FIT/GAP EXECUTIVE SUMMARY OVERVIEW

Veronica Salvador and Glen Perry
Fit/Gap Consulting

- ERP Analysts, Inc. (ERPA) is contracted with the CSU to work with the campuses
- ERPA is an Oracle Platinum Partner
- Provide consulting on conversion of PeopleSoft from a quarter curriculum system to a semester curriculum system
- Over the course of 4 weeks, met with departments who are the primary business owners of the PeopleSoft modules
Overall TopicsReviewed

- Identify gaps between business requirements and application functionality to convert the system from Q2S
- Identify major conversion, interface, reporting, and customization requirements and risks to performing conversion
- Identify any proactive steps or activities that could be engaged sooner in preparation for Q2S
- Review overall processes, flows, timelines by each business area
Fit/Gap Sessions

- Academic Advising ..................... Angela Schneider
- Academic Structure ...................... Angela Schneider
- Admissions .............................. John Pliska
- Financial Aid ............................. Rhonda Johnson
- Student Financials ...................... Darrell Haydon
- Student Records ......................... Angela Schneider
- Transfer Credit ........................ Angela Schneider, John Pliska, Donna Wiley
- Technical (ITS) .......................... David Corral, Roger Chen, Borre Ulrichsen
Delivered Report Format

- Summary tables for each PeopleSoft item reviewed
- PeopleSoft screenshots

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Impact</th>
<th>Type of Change</th>
<th>Functional</th>
<th>Technical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>Single sentence description</td>
<td>(Select One)</td>
<td>(Select One)</td>
<td>Under 40</td>
<td>Under 40</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No Impact</td>
<td>No Change (Δ)</td>
<td>40-160</td>
<td>40-160</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Req. Change Enhancement</td>
<td>Δ Configuration</td>
<td>160-480</td>
<td>160-480</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Δ Existing BP</td>
<td>Over 480</td>
<td>Over 480</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Δ Existing Mod</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Δ Existing Rpt/Qry</td>
<td>00% Campus</td>
<td>00% Vendor</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New Bus. Process</td>
<td>00% Campus</td>
<td>00% Campus</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New Modification</td>
<td>00% Vendor</td>
<td>00% Vendor</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New Report/Query</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New Project</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Term Controls*
- *Term*: Summer Quarter 2015
- Academic Career: Undergraduate
- Auto Calculate Tuition
- Auto Calculate Waivers
- Auto Calculate Self Service
- Auto Calculate Term Withdrawal
Academic Advising

- Is key to the communication plan with Faculty, Staff, Students
- Advising needs to begin Summer/Fall 2017
- Phased approach - Departments who complete their programs first will be trained on using the IAP’s with their students; could then train other departments
- Activate My Planner (will serve as foundation for IAP) and
- Build degree audit for semesters
- Course Catalog will have a major overhaul due to conversion; AA relies heavily on the course catalog to function
Academic Advising

Risks

- Staffing is the main risk for the Advising module
- At this time, it is unclear whether the curriculum schedule poses risk, as further detail is needed.

Next Steps

- Develop a full communication plan for current and future students
- Make early decisions on course counts rather than units
- Complete the development/implementation of crosswalk tables
- Create a business process plan for Q2S exceptions
Academic Advising

- 25 components reviewed
- 10 configuration action items
- 1 enhancement action item

CSUEB

- 3,930 functional staff hours
- 120 technical staff hours
- 2,490 contractor hours

CSUEB

- 1,470 functional staff hours
- 0 technical staff hours
- 490 contractor hours
Academic Structure

- Configuration updates to several components of the academic structure
- For most, this should require only a one-time change of the values in terms of the semester conversion.
Academic Structure

- For the majority of the 19 components reviewed, standard changes are required, such as:
  - conversion units,
  - adding a “conversion term”
  - configuring “term” to mean semester
  - creating a new naming convention system
  - Dates and values adjustments
  - Academic Calendar component (which defines rules for withdrawals/dropped classes) values need updating to reflect semester
Academic Structure

19 components reviewed

15 configuration action items

CSUEB

560 functional staff hours

200 technical staff hours

0 contractor hours

Fit/Gap Sessions

- Academic Advising
- Academic Structure
- Admissions
- Financial Aid
- Student Financials
- Student Records
- Transfer Credit
- Technical (ITS)
Admissions includes Recruitment and Outreach

- Application and fee deadlines
- Matriculation timeline business processes (Change from admit decision based on ALL paperwork submitted to admit decision before all official documentation received)
- Communication and Checklist functionality business process improvement (Move communications into central place in Blackboard Connect)
Admissions

2 components reviewed
15 configuration action items
1 enhancement action item

CSUEB
720 functional staff hours
200 technical staff hours
0 contractor hours

CSUEB
384 functional staff hours
0 technical staff hours
96 contractor hours
Financial Aid

- Most modifications involve:
  - Updates to values (semester terms)
  - Eliminate Winter term
  - Packaging plan selections
  - Application rule setup
  - Pell Payment setup to reflect academic weeks of instruction
Financial Aid

- 4 components reviewed
- 39 configuration action items
- 1 enhancement action item

CSUEB
- 1,780 functional staff hours
- 400 technical staff hours
- 480 contractor hours

CSUEB
- 100 functional staff hours
- 80 technical staff hours
- 100 contractor hours
Student Financials

