

## SAUG Campus Enhancement List

Module	Sub-Module	Modification Name	Business Challenge	Modification Description	Effort	Technology Used	Dependencies	Campus	Campus Contact Name	Campus Contact email	Campus Contact Phone
AD	Self Service	Admission Application Status	Allow students, through self service, to view their application progress	Consists of a summary page of all current and future applicants, and a detailed page for each application. These pages provide links to other applicable self-service functionality.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
AD	Self Service	View My Test Scores	Provide students with a view of university required test scores	The student can view their test scores on the math placement test, chemistry placement and writing proficiency tests. There is also an explanation regarding which courses require these tests.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
AD	Test Scores	Automated test credit load	Provide a method to process test credit equivalencies automatically for AP and credential tests.	Due to the large volume of AP and credential tests received, an automated process, which can be run through the process scheduler, is provided to perform the test credit equivalencies for a specified test date range. These test equivalencies are used to satisfy degree audit requirements.	Med	Component Interface		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	
AD	Test Scores	Placement and credential test score load (ELM, EPT, CPT, MPT, CBEST, CSET, RICA, etc.)	Provide a method of loading local placement and credential tests into PeopleSoft.	SQRs were developed to load the various math, chemistry and english placement tests and credential tests into Peoplesoft test tables and locally defined suspense tables. These tests are used in enrollment prerequisite checking and to satisfy degree audit requirements.	Med	SQR		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	
AV	Faculty Self Service	Early Warning on Students not making the grade	Provide a way for faculty to notify the advisor to help the student and provide a system to track the progress.	Add a tab to the class roster to allow faculty to create an entry for the advisor to contact the student and/or refer the student for counseling. Faculty can see the status of the process.	Med	PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	
CC	Self Service	Redesign FERPA	PeopleSoft FERPA page too complicated	This page will allow a student to update their own FERPA status, either hide or show. The other delivered functionality was eliminated from this page.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
FA	Self Service	Financial Aid Satisfactory Academic Progress	Student can view their academic progress for Financial Aid eligibility	Students receiving financial aid are reviewed each year. This page allows a student to check their academic progress towards financial aid eligibility.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
SF	Self Service	Request Parking Permit	Allow the student to request a parking permit online	The student requests a parking permit online and is then billed for that permit and a decal is mailed to them.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
SR	Advisement	Advisement	Setting and releasing of registration holds.	A set of pages summarizing the student's academic record pertinent to the advisement process.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
SR	Self Service	Extended Education Quick Admit/Quick Enroll	Provide Extended Education students the opportunity to register online as they did in our legacy system. This capability must be linked to LDAP for authentication.	Modifications were required to the baseline delivered self service functionality. An LDAP interface was required for authentication, we limit the terms available for registration, and we modified term activation to accommodate our requirements.		PeopleSoft pages, Component interface		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
SR	Self Service	Self Service Schedule of Classes Enhancements	Provide an easier class search for student lookup	This modification provides a single more concise search page. We control the terms available for selection. In addition, there is a separation between credit extended education, non credit extended education and regular university classes.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
SR	Self Service	Redesign View My Class Schedule	Summarize and provide more information to our students about this class schedule.	The location of the class is linked to our campus maps, the faculty ids are linked to the instructor's web page if available, and all information will print on a single page.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209

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SR	Self Service	Class Roster Enhancements	Provide additional student information	Plans, student level , enrollment status and course indicators were added to the roster. Course indicators lists the grade a student received in department identified associated courses. An additional page allows the faculty to generate more permission numbers.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
SR	Self Service	Student Inquiry/Applicant Inquiry	Provide a campus view of student information through a single navigation path	Provides departmental access to required student data. It consists of a series of pages grouped by term, course, transfer, test scores and bio/demo. This information is available for both students and applicants.		PeopleSoft pages		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6209
SR	Transcripts	Official/Unofficial/Audit Transcript	Reproduce our current official transcript and batch transcript processing	Duplicate the format and functionality of our legacy official transcript. Create a process to run batch transcripts that have been held for grades and degree completion. It checks that all grades have been posted or that a degree has been posted.		Oracle package called by an SQR.		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	818-677-6213
SR	Enrollment - Cohort	Enroll students in a group of pre-defined classes	Enroll a group of students in a block of classes	Create a phantom course and let students enroll in just one class number. Create a process to swap the students to a block of pre-defined classes. This is used for the Freshmen connection program.	Med	PeopleSoft pages, SQR		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	
SR	Self Service	Order Textbooks Online	Allow students to order textbooks for their classes online through the campus designated bookstore website.	After students are enrolled in their classes, pass the enrolled class information to the bookstore designated web site via a link so students can order the textbooks online.	Small	PeopleSoft pages with Iscript.		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	
SR	Grading	Classes With No Grades	Provide department a method to find out classes that have not been approved at end of term	An inquiry page to allow departments to find out the classes that has not been set as ready for posting during grading period. Access is based on ACAD Org on the Operid.	Small	PeopleSoft Page		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	
SR	Grading	Incomplete Grades	Provide department a way to find out the list of students with incomplete grades	An inquiry page to allow departments to find out the students with incomplete grades by class	Small	PeopleSoft Page		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	
SR	Schedule of Classes	Supervision classes with multiple instructors	Provide a method for department to assign multiple instructors to a single class per course per term	Allow students to enroll in one class (per course per term). A page is provided to associate students with individual instructors using the PS delivered Instructor Edit field. An SQR to set the instructor edit field in class association. Faculty grade Roster is cloned to add security to allow the instructor to give grade to his/her students only. A SQR to create pseudo classes for classes with more than 9 instructors in APDB file extract.	Med	PeopleSoft Page, SQRs		Northridge	Daveen Kay	<a href="mailto:daveen.kay@csun.edu">daveen.kay@csun.edu</a>	
AD	3C	Checklist/Applicant Status Update	As applicants return their Enrollment Confirmation Deposits, an automated method of completing the appropriate checklist and changing the applicant's status was necessary.	Based on receipt of payment of a given item_type, and a corresponding initiated checklist, the checklist is completed and the applicant's status is updated to DEIN. (POM_AD002)	Med	SQR		Pomona	Tim Raymond	<a href="mailto:tiraymond@csupomona.edu">tiraymond@csupomona.edu</a>	909-869-6851
AD	Auto-Eval	Customize Auto-Eval	Delivered process was not suitable for our business process. We could not segregate, evaluate , and manipulate the applicants with the granularity necessary.	Added logic in assignment of Evaluation codes to allow accurate segregation. Added custom rating components to differentiate applicants with same OVER score for different reasons. Modified Trans GPA to pull from App. instead of highest in Education pages.	High	SQR		Pomona	Tim Raymond	<a href="mailto:tiraymond@csupomona.edu">tiraymond@csupomona.edu</a>	909-869-6851

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AD	Evaluations	Evaluation Helper	After the auto-eval is performed and an applicant's status is updated accordingly there is much more left for the analysts to do. Automating much of that saves a lot of time.	Applicant's in a given status as of the run date, are assigned the appropriate checklist items, appropriate prog reason (if necessary) and appropriate communication. (POM_AD506)	High	SQR		Pomona	Tim Raymond	<a href="mailto:tiraymond@csupomona.edu">tiraymond@csupomona.edu</a>	909-869-6851
AD	Matric	Mass Matric	The delivered Mass Change routines to Mass Matric applicants did not meet the needs of Cal Poly Pomona.	Custom SQR was developed to pull the and matric people who meet the criteria set by Admission for who should be matriculated. POM_AD501	Med	SQR		Pomona	Tim Raymond	<a href="mailto:tiraymond@csupomona.edu">tiraymond@csupomona.edu</a>	909-869-6851
AD	Self Service	Test Summary for Students	Students need access to view the test score information on file	Once the process was modified to accommodate advisors, the view was made available in the student self-service role	High	PS Objects Custom View		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-979-6379
SF		Parking Decal	Provides students the option to order a term parking permit during a designated time period.	Developed process to order and pay for a parking permit, records debit and credit to student account balance. (Parking permit is mailed to the student from Student Accounts)	High	PS Objects		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	
SR	Pre-requisite Checking	Pre-requisite Checking Using Test Scores	Cal Poly Pomona (CPP) uses both raw test scores as well as courses, as pre-requisites for enrollment in other courses. Additionally, there is a requirement by the Math Dept. that these raw test scores or course pre-requisites be taken within a specific	The milestones that were created have an effective date that corresponds to one day prior to the first day of the enrollment term, and are active for that term and all forward terms, until the next time the process runs and a new milestone record is created	High	PS Objects		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-869-4554
SR	Program Stack	Batch Discontinuation	Insert a discontinuation row for students not eligible to enroll	Using selected criteria on four specific populations, a discontinued row is inserted. (Students who have not enrolled for two successive terms; transitory student populations; students who failed to enroll after their date to return from leave of absence	High	Application Engine		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-869-2866
SR	Self Service	Grade Roster- Invalid Instr. Grade and not allow instructor to make changes after selecting "approved" status.	Campus wanted grades/marks not used by instructors removed from their view and did not want changes to the grade roster after the instructor marked it as approved.	Removed from view in the translate table the grades that were not valid for faculty use and grey out "Approval Box" once it has been selected and saved by the primary instructor.	High	PS Objects		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-979-6379
SR	Self Service	Test Summary and Email for Advisors	Advisors need to see test score detail and need access to email addresses for each student, as all/most notification is via email.	On the SS_ADV_ANYONE page, modified the Student Details options to include Academic Test Summary and email. New pages was developed to display this additional information.	High	PS Objects (New XLAT values)		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-979-6379
SR	Self Service	Permission List Instructor View	Instructors can only override class size, other overrides are done at the department level.	Using the batch process permissions numbers are created and a list of these numbers for each course are available to the Instructor in self-service. Only those numbers created via batch are viewable from class roster in Faculty Center. Uses link from	Med	SQR		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-979-6379
SR	Service Indicators	Batch Service Indicator Assignment	Sometimes Service Indicators need to be placed for an entire population of students.	Created a batch process to place or remove service indicator and reason codes from an flat file list of emplids. (POM_SR501)	Med	SQR		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-869-2866

