



Executive Update

Student Information System CS9.0 Upgrade

Updated: May 1, 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	Project Health continues to be "Lime". Functional Teams are continuing their testing.
Academic Advisement	Green	Lime	With update of Bundle 7 into UP5, Functional Testing can continue. Several updates for Academic Advisement are included in this Bundle.
Admissions	Green	Green	Continuing to test applications and interfaces.
Campus Community	Green	Green	Campus Community has configured most types in UP4. Service Indicators are currently under review.
Database	Green	Green	Continuing development of UP 5 environment and preparing to test interfaces.
Financial Aid	Green	Green	ISIR Load and key custom jobs are functioning in CS 9.0 (UP5) – ITS working on all jobs to be functioning in UP5 environment.
Graduate Enrollment Management	Green	Green	Continuing to test.
Reporting / RDS Interfaces	Lime	Lime	Developing static 8.0 and 9.0 environments. Continuing initial testing of reports.
Security	Green	Green	Continuing to configure and test the 9.0 environment.
Student Financials	Yellow	Lime	Most testing in UP5 environment put on hold until new Bundle Update 7 was installed on 4/24/08. Testing percentages will increase over the next two to three weeks.
Student Records	Lime	Lime	Customizations for Transcripts and enabling Printing of Transcripts and Enrollment Verifications are yet to be completed and tested.
System Administration	Green	Green	Performance on UP5 system is being addressed by Sys Admin team working along with Database Team.
Training	Green	Green	Continuing to move forward as planned. Training sessions with specific populations are targeted. For Implementation, a "traveling band" of training will take place visiting department to department. Camtasia Software has arrived and the first Camtasia presentation will be on Faculty Grade entry as soon as the Faculty Center Grade Entry Customizations have taken place.

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

- AA Staff worked with OAAS staff for one week to determine any updates needed for the Academic Requirements configurations.
- Analyzed inconsistent data on Advisement Reports between v8 and v9. Expect that Bundle 7 for v9 will provide fixes for most of the noted issues.
- Completed all test scripts in UP4.
- Completed all setup for UP5.
- Met with ITS Team to identify all necessary steps to prepare Academic Advisement for Go-Live.

Admissions

- Tested non-degree and readmit in UP5. Two issues have been identified and documented. Neither impacted the student records; they tested fine.
- Created test scripts for the UGrad RPlus interface. This includes the edit step (143 scripts), the search/match step (38 scripts) and the post step (504 scripts).
- Created five input files to the RPlus interface to facilitate all test scripts. Performed all test scripts in cs90dev. Made a few updates to the process.

Campus Community

- Types (phone, address, email) are nearly configured by Technical Staff.
- Testing 95% complete in UP4.
- Service Indicator data gathered in UP5.

Database

- Removed CS90UP2, SA8PRE, PA8PRE to gain needed resources for CS90 databases.
- Created CS90UP5 database.
- Refreshed PS89TRN from PA89SBX and CS90SBX database from CS90UP5.
- **Interfaces:**
 - Making changes to interface applications views, procedures and tables that are impacted by the CS90 upgrade in development environment.
 - Develop test plans for each interface between the application and LUWAre/RDS/CS90.
 - Create test databases on ACORN1 to test interface between LUWAreDEV/RDSDEV/CS90RDS.

Financial Aid

- Test of email communications (FA18) to be run from CS 9.0.
- Testing of Query Manager using Scheduler for reports run on a daily basis.
- Testing of a portion of the 'starting lineup' programs in CS9.0, UP5 database (FA01, FA02, FA04 are functioning).

Graduate Enrollment Management

- Application entry successfully tested.
- Completed identification of key WebFocus reports.
- Plan change and add career successfully tested.

Reporting / RDS Interfaces

- Preliminary test of key reports with RDS 9.0 completed by BI Admin.
- RDS 8.0 static server built.

