Common Management System

CMS Student Administration Status Update

February 16, 2006

Susan Kachner
Director of Administrative Computing
CMS Student Administration Project Lead
Agenda

- CMS Overview
- Overview of Student Administration (now called Campus Solutions)
- Project Implementation and Timeline
- Overview of Self-Service for Students
- Overview of Self-Service for Faculty/Staff
- Benefits of CMS Student Administration
- Myths and Realities
- Questions
CMS Overview

- **Reporting Committee**
  - Susan Kachner, chair
  - Wide Campus Representation
  - Examine Report Delivery Needs & Methods
  - Recommendation this Spring
CMS Overview

- **Forms Committee**
  - Welson Badal, chair
  - Wide Campus Representation
  - Examine Forms Needs Delivery Methods
  - Recommendation this Spring
  - Implementation in ….
CMS Overview

- Divisional Involvement
  - User Work Teams
  - Support Groups
  - Integration Work Teams
CMS Overview

● Divisional Activities
  - Identify issues with existing system
  - Input/Feedback from User Work Teams
  - Process Map Review
  - Fit/Gap Review
  - Acceptance Testing
  - Forms and Reports
Overview of Student Administration

- **Modules Included**
  - Campus Community – Demographic data, holds, checklists
  - Admissions
  - Catalog/class schedule
  - Registration
  - Records – grades, transcripts, graduation
  - Academic Advising – degree audit
  - Student Financials
  - Financial Aid
  - Self-Service (students and faculty)
Overview of Student Administration

**Implementation Teams**
- CMS Steering Committee (HR, Finance and SA)
- Student Administration Management Team
- Implementation Teams (one per module such as Admissions, Registration, Financial Aid, etc.)
- Focus groups (Faculty, student, users)
- Primary Stakeholder – Nancy Dority, AVP of Enrollment Services
Overview of Student Administration

- **SA Management Team Members**
  - Sylvia Alva (Academic Programs)
  - Mark Lopez (Student Financials)
  - Amir Dabirian (Executive Sponsor)
  - Nancy Dority (Admissions & Records)
  - Susan Kachner (Lead)
  - Joe Luzzi (Technical Lead)
  - Lea Jarnagin (Student Affairs)
  - Chris Manriquez (Project Director)
  - Deborah McCracken (Financial Aid)
  - Maria Mezhinsky (Admissions & Records)
  - Harry Norman (Extended Education)
  - Michelle Totten (Assistant Project Director)
  - Implementation Partner - TBD
Overview of Student Administration

- **What is delivered?**
  - Base software with CSU-specific modifications such as the Mentor application process, remediation registration and Cal Grant.
  - All vendor changes first go through CMS Central and are then delivered to the campuses.
  - Campuses are limited in what changes they can make to CMS since most changes must be approved and done through CMS Central.
  - Any centrally-approved modifications are delivered by CMS Central to the campuses.
  - Self-Service is the one area where campuses are free to make changes.
Overview of Student Administration

- **Data Instances**
  - Production instance – live data
  - Reporting instance – nearly live data formatted just like production to be used for reporting
  - Various test/development instances
  - Data Warehouse – selected production data refreshed daily stored at CSU Fullerton and formatted to enable efficient reporting. Can also include non-CMS data such as CashNet data.
Project Implementation and Timeline

- **Key Decisions Already Made**
  - Registration go-live term - Summer 2008
  - Academic Advising – We will be converting DARS to the CMS Academic Advising module rather than keeping DARS and interfacing it to CMS. The timeframe for the completion of this conversion is 2008.
Project Implementation and Timeline

- In progress
  - SIS+ Data Cleanup
  - Process Mapping of current business processes
  - Planning

- Dec 2005 – Feb 2006: SA Readiness Assessment
  - Selected Cedar/Crestone as the Readiness Assessment partner in December 2005.
  - Focus group interviews were held in January 2006.
  - Final report has been submitted to the campus.
  - Next step is for the campus to finalize approval and submit the report to the Chancellor’s Office in order to begin our implementation.

- Feb – Mar 2006: Select SA implementation partner
  - RFP in-progress and partner will be selected mid-March 2006.