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SR	Academic Standing	Assign Academic Standing	Academic Policy requires that disqualification be based on "Grade Point Balance" (GPB). It is also a requirement to use specific academic standings assigned in any prior term, not just the immediately preceding term.	Developed process and run control pages to calculate the Grade Point Balance (GPB) and created a new page to store the GPB for the CPP and Overall GPA. (Campus will view the GPB in the Unofficial Transcript view in self-service) (POM_SRAST, POM_SA106 -	High	PS Objects		Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-979-6379
SR	Open University	Open University Copy Schedule	Since any regular session can also have an Open University enrollment, the campus needed a systematic method to create an OU schedule	Copies existing class schedule within specified sessions, for a particular term. The copy process includes all salient class schedule fields by voids the enrollment count so that the class is reset to zero enrollments. All enrollment requirements are pr	Low	SQR	Regular Session Schedule	Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	909-979-6379
SR	Dropping a student	Administrative Drop	Faculty may drop a student who does not meet requisites or who does not attend the first day of class.	During a specified time period, faculty may drop a student by using the checkboxes on the Class Roster and selecting an "Drop Student" button. The drop student button only appears during the administrative drop time period.	Med			Pomona	Rose Kukla	<a href="mailto:rkukla@csupomona.edu">rkukla@csupomona.edu</a>	
AD	Transfer Credit	ASSIST Interface	To load both external catalogs and a large number of transfer rules in an efficient manner	The modification uses community college data from the statewide ASSIST database to populate external catalogs for California Community Colleges. It also translates the GE and articulation data from ASSIST into PS transfer credit rules. Along with this, there is a web page form for requesting additional rules to be built.	Very big on our part; would not be difficult for someone else to use.	Visual Basic for the initial job. The update job is being created in SQR.	Access to ASSIST files	San Jose	Dana Linder	<a href="mailto:dana.linder@sisu.edu">dana.linder@sisu.edu</a>	(408) 924-7313
All	Communication	Messaging System	To be able to communicate with all students electronically, without having to either depend on their e-mail addresses or create and maintain e-mail addresses for all applicants, students and alumni	This modification uses the workflow part of PS to make one-way messaging possible to individual students or groups of students. (External data loads of students numbers can be attached. Faculty can pull up a class roster, or a group of rosters and send to all or part of the students on the roster.) Students will be notified of waiting messages when they log into the portal.	Major - we hired consultants to do this.	PS Workflow	None	San Jose	Michael Dunefsky	<a href="mailto:michael.dunefsky@sisu.edu">michael.dunefsky@sisu.edu</a>	(408) 924-1672
CC	Bio-Demo Information	Duplicate ID Correction	To find duplicate IDs and efficiently determine which ID to keep. Helps in finding tables where data resides and in deleting unwanted IDs	One program loads the suspect duplicates it can find, then handles the deletion of IDs and creates a backup file of IDs deleted. This program also notifies users about which offices still need to review records and which records are in dispute. There is also a web page that allows users to add duplicate IDs to the program and to review and make recommendations of the duplicates that are found. A third program helps users locate the tables where IDs reside.	Large - duplicates are not easy to deal with.	Visual Basic, SQR and web page	None	San Jose	Dana Linder	<a href="mailto:dana.linder@sisu.edu">dana.linder@sisu.edu</a>	(408) 924-7313
CC	External Orgs	External Org cleanup and matching	Initially, the challenge was to eliminate duplicate orgs from our legacy database. We later used this program to match our legacy orgs against the delivered Ext Org table to determine which legacy orgs to add.	There are a series of web pages that use COSAR values to sort orgs by state or country, then place them in alpha order for review. In order to compare with delivered values, we also sorted them by state and then by name so we were able to spot duplicates.	Medium	Web pages	None	San Jose	Dana Linder	<a href="mailto:dana.linder@sisu.edu">dana.linder@sisu.edu</a>	(408) 924-7313

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SF	Tuition Calc/fee payment	Self Service Installment Payment Plan	To allow students to select an installment payment plan through self service, rather than having to see someone at the Bursar's Office.	This modification allows the Bursar's Office to turn on and off access to the Installment Payment plan by adding and deleting a word that is actually in the short description of the Installment Payment Plan itself.	Low - but process could use some improvement. We'd be willing to work with others to make this work better.	Nothing outside of PeopleSoft	None	San Jose	Michael Ridgway	<a href="mailto:michael.ridgway@sjsu.edu">michael.ridgway@sjsu.edu</a>	(408) 924-7314
AA	TC Processing	TC Adjust Entry Customization	No location to store TC Adjust amount prior to matriculation.	Application pages provide interface for storing a TC Adjustment prior to matriculation. SQR process will post and adjust PS_STDNT_CAR_TERM with the amount for the articulation term.	Low	SQR, App Designer	None.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
AA	TS130 Processing	CI Custom TS130 Process	Delivered process was not suitable for our business process. Transcripts are pre-coded with EMPLID prior to scanning and loading to reduce workload.	TS130 Load and TS130 Org Search processes modified to load the EMPLD into External ID table and automatically set the Person search status to complete and post. Org Search modified to force Course Post flag and retain person search statuses.	Medium	SQR	Tailored for CI Needs - may not fit another campus business process.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
AD	3Cs	Action/Reason Letter Assignment	Unable to assign and generate letters in a consistent format.	Allows user to map admissions program/action reason combinations to letter codes. Process then assigns unique communications to the applicant.	Low	SQR, App Designer	Clear use of program action/reasons and communications	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
AD	Reporting	Application Status Report	Required comprehensive application numbers for enrollment decisions.	Tabulates applicants by status (mapped from program action/reason combination) and academic plans.	Low	SQR, App Designer	Clear use of program action/reasons.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
AD	Reporting	Admissions Data Mart	Needed consistent accumulation of application data for processing, error, and ERS cleanup items.	Joins and flattens admissions data into six concise tables for use by PeopleSoft query.	Medium	SQR, App Designer	Understanding and evaluation of the data needs for your institution.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
AD	3Cs	Checklist Processor	Time consuming process to build tailored checklists for applicant populations.	Builds tailored checklists for various application populations, taking into account different checklist requirements for fees, transcripts, tests, and residency requirements. Processing is based upon program action/reason and will update that program action/reason upon checklist completion.	Medium	SQR, App Designer	Understanding of checklist usage and program action/reasons.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
AD	Test Scores	Suspended Test Scores Reset	CSU-CI did not want to create new persons in the system for received test scores, but keep the students in the suspense tables. Setting them to ignore causes them to be set to purge.	Searches for unmatched test scores set to purge and resets their status to await search again.	Low	SQR, App Designer	Search/Match "New" status should be set to "Ignore" for reset to work.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
AD	Interfaces	Hobsons Interface	No interface exists for transmitting information from CSU-CI to Hobsons Connect recruitment system.	Aggregates pertinent information for self-service to Hobsons.	Medium	SQR, App Designer	Requires detailed knowledge of data requirements and usage for third-party recruitment system.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
AD	Mentor Processing	Mentor Index Creation	Mentor processing moved too slowly, which prevents effective processing.	Created custom indexes specifically for accelerating Mentor processing for the campus.	Low	Indexes	None.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
CC	Reporting	ID Find Process	No method for finding and resolving duplicate IDs in the system.	SQR uses dynamic SQL statements to search every table with the various EMPLID fields (EMPLID, COMMON_ID, etc...) and looks for instances of a particular EmplID in the system.	Low	SQR, App Designer	Takes a long time to return information given the comprehensive search.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
CC	Security	Password Change Pages	Password changes take an exception amount of time for CMS staff to complete in the volume received.	Stripped down the User Profile pages to allow Help Desk and Enrollment Services staff to reset passwords to PeopleSoft based upon proper identification.	Low	App Designer	Understanding of security requirements for the campus and the system.	CI	Angela Stockmon	<a href="mailto:angela.stockmon@csuci.edu">angela.stockmon@csuci.edu</a>	805.437.3287

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CC	Security	Student Email Creation	Creates an on-campus e-mail address in the system for incoming students. Email is used for generating a new Operator ID.	Looks at incoming students and determines if the OCOMP address has been populated.	Low	SQR, App Designer	Need email address formula for generating unique email addresses	CI	Angela Stockmon	<a href="mailto:angela.stockmon@csuci.edu">angela.stockmon@csuci.edu</a>	805.437.3287
CC	3Cs	Custom Letter Generation	Complicated process for merging extracted data out of PeopleSoft Letter Generation	Cloned and modified PS Letter Generation to produce a usable *.dat file. The *.dat file contains all the information to automatically merge (based upon process instance number) from a central repository.	Medium	SQR	Requires changing the letter merging and distribution method. Also requires Microsoft Word and macros we've developed.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
CC	Interfaces	Quicksilver Interface	No direct interface between PeopleSoft and the Quicksilver library system.	SQR loads a custom table CI_QCKSLVR_TBL with a list of users for loading and updating into our Quicksilver system. Direct connection to Unisys for data pulls.	Medium	SQR, App Designer	Tailored for CI Needs, batch loaded for performance reasons, and direct connection to Unisys setup required.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
CC	Interfaces	Web Directory Interface	No direct interface between PeopleSoft and CI Web Directory	SQR loads a custom table with a list of staff/faculty information for our online directory. Direct connection to Unisys for data pulls required.	Low	SQR, App Designer	Tailored for CI Needs, batch loaded for performance reasons, and direct connection to Unisys setup required.	CI	Neal Fisch	<a href="mailto:neal.fisch@csuci.edu">neal.fisch@csuci.edu</a>	805.437.3278
CC	Interfaces	Web Calendar Interface	No direct interface between PeopleSoft and CI Web Calendar	SQR loads a custom table with a list of event information for our online calendar. Direct connection to Unisys for data pulls required. A second SQR allows for generating recurring events. Application pages used to set security and update event information for the Web Calendar	Medium	SQR, App Designer	Tailored for CI Needs, batch loaded for performance reasons, and direct connection to Unisys setup required.	CI	Neal Fisch	<a href="mailto:neal.fisch@csuci.edu">neal.fisch@csuci.edu</a>	805.437.3278
CC	Enhancement Request Tracking	System Enhancement Request	No centralized location for tracking system enhancement requests for evaluation by CI CMS Steering Team.	Application pages allows submission of enhancement requests and provide fields for functional and technical assessments. SQR generates a custom report for viewing ease.	Medium	SQR, App Designer	Tailored for CI Needs - but modeled after the CO CMS modification request process.	CI	Neal Fisch	<a href="mailto:neal.fisch@csuci.edu">neal.fisch@csuci.edu</a>	805.437.3278
CC	Interfaces	IDWorks Interface	No direct interface between PeopleSoft and IDWorks.	SQL View that provides student, faculty, and staff information for uploading into the IDWorks system for creating ID Cards	Low	App Designer	Tailored for CI Needs - needs to be coordinated with ID Card needs.	CI	Neal Fisch	<a href="mailto:neal.fisch@csuci.edu">neal.fisch@csuci.edu</a>	805.437.3278
CC	Interfaces	Web Application Interfaces	No comprehensive reference for PeopleSoft data made available to web applications.	A series of views for basic information used in web applications at CSU-CI. Includes a "check field" to allow a person to verify the check field for form population.	Medium	App Designer	Tailored for CI Needs - needs to be coordinated with web applications.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Facilities Processing	Room Utilization Report	No succinct report to analyze room utilization for a particular term.	SQR customized from CSU-Northridge to produce flattened room utilization information.	Low	SQR, App Designer	None.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Student Enrollment Report	No delivered aggregation for student enrollment figures.	SQR that generates the report based upon CSU-CI needs.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Enrollment Patterns Report	No delivered aggregation for student enrollment figures.	SQR that generates the report based upon CSU-CI needs.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Class Enrollment Report	No delivered aggregation for student enrollment figures.	SQR that generates the report based upon CSU-CI needs.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Class Roster Report	Delivered class roster does not provide enough information.	SQR produces class roster with addition information.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Printable Schedule of Classes Extract	No delivered extract for SOC information for printing.	SQR produces schedule of classes information for printing and general reporting.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Interfaces	BlackBoard Interface	Delivered LMS Extract was determined to not provide the correct information for BlackBoard usage at CSU-CI	SQR produces four extract files for loading students, faculty, and enrollment information.	Medium	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Expected Graduation Term Report	No delivered report for students by expected graduation term.	SQR produces the report used for tracking students with a particular expected graduation term.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279

