. The three listed items are all handled outside of the system so there is not an automated conversion process to handle this.

During our Academic Advisement build, if there are new student |

	groups or student milestones needed, Academic Advisement will submit a request to the Director of Student Records to have these created. If the number of students impacted (or that need the student group or student milestone assigned to their record) is large, we will need to ask for a small conversion to take place so it does not fall to end users to manually enter.
My Planner	A decision will need to be made if the My Planner functionality in Campus Solutions will be used and if so, what modifications would it require to use it.

Customization Review

Use the following table to list your existing Customizations. This list should be created from information provided by both functional and technical resources. Once the list is completed, this list can be used to determine upgrade requirements, if Customizations can be replaced, if the customization is still required after the upgrade, how the customization may need to be modified to work in the new version, etc. A customization that is required after the upgrade may require retrofitting to the new version. This list will be useful for identifying the customization, the retrofit process and the developer working on the retrofit, timing of the retrofitted customization for testing purposes, and additional testing with each test move.

MODULE: Academic Advisement		
Customization Description	**Required after Upgrade?**	**Notes**
Degree Clearance 1 Panel	N/A - this will be handled by the Student Records Module (SR has already had sessions with GSSP participation regarding the Degree Clearance Panels).	Panel 1 is viewed/updated only by Graduate Student Service and Progress staff. The following fields are displayed: Career/Nbr Institution Program Status Program Reason Program Plan Sub Plan Prog. Plan Subplans Minor Plans Advisors
Degree Clearance 2 Panel	N/A - this will be handled by the Student Records Module (SR has already had sessions with GSSP participation regarding the Degree Clearance Panels).	Panel 2 is viewed/updated only by Graduate Student Services and Progress staff. The following fields are displayed: Career/Nbr Institution Program Plan Sub Plan Doc Time Limit Start Do Time Limit End Balance Letter Extension End Date Plan GPA Thesis Type Attend Commencement Term Major Credits

		Minor Credits Grad Application Year Grad Application Month Grad Clearance Year Grad Clearance Month
Customization Description	**Required after Upgrade?**	**Notes**
Transcript Text Panel	N/A - this will be handled by the Student Records Module (SR has already had sessions with GSSP participation regarding the Degree Clearance Panels).	Transcript Text Panel is viewed/updated only by Graduate Student Services and Progress staff. The following fields are displayed: Academic Career Print Loc Seq Relative Position Print Location Institution Text Seq Nbr Transcript Level Transcript Type Transcript Text

Integration Review

Use the following table to list your existing Interfaces. This list should be created with detailed information from both functional and technical resources. Once the list is completed, this list can be used to determine upgrade requirements, if interface can be replaced, if interface is still required after the upgrade, how the interface may need to be modified to work in the new version, etc. An interface that is required after the upgrade may require retrofitting to the new version. This list will be useful for identifying the Interface, the retrofit process and the developer working on the retrofit, timing of the retrofitted interface for testing purposes, and additional testing with each test move.

MODULE: Academic Advisement		
Integration Description	**Required after Upgrade?**	**Notes**
N/A	N/A	

Note if integrated with an outside or 3rd party

Report Review

Use the following table to list your existing Reports. This list could also include Queries that are critical to your business process so that they too can be easily tracked and tested during the upgrade. This list should be created with detailed information from both functional and technical resources. Once the list is completed, this list can be used to determine upgrade requirements, if the report/query can be replaced, if the report/query is still required after the upgrade, how the report/query may need to be modified to work in the new version, etc.

MODULE: Academic Advisement		
Report Description	**Required after Upgrade?**	**Notes**
UM_GS_APPS_MOVE_IN	Y	GS applications that should be 08GRD
UM_GS_APPS_MOVE_OUT	Y	08GRD applications to move out
UM_GS_BALANCE	Y	Graduate School Balance Letter w/DOB
UM_GS_BALANCE_OLD	Y	Graduate School Balance Letter
UM_GS_CLEAR_DISC	Y	Cleared for grd, but DC
UM_GS_COM_INVITATION	Y	
UM_GS_CONGRATS	Y	Graduate School Congratulations Letter - this report is generated in PeopleSoft and then loaded into an Access database via a csv file in order to manipulate the query results and send communications out to the students.
UM_GS_FAC_DOD	Y	Graduate School Faculty date of death
UM_GS_FILE_NOT_PULLED	Y	NO FFILEM COMMENT
UM_GS_INSTR_ADV_BY_EMPLID	Y	Active roles and plans by ID
UM_GS_INSTR_ADV_BY_PLAN	Y	People and their roles
UM_GS_MONTHLY_GRADS	Y	Students cleared for graduation
UM_GS_NEW_STU	Y	New enrolled, not in GS custom
UM_GS_NON_GS_MLSTN	Y	