- The primary focus is **COMMUNICATION**
- From 4 quarter system to 2 semesters and summer session means **fewer, but higher payments** required
- Parents, students, campus community needs to be advised ahead of time
- Term numbering convention needs to change
- Many business improvement opportunities were identified; including cross-module opportunities with Student Records
Student Financials

11 components reviewed
19 configuration action items
29 enhancement action item

CSUEB
144 functional staff hours
520 technical staff hours
1296 contractor hours

CSUEB
830 functional staff hours
0 technical staff hours
2408 contractor hours
Student Records

● Most heavily impacted in terms of conversion
● Student Records module controls:
  ○ Curriculum development for courses and classes
  ○ Enrollment
  ○ Grades and statistics
  ○ Transcripts
  ○ Graduation

● Most module changes are in the areas listed above
● Placeholder term to ensure statistics are accurately transformed
Student Records

- It was determined that the **actual processing of student records** would **not be impacted in significant ways**.
- The manner in which staff currently conduct business in the quarter system will by and large be the same way they do so in the semester system.
- The timing on activities will change to some degree and there will be some training opportunities to ensure that staff and students fully understand how the semester conversion impacts the student’s academic record.
Student Records

- 12 components reviewed
- 33 configuration action items

CSUEB

- 13,362 functional staff hours
- 1,710 technical staff hours
- 3,328 contractor hours

Fit/Gap Sessions
- Academic Advising ...
- Academic Structure ...
- Admissions ............
- Financial Aid ...........
- Student Financials ....
- Student Records .......
- Transfer Credit .......
- Technical (ITS) .........
Transfer Credit

5 PeopleSoft Components reviewed; many needing common updates in verbiage, term values, units, etc.

- Other Credit
- Test Credit
- Course Credit
- Transfer Credit Modifications - 2 items for configuration
- Query Report Review
Transfer Credit

- Rebuild all of the transfer rules by Oct. 2017. Insert new rows for the new articulations in PS.
- Goal is to have transfer credit rules in place by June 2016 for the core feeder schools to support prerequisite checking for Fall 2016 students.
- Hold a regularly scheduled “transfer credit maintenance/campus community” meetings for all impacted/involved business areas. There are currently so many disparate business areas that touch discrete parts of the transfer credit data.
- One major challenge currently faced is that the Articulation Office, while doing a stellar job, at the task of building the rules for the transferrable courses for the 26 identified feeder schools, is only addressing a subset of data.
- Admissions and Transfer Credit should streamline a process to address a more holistic transfer credit rule build approach.
Transfer Credit

- 5 components reviewed
- 4 configuration action items

CSUEB

- 218 functional staff hours
- 512 technical staff hours
- 570 contractor hours
Technical

Review of 6 components

- Student conversion
- Course conversion
- PS Baseline Semester Mods
- CMS Baseline Mods
- New Semester Development
- East Bay Local Mods
Technical

Review of 6 components

- **Student conversion** - The conversion of academic data from quarters to semester requires a **placeholder term** to store the converted data. This placeholder term will be programmatically inserted between a student’s last quarter term and his or her first semester term utilizing an Application Engine Process.
Technical

Review of 6 components

- Student conversion -

The format of field STRM will change to accommodate semesters. The proposed format guidelines for 4 byte character field STRM are:

- 1st number becomes 3
- 2nd and 3rd numbers stay calendar year
- 4th number becomes 0, 5, 7, or 9 (no reuse of previous numbers)
  - 0 – winter
  - 5 – spring
  - 7 – summer
  - 9 - fall
Technical

Review of 6 components

- Student conversion -

Using the new format, if Summer 2018 is the last quarter term, the new term values would become:
  - Summer 2018 is 2183
  - Conversion placeholder term becomes 3188
  - Fall 2018 becomes 3189
  - If Winter Intersession 2019 stays a term then it will become 3190
  - Spring 2019 becomes 3195
  - Summer 2019 becomes 3197
  - Fall 2019 becomes 3199
Review of 6 components

- **Student conversion**
- **Course conversion guide** - A custom online self-service utility that uses as much PS-delivered functionality as possible and equate quarter courses to semester courses. It pulls the course descriptions, etc. from PS delivered course catalog tables.
- **Develop new functionality for an easier quarter to semester transition.** Course Conversion Guide will show advisors and students semester equivalent of the quarter course.
Technical

Review of 6 components

- Student conversion
- Course conversion guide
- PS Baseline Semester Mods - Baseline Modifications will recalculate Statistics for the Place Holder and other Semester terms, cumulative units for financial aid and recreate transcript text if any Maintenance (Insert/Delete/Update) has been performed on a term prior to placeholder term.
Technical

Review of 6 components

- Student conversion
- Course conversion
- PS Baseline Semester Mods
- CMS Baseline Mods - Determine if any CMS baseline modifications need to be changed
- New Semester Development - New customizations required to support the conversion.
- East Bay Local Mods - East Bay will create a full inventory of local modifications for review
Technical

- 6 components reviewed
- 38 configuration action items
- 390 functional staff hours
- 80 technical staff hours
- 2,870 contractor hours

CSUEB

Fit/Gap Sessions
- Academic Advising...
- Academic Structure...
- Admissions............
- Financial Aid...........
- Student Financials....
- Student Records......
- Transfer Credit........
- Technical (ITS).........
Next Steps

● Budget

● Fit/Gap Action Plan
  ○ Glen and Veronica to convene group meetings in January
  ○ Prioritize action items
  ○ Identify resources (there may be a gap in resources needed to conduct the work)
  ○ Create timelines