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Module	Sub-Module	Modification Name	Business Challenge	Modification Description	Effort	Technology Used	Dependencies	Campus	Campus Contact Name	Campus Contact email	Campus Contact Phone
SR	Reporting	Grade Distribution Report	No delivered report for grade distribution information.	SQR produces the grade distribution information.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Interfaces	Diploma Interface	No delivered interface between PeopleSoft and Michael Sutter diploma printer.	SQR produces a *.csv file for diploma generation system.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Printable Course Catalog Report	No delivered extract for Course Catalog information for printing.	SQR produces a *.csv file for course catalog reporting and catalog printing through an external vendor.	Low	SQR, App Designer	Tailored for CI Needs.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Interfaces	Resource 25 Interface	No delivered interface between PeopleSoft and Resource 25 for room scheduling.	Application Designer modifications to create a real-time transfer for information between PeopleSoft and Resource 25.	Medium	App Designer	Resource 25 Configuration, External Database Connections, Oracle Accounts	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Interfaces	Credential Interface	No delivered interface between PeopleSoft and CI Custom Credential system.	Application pages allow for setup of Credential data. SQR loads a table for automatic data pull into our external system.	Medium	SQR, App Designer	External Database Connections, Oracle Accounts, VPN Connections.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Remediation Report	Delivered remediation report insufficient for campus-wide needs.	SQR produces a *.csv extract for tailored data needs - including contact lists, test information, and CMS remediation information.	Low	SQR, App Designer	Tailored for CI Needs	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Reporting	Student Records Data Mart	Needed consistent accumulation of student data for processing, error, and ERS cleanup items.	Joins and flattens student, enrollment, and catalog data into eleven concise tables for use by PeopleSoft query.	Medium	SQR, App Designer	Tailored for CI Needs	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Term Processing	Term Withdrawal Loader	No batch method of identifying and withdrawing students from terms for non-enrollment.	Selects individuals without enrollment but with active terms, inserts values into the PeopleSoft-delivered tables. Batch Withdrawal is then executed.	Low	SQR, App Designer	Consistent business process for term activation and withdrawal.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Term Processing	Program Stack Cleanup	No automated method for keeping program stacks in agreement with terms and enrollment.	Selects individuals without enrollment and updates the appropriate program stack for non-enrollment, discontinuation, or informal/formal leave.	Medium	SQR, App Designer	Consistent business process for terminating program stacks based on enrollment changes.	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SR	Transcripts	CI Custom Transcript Crystals	Delivered PeopleSoft transcript crystals were not applicable to our campus. Needed to be tailored for Channel Islands	Custom crystal reports utilizing the systemwide campus transcript customization.	Low	Crystal Reports	Tailored for CI Needs	CI	Joseph Dobzynski, Jr.	<a href="mailto:joseph.dobzynski@csuci.edu">joseph.dobzynski@csuci.edu</a>	805.437.3279
SF	CashNet	CashNet Online Payment Process	Needed an online method for students to pay fees.	This is a multi-part development effort. The process contains demographics, student balance, login information, setup pages, and a custom self-service login page.	Medium	SQR, App Designer, PL/SQL	Tailored for CI Needs	CI	Cory Landers	<a href="mailto:cory.landere@csuci.edu">cory.landere@csuci.edu</a>	805.437.3224
AD	Recruitment	Enrollment Report	Admissions and Recruitment needed more complete data to develop enrollment management plans	This report is a statistical report that includes the count of Students for a particular Student Group by Major, Gender, Ethnicity and Residency. It also includes the FTE.	Med	SQR	None	Maritime	Ram Madadi	<a href="mailto:rmadadi@csum.edu">rmadadi@csum.edu</a>	707.654.1726
AD	Recruitment	Weekly Admissions Report	Admissions and Recruitment needed more complete data to develop enrollment management plans	A statistical report of applicants for a specified term, broken down by app status, gender, ethnicity, class level, major, and geographical origin, and compared to prior like term.	Med	SQR	None	Maritime	Ram Madadi	<a href="mailto:rmadadi@csum.edu">rmadadi@csum.edu</a>	707.654.1726
ALL	LDAP	LDAP	Approximate single sign-on	Custom LDAP Authentication Code	High	PeopleCode	None	Maritime	Ram Madadi	<a href="mailto:rmadadi@csum.edu">rmadadi@csum.edu</a>	707.654.1726
SF	Payment of Fees	CASHNet	Needed to make payment of reg fees easier for students so they would pay more promptly.	CMA CASHNet Interface Project enables campus to take payments online from Students, Payments, Employees and potential Third Party Customers. There are new CIs added which will look up the Student Account for their student account fees.	High	PeopleCode, SQR	None	Maritime	Ram Madadi	<a href="mailto:rmadadi@csum.edu">rmadadi@csum.edu</a>	707.654.1726

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SR	Self Service	BookNow	Wanted seamless transition from registering for classes to purchases books for those classes.	Added a selection on page LRNSRV_MNGLRN_HOME to Order Books. When selected, data is sent to and a new page is opened on Follet's website. This page contains all of the books required for the classes the student is registered for. The data sent contains CMA Bookstore's ID, the current term, and the SUBJECT, CATALOG_NBR, and CLASS_SECTION for each class the student is registered for. This makes it easier for the students to purchase their books.	Med	PeopleCode	None	Maritime	Rich Bjorndal	<a href="mailto:rbjorndal@csum.edu">rbjorndal@csum.edu</a>	707.654.1724
SR	Student Records	Public Safety	This modification will allow only Public Safety Officers to view names and birthdates for students under the age of 21 only. The permission security list of the Peoplesoft system will only allow access who has a Public Safety role.	Helps the CMA Police services to collect and report incidents of underage students who are caught consuming alcohol.	Low	PeopleSoft pages	None	Maritime	Ram Madadi	<a href="mailto:rmadadi@csum.edu">rmadadi@csum.edu</a>	707.654.1726
SR	Student Records	R25	To decrease workload and increase accuracy.	Integrates R25 Scheduling into PS Student Records Scheduling	High	SQR	None	Maritime	Ram Madadi	<a href="mailto:rmadadi@csum.edu">rmadadi@csum.edu</a>	707.654.1726
AD	INTL Admissions	INTL Checklist	All International applicants need to submit TOEFL, financial statement, financial sponsor and an international application.	Automated process to Create the JGRINC checklist with the 4 checklist items runs daily to put a checklist on all new applications in the INTL application center.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	UGRD Admissions	UGRD Test Checklist	All Staff are having to manually assign ULDAMT(needs to take the SAT/ACT) checklist for lower division applicant in the UGRD application center in the UGRD program who do not have Residency is R with GPA greater or equal to 3 or Residency is N with GPA greater or equal to 3.61.	Automated process to Create the checklist runs daily to put the checklist if one doesn't exist. The checklist item update process is used to complete the Checklist item with an ACT/SAT	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	INTL Admissions	INTL Test Checklist	All Staff are having to manually assign JTSTSC(needs to take the GRE/GMAT/MAT) checklist for pbac apps in the INTL application center in the grad program.	Automated process to Create the checklist runs daily to put the checklist if one doesn't exist. The checklist item update process is used to complete the Checklist item with an GRE/GMAT/MAT	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	PBAC Admissions	PBAC Test Checklist	All Staff are having to manually assign CTSTSC(needs to take the GRE/GMAT/MAT) checklist for pbac apps in the INTL application center in the grad program.	Automated process to Create the checklist runs daily to put the checklist if one doesn't exist. The checklist item update process is used to complete the Checklist item with an GRE/GMAT/MAT	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	PBAC Admissions	Undergraduate degree verified checklist	Need a way for staff / program coordinators to see if the Undergraduate degree has been verified.	Automated process to Create the checklist runs daily to put the checklist if one doesn't exist. Then the process checks the education page for a degree with the transcript status of evaluated - also checks the program plan stack for an internal degree that is completed - to complete the checklist	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132