Note: The current Graduate reports listed above support Admission or Student Records business processes. Academic Advisement has made note of the current reports, but will not actually build/update the listed reports for OTR and GSSP use for the v9.0 upgrade. However, there may be new reports that Academic Advisement will develop to support querying the degree audit report results in the Analysis Database Tables. Once AA IDPs have been completed, the AA team will have identified a list of reports that OTR and/or GSSP (or other areas on campus) will need to support the new functionality that they will be using moving forward.

Additional Setup Requirements

Use the following table to list your additional setup requirements during the upgrade process.
This list should be created with detailed information from both functional and technical resources.
Once the list is completed, this list can be used to keep track of new setup that is required and
who has the responsibility to complete that setup. Sometimes additional setup requires a
technical task, sometimes a functional task, it might require new security, etc. This list will be very
useful and should be used with each Test Move so you have a detailed plan to follow and it is
highly fine tuned with each Test Move as you prepare for your Go Live tasks.

MODULE: Academic Advisement			
Description	**Navigation**	**Assigned To**	**Notes**
Academic Advisement set up tables will need to be populated to support the degree audit report. The following are the tables: Installation Student Admin Advisement Report Types Academic Advising Setup Installation Academic Advisement Academic Institution Table Advising Student Groups Define Tests for Advisement Define Course Lists Define Academic Requirements Define Requirement Groups Define Course Share Sets Define Dynamic Condition Define Entity Groups Define Requirement Useage	Set Up SACR > Product Related > Academic Advising Set Up SACR > Self Service > Academic Advising Academic Advisement > Academic Requirements	Business Analysts	
Program Enrollment and Activity Management setup tables (this is brand new functionality that Oracle has been delivering in pieces via bundles).	Set Up SACR > Product Related > Student Records > Program Enrollment Records and Enrollment > Program Enrollment Records and Enrollment > Individual Activity Manager	Business Analysts	Academic Advisement will explore if this delivered functionality is a valid option to be used for all or some of the programs at UMN. The Program Enrollment and Activity Management will be reviewed in an AA IDP session where a decision will be made if this

			functionality will be used.
Security will need to be mapped and developed for the entire Academic Advisement module.		Business Analysts/ Security Coordinator	
Potentially, Course Equivalency Groups will need to be setup to fully support the curriculum requirement build in AA. An example of a need for Course Equivalency Groups would be if a course used to have one subject and now that subject has changed, but it is still the same course and two course IDs were created. The Course Equivalency Group identifies that even though there are two Course IDs the courses are equivalent to each other.	Curriculum Management > Course Catalog > Course Equivalency Groups Curriculum Management > Course Catalog > Course Catalog	Student Records - Catalog Manager	The Academic Advisement module would not setup the Course Equivalency Groups. The Academic Advisement module and repeat processing will flush out if there are missing Course Equivalency Groups. If AA finds courses where a Course Equivalency Group needs to be set up, a communication will be sent to the Director of Student Records.

Test Plan

Testing is the most critical step for the functional user in an upgrade. You should:
- Start with a base Test Plan document
- Add/adjust your test plan as your testing progresses
- Your test plan should be an ever evolving living document
- Your test plan can be used for upgrade testing as well as patch and fix testing
- Your test plan should include testing of all business processes managed by your office; cross functional testing items; items that have been a problem in the past such as viewing a specific screen or checking for a particular status; etc.
- Others should be able to pick up your test plan and complete testing
- For upgrades, make sure each step is retested after each test

Refer to document:

Draft test scripts have been developed and once finalized, will be uploaded to Google drive in the 04_Test_and_Train > 04_8_Academic Advising folder.

Academic Advisement team will create a test plan in the near future and the plan will be added to this document at that time.

Go Live Checklist

The Go Live Checklist should include a running list of activities that someone needs to do on go live weekend to bring your office/module live in the new system. This list should be developed with each test move during the upgrade. With each test move, your Go Live Checklist will be fine tuned. A detailed Go Live Checklist will help minimize issues during the go live. Begin by filling in the Activities and responsible resources. Dates and times can be added to the list once all activities are determined.