Security

- Continued to design, set-up, and test LU9 security.
- Developed a plan to turn SA8PRD into view only during implementation.
- Discovered how to turn off all of the Gradebook links (in CS90TRN). Gave information to ITS, so that ITS can do the same in CS90DEV and CS90UP5.

Student Financials

- Continue weekly Functional Leads/Bursar/ITS hands-on testing.
- Continue to update Issues log, Regression Testing Scripts, Executive Updates, Customization Status Updates.
- The Account Summary customization page in Self-Service has been completed.
- Payment Applier (a process that takes unapplied credits and payments and posts them against outstanding charges) has failed on nine students. Complicated account cleanup on these is required for batch process to finish but will not need to be completed by go-live date.
- Where Financial Responsibility Disclaimer will be placed on registration pages has been determined.

Student Records

- Testing sessions increased to three times a week. Have successfully tested approximately 30% of our 225 test scripts in the UP5 environment.
- Identified the WebFocus Reports needed in CS 9.0 and provided the information to ITS.
- Reviewed Security Roles for members of the Registration and Records Staff and provided the information to the Security Team.
- Reviewed and successfully tested the customized class schedule report LUCSR201.
- Completed a preliminary test of key functions after the implementation of Bundle 7 and found that the only issue was the Class Search modifications were no longer available.

System Administration

- UP5 has been updated with CS Bundle 7.
- Solution for timeout issues is being tested.
- XML tables identified for manual migration.
- Permanent CS Training environment established.
- Campus Solutions Sandbox systems established.
- Enterprise Portal Specifications from CORE Meeting are being implemented.

Training

- 100+ Users Trained in Welcome to 9.0
- Training sessions announced for 9.0 Intermediate Training
- Advisor Training Materials Drafting Commenced
- Commenced drafting of a thorough training calendar
- Updated Locus Training website

SIGNIFICANT EVENTS PLANNED FOR THE NEXT 14 DAYS:

Academic Advisement

- Continue making changes to Academic Requirements, as reported by OAAS staff.
- Begin test scripts for Academic Advisement in UP5

Admissions

- Getting cs90up5 set up and beginning to test. Testing will require two solid days of effort.

Campus Community

- Regression testing of UP5.
- Continuation of Type configuration.
- Service Indicator Review.

Database

- Performance Tuning of CS90UP5.
- Testing and documenting the different application interfaces.

Financial Aid

- Completion of testing for 'starting lineup' and production of packaging and letters.
- Testing of batch repackaging function to be completed (currently running with abends).

Next 30 Days

- 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

- Continue with testing in UP5.

Reporting / RDS Interfaces

- WebFocus installation on RDS 8.0 static server.
- Completion of RDS 9.0 static server build.
- WebFocus installation on RDS 9.0 static server.
- RDS 8.0 static database build.
- RDS 9.0 static database build.
- Begin comparison testing of static RDS 8.0 and 9.0 by functional areas.

Security

- Continue to design, set-up, and test LU9 security.
- Create the 9.0 role for the academic advisors and assign the role to CS and PA using the automated role assign process developed by Greg.
- In preparation for turning SA8PRD into view only during implementation. ITS is working on the process to turn the Display Only flag on for selected menu items. Working on creating the list of the menu items to be set to Display Only.

Student Financials

- Complete the Security Profile Matrix for Student Financials users.
- Run a General Ledger Process tracer in UP5 environment to determine reason why process takes an extraordinary amount of processing time.
- The Touchnet eCheck and Credit Card testing was successfully unit tested (functional testing had not started) but failed when the Bundle 7 update was installed. Testing will continue when these new technical, communication issues between the servers has been resolved.
- CS9.0 Collection Module Set-Up pages to be completed.
- Late Fee Processing testing continuing.
- Testing of Financial Responsibility Disclaimer to be done.

Student Records

- Analyze the use of the Planner to record Discover Loyola advising.
- Continue our testing of test scripts and Bundle 7 updates.
- Continue to review Degree Check customizations.
- Review the Class Schedule Report customizations for LUCSR201A, LUCSR201B, and LUCSR201C.