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Module	Sub-Module	Modification Name	Business Challenge	Modification Description	Effort	Technology Used	Dependencies	Campus	Campus Contact Name	Campus Contact email	Campus Contact Phone
AD	Pbac Admissions	Classified checklist	Need a way for to show the applicant that he/she has been classified.	Automated process to Create the checklist runs daily to put the checklist if one doesn't exist for all currently enrolled students and new applicants if the student standing has been set to "classified".	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Pbac Admissions	EPT Test checklist	Need a way for to show the applicant that he/she needs to take the EPT test.	Automated process to Create the checklist runs daily to put the checklist if one doesn't exist for that application and the EPT status is "U". Completes the checklist if the EPT status is no longer a "U"	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Pbac Admissions	ELM Test checklist	Need a way for to show the applicant that he/she needs to take the ELM test.	Automated process to Create the checklist runs daily to put the checklist if one doesn't exist for that application and the ELM status is "U". Completes the checklist if the ELM status is no longer a "U"	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	CRED Admissions	CBEST / CSET / RICA Test load	Need a way for to load CBEST/CSET/RICA tests	Manual process to load CBEST/CSET/RICA into a suspense table and run search/match/post.	High	SQR	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	CRED Admissions	CBEST / CSET / RICA Checklist	Need a way for to alert the Credential applicants that CBEST/CSET/RICA tests are needed	Automated process to create a CBEST/CSET/RICA checklist for all applicants - then complete based on scores on official tests.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Credential Admissions	Credential Program Application checklist	Need a way for to alert the applicant that we are needing a Credential application.	Automated process to Create the checklist runs daily to put the checklist if one doesn't exist for all new Credential applicants. The checklist is manually completed when the Credential app is verified.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Transcript Checklist (UTRANS)	Process needed to add a checklist item per school that we are requesting a transcript from	Automated process to Create the checklist runs daily to add or complete the checklist depending on the state of the Education page.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Accept Decline Modification	Need a way to open/close accept decline by app center/term	Created a screen which stores by term/app center the begin and end dates where the accept/decline link appears for all admits.	High	Record / PeopleCode on the Student Self Service Page	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Mass Matriculation	Process needed to add a mass matriculation row per app center/accept decline flag	Automated process to add a MATR/AUTO row for each app center with the option to mass matric only program status PM(pre matrices) or PM and AD(admits). Currently all FTF and INTL applicants are forced to Accept admission. The PeopleSoft Applicant Activation process has to run after the Mass Matriculation.	High	App Engine	Applicant Activation must run after to copy the admission stack to the record side.	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Mass Withdrawal	Process needed to mass deny all who failed auto admit with a program reason code that specifies the deny. All others who were not picked up in the auto admit processing are cancelled. A report is used to pick up the Denys and based on the program reason - returns a message that is mail merged into a denial letter.	Automated process to add a DENY or WAPP row for the specified population based on the run control.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	INTL Orientation and Insurance Holds	All International applicants need to attend orientation and supply proof of insurance. This is an enrollment hold until completed.	Automated process to Create the ORN and VIN holds on all new applications in the INTL application center. The VIN is re-added each fall for continuing.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132

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AD	Admissions	Basis of Admission / Student Standing	Most applicants based on residency / level / admit type/career/program/ eval status are given a specific basis and student standing so this can be automated	Automated process to add the basis and student standing for all newly admitted applicants based on their criteria.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	UAPFEE checklist / NAF service Indicator	Based on the application fee - places or releases the checklist/hold	Automated process to Create or complete the UAPFEE checklist / NAF service indicator	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	CON Service Indicator	Set Conditional Enrollment holds based on outstanding checklist items	Manually run process to Create the CON hold after add/drop date to place a future conditional hold on all applicants with outstanding checklist items. A scheduled process runs daily to complete the hold when all checklists are completed.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	EOP	EOP Status Process	Update the EOP Status reported in ERS based on the EOP page/and term activation	Manually run process to update the EOP status for the term being reported to the CO	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Residency Checklist	Based on the information loaded from Mentor into the staging table - if residency cannot be determined - a URESPA(parent info) or URESPPH(applicant info) or URESPPH (need residency questioner) checklist item is created and residency status is updated to an 'X' if not already an 'X'. A query is then run and based on the code - the proper letter is sent out.	Automated process runs daily to find residency problems and place a URESPPH checklist and the proper checklist item. The checklist is manually completed when the proper documentation is provided	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Residency Checklist Communication / Mail Merge	Process needed to pick up any applicants with the specified initiated checklist and adds the specified communication code and creates the specified csv file for mail merging into the correct Residency letters.	Manual process adds a communication row/csv file	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	PBAC Career Admissions	Grad Auto Admit	Process needed to automatically add an admit row for all grad applicants whose program coordinator's admitted to program - classified or conditionally classified. Process also needed to automatically add a deny row for those denied to program.	Automated process to add a ADMT/PROG row for the applicants who have been evaluated	High	App Engine	Eval Page must be filled out by the program coordinator	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	CRED Admissions	Credential Program Application verified	Process needed to automatically add an APPL/CACK program action/ reason (Credential application verified) row for all credential applicants whose has a completed LPRGAP(Credential application checklist).	Automated process to add a APPL/CACK row for the credential applicants whose checklist is completed	High	App Engine	LPRGAP checklist completed	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132

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AD	UGRD Admissions	File to Complete	Process needed to automatically add an APPL/COMP for all Undergrad applicants whose file is complete(all checklist items are completed). The staff then runs a query and works up all the APPL/COMP	Automated process to add a APPL/COMP row for the applicants whose documents are all in.	High	App Engine	all checklists completed	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Notice of Admission Communication / CSV file for mail merge	Process needed to pick up any newly admitted applicants by application center - adds a completed communication record and creates a row in a csv file for mail merging into a Notice of Admission	Manual process adds a communication row/csv file	High	SQR	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Incomplete Communication / CSV file for mail merge	Process needed to pick up any incomplete applicants by application center - adds a completed communication record and creates a row in a csv file for mail merging into a Incomplete letter	Manual process adds a communication row/csv file	High	SQR	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Admission Status Override	Process needed to pick up any newly admitted applicants - adds the proper admission status in the admission status override field. This is also updated if the applicant	Manual process adds a communication row/csv file	High	SQR	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	EOP	EOP Recruiting Category Insert	Update the Recruiting Category on all applications if there is any existing EOP recruiting category on any Prospect Record. The Recruiting Category on the Application shows on the Admission Inquiry Screen.	Automated process to update the EOP recruiting category for the current admission term	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Acknowledgement Communication / CSV file for mail merge	Process needed to pick up any new applicants by application center - adds a completed communication record and creates a row in a csv file for mail merging into a Acknowledgement letter	Manual process adds a communication row/csv file	High	SQR	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Campus Community / Admissions	Duplicate Service Indicator / Report	Need a way to stop activity on suspected duplicate records	Automated process adds a Dup service indicator on all records suspected as a duplicate. Also created a report for staff to view	High	SQR	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	PBAC Career Admissions	Grad Auto Evaluation	Process needed to facilitate paperless graduate admission	Automated process to alert program coordinators that a new applicant is being sent to them for review and admission decision. Also builds the evaluation page	High	App Engine	Applicant has a program action/reason of APPL/PROG or APPL/SPEC and no eval page	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Campus Community / Admissions	Housing Integration / Student Group	Process needed to rebuild the HOU student group from a file from Housing	Process to go through a list provided and return the emplid from a search/match - also rebuild the HOU student group	High	App Engine	file from Housing	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Campus Community / Admissions	Intl Insurance hold	Process needed to create an Intl Insurance hold based on a file	Process to go through a list provided and add the specified hold if one doesn't already exist	High	App Engine	file from International Admissions+H188	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132

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Module	Sub-Module	Modification Name	Business Challenge	Modification Description	Effort	Technology Used	Dependencies	Campus	Campus Contact Name	Campus Contact email	Campus Contact Phone
AD	Admissions	SSN Mismatch Checklist	Need a way to alert the applicant that the SSN they provided on their mentor application is different than the one we have.	Automated process runs daily to find all newly loaded returning applicants and checks the ssn against the existing national id and if different - create a checklist	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Campus Community / Admissions	Birthdate Mismatch Checklist	Need a way to alert the applicant that the birthdate they provided on their mentor application is different than the one we have.	Automated process runs daily to find all newly loaded returning applicants and checks the birthdate against the existing birthdate and if different - create a checklist	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Campus Community / Admissions	Name Mismatch Checklist	Need a way to alert the applicant that the primary name they provided on their mentor application is different than the one we have.	Automated process runs daily to find all newly loaded returning applicants and checks the primary name against the existing current primary name and if different - create a checklist	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Test Maintenance	Need a way to set all tests in the suspense file to "take no action" or back to "Search Match" or to "Purge" based on what we are doing with that particular test.	Manual process to adjust the processing flag for the specified test.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Audited/ Not Audited Service Indicator	All admitted applicants will have a positive "Audited" or negative "Not Audited" service indicator (official transcript impact) based on the information. If the student is a new student then he will get the "Audited" service indicator - meaning that all his student record information is in PeopleSoft.	Automated process to add the correct service indicator based on admit type/ and the existence of any enrollment history.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Intl Admissions	Intl admissions need to track of the applicant has a passport.	Need a way to alert the applicant that we are needing to verify their passport.	Automated process runs daily to give all new INTL applicants a passport checklist. This checklist is manually completed by staff.	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Admissions	Need an easy way for the query tool to pull the department/school from the plan.	Need a way to alert the applicant that we are needing to verify their passport.	Automated process runs daily rebuild the plan/dept/school table	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
AD	Campus Community	Relationships update	Need an easy way to keep the relationships page current	Automated process runs daily adjust the relationships page based on existing information	High	App Engine	None	Fresno	Dolores Charest	<a href="mailto:doloresc@csufresno.edu">doloresc@csufresno.edu</a>	559 278 7132
FA	Financial Aid	Add/Remove NFR Holds	Automatic release and removal of NFR Holds	Select students with NFR hold and units taken greater than or equal to 12 units to remove. Also selects students to add NFR hold that have dropped units after Financial Aid disbursement.	Med	Application Engine		Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559.278.411
FA	Financial Aid	Assign FAN Communication	Process needed to be able to assign an award letter communication when packaging	Assigns a Communication request based on awarding from Mass Packaging Processes.	Med	SQR		Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559.278.4111
FA	Financial Aid	Checklist Removal	No process to remove a checklist once the criteria has changed due to a subsequent ISIR received	Process will check the most recent ISIR received and will determine whether the checklist previously created is still needed. If it is no longer needed and the status is "Initiated", the process will remove the checklist.	Med	Application Engine		Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559.278.4111