Go Live Checklist			
Start Date/Time	**Activity**	**People Involved**	**Responsible Lead**
	Populating the Analysis Database Tables with degree audit report results for each student. This will allow a student to run their own degree audit in self-service. *Note: The need to populate the Analysis Database Tables for the first time may not be a requirement to go-live. This step may be eliminated via a future bundle.*	Stacia Madsen Jennifer Selander	Stacia Madsen
	Add Advisement Report Types to the Academic Institution Table (Academic Institution 7) to activate degree audit report self-service functionality.	Stacia Madsen Jennifer Selander	Stacia Madsen

Fit Gap Analysis

This section can be used to keep track of Fit/Gap analysis and new functionality that could be deployed during the upgrade. This section may or may not be used during the upgrade process.

Topic: Degree Plan

Degree Plan	
	Detail
Description of Current Process and Functionality	A Graduate student is required to complete a Graduate Degree Plan (GDP) form, which is found on the Graduate School website (http://www.grad.umn.edu/students/forms/index.html). The GDP form is in PDF format and contains six main sections which are Student Information, Degree Major/Minor Information, Transfer Coursework, University of Minnesota Coursework, Course Totals (transfer and UMN coursework), Language Requirement and Approval. Once the student has completed the GDP form, the student will need to collect approval signatures from their Adviser (and co-Adviser), Director of Graduate Studies and College. After the GDP form has been approved, the form is then sent to the Graduate Student Services and Progress (GSSP) Office in hard copy. The GSSP Office will manually review the form to identify any errors (i.e. University ID, name, degree, exceeding limits, etc.) and communicate back to the program if any errors have been found. If no errors are found or the errors have been fixed, the GDP form is imaged through ImageNow software and a student is sent a copy of their GDP form via email. The Degree Plan form will be accessed by GSSP to perform a manual degree clearance.
Currently utilizing Delivered Functionality (Y/N) and Description	No - The degree plan process is performed manually outside the system. (Note: GSSP is using a few custom tables that were built specifically for tracking/clearing Graduate students. Those custom tables are being reviewed by the Student Records module with the goal of eliminating those custom tables and utilizing delivered PeopleSoft functionality.)
Customizations (Add mod, Carry mod, or eliminate)	Student Records is going through this process with the Graduate area in regards to their customized tables. Academic Advisement is not able to clearly state that a modification will or will not be required to assist in automating the Graduate Degree Plan form. Once UMN participants have a solid understanding about the delivered functionality, selection of the functionality to be used will be made, which will then determine if a modification(s) will be required. If the degree audit report is selected, there will need to be a modification made to the report to allow the degree audit report

	to select from all of a students enrollments regardless which system campus they completed the course at.
Additional Configuration Required to deliver in version 9.0 (Y/N) and Description	Yes - The Academic Advisement functionality has not been configured and used at UMN before. To successfully use the Degree Audit Report, Academic Advisement setup tables will need to be populated with the program curriculum requirements (this includes, University, College and Program requirements).
	Yes - The Program Enrollment and Activity Management functionality has not been configured and used at UMN before (Program Enrollment and Activity Management functionality is new to v9.0 and was released in pieces by Oracle via bundles (bundle 29 was to contain all the final pieces to making this component work, but bundle 30 has additional functionality that was rolled out to support these components). To successfully use the Academic Progress Tracker (this is what the advisor and student would see), the Program Enrollment setup tables will need to be populated with the program curriculum requirements.
Potential Improvement	Eliminate paper forms from being filled out manually, which will prevent entry errors, provide real-time data to the student and advisor and provide the ability to report on Graduate students in a different way than has been done previously. Provides a tool to use in automating a part of the degree clearance business process. Also removes the final step of imaging a students Graduate Degree Plan in ImageNow as the detailed data will be stored directly in the Campus Solutions system.
Need for Improvement (1=Critical 2=Essential 3=Optional)	1
Recommendation for Best Practices	1. Use the degree audit report and/or program enrollment and/or activity management functionality to automate part of the Graduate Degree Plan Form.
	2. Use the My Planner functionality to automate part of the Graduate Degree Plan Form.
	3. Use the degree audit report and student exceptions to automate the Graduate Degree Plan and potentially degree clearance.
	An analysis of program requirements will need to be completed to assist in determining how many programs will need to be built into the system. Once that program requirement analysis is complete this will support deciding how many catalog years will be needed in the system. Based on this assessment and identifying what student data lives outside the system that will need to be manually input into the system, this will bring us to the final step of defining our project scope for the Academic Advisement go-live.
Issues	Colleges at the Graduate career level do not typically publish a list of required courses that all students must take within a

