

**Administrative Systems Steering Committee**  
**April 27, 2007**  
**Joint meeting with Chief Financial Officers**

**Present:** Rachel Albert, Chris Bell, Allen Berger, Charlie Bonin, Jim Breece, Dick Campbell, Ralph Caruso, Tracy Elliott, Tony Enerva, Bill Geller, Bob Hansen, Jon Henry, Sue Hunter, Dick Kimball, Chris Legore, Eldon Levesque, Eddie Meisner, Cindy Mitchell, John Murphy, Josh Nadel, Tom Potter, Laurie Pruett, Rosa Redonnet, Donna Somma, Claire Strickland, Stuart Swain, Janet Waldron, Bill Wells, Miriam White, Joanne Yestramski, Darren-Michael Yocum.

**Campus Solutions: Overview**

Darren-Michael demonstrated various steps involved in admitting and processing students in PeopleSoft. He provided a demo of student self-service for a new student (accepting financial aid and enrolling in classes); a continuing student (transferring credit and verifying enrollment); and a multi-institution student.

**Issues related to distance education**

The multi-institution process presents issues that must yet be resolved. How do we set up a single process in PeopleSoft, recognizing that campuses have been handling distance courses in different ways? We want to be sure that students will not be intimidated by a complex system.

A multi-institution student is supported by PS, because we have one database. Financial aid will come from only one institution to a multi-institution student. But as delivered, PS would not allow a UMaine student, for example, to activate self-service to register for a UMA distance education class; assistance from a staff member would be needed. However, a mod exists to allow this student access to self-service. Campus reps have been working on the design, which will also allow a student to see where the various charges go, and where each course comes from.

Students who do use self-service for distance education courses will need to be advised that distance courses may not apply to residency requirements, that such courses will be considered as transfer and so will not count in the GPA, and that financial aid may not apply unless previous permission is obtained. Chris said that it will be important for staff, especially at the Centers, to be able to have security access in order to help these students. Darren-Michael noted that the Registrars are designing oversight/control so that students cannot just sign up for distance courses without being aware of these considerations.

It is hoped that all distance ed courses will be searchable in one central repository. Currently, distance ed courses can be searched by individual campus only. With PS the student "belongs" to the institution that sponsors the course, thus the FTE stays with that campus.

Other issues to be addressed include: Will a student who is taking nine credits from one institution and three from another be considered full-time with regard to fees, Dean's List, etc.? What about residency requirements? Allen noted that Chief Academic Officers may wish to educate their faculty senates about this and other policy issues.

Jim Breece will take any philosophical academic policy issues to the CAOs for discussion.

**Issues related to fees:**

PeopleSoft breaks out fees by campuses, but courses that qualify for various fees need to be identified. It may not be appropriate for a web-based student to be charged campus fees that support initiatives designed for students who are in residence at an institution.

Joanne noted that the CFOs have not resolved the fees issue, and suggested that an independent group of financials people look carefully at the whole issue of fees, revenue distribution, and waivers, based on the guiding principles regarding uniformity, simplicity, technology, and holding the campus harmless, and return to the CFOs in June with recommendation(s). There are policy questions involved. Janet cautioned that the campus-specific impacts are enormous, and the campus must have involvement, including policy discussions at the campus level.

Processing of add-drop and withdrawal may relate to the fee issue.

Darren-Michael is confident that we can accomplish a fee structure within PS, no matter the outcome of the discussion. There should be no technology constraints.

**Business Case for UPK (User Productivity Kit)**

UPK is an Oracle product that fully integrates with PeopleSoft and allows coordinated creation of context-sensitive training and user support tools for all Oracle applications (HR, Campus Solutions, Financials, Discoverer, Query, Resource 25, RMS). UPK requires no campus expertise or responsibility; Robin Sherman and her staff of two will be responsible for creating all training and materials and documentation.

Ralph noted that UPK has proven extremely successful for end-users at other institutions where it is used. Joanne reported that the Sponsors met Wednesday and have given their unanimous support to this purchase.

At this point, the cost of UPK is \$370,000, and it is anticipated that the one-time cost will come from capital funds. The vacant trainer position in ASDS would not be filled.

**Address Cleansing Software**

This proposal is in response to three areas of risk:

1. Student self-service – Cindy estimates 1 FTE is currently dedicated to managing duplicate addresses/ids in the system. Duplicates result in a significant loss in wasted mailings, postage, and associated collateral.
2. Advancement
3. Continuing huge ongoing risk as we implement each module; if end-users are not especially careful entering data and using the search-match process, duplicates will result.

About 80% of our duplicates are bad addresses; i.e. expressed multiple ways. This is affirmed by other institutions' experience.

The address cleansing software sits behind a PS page and manages the data coming in against existing data. Addresses are standardized and duplicates are identified. Addresses and zip codes are validated. Any new addresses and zip codes are introduced as they are created (U.S. and Canadian).

On May 15, two of the products will be demonstrated. Depending on the product we purchase, costs should run about \$85K one-time and \$45K ongoing. Ralph is meeting with the IT Policy and Planning Committee to discuss potential funding possibilities, and will return to the CFOs and the Steering Committee with more details. It is hoped that this project can be funded without campus help.

Allen suggested that the Steering Committee should defer to CFOs on this; the case is made largely on financial grounds. CFOs need to be comfortable with procedures for recovering cost.

John M. emphasized that there must be no new implementations that will affect the campuses, and noted that neither UPK nor address cleansing appears to have a negative effect.

The meeting was adjourned.

Respectfully submitted,  
Eddie Meisner, Recorder