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FA	Financial Aid	Custom Update Processes	Specific updates processes not provided in PS	Based on parameter options, it will fix NSLDS Loan year, set the disbursement hold flag for Condition Admits, update Budget Build Flag, populate EOP packaging variable, populate Work Study packaging variable and populate Aggregate Loan Limits packaging variable.	Med	SQR		Fresno	Rik Clausen	<a href="mailto:rik@csufresno.edu">rik@csufresno.edu</a>	559.278.4111
FA	Financial Aid	Packaging Update (SuperMod)	Customized module for Fresno with additional functionality not provided in the PS packaging module	Based on specific criteria, the module 1) sets the aid processing status flag for qualified students to Ready to Package, 2) determines students selected for Federal verification not yet verified and resets the processing status to Ready for Review, 3) identify students selected for institutional verification and the the flag to Select, 4) identify students with incomplete institutional verification and reset the status Ready to Review.	Med	SQR		Fresno	Rik Clausen	<a href="mailto:rik@csufresno.edu">rik@csufresno.edu</a>	559.278.4111
FA	Financial Aid	Loan Self Service Accept/Decline	PS delivered did not allow lender selection	Customized CSU Northridge module for online loan accept or decline with ability to select lender.	Med	PeopleTools		Fresno	Rik Clausen	<a href="mailto:rik@csufresno.edu">rik@csufresno.edu</a>	559.278.4111
FA	Financial Aid	SS Loan Origination Update	Update lender selection	Updates the Loan Origination Record with the lender destination number that was entered on the Self Service Accept/Decline Awards page.	Med	SQR		Fresno	Rik Clausen	<a href="mailto:rik@csufresno.edu">rik@csufresno.edu</a>	559.278.4111
FA	Financial Aid	SAP Batch Process	PS module did not meet Fresno criteria	Customized module to meet Fresno criteria for calculating and determining SAP status	Med	Application Engine		Fresno	Rik Clausen	<a href="mailto:rik@csufresno.edu">rik@csufresno.edu</a>	559.278.4111
FA	Financial Aid	Scholarship Letter	Not available in PS	Create .csv extract file for Scholarship Award Notification letter and assign a communication.	Med	Application Engine		Fresno	Rik Clausen	<a href="mailto:rik@csufresno.edu">rik@csufresno.edu</a>	559.278.4111
FA	Financial Aid	Set/Remove Service Indicators	Process to set, delete and reassign service indicators	Based on selection criteria for Fee Deferment, assignment, removal and reassignment of service indicator.	Med	Application Engine		Fresno	Rik Clausen	<a href="mailto:rik@csufresno.edu">rik@csufresno.edu</a>	559.278.4111
FA	Financial Aid	Update Checklist	Automatically update FAASAR checklist item to complete for packaging	For students only assigned the FAASAR checklist item, set to waived and status to complete	Med	Application Engine		Fresno	Rik Clausen	<a href="mailto:rik@csufresno.edu">rik@csufresno.edu</a>	559.278.4111
SF	Student Financials	Assign Refund Svc Ind	PeopleSoft does not deliver a process to prevent Student Financial Credit Balance Checks from being produced subsequent to student initiated drops or withdrawals. If the credit balance relates to an enrollment level change, Financial Aid and Student Financials need to review the refund check for accuracy. Student Financials needs to review the fees and Financial Aid needs to review the award package to ensure that all necessary adjustments have been made.	Automated process which evaluates units student is taking and placing No refund serice indicator on the account.	Med	SQR	Needs to be run after Group Post and before batch refund process	Fresno	Anna Wielicki	<a href="mailto:annaw@csufresno.edu">annaw@csufresno.edu</a>	559 278 4604
SF	Student Financials	Automatic Release of NFR Holds	Needs way of removing negaive service indicator		Med	App Engine	None	Fresno	David Morilla	<a href="mailto:dmorilla@csufresno.edu">dmorilla@csufresno.edu</a>	559 278 4604

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SF	Student Financials	Build Cred Hist Temp table	PS delivered process called Credit History runs 8 to 10 hours . It places negative service indicator on students who should be excluded for the run (Students on financial aid deferral) Delivered process does not allow user to exclude this group.	Process creates list of ID's to be used by Credit History process to assign negative service indicator to over due accounts.	Med	SQR	Needs to be run before Credit History job	Fresno	Anna Wielicki	<a href="mailto:annaw@csufresno.edu">annaw@csufresno.edu</a>	559 278 4604
SF	Student Financials	Cashnet Downloads	Need a way to lookup balance and Student Id when Cashier is entering payment	Process creates 3 files to be used by the CashNet.com system in case on line lookup is not working. Cashnet.com ftp's all 3 files to their server every night.	Med	SQR	None	Fresno	Anna Wielicki	<a href="mailto:annaw@csufresno.edu">annaw@csufresno.edu</a>	559 278 4604
SF	Student Financials	Ebill Extract File Creation- Cashnet	Need a way of billing students	This process will create a Ebill Student extract file from the Peoplesoft Student Financials related billing tables. It will utilize a new temporary table in which the data will be deleted at the beginning of each run of the job. File is used by Cashnet.com to create Statements for students	Med	SQR	PS delivered Student Bill process needs to be run first	Fresno	John Howell	<a href="mailto:jhowell@csufresno.edu">jhowell@csufresno.edu</a>	559 278 4604
SF	Student Financials	Ebill Sponsor File Extract	Need a way of billing Sponsors	This process will create a Ebill Sponsor extract file from the Peoplesoft Student Financials related billing tables. It will utilize a new temporary table in which the data will be deleted at the beginning of each run of the job. File is used by Cashnet.com to create Invoices for Sponsors.	Med	SQR	PS delivered Sponsor Bill process needs to be run first	Fresno	John Howell	<a href="mailto:jhowell@csufresno.edu">jhowell@csufresno.edu</a>	559 278 4604
SF	Student Financials	Null Date Update	When the financial aid office reverses as disbursement to a student's account, often the refund item type becomes unapplied. PS does not allow a way to insert a due date for the new charge. The system looks at the null date in the installation setup for the due date. The null date currently defaults to 01/01/2500 or there may be a billing date in the null date which acts as the due date for the charge. Since the due date is a date in the future, students can register even if they have a financial aid over award. A program needed to be written to automate the null date setting to the current system date so it does not have to be changed daily by staff. This will block students from registering if they owe the university.	Update Null Date to the sysdate	Med	SQR	None	Fresno	Anna Wielicki	<a href="mailto:annaw@csufresno.edu">annaw@csufresno.edu</a>	559 278 4604

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SF	Student Financials	Item Term Synchronization	At certain times of the year, posting of student financial transactions results in the accounting term for the transaction being different than the item term for the truncation. This results in the student seeing an apparent mismatch of charge/payment activity on the account summary screen.	Synchronize the item and accounting terms to actual activity with the item term being the primary value.	med	SQR	None	Fresno	Anna Wielicki	<a href="mailto:annaw@csufresno.edu">annaw@csufresno.edu</a>	559 278 4604
SF	Student Financials	Application Fee Reconciliation	Needed to be able to report Application Fees	A report listing all applications by students by fee status multiply by the amount due and compared to the amount credited in the General Ledger	Med	SQR	None	Fresno	Anna Wielicki	<a href="mailto:annaw@csufresno.edu">annaw@csufresno.edu</a>	559 278 4604
SF	Student Financials	Fee Reconciliation	Needed to be able to report student fees per Career	A report listing all enrolled students by career, number of units, amount charged by tuition calc. and amount credited in the General Ledger.	Med	SQR	None	Fresno	Anna Wielicki	<a href="mailto:annaw@csufresno.edu">annaw@csufresno.edu</a>	559 278 4604
SR	Student Records	Approve All Fully Graded Grade Rosters (FR_SA_SR_02852)	Each Semester ~200 Grade Rosters left fully graded but not approved	Change the status of all fully graded classes (but not approved status) to approved	Low	App Designer/ App Engine	None	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2225
SR	Student Records	Assign Registration Priority (FR_SA_SR_00397)	Campus Business Process assigns Registration Priority based on several criteria	Assign Student Groups based on Campus Business Processes for Registration Priority	Med	App Designer/ App Engine	None	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2226
SR	Student Records	Cancellation of Students from Term for Disqualification (FR_SA_SR_00618)	Cancel Students from a term and disenroll from courses if Academic Status in DISQ	Add DISQ students to a new Term_WD_Request_ID (HDR and DTL) to be withdrawn by PS process	High	App Designer/ SQR	Run Term Withdrawal/ Cancellation with returned Request ID	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2227
SR	Student Records	Drop Students from Same Class 'I' Grade in Last 2 Years (FR_SA_SR_00985)	Don't allow student to repeat enrollment in classes that currently have outstanding "I" grades	Create Drop Requests from current enroll term class that repeats a course that has an 'I' grade for previous 2 years	Medium	App Designer/ SQR	Grade Lapse (I to IC) run	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2228
SR	Student Records	Email Previous Terms Grade Changes to Instructor (FR_SA_SR_01060)	Notify the Instructor if a Grade Change is made to a student in their class	Process will email the instructor (or department head) if a grade is changed on a student's record (since last run date)	High	App Designer/ SQR	None	Fresno	John Howell	<a href="mailto:jhowell@csufresno.edu">jhowell@csufresno.edu</a>	559-278-4303
SR	Student Records	Emails to Students Enrolled in Classes from the Waitlist (FR_SA_SR_01063)	Need to notify students when they are enrolled in a class from the Waitlist	Process will notify students when they are enrolled in a class from the Waitlist	Medium	App Designer/ SQR	None	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2230
SR	Student Records	Grade Roster Email (FR_SA_SR_00748)	Emails Grade Roster Approved status to Instructor, Registrar and Assistant Registrar	When a grade roster is approved and saved in the Faculty Center the Instructor, Registrar and Assistant Registrar are emailed an acknowledgment	Medium	App Designer/ PeopleCode	None	Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559-278-4113
SR	Student Records	Limit Class Search Terms Setup (FR_SA_SR_00415)	Too many terms available in class search (too confusing for staff and students)	Limits Selectable terms in Class Search to 3 terms	Medium	App Designer/ PeopleCode	None	Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559-278-4113
SR	Student Records	RD Grade Processing (FR_SA_SR_00747)	Blank grades causing problem with Financial Aid and Degree Progress Reports	Create Enrollment Request Id to change blank grades to RD grades at very end of grading cycle	Medium	App Designer/SQR	Run Block Enroll Merge with returned Request ID	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2233
SR	Student Records	Set RP Grades for 298 & 299 Courses (FR_SA_SR_00744)	All 298 and 299 classes are one year long, but students enroll in classes in Fall and Spring. All Fall grades need to be set to RP.	Create Enrollment Request Id to change blank grades to RP grades for every student enrolled in classes with catalog number 298 or 299	Medium	App Designer/SQR	Run Block Enroll Merge with returned Request ID	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2237
SR	Student Records	Set Disqualification Service Indicators (FR_SA_SR_00608)	After a student has been changed to an Academic Standing of DISQ, need to prevent further enrollment	Insert a DIS row into the Service Indicator and Service Indicator Audit tables for students who have a DISQ Academic Standing and not the DIS Service Indicator	Medium	App Designer/ SQR	DIS Service Indicator set up with "hold" impact and DISQ Academic Standing setup	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2235