particular program. Because program requirements are individualized by student, an approval process must occur between the advisor, Director of Graduate Studies (for that program), the College and the student to approve a list of courses the student must complete to complete their degree. Delivered functionality does not capture the approval of the course selections by each entity. The course work that satisfies degree requirements on the audit and/or academic progress tracker (program enrollment) will need to be approved courses only instead of all courses that exist in the enrollment, transfer, test, and other credit tables. There is functionality in PeopleSoft - Campus Solutions that may be used, but may require multiple components to be utilized instead of just one.

There will be times that a student has more than one program/major. The coursework the advisor approves must be captured in the right program/major on the degree audit report (this won't be an issue if Program Enrollment functionality is selected).

University of Minnesota has set up Campus Solutions to contain multiple Academic Institutions to reflect each system campus. Delivered functionality of the degree audit report only looks for enrollments based on the Academic Institution that is tied to the degree audit report type generated. This means that if a student is primarily a Duluth student as has taken a couple courses at Twin Cities, when the degree audit report is generated for Duluth, the report only selects from the Duluth enrollments to satisfy requirements. Policy at University of Minnesota is that courses taken at any campus within University of Minnesota is acceptable to meet requirements without having to transfer the courses in. To open up all the academic institutions enrollments to the degree audit report, a modification will need to occur.

Security Consideration	Because Academic Advisement has not been used in Campus Solutions, all of the permission lists and roles will need to be mapped, approved, built and tested.
Portal Considerations	To be determined.
Reporting Considerations	Refer to Report Review section.
Interface Considerations	N/A
Session Participants	Frank Blalark, Stacia Madsen, Amber Cellotti, Ingrid Nuttall, Brad Bostrom, John Vollum
Steering Committee Signoff	Frank Blalark 07/30/2013 Brad Bostrom 07/30/2013 Carla Boyd 08/08/2013 Ingrid Nuttall 08/13/2013

Topic: Student Exceptions

Student Exceptions	
	Detail
Description of Current Process and Functionality	A Graduate student is required to complete a Graduate Degree Plan (GDP) form, which is found on the Graduate School website (http://www.grad.umn.edu/students/forms/index.html). The GDP form is in PDF format and contains six main sections which are Student Information, Degree Major/Minor Information, Transfer Coursework, University of Minnesota Coursework, Course Totals (transfer and UMN coursework), Language Requirement and Approval. Once the student has completed the GDP form, the student will need to collect approval signatures from their Adviser (and co-Adviser), Director of Graduate Studies and College. After the GDP form has been approved, the form is then sent to the Graduate Student Services and Progress (GSSP) Office in hard copy. When/If the student would like to replace an approved course on their original GDP form with a new course, the student will either fill out a petition form or will fill out a new GDP form. The student will need to gather signatures again for either form and the form is then submitted to GSSP. If the petition form is received by GSSP, the staff will pull the student's existing GDP and cross out the old course and write in the new course. The petition form will be sent to be imaged in the ImageNow software.
Currently utilizing Delivered Functionality (Y/N) and Description	No - The petition process is performed manually outside the system.
Customizations (Add mod, Carry mod, or eliminate)	Academic Advisement is not able to clearly state that a modification will or will not be required to assist in automating the petition process. Once UMN participants have a solid level of understanding about the delivered functionality, selection of the functionality to be used will be made, which will then determine if a modification(s) will be required.
Additional Configuration Required to deliver in version 9.0 (Y/N) and Description	N - delivered tables to support student exceptions processing do not require configuration.
Potential Improvement	Eliminate paper forms from being filled out manually, which will prevent entry errors, provide real-time data to the student and advisor, and provide the ability to report on Graduate students in a different way than has been done previously.
Need for Improvement (1=Critical 2=Essential 3=Optional)	1
Recommendation for Best	Use the authorize student exceptions and/or course substitution