- April 2006: Begin functional training and fit/gap
Project Implementation and Timeline

- **Phased-In Implementation**
  - Course inventory (catalog) – August 2007
  - Summer and Fall 2008 class schedules – September 2007 (begin schedule build)
  - Admissions applications for Fall 2008 – either October 2007 or January 2008
  - Financial Aid ISIR’s loaded for 2008/09 – February/March 2008
  - Registration/Fee payment for Summer 2008 – April 2008
  - Grading and transcripts in CMS – Summer 2008
SIS+ and TITAN Online Moratorium on changes

- During the Student Administration implementation, only the following SIS+ changes will be made:
  - Changes mandated by federal or state law or by the Chancellor’s Office or critical campus changes
  - Fixes to problems
  - Small changes/reports/labels
Project Implementation and Timeline

- **University Plaza**
  - Dedicated work space obtained for the CMS Student Administration implementation team
  - University Plaza (also known as the Pennysaver Building) is a 2-story building located across the street from College Park
  - First story space (east half of the building) – module work teams, technical teams and fit/gap space
  - Second story space – large CMS training room (individual computer work stations)
Project Implementation and Timeline

- University Plaza
Overview of Self-Service for Students

- CMS student self-service provides
  - Real-time access to their student information available 24x7
  - Response-time and capacity will be greatly improved over TITAN Online
  - Will no longer need to shut down degree audit access to students during periods of heavy registration
  - Will gradually replace TITAN Online as we phase in implementation
  - The goal is to make the transition to CMS Self-Service as seamless as possible to students
Jessica Simpson

Accept Admission

We are pleased to grant you admission to the following program(s). Note that once you accept or decline admission to a particular program it will no longer appear on this page. Select the program you would like to accept or decline.

<table>
<thead>
<tr>
<th>Academic Institution</th>
<th>Term</th>
<th>Academic Career</th>
<th>Program</th>
<th>Application Number</th>
<th>ACCEPT/DECLINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PeopleSoft University</td>
<td>2005 Fall</td>
<td>Graduate</td>
<td>Graduate Science Programs</td>
<td>00024168</td>
<td>ACCEPT/DECLINE</td>
</tr>
</tbody>
</table>
1. Select classes to add

To select classes for another term, select the term and click Change. When you are satisfied with your class selections, proceed to step 2 of 3.

PSYCH 390 has been added to your enrollment shopping cart. Add more classes or click Proceed to Step 2 to continue processing your enrollment.

2005 Fall Enrollment Shopping Cart

<table>
<thead>
<tr>
<th>Delete</th>
<th>Class</th>
<th>Description</th>
<th>Days/Times</th>
<th>Location</th>
<th>Instructor</th>
<th>Units</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PHILO 210-1</td>
<td>Free Will &amp; Determinism (Lecture)</td>
<td>T U T H 9:00AM - 10:20AM</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>PSYCH 390-1</td>
<td>Med Views (Lecture)</td>
<td>T U T H 11:00AM - 12:20PM</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td></td>
</tr>
</tbody>
</table>

My 2005 Fall Class Schedule

<table>
<thead>
<tr>
<th>Class</th>
<th>Description</th>
<th>Days/Times</th>
<th>Location</th>
<th>Instructor</th>
<th>Units</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANTHRO 405-1</td>
<td>Approaches to Archaeology (Laboratory)</td>
<td>TBA</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>ART 131-1</td>
<td>Introductory Art Seminar (Seminar)</td>
<td>T U T H 10:00AM - 11:20AM</td>
<td>TBA</td>
<td>Staff</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>ART 145-1</td>
<td>Advanced Sculpture (Seminar)</td>
<td>T U 4:00PM - 6:30PM</td>
<td>TBA</td>
<td>A. Edmundson</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>ART 175-1</td>
<td>The Use of Electronics in Art (Lecture)</td>
<td>M 2:00PM - 4:00PM</td>
<td>TBA</td>
<td>J. Sadler</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>ENGL 101-1</td>
<td>American Literature (Lecture)</td>
<td>T U T H 1:00PM - 2:20PM</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>HISTORY 201-1</td>
<td>European History I (Lecture)</td>
<td>T U 9:00AM - 10:50AM</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td></td>
</tr>
</tbody>
</table>
## Add Classes

### 2. Confirm classes

Click Finish Enrolling to process your request for the classes listed below. To exit without adding these classes, click Cancel.

---

2005 Fall | Undergraduate | PeopleSoft University

<table>
<thead>
<tr>
<th>Class</th>
<th>Description</th>
<th>Days/Times</th>
<th>Location</th>
<th>Instructor</th>
<th>Units</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHILO 210-1 (1024)</td>
<td>Free Will &amp; Determinism (Lecture)</td>
<td>TuTh 9:00AM - 10:20AM</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td>Closed</td>
</tr>
<tr>
<td>PSYCH 390-1 (1066)</td>
<td>Mod Views (Lecture)</td>
<td>TuTh 11:00AM - 12:20PM</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td>Open</td>
</tr>
</tbody>
</table>