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SR	Student Records	Zero Unit Withdrawals/Batch Term Withdrawal (FR_SA_SR_00810)	Students are dropping from all their classes, but not term withdrawing (pro-rated fees not calculating)	Adds students that have completely Dropped or Withdrawn from all their classes for the term to a Term_WD_Request_ID. (PS program post the Withdrawal) and 3rd step completes process.	Medium	App Designer/ SQR	Run Term Withdrawal/ Cancellation with returned Request ID	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2243
SR	Student Records	SR - SF Cancel/Withdraw Change (FR_SA_SR_00902)	During certain times in the cycle, the Registrar's office needs to change the action/reason/date for a batch withdrawal (created by Student Financials for non-payment of fees)	Process will change action/reason/date for a given Request ID before the mass cancellation process is run.	Low	App Designer/ SQR	Request ID created/populated by Student Financials	Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559-278-4113
SR	Student Records	Reset Enrollment Eligibility Flag (FR_SA_SR_00894)	After Term withdrawal for non-payment of fees, at certain times in the cycle we want to allow students to be able to enroll again.	Process sets the Eligible-to-Enroll flag back on for a specific batch of students who were batch withdrawn.	Low	App Designer/ SQR	Run with Batch ID provided use for Batch withdrawl	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2234
SR	Student Records	Stack Discontinuation Processing (FR_SA_SR_00465 and 00825)	Need a way to discontinue Non-Active Program stacks	2 processes (one for PBAC and one for UGRD) discontinue Program stacks based on a multitude of campus business practices	High	App Designer/ SQR	Must be durring a term after census	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2240
SR	Student Records	Term Activation Custom Population (FR_SA_SR_00465)	Delivered PS functionality does not have parameters specific enough to term activate the precise population desired for continuing students	Populates Term Activation Custom Population Table (PS_TRMAC_CUST_PPLT) for Continuing Students based on complex campus policies	High	App Designer/ App Engine	Run the Term Activation Batch Process with Run Control defined in Fresno process	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2242
SR	Student Records	Excess Units Petition(FR_SA_SR_3137)	Need a place to store Excess Units Petitioned that can be used to set Overrides for Student_Car_Term Values	New records/page used to store Excess Units that are Petitions by students. Processes will not overwrite these values in Term Activation	Medium	App Designer/ PeopleCode	None	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2243
SR	Student Records	Set Unit Enroll Limits for Students	Need to set enrollment minimum units for athletes and International students and enrollment maximum units for GPA, Cred and Transitory students	Process will set term activation limits based on checkboxes on page. If the Excess Units Petitioned is populated, the values will not change.	High	App Designer/ App Engine	Excess Units Petition Mod must be in place first	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2238
SR	Student Records	Students In Terms Reports (FR_SA_SR_3053)	All Departments, Schools, Majors, Groups want reports that return all kinds of different data. Try to make one quick flexible reporting tool that is easy for end users to utilize.	Create Excel spread sheet from inputs (Term Range, and OPTIONAL: Careers, School, Program, Department, Program, Multiple Majors, Multiple Stdnt Groups, Student Levels, Ethnicities Min/Max Term GPA, Min/Max Cum GPA, or Min/Max Term Units) and creates outputs (Term, Career, Program, Plan Code, Plan Description, Name, Student ID, Term GPA, CumGPA, Term Units, and Total Cum Units and OPTIONAL: Academic Level, , Ethnic Code, Ethnic Group, Gender, Residency, Student Age (in Years), Degree Application Status, Mailing Address, Home Address, Preferred Email, Campus E-mail, Preferred Phone, Home Phone)	Medium	App Designer/ PeopleCode/ SQR	None	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2243
SR	Student Records	Test Score to Milestone load (FR_SA_SR_3000)	Need to be able to use test scores as pre-requisites for classes	Created a process to easily load test scores from Excel spreadsheet into Test table, then create Milestones from the test scores. (Milestones are then used as prerequisite)	High	App Designer/ App Engine	Testscore and Milestone setups	Fresno	Holly Baum	<a href="mailto:hbaum@csufresno.edu">hbaum@csufresno.edu</a>	559-278-2243
SR	Student Center	Student Center Modifications	Several changes needed to meet Campus business needs	Several changes made to meet Campus business needs	High	App Designer/ PeopleCode	None	Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559-278-4111
SR	Faculty Center	Faculty Center Modifications	Several changes needed to meet Campus business needs	Several changes made to meet Campus business needs	High	App Designer/ PeopleCode	None	Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559-278-4112
SR	Advisement	Advisement Modifications	Several changes needed to meet Campus business needs	Several changes made to meet Campus business needs	High	App Designer/ PeopleCode	None	Fresno	Rik Clausen	<a href="mailto:rikc@csufresno.edu">rikc@csufresno.edu</a>	559-278-4113

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AA	Process Transfer Credit	Transfer Credit Batch	To model large number of students' transfer credit.	A PeopleSoft bolt-on batch process to simulate the Fetch, Calculate, Post/UnPost functions performed online. There are 3 types of selection criteria where user defines it at run time: 1. New Student still in applicant status 2. New Student in Matriculated status 3. Returning student currently enrolled.	Med	Application Engine, Component Interface	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Process Transfer Credit	Test Credit Batch	To model large number of students' test credit.	A PeopleSoft bolt-on batch process to simulate the Fetch, Calculate, Post/UnPost functions performed online. There are 2 types of selection criteria where user defines it at run time: 1. New Student still in applicant status 2. New Student in Matriculated status	Med	Application Engine, Component Interface	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Process Transfer Credit	Transfer Credit Copy Units Push Button	To post large number of students' transfer credit after matriculation.	A PeopleSoft bolt-on batch process to simulate the online posting process.	Med	Application Engine, Component Interface	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Self-Service	Test Summary	Allowing students to view scores of tests taken prior to admission or graduation.	A PeopleSoft bolt-on view only inquiry page that allows a student to see their tests taken, test dates, and test scores online thru Self-service.	Low	Online process, page, view	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Advising	Writing Proficiency Exam (WPE) Milestone	Batch posting of milestones used to note status of the Graduation Writing Assessment Requirement (GWAR), which is tracked in the audit as part of the graduation evaluation process.	A PeopleSoft bolt-on batch process to create a milestone when the student passed or was waived the Writing Proficiency Exam.	High	Application Engine	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Communications	Transfers Checklist Update	Checklists are created manually by the evaluator when continuing students' external transcript are required. The challenge was to track receipt of the transcripts processed thru EDI and update checklist/items.	A PeopleSoft bolt-on batch process to update the checklist/items status to "Completed" when transcripts are received thru EDI. The process also updates the Checklist Item Update flag from the education page.	High	Application Engine	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Advising	Writing Proficiency Exam Test Score Load	Entering WPE test scores (GWAR) into PS system by batch.	Reads from a flat file created by Testing Department and populates the Test Results tables.	Med	SQR	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Advising	Writing Proficiency Exam Email Generation	Notify students of their WPE test scores (GWAR)	Two step process: 1) Run the WPE Email notification process to populate the 3C communication tables. 2) Run the Letter Generation process to generate the data file for JetForm Email technology. Emails are sent out thru our email server.	Med	Application Engine	1. New test scores have to be loaded first. 2. Run the LetterGen process. 3. JetForm	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Athletics	NCAA Eligibility Tracking	Track athletes' academic performance and NCAA compliance.	1) Create an online application using PeopleSoft objects. 2) Create reports used by the Athletic department	High	PeopleTools and SQR and Crystal Report	CS-Link for the reports	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817