Practices	functionality to process petitions.
Issues	There will be a learning curve for those end-users who process student exceptions (petitions) in the system. How to create a student exception in the system is often challenging for end-users who do not have the expertise on how curriculum requirements were built. The larger the group is who process student exceptions, the more errors that surface so training is very important (even going as far as one on one training).
	If student exceptions functionality is used, there is a gap where future coursework does not appear on the degree audit report until the student enrolls in the course. All approved coursework will need to be displayed on the degree audit report.
	For those student exceptions that exist today, will there need to be a manual conversion performed to store them in the system where the degree audit report may now access those exceptions.
Security Consideration	Because Academic Advisement has not been used in Campus Solutions, all of the permission lists and roles will need to be mapped, approved, built and tested.
Portal Considerations	To be determined.
Reporting Considerations	Refer to Report Review section.
Interface Considerations	N/A
Session Participants	Frank Blalark, Stacia Madsen, Amber Cellotti, Ingrid Nuttall, Brad Bostrom, John Vollum
Steering Committee Signoff	Frank Blalark 07/30/2013 Brad Bostrom 07/30/2013 Carla Boyd 08/08/2013 Ingrid Nuttall 08/13/2013

Topic: Student Milestones

Student Milestones	
	Detail
Description of Current Process and Functionality	Multiple student milestones are used at the Graduate career level to assist in tracking degree requirement completion. The Graduate Student Services and Progress (GSSP) staff and the Information Technology Supervisor from the Office of the Registrar (OTR) maintain the student milestones in the system. An example of a student milestone used at the Graduate career level is to track if a Graduate student has filed a time extension to completing their program and this extension has been approved. If the time extension has been approved, the '08 Graduate General' student milestone will be assigned to the student's record.
Currently utilizing Delivered Functionality (Y/N) and Description	Y
Customizations (Add mod, Carry mod, or eliminate)	GSSP is using a few custom tables that were built specifically for tracking/clearing Graduate students. Those custom tables are being reviewed by the Student Records module with the goal of eliminating those custom tables and utilizing delivered PeopleSoft functionality.
Additional Configuration Required to deliver in version 9.0 (Y/N) and Description	N/A - The Student Records module is responsible for configuring Student Milestones. They have already begun the groundwork on understanding how existing student milestones for Graduate students are being used. If Academic Advisement finds a need to create a new student milestone to support auditing of requirements, the Academic Advisement analysts will initiate an e-mail request to Director of Student Records to have the milestone built. Further discussion may need to take place with Student Records if the newly created milestone requires current students to have the milestone on their record and the number exceeds what is determined manageable for adding it to a student's record manually (if there is a large number of students, this may become a mini-conversion).
Potential Improvement	N/A
Need for Improvement (1=Critical 2=Essential 3=Optional)	N/A
Recommendation for Best Practices	N/A
Issues	N/A
Security Consideration	N/A
Portal Considerations	N/A
Reporting Considerations	N/A
Interface Considerations	N/A
Session Participants	Frank Blalark, Stacia Madsen, Amber Cellotti, Ingrid Nuttall, Brad Bostrom, John Vollum
Steering Committee	Frank Blalark 07/30/2013

Signoff	Brad Bostrom 07/30/2013
	Carla Boyd 08/08/2013
	Ingrid Nuttall 08/13/2013

Topic: Student Groups

Student Groups	
	Detail
Description of Current Process and Functionality	Multiple student groups are used at the Graduate career level to assist in tracking degree requirement completion. The Graduate Student Services and Progress (GSSP) staff and the Information Technology Supervisor from the Office of the Registrar (OTR) maintain the student groups in the system. An example of a student group used at the Graduate career level is for Graduate students who are in a doctorate program that require them to complete their preliminary orals before they can register for their dissertation credit. A student will complete their preliminary orals, the DOCT student group code is then added to the student's record with an effective date of the day they passed their preliminary orals and the student is then eligible to register in their dissertation credit for the next term and their in-state tuition is reduced.
Currently utilizing Delivered Functionality (Y/N) and Description	Y
Customizations (Add mod, Carry mod, or eliminate)	N/A
Additional Configuration Required to deliver in version 9.0 (Y/N) and Description	N/A - The Student Records module is responsible for configuring Student Groups. They have already begun the groundwork on understanding how existing student groups for Graduate students are being used. If Academic Advisement finds a need to create a new student group to support auditing of requirements, the Academic Advisement analysts will initiate an email request to Student Records to have the student group built. Further discussion may need to take place with Director of Student Records if the newly created student group requires current students to have the student group on their record and the number exceeds what is determined manageable for adding it to a student's record manually (if there is a large number of students, this may become a mini-conversion).
Potential Improvement	N/A
Need for Improvement (1=Critical 2=Essential 3=Optional)	N/A
Recommendation for Best Practices	N/A
Issues	N/A
Security Consideration	N/A
Portal Considerations	N/A
Reporting Considerations	N/A
Interface Considerations	N/A
Session Participants	Frank Blalark, Stacia Madsen, Amber Cellotti, Ingrid Nuttall, Brad Bostrom, John Vollum