System Administration

- Expect to test Read-Only version of SA8PRF.
- Adding additional Application Servers to UP5 to test transaction load balancing
- Requesting RedLine connection to test front-end load balancing.
- Begin set-up of News Publications in portal.

Training

- Create draft of materials for Intermediate Training session.
- Complete Advisor Training session.
- Complete Law School Focus Group.
- Complete Cashier Training.
- Complete Discover Loyola LOCUS Presentation meeting with ITS.

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	Complete	4/10/08 4/11/08
Welcome to 9.0 training - Students - Faculty	Training	Training Team	4/14/08 5/30/08	In Process	Ongoing Ongoing
Core Team Mtg (April)	Project Mngt Team	ITS / Functional Teams	4/22/08	Complete	04/22/08
Core Team Mtg (May)	Project Mngt Team	ITS / Functional Teams	5/13/08	Scheduled	
Completion of UP5	Project Mngt Team	ITS / Functional Teams	5/15/08	In Process	
Additional UPs (TBD)	Project Mngt Team	ITS / Functional Teams	TBD		
Go / No Go Decision to proceed to final stages	Project Mngt Team	ITS / Functional Teams	6/1/08	Planned	
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	
Final Go / No Go Decision	Project Mngt Team	ITS / Functional Teams	6/13/08	Planned	
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
15	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.	A preliminary solution has been implemented. Preliminary testing indicates that service indicators with Enrollment impact is working correctly. Additional testing is still required.	3/28/08
CC	High	Lime	5/9/08
16	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	Faculty Center assessment has been completed. A solution has been identified and will be moving into the development environment for testing.	3/24/08
Security	Medium	Lime	5/15/08
17	In order to provide the University Community access to information during the cut-over period for the new production version, we need to have a view-only version of the SA 8.0 application available.	ITS and Security are working together to establish an SA 8.0 version that is view only. This will be completed and tested prior to Go Live.	4/29/08
ITS / Security	Medium	Green	7/11/08
18	When testing the new enrollment appointment functionality it was discovered that the appointment table cannot be created after students are enrolled. This will be an issue at Go Live since students are already enrolled for 1086 and we will need to assign appointments.	We are investigating a resolution to this issue.	4/28/08
Rec / Reg	Medium	Lime	TBD
19	There are a number of reports, including transcripts and files that are not accessible following batch processing.	ITS Technical Team is researching the cause and a resolution to this issue.	4/28/08
	High	Yellow	TBD
20	We are not able to print transcripts and enrollment verifications utilizing Crystal Reports.	Awaiting Crystal Reports ver. 9.0 to address this issue. Expecting is to have this available by 5/9/08	4/28/08
Rec / Reg	High	Lime	TBD

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

NBR	ISSUE	ACTION	AWARENESS
OWNER	RISK	STATUS (Green, Lime, Yellow, Orange, Red)	TARGET COMPLETION
8	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.	2/26/08
ITS	Low	Green – Closed (This is an activity that has been planned and is part of the Project Plan.)	04/25/08
9	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.	2/26/08
AA	Low	Green – Complete (Not a Show Stopper. Does not require a fix before Go Live.)	04/08/08
10	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	2/14/08
ITS	Low	Green – Closed (not an issue)	04/04/08
11	On CS9.0 Student Center, students should see a different view of their Account Summary than what is delivered.	ITS has developed a resolution to this issue. Functional Team has completed testing.	2/26/08
ITS / SF	Potentially “high” due to the complexity of the request.	Green - Closed	4/22/08
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.	ITS has developed a resolution to this issue. Functional Team has completed testing.	2/26/08
ITS / SF	Potentially “high” due to the complexity of the request.	Green - Closed	4/22/08
13	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.	3/01/08
Reg / Rec	Low	Green – Closed (Ongoing project activity)	4/4/08