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AA	Graduation	Commencement Extract	Identify students who have either graduated or planned to graduate within a five-term period, their degrees and majors. The Commencement ofc uses this to create a camera ready copy for printing a book that is distributed at the ceremony.	Data is extracted from PeopleSoft to a flat file and sent to the Commencement office.	Med	SQR	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Graduation	Diploma Load	Identify students who have graduated, for loading into the Diploma Tracking component, by individual student and by batch. This process is used to print diplomas and certificates in-house.	1) Load eligible students into the Diploma Tracking system by batch 2) Load an individual student into the Diploma Tracking system	High	Application Engine	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Graduation	Diploma Tracking	Identify the status of students' diploma printing, tracking method of issuance, communicating diploma print status, sending reminder communications.	1) Diploma Preference - allow students to select either send the diploma by mail or pickup in person. 2) Diploma Tracking - keep track of transactions from when the diploma is printed to changes and modifications to delivery.	High	PeopleTools	None	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Graduation	Diploma Print Process	Printing diplomas and certificates in-house instead of outside vendor. Allows printing by batch and by individual diploma/certificates, and immediate print capability.	1) Diploma Printing by batch - an automated process to print diplomas thru JetForm 2) Diploma Printing by manual - CS-Link report that allow users to print diplomas by special request	High	PeopleTools, JetForm, CS-Link, MSWord	JetForm, CS-Link	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Graduation	Diploma Letter	Communication segment of the Diploma component, that emails students once diplomas or certificates are ready for pickup or have been mailed.	1) Diploma Notification thru Email 2) Diploma Reminder Email and Letter	High	PeopleTools, SQR, JetForm, CS-Link	JetForm, CS-Link	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AA	Advising	Writing Proficiency Exam Conversion from GMAT/GRE for GVAR clearance.	Converts GMAT/GRE scores to fulfill the GVAR requirement	Converts GMAT/GRE scores to fulfill WPE requirement	Med	SQR	None	LB	Claudia Tokumoto Paul Sandness	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a> <a href="mailto:psandnes@csulb.edu">psandnes@csulb.edu</a>	562-985-2817 562-985-8987
AA	Advisor Requests	Advisor Request System	Tool for advisors to notify Enrollment Services of substitutions and waivers of degree requirements, changes of majors, addition of subplan to student record. Reduces paper, eliminates processing delays, provides more accurate degree audits.	A PeopleSoft bolt-on for submitting, approving and responding to advisor requests. Examples: change of major, substitutions and waivers, etc. Also includes a worklist and email notifications to advisor and student.	High	PeopleTools	Email notifications use JetForms and CS-Link 3rd party tools.	LB	Claudia Tokumoto	<a href="mailto:ctokumot@csulb.edu">ctokumot@csulb.edu</a>	562-985-2817
AD	Checklists	Checklist Assignment	Needed an automated process to Create checklist and checklist items when applications are received and transcripts are needed.	A PeopleSoft bolt-on process to create checklist and checklist items based on values defined by user.	Med	Application Engine	None	LB	Jessica Wagoner	<a href="mailto:jwagoner@csulb.edu">jwagoner@csulb.edu</a>	562-985-4652
AD	Develop Enrollment	Basis of Admission	Set defaults for Basis of Admission	A PeopleSoft bolt-on process to set a default value for the Basis of Admission code.	Med	Application Engine	None	LB	Jessica Wagoner	<a href="mailto:jwagoner@csulb.edu">jwagoner@csulb.edu</a>	562-985-4652
AD	Develop Enrollment	FTF Impaction Evaluation	Further evaluation is needed for First Time Freshmen for impacted school.	A PeopleSoft bolt-on process to evaluate First Time Freshmen admission applications. Setup is done online and the process classifies the students into different categories: admit, deny, or redirect. Communications are assigned to these students.	High	SQR, online setup pages	CSU Evaluation Process	LB	Jessica Wagoner	<a href="mailto:jwagoner@csulb.edu">jwagoner@csulb.edu</a>	562-985-4652

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AD	Develop Enrollment	GRAD Admission Decision	A process was needed to automate the communication between the departments on campus and the Admissions Office. The departments receive reports from Admission informing them of applicants waiting for an admission decision. The department personnel can go online and enter the admission decision.	A PeopleSoft bolt-on process to evaluate graduate students for admission purposes. A series of criteria are defined by user. Those students who pass the criteria would be granted admission and those who didn't pass would be denied. If information is missing, those students would be rejected by the process and a report is generated for manual review.	High	Application Engine	None	LB	Jessica Wagoner	<a href="mailto:iwagoner@csulb.edu">iwagoner@csulb.edu</a>	562-985-4652
AD	SEVIS	SEVIS Domestic Address	It is required to report to SEVIS when foreign students change their domestic addresses. Because students are allowed to update addresses thru self-service (but not the SEVIS address), it is very hard to keep track of the changes.	A PeopleSoft bolt-on process to compare the student's mailing address with the SEVIS domestic address. If they are different, then SEVIS domestic address will be updated. These changes will be captured by the Alert process and SEVIS will be notified.	Med	SQR	None	LB	Jessica Wagoner	<a href="mailto:iwagoner@csulb.edu">iwagoner@csulb.edu</a>	562-985-4652
AD	Accept Admission	SS Accept/Decline and Enrollment Deposit	Allow students to accept admission online, but collect the enrollment deposit first.	Setup and self-service pages to enable online accept/decline of admissions offer. If accepted, student must pay the enrollment deposit first. Delivered accept/decline was replaced with campus bolt-on to enable more granular population controls and real-time payment.	High	PeopleTools, CashNet eCheckout	CashNet eCommerce	LB	Peter Thompson	<a href="mailto:pthompo@csulb.edu">pthompo@csulb.edu</a>	562-985-8760
AD	Orientation Signup	SOAR new student orientation signup and tracking.	All new freshmen and undergrad transfers must sign up and attend an orientation day. Some sessions are overnight.	A bolt-on with setup and orientation enrollment tracking table. Also a self-service bolt-on so students can sign themselves up.	High	PeopleTools	None	LB	Peter Thompson	<a href="mailto:pthompo@csulb.edu">pthompo@csulb.edu</a>	562-985-8760
All	Run Controls	Delete Old Run Controls	Some users accumulate a large number of run controls. PS provides no way to delete the obsolete ones.	Three step process: 1) An administrator sets up a list of eligible users. 2) The users go to a custom page where they see all their run controls and mark some for deletion. 3) A scheduled SQR deletes the marked run controls and their child records.	Med	PeopleTools, SQR	None	LB	Jesus Lu	<a href="mailto:ilu@csulb.edu">ilu@csulb.edu</a>	562-985-8345
All	FTP Files	Unix File Folder Cleanup	Without access to Unix shell scripts, perform cleanup of old files in Unix FTP folders.	A properties file contains file deletion rules (nbr of days) for each application folder and subfolder. An SQR reads the properties file and does a "call system" to delete old files.	Low	SQR	None	LB	Peter Thompson	<a href="mailto:pthompo@csulb.edu">pthompo@csulb.edu</a>	562-985-8760
All	Security	Export security matrix	View the current setup of all page security.	Export all page security details in a matrix of roles X components. Send to a flat, delimited format. Use an Excel macro to import and format the output.	Med	SQR	LB SA naming standard for input parameters. CS-Link SQR environment.	LB	Peter Thompson	<a href="mailto:pthompo@csulb.edu">pthompo@csulb.edu</a>	562-985-8760
All	Security	Delete duplicate or erroneous Emplids	Emplids are used as the key in many tables. If an ID needs to be deleted, all those tables are affected.	Place one or more Emplids in a flat file. An SQR creates the Delete SQL to remove rows of data from all tables containing the ID.	Low	SQR	Assumes that the field name is Emplid.	LB	Vicki McAlister	<a href="mailto:vmcalist@csulb.edu">vmcalist@csulb.edu</a>	562-985-8722

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Module	Sub-Module	Modification Name	Business Challenge	Modification Description	Effort	Technology Used	Dependencies	Campus	Campus Contact Name	Campus Contact email	Campus Contact Phone
CC	Communications	3C Helper	Assigning different kind of letters to students in large quantity is not something that can be accomplished manually. Mass Change is not flexible nor is user friendly. The 3C Helper was mainly designed to replace Mass Change. Enhancements were added to insert Program Action/Reason into Admissions applications, assign recruiting categories, and add service indicators.	A PeopleSoft bolt-on process to assign letter codes, insert admission program status, and assign recruitment category. User defines the population selection criteria and what actions to take. For Letter Code assignment, the application engine program populates the Mass Change temp tables with the right values. Then, 3C Engine is run to create the communications and the Letter Gen process to complete the communications and to generate the data file for letter printing.	High	Application Engine	None	LB	Jessica Wagoner	<a href="mailto:iwagoner@csulb.edu">iwagoner@csulb.edu</a>	562-985-4652
CC	Checklists	Checklist Update	Needed an automated process to mass Update checklist and checklist item status when transcripts and/or test scores are received.	A PeopleSoft bolt-on process designed to do two things: 1. Update the checklist item to "completed" status when transcripts are received thru the EDI process. If all items are received, then the checklist will also get updated with "completed" status. The checklist Item Update flag from the Education page will be turned off. 2. Update checklist/item status when test scores are received and turn off the Checklist Item Update flag from the Test Results page. User defines the checklist code and the checklist item code.	Med	Application Engine	None	LB	Jessica Wagoner	<a href="mailto:iwagoner@csulb.edu">iwagoner@csulb.edu</a>	562-985-4652
CC	BioDem Data	Load Campus Email Addresses	Keeping PeopleSoft data in synch when Campus Email addresses are created and maintained in a different system.	Flat-file feed from the email system is loaded nightly into PeopleSoft. Data is compared and updated. Invalid addresses are output to a file.	Low	SQR	None	LB	Peter Thompson	<a href="mailto:pthomps@csulb.edu">pthomps@csulb.edu</a>	562-985-8760
CC	BioDem Data	Delete Campus Email Addresses	Deleting invalid campus email addresses from PeopleSoft.	Flat-file that was generated by the load process is used as input. Invalid addresses are deleted. Because the delete process is separate, it can also be used to delete lists of non-campus addresses as well.	Low	SQR	None	LB	Peter Thompson	<a href="mailto:pthomps@csulb.edu">pthomps@csulb.edu</a>	562-985-8760
CC	Communications	Label Generator	Print labels for cards or envelopes for ad-hoc populations.	Flat-file list of emplids is read by an SQR which then produces formatted labels, a report view of the labels and a flat data file.	Med	SQR	Looks up data from RDS reporting instance. Label file is processed by JetForms and CS-Link 3rd-party tools.	LB	Peter Thompson	<a href="mailto:pthomps@csulb.edu">pthomps@csulb.edu</a>	562-985-8760
CC	BioDem Data	ID Lookup	Allow campus help desk to confirm current status of students, faculty and staff without exposing personal data.	When emplid is entered, a custom page shows masked personal data and a summary of role status.	Low	PeopleTools	Looks up role data from a custom LDAP interface table.	LB	Peter Thompson	<a href="mailto:pthomps@csulb.edu">pthomps@csulb.edu</a>	562-985-8760
FA	Apply for Financial Aid	FA Term Academic Level Update	In PeopleSoft, when a transfer student is matriculated but their transfer credit has not yet been posted, FA Term builds the student as a Freshman instead of the correct upper classman level. This mod checks against the Admissions Academic Level and updates the FA Term Academic Level accordingly.	This process runs regularly to update grade levels as they may change for some students. This assures for the awarding of loans is at the correct loan limit. Updates academic level-related fields on FA Term table.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Checklists	Perkins Loan Entrance Interview Assignment	Assign Perkins Loan Entrance Interview checklist/checklist item(s) to students who have accepted Perkins loans.	Inserts a unique Perkins checklist for students who accepted their Perkins loan. This notifies the student that they will need to complete this requirement before receiving the Perkins loan.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325