Steering Committee Signoff	Frank Blalark 07/30/2013 Brad Bostrom 07/30/2013 Carla Boyd 08/08/2013 Ingrid Nuttall 08/13/2013

Topic: Service Indicators

Service Indicators	
	Detail
Description of Current Process and Functionality	Multiple service indicators are used at the Graduate career level to assist in tracking degree requirement completion. The Graduate Student Services and Progress (GSSP) staff and the Information Technology Supervisor from the Office of the Registrar (OTR) maintain the service indicators in the system. An example a service indicator used at the Graduate level is the negative service indicator that is placed on the student's record when they successfully pass their dissertation. GSSP will receive the forms indicating their successful completion of their dissertation and after GSSP performs verifications about the student's record, GSSP will update certrain tables in the system and then remove the negative service indicator.
Currently utilizing Delivered Functionality (Y/N) and Description	N/A
Customizations (Add mod, Carry mod, or eliminate)	N/A
Additional Configuration Required to deliver in version 9.0 (Y/N) and Description	N/A - The Student Records module is responsible for configuring Service Indicators. They have already begun the groundwork on understanding how existing service indicators for Graduate students are being used.
Potential Improvement	N/A
Need for Improvement (1=Critical 2=Essential 3=Optional)	N/A
Recommendation for Best Practices	N/A
Issues	N/A
Security Consideration	N/A
Portal Considerations	N/A
Reporting Considerations	N/A
Interface Considerations	N/A
Session Participants	Frank Blalark, Stacia Madsen, Amber Cellotti, Ingrid Nuttall, Brad Bostrom, John Vollum
Steering Committee Signoff	Frank Blalark 07/30/2013 Brad Bostrom 07/30/2013 Carla Boyd 08/08/2013 Ingrid Nuttall 08/13/2013

Topic: Transfer Credit

Transfer Credit	
	Detail
Description of Current Process and Functionality	A Graduate student is allowed a minimal number of transfer units to be applied toward their program requirements. Currently, Graduate transfer coursework is not loaded or data entered into the system. If a student will be using transfer coursework to meet program requirements, the student will list that transfer coursework on their Graduate Degree Plan (GDP) form. This approved form is then received by the Graduate Student Services and Progress (GSSP) Office and GSSP will perform a verification between the GDP form and the hard copy external transcript to verify the transfer coursework information listed on the GDP form matches the transfer coursework information on the external transcript (i.e. grades, units, etc.) and that the student does not exceed the maximum number of accredited graduate level transfer units.
Currently utilizing Delivered Functionality (Y/N) and Description	N - GSSP will receive the external transcript(s) and use this transcript to manually verify the transfer coursework listed on the GDP form is accurate and does not exceed the allowed number of transfer units.
Customizations (Add mod, Carry mod, or eliminate)	N
Additional Configuration Required to deliver in version 9.0 (Y/N) and Description	N - UMN will possibly utilize the Course Credits - Manual process, which does not require additional configuration to setup tables.
Potential Improvement	Eliminate entry errors by the student when listing their transfer course work and provide real-time data to the student.
Need for Improvement (1=Critical 2=Essential 3=Optional)	1
Recommendation for Best Practices	Use the delivered Course Credits - Manual component to process Graduate transfer course work in the system. This will then make the transfer course work eligible to be viewed by the student and advisor as well as being used by the degree audit report.
Issues	There are many times that the transfer course work is not directly equivalent to a course at UMN. How the transfer course work is used is unique to that student and their program. A decision will need to be made how to articulate transfer course work to create less work for staff (i.e. inputting transfer course work in the system may required using both Course Credits - Manual and Student Exceptions). Inputting Graduate transfer course work detail into the system will take longer than posting bulk transfer units. Current staff

	that post bulk transfer units may not have the time to input the transfer course work detail nor the expertise to determine which resident course to articulate the external course to if there are multiple resident courses to choose from.
Security Consideration	May not need to create new security or request new security if current staff that would process the transfer credit are doing it now in Campus Solutions.
Portal Considerations	To be determined.
Reporting Considerations	Refer to Report Review section.
Interface Considerations	N/A
Session Participants	Frank Blalark, Stacia Madsen, Amber Cellotti, Ingrid Nuttall, Brad Bostrom, John Vollum
Steering Committee Signoff	Frank Blalark 07/30/2013 Brad Bostrom 07/30/2013 Carla Boyd 08/08/2013 Ingrid Nuttall 08/13/2013