---

**My Class Schedule**  **Wish List**  **Class Search**  **Add**  **Drop**  **Swap**  **Edit**
Add Classes

3. View results

View the following status report for enrollment confirmations and errors:

2005 Fall | Undergraduate | PeopleSoft University

<table>
<thead>
<tr>
<th>Class</th>
<th>Message</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHILO 210</td>
<td><strong>Error:</strong> Class 1024 is full. If a wait list is available, click Fix Errors to return to step 1. Click the class link, select the wait list option and resubmit your request.</td>
<td>✗</td>
</tr>
<tr>
<td>PSYCH 390</td>
<td><strong>Success:</strong> This class has been added to your schedule.</td>
<td>✓</td>
</tr>
</tbody>
</table>
**Account Summary**

**You owe 5,161.00. For the breakdown, access Charges Due**
- Due Now 496.00
- Future Due 4,665.00

**You have a past due balance of 496.00.**

**What I Owe**

<table>
<thead>
<tr>
<th>Term</th>
<th>Outstanding Charges &amp; Deposits</th>
<th>Pending Payments</th>
<th>Total Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998 Fall</td>
<td>396.00</td>
<td></td>
<td>396.00</td>
</tr>
<tr>
<td>2000 Spring</td>
<td>50.00</td>
<td></td>
<td>50.00</td>
</tr>
<tr>
<td>2000 Fall</td>
<td>50.00</td>
<td></td>
<td>50.00</td>
</tr>
<tr>
<td>2005 Fall</td>
<td>4,665.00</td>
<td></td>
<td>4,665.00</td>
</tr>
<tr>
<td>Total</td>
<td>5,161.00</td>
<td></td>
<td>5,161.00</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

**Remittance Addresses**

**Financial Aid**

<table>
<thead>
<tr>
<th>Summary</th>
<th>Activity</th>
<th>Charges Due</th>
<th>Payments</th>
<th>Pending Financial Aid</th>
<th>Make a Payment</th>
</tr>
</thead>
</table>
### Jessica Simpson

### Financial Aid

#### Award Summary

**Financial Aid Year 2004-2005**

Select the scheduled disbursement dates hyperlink to review when you may receive funds.

<table>
<thead>
<tr>
<th>Award Description</th>
<th>Category</th>
<th>Offered</th>
<th>Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lake Michigan Polar Club Grant</td>
<td>Grant</td>
<td>2,500.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Cal Grant A</td>
<td>Grant</td>
<td>2,600.00</td>
<td>2,600.00</td>
</tr>
<tr>
<td>TERI Loan</td>
<td>Loan</td>
<td>2,500.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Academic Year Totals</strong></td>
<td></td>
<td>7,600.00</td>
<td>2,600.00</td>
</tr>
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</table>

Currency used is US Dollar.

#### Terms

**2005 Spring**

<table>
<thead>
<tr>
<th>Award Description</th>
<th>Category</th>
<th>Offered</th>
<th>Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lake Michigan Polar Club Grant</td>
<td>Grant</td>
<td>2,500.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Cal Grant A</td>
<td>Grant</td>
<td>2,600.00</td>
<td>2,600.00</td>
</tr>
<tr>
<td>TERI Loan</td>
<td>Loan</td>
<td>2,500.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Term Totals</strong></td>
<td></td>
<td>7,600.00</td>
<td>2,600.00</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.

Your financial aid award is determined from the information provided on your financial aid application. If there is no financial aid displayed your application may be in progress. Please check back in a few days.

### Financial Aid Eligibility

### Return to Aid Year Selection
Overview of Self-Service for Faculty/Staff

- Faculty will be able to these in real-time
  - View their teaching schedule
  - Access their class rosters
  - Record grades on the web
  - View Advisee Information including transcripts and degree progress reports
  - View course catalog and class schedule
Faculty Center

Select Term 2004 Fall > PeopleSoft University

Show all classes
Only classes with enrollment
View My Weekly Schedule
View FERPA Statement

My Teaching Schedule > 2004 Fall > PeopleSoft University

<table>
<thead>
<tr>
<th>Class</th>
<th>Class Name</th>
<th>Days and Time</th>
<th>Location</th>
<th>Class Dates</th>
<th>Enrolled</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHEM 102-1</td>
<td>Elem Chem (Lecture)</td>
<td>MWF 9:00AM - 9:50AM</td>
<td>Angel 102</td>
<td>Aug 30, 2004-Dec 12, 2004</td>
<td>9</td>
</tr>
<tr>
<td>LEC 1432</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHEM 102-1B</td>
<td>Elem Chem (Laboratory)</td>
<td>TBA</td>
<td>TBA</td>
<td>Aug 30, 2004-Dec 12, 2004</td>
<td>9</td>
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<tr>
<td>LAB 1742</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHEM 102-TR1</td>
<td>Elem Chem (Lecture)</td>
<td>M 8:00AM - 10:30AM</td>
<td>King 406</td>
<td>Aug 30, 2004-Dec 12, 2004</td>
<td>0</td>
</tr>
<tr>
<td>LEC 1630</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