Summary of New Configuration

Useful Documents to Reference

Document Title	Provide By
CommitteeAssignment.pdf	GSSP Office
DoctoralDegreeClearanceDRAFT.pdf	GSSP Office
GraduateDegreePlanForm.pdf	GSSP Office
GraduateStudentRequestforExtensionToMaxTimeLimitFormDRAFT.pdf	GSSP Office
LeaveOfAbsenceReinstatementProcessFlowDRAFT.pdf	GSSP Office
MastersDegreeClearanceDRAFT.pdf	GSSP Office
PreliminaryWrittenExaminationPWE.pdf	GSSP Office
Student Centric Guide (http://www.grad.umn.edu/prod/groups/grad/+pub/@grad/documents/policy/studentpolicyguide.pdf)	GSSP Office

Project Implementation Q & A

	Question	Answer

1	Will the AA implementation include more than the Graduate degree audit reports?
	
	For example:
	  a. Apply for graduation online;
	  b. Graduation Tracker;
	  c. Graduation Reporting
	
	Program Enrollment and Activity Management, may be used by Academic Advisement. This functionality will be.
		The goal of the Academic Advisement Graduate implementation is to automate the Graduate Degree Plan (GDP) business process.
		
		Allowing Graduate students to apply for graduation on-line, clearing students for graduation, reporting on Graduate students, processing student milestones and student groups, and other day to day processes for Graduate students will be handled by the Student Records module.

2	Will Twin Cities build and maintain their Graduate programs and Duluth build and maintain their Graduate programs in the system **-or-** will Twin Cities build and maintain all the Graduate programs for both campuses?	Carla (Duluth): If at some point Duluth will be supporting the student exceptions, then it is better to have a Duluth resource to participate in the build process. We do have graduate programs that are managed by Duluth only. These particular programs are cleared and posted by Duluth. Duluth also posts the degrees that are cleared by the Twin Cities staff. The end result is that Duluth will need to provide a resource to build. Graduate programs for AA coding is generally easier due to the structure of the curriculum and we know Graduates have more exceptions typically or they march right through because the curriculum is so lock-step. The Program Enrollment concept is like a template. Build the program template for a catalog year and then you assign it the student for that catalog year. If you need to make changes, you perform an exception in the Program Enrollment. The Program Enrollment is like creating that degree plan. When changes occur you just tweak the template. If Twin Cities uses the degree audit report and Duluth uses Program Enrollment then Duluth will definitely need to provide a resource. Carla identified Jodi Lieske and Donna Triebwasser as AA resources for Duluth. Both Jodi and Donna will build/maintain the Graduate programs for Duluth (they may need some assistance from Twin Cities if time permits). The time available to the project for Jodi and Donna combined will be 20% to 25%.

	Question	Answer
3	If Twin Cities builds/maintains all the Graduate programs for both campuses, will the maintenance of Duluth programs be long-term or will Duluth eventually maintain their own programs post go-live?	Twin Cities will build/maintain their own Graduate Programs and Duluth will build/maintain their own Graduate Programs.
	Question	**Answer**
4	Which campus will build and maintain the Graduate programs in the Academic Advisement Tables?	<u>Resources</u> Andrew Hill and Jennifer (Jenn) Selander (Twin Cities) Jodi Lieske and Donna Triebwasser (Duluth) - Duluth is hoping to commit 20% to 25% FTE resources to the project..
5	Currently, Twin Cities performs degree clearance for Duluth students for most of their programs (estimated that Duluth performs degree clearance for five of their programs and Twin Cities performs degree clearance on 24 Duluth programs). Once a Duluth student is cleared for graduation by Twin Cities, Duluth posts the student's degree in the system (meanwhile, Twin Cities is also clearing their own students and posting their degrees in the system). Will this business process continue or is the goal of automating current business process to allow Duluth to perform their own degree clearance for all their programs and post the degrees?	Clearing for graduation and posting degrees falls under the Student Records (SR) module. This item should be discussed within a SR IDP session or a separate meeting should be scheduled with SR to discuss. The Academic Advisement module as a whole will not be part of this discussion/decision (some AA participating members fall under SR as well and will be participating in the discussion/decision when scheduled).
6	Student Records has been handling IDP sessions about Student Groups, Student Milestones, Reporting, etc. Will Student Records continue to work with the Graduate level on these items or will Academic Advisement need to take this over?	Student Records will continue handling sessions regarding student groups, student milestones, etc. and Academic Advisement will discuss how student groups and student milestones will be used in the degree audit.
7	Is the scope to build all Master's, Doctorates, Post-Baccalaureate Certificates and Minors (estimated to be 488 programs at Twin Cities and 53 programs at Duluth)?	
8	For those Graduate programs that are available in DARwin, will those programs be built in PeopleSoft for go-live?	Yes, build the Graduate programs housed in DARwin into Campus Solutions - Academic Advisement. Current students who are using DARwin will continue to access their degree audit report from DARwin. Newly admitted students for Summer 2014 and moving forward will be instructed to use

		Campus Solutions - Self-Service to view their degree audit report. This is to prevent confusion for current students who have been using DARwin.

	Question	**Answer**
9	Will the build support degree audit reports for both current students and new students (new students being Summer 2014 or Fall 2014 admits)?	Academic Advisement continues to define the project build scope. There have been several options discussed, but no decisions made. The final decision will occur after all the IDP sessions are completed. This is because AA participants must have a good level of understanding of functionality and how long it will take to build/support this functionality, participants must make a decision about what functionality to use (and if there will be a modification, participants need to be aware how many programs will need to be built for Twin Cities and Duluth, and participants will need to define what manual conversion will be needed. The following are options that have been discussed (list of options may change as IDPs continue): Option 1 Build all Graduate programs to serve both current students as of Fall 2014 go-live and new students moving forward. This would include the Graduate programs that are supported by DARwin. This option would require that multiple catalog years be built and manual conversion occur for the Graduate Degree Plan, Student Exceptions and Transfer Credit. Option 2 Build the Graduate programs in a phased approach. Build and activate Graduate programs by College. Decide the first set of Colleges that will have their Graduate Programs built for the Fall 2014 go-live. All remaining Colleges would be activated in waves. A timeline would be developed to define which Colleges go-live first and then the next set of Colleges and so on and so forth. This would support current students and newly admitted Fall 2014 students. This options would require that multiple catalog years be built and manual conversion occur for the Graduate

Degree Plan, Student Exceptions and Transfer Credit.

Option 3
Build the Graduate programs in a phased approach. Build and activate Graduate programs by College. Decide the first set of Colleges that will have their Graduate Programs built for the Fall 2014 go-live. All remaining Colleges would be activated in waves. A timeline would be developed to define which Colleges go-live first and then the next set of Colleges and so on and so forth. This would support newly admitted Summer 2014 and Fall 2014 students moving forward. This options would require that only one catalog year be built and only Summer 2014 Graduate Degree Plans, Student Exceptions and Transfer Credit would need to be manually converted..

Option 4
Build all the Graduate programs to serve Summer/Fall 2014 new admits and moving forward. This option would require only one catalog year be built and only Summer 2014 Graduate Degree Plans, Student Exceptions and Transfer Credit would need to be manually converted.

10	If the degree audit report is to service current students, how far back do we need to produce degree audit reports (this will help to determine the number of catalog years we will need to review for changes)?	See Nbr 9.
11	If the degree audit report is to service current students, majority of the current students will have degree plans and student exceptions in their file that will need to be manually built into the system. Who will be responsible for manually building these into PeopleSoft?	Frank (Twin Cities): If there is to be manual conversion of the Graduate Degree Plan (GDP) and the student exceptions, student employees may possibly data enter this information into the system to support go-live for current Graduate students.
12	Will student exceptions (course substitutions, waivers, etc.) be processed by both Twin Cities and Duluth (meaning, Twin Cities processes exceptions for their Graduate students and Duluth processes exceptions for their Graduate students) **-or-** will Twin Cities process all student exceptions	Student Exceptions will be processed both at Twin Cities and Duluth.

	regardless if the student is a Twin Cities student or a Duluth student?	
13	Who will actually process the student exceptions (i.e. maintainers of the program setup, point of contacts at the Colleges, degree clearance staff)?	This has not been decided. We will discuss during the Student Exceptions AA IDP session.