My Favorite Websites

EDIT MY FAVORITE WEBSITES  MSN Home  Blackboard
### Class Roster Information

**Course:** CHEM 102  
**Title:** Elem Chem  
**Class Number:** 1432  
**Class Section:** 1  
**Component:** Lecture

**Institution:** PeopleSoft University  
**Term:** 2004 Fall  
**Session:** Regular Academic Session  
**Career:** Undergraduate

**Day:** Mon Wed Fri  
**Time:** 9:00AM - 9:50AM  
**Location:** Angel 102  
**Instructor:** Edmundson, Aurelia  
**Co-Instructor:** Gayle, Gale

### Enrollment Status
- **Enrolled:** 9  
- **Enroll Capacity:** 35

### Enrolled Students

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Grade</th>
<th>Units</th>
<th>Program and Plan</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Alexander, Lucas</td>
<td>Graded</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - Biology (BS)</td>
<td>Junior</td>
</tr>
<tr>
<td>2</td>
<td>Basile, Valerie</td>
<td>P/NP</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - English (BA)</td>
<td>Freshman</td>
</tr>
<tr>
<td>3</td>
<td>Basile, Valerie</td>
<td>P/NP</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - Local Area Network and Adm Ser</td>
<td>Freshman</td>
</tr>
<tr>
<td>4</td>
<td>Hardy, Michael</td>
<td>Graded</td>
<td>3.00</td>
<td>Graduate Liberal Arts Programs - Elementary Edu</td>
<td>Freshman</td>
</tr>
<tr>
<td>5</td>
<td>Johnson, Sadie</td>
<td>Graded</td>
<td>3.00</td>
<td>Fine Arts Undergraduate - Undeclared Undergraduate</td>
<td>Freshman</td>
</tr>
<tr>
<td>6</td>
<td>Jones, Alexis A.</td>
<td>Graded</td>
<td>0.00</td>
<td>Liberal Arts Undergraduate - Undeclared Undergraduate</td>
<td>Freshman</td>
</tr>
<tr>
<td>7</td>
<td>Kashishi, Khanom</td>
<td>Graded</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - Undeclared Undergraduate</td>
<td>Freshman</td>
</tr>
<tr>
<td>8</td>
<td>King, Martin Robert</td>
<td>Graded</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - English (BA)</td>
<td>Freshman</td>
</tr>
<tr>
<td>9</td>
<td>Langbehn, John Paul</td>
<td>Graded</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - Classics-BA</td>
<td>Freshman</td>
</tr>
<tr>
<td>10</td>
<td>Lewis, Frederic</td>
<td>Graded</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - Art Minor</td>
<td>Freshman</td>
</tr>
</tbody>
</table>
Benefits of CMS Student Administration

- Software is fully web-based
- Software is supported by the Chancellor’s Office. All changes required by the Chancellor’s Office to processes like Mentor or remediation registration are done centrally and delivered to the campuses
- Sharing of best-practices and campus-developed enhancements and reports across CSU campuses
Benefits of CMS Student Administration

- Expanded Class Schedule search including searching by GE categories, listing pre-requisites and final exam schedules
- Registration wishlists and waitlisting (if we choose to implement these features of CMS)
- Faculty self-service including posting grades on the web
- CMS Data Warehouse will provide easier access to end-users for ad-hoc reporting
Myths and Realities

- Customizations in CMS will be highly restricted.
  - True, other than in self-service

- We will need to modify some current business processes to fit the CMS software.
  - True. This is a wonderful opportunity to make needed changes.

- Won’t be able to report or extract data out of CMS.
  - Not true. In fact, with the Data Warehouse, it will be easy to do this.
Myths and Realities

- Even with backfilling staff who will be working nearly full-time on CMS from 2006 – 2008, some day-to-day legacy processes will take longer to complete.
  - True
- End-users will play a significant role in testing.
  - True
- We won’t be able to see all the information we need on a single screen in CMS.
  - Partially true. CMS web pages spread information across multiple screens.
Myths and Realities

- Navigation in CMS is slower than SIS+.
  - Not necessarily true. Of course, training is essential. We will be able to bookmark pages we use frequently and utilize those bookmarks from any workstation (even at home) since the bookmarks are saved on the CMS servers and not on our workstation.
Questions

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