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FA	Communications	FAN Letter Assignment	Assign award letters.	Inserts into the communication table for students who have been newly awarded or have an award revision.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Communications	Miscellaneous Letter Assignment	Provide capability to assign any communications as needed.	Reads and assigns communications from a flat file containing only EMPLIDs. This allows the user to select a specific group of students to get a specific communication such as Cred students who may be Pell eligible who need to know the requirements of receiving this fund.	Med	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Communications	Missing Documents Letter	Create letter listing missing documents, with attachments of forms to be submitted, in JetForms.	Involves modifying the existing PeopleSoft-delivered letter gen program and creating custom sqc to work with templates created in JetForms. This a technical process to align with the JetForms format for our documents.	Med	SQR and related SQCs	Letter/form templates created in JetForms	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Communications/Checklists	Checklist 2 Process	Process checklists/communications based on business requirements not met by PeopleSoft or Baseline.	Creates checklists and communication.	Low	SQR	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Data Capture/Imaging	Imaging Import	Needed an automated approach to update data captured by Hershey Imaging Interface to PeopleSoft checklist, verification & related tables.	Reads flat file generated by Hershey and updates appropriate checklist(s)/checklist item(s), verification and related tables. Through campus ID, this process is able to update the items that have been submitted with the date of submission.	Med	AppEngine, Component Interface	Flat file is output from Hershey	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Exchange Financial Aid Data	Automate INAS Calculation	Students enrolled in only one semester need to have their EFC adjusted, and there was no automated way provided to accomplish this.	Updates budget duration fields on the ISIR page under CSS Rules from 9 months to 4 months before running batch INAS job (FAPINAS).	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Manage Need Analysis	Budget Locking Process	Prevent budgets from being recalculated in most situations once the initial budget has been determined.	Updates Budget Required flag on FA Term table so that when the budget process runs, it does not run on all student records. For those that are correct, most at the initial run, this process locks their budget.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Manage Need Analysis	FA Term Budget Flag Reset	When the final state fees determined by the CO were different than were originally used in creating students' budgets, we needed an automated approach to rebuild budgets for students with an active FA term.	Sets Budget Required flag on FA term to 'Y' this allows staff to manually select a particular student record to be prompted for a budget to be rebuilt for any reason, such as change in state residency.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Athletic/Presidential Batch Packaging Select Process	Step 1 of Batch Packaging process (Batch Packaging Select) does not select students without valid ISIR. This process allows mass packaging of athletes and presidential scholars for whom we have received an eligibility roster, but don't have an ISIR.	Inserts/Updates Batch Packaging Staging tables so that it will pick up students who do not have a valid ISIR because they are only an Athletic or a Pres scholar. These students need to be picked up to have their Athletic/Pres scholarships awarded to them.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Authorization Proration Fix	PeopleSoft Disbursement Proration functionality does not work correctly according to CSU rules, resulting in inaccurate amounts to be disbursed.	Updates student awards/disbursement tables with the correct prorated award amount based on enrollment status. For example, Cal grant std should only get half of their Cal grant award because he is enrolled in 6 units.	Med	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325

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FA	Package and Disburse Aid	Cal Grant B Access Grant Authorization Proration Fix	PeopleSoft Disbursement Proration functionality does not work correctly according to Cal Grant rules, resulting in inaccurate amounts to be disbursed.	Updates student awards/disbursement tables with the correct (rounded) disbursement amount based on enrollment status. For example, Cal grant student should only get \$387.00 of their \$775.00 Cal grant B access grant (not \$387.50) because he is enrolled in 6 units.	Med	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Batch Award Locking Mod	Provide capability to lock/unlock awards in batch so as to be able to selectively repackage awards.	Sets Lock Award flag on student awards and related tables. Allows specific funds to be "locked" so that when repackaging is run, these "locked" funds do not get changed; loans that have been disbursed is one example.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Cal Grant Over Ceiling Packaging Variable Update	Update packaging variable if student is over the income and/or asset ceilings to prevent awarding of Cal Grant in mass.	This process checks against the Cal Grant income and asset ceilings setup page and the ISIR to make sure Cal Grant students are meeting this requirement. If found that income/asset values are greater than the figures on the setup page, these records are checked at this variable field to prompt ineligible for Cal Grant.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Cal Grant Ready to Package Process	Select students for whom we have recently loaded Cal Grant data and has already been packaged but hasn't received a Cal Grant.	Sets Processing Status flag on Packaging Status Summary page to 'Ready for Packaging' so that when packaging is run again, students who recently became eligible for a Cal Grant will be repackaged with a Cal Grant.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Checklist 3 Process	Perform multiple Packaging Status Summary and Packaging Variable updates.	Updates numerous flags on Student Aid Attribute and FA Term tables, inserts students into generic student group, and updates packaging variables.	Med	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Ineligible Cal Grant Variable Removal	Zero out packaging variables for students not eligible for Cal Grant.	Updates student packaging variable table to blank out the fields packaging uses to select students for Cal Grant awarding. Students who become ineligible will not be picked up to get a Cal Grant award.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Loan Exit Interview Interface	Update FA Exit Interview flag from Edfund roster in batch.	Reads flat file produced by EdFund and inserts a checklist and updates Loan Exit Interview Status flag on Packaging Status Summary page to 'Complete'. This indicates that the student has completed the Exit Loan Interview requirement.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	NSLDS Transfer Monitoring Info File Extract Process	Create a flat file for NSLDS of students transferring to CSULB.	Produces flat file to NSLDS of students transferring to CSULB so their awards can be monitored.	Low	SQR	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Post-Packaging Process	Prevent ISIRs from being loaded for students who have been packaged by setting the Institutional review flag to "C".	Sets the Institution Review flag to 'C' on Student Aid Attribute table.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Presidential and Athletic Award Roster Load	Load rosters into PeopleSoft packaging variables tables so awards can be packaged in mass.	Updates student packaging variables specific for Athletic/President scholarship fields so when packaging is run, student who are Ath/Pres sch are picked up and awarded the correct fund/s and amount/s. If students are not aid year activated, the process also activates the student for that aid year.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Package and Disburse Aid	Reset Overdisbursed Students	Flag students for reauthorization if they have been disbursed at a full-time rate but have since become less than full-time.	Increments the Authorized Balance amount by 1 cent on the student award disbursement table.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325

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Module	Sub-Module	Modification Name	Business Challenge	Modification Description	Effort	Technology Used	Dependencies	Campus	Campus Contact Name	Campus Contact email	Campus Contact Phone
FA	Package and Disburse Aid	SF Waiver Variable Update	Student Financials use Tuition Calc variables to assign fee waivers. FA needed a process to stay in sync with SF to prevent students from being overawarded.	Updates student packaging variables to incorporate the waiver fund into packaging to prevent overawarding.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Process Loans	Edfund Loan Interview Interface	Needed an automated approach to update student entrance interview completion information from Edfund to PeopleSoft checklist tables.	Reads flat file produced by EdFund and inserts a checklist and updates Loan Entrance Interview Status flag on Packaging Status Summary page to 'Complete'. This indicates that the student has completed the Entrance Loan Interview requirement, and the next steps of loan processing can continue.	Low	AppEngine	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
FA	Self-Service	Custom Long Beach FA Self-Service Lender Selection for FFEL loans	Provide students capability to select, view and change their lender online.	Custom fields, records (with peoplecode), pages and components were created. Allows students to reference their Stafford loan lender; give ability for students to select/change their lender.	Med	PeopleTools	None	LB	Chau Dao Glendon Lin	<a href="mailto:cdao@csulb.edu">cdao@csulb.edu</a> <a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-7390 562-985-8325
Security	Self-Service	Revoke Self Service Security Role	A process was needed to revoke self service security from students and instructors who were no longer enrolled or employed after a certain period of time.	Based on run control parameters, the LB process selects students or instructors who have not met the self-service role criteria for a period of time. We typically use 13 months. The process also sweeps out the admitted roles when run after census date.	Med	PeopleTools,Application Engine	Relates to the logic in the UserProfile Creation process.	LB	Bruce Kosmal	<a href="mailto:bkosmal@csulb.edu">bkosmal@csulb.edu</a>	562-985-7863
Security	Portal	Portal Name Synch	Synchronizing the Portal displayed name with official Bio/Dem name in PS, which can sometimes change. The delivered App Msg sends the UserProfile description as the name.	App Engine compares Names table with UserProfile and updates UserProfile via CI if there is a mismatch. This triggers a new App Msg to the Portal.	Low	App Engine, Component Interface, App Message	PeopleSoft Portal	LB	Jacqueline Yung	<a href="mailto:yung@csulb.edu">yung@csulb.edu</a>	562-985-2824
SF	CashNet	PS to CashNet Nightly Downloads	Update local CashNet database with latest PS data.	Uploads PS data for students, sponsors and their derogatories (Service Indicators), to the local CashNet Server.	Low	SQR	None	LB	Christine Welch	<a href="mailto:cwelch@csulb.edu">cwelch@csulb.edu</a>	562-985-8307
SF	Group Post	Auto Charge	Manually posting of payment plan charges and housing charges.	The process looks for an specific unapplied payment item type and creates a group post for all applicable students. The group I posted and manual student post is avoided.	Low	SQR	None	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	558 985-8316
SF	Refund	Loan Disbursement Notification	Received excessive phone calls from students inquiring about their Financial Aid refund.	Sends emails to students to notify them that their aid has disbursed. The email also includes a loan cancellation form if they choose to cancel their loan.	Low	SQR	Jet Forms/Jettrak	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	559 985-8316
SF	Records / Svc Indicators	Place/Remove Svc Ind	Automates the process of placing and removing past due service indicators.	Places and removes a balance due service indicator based on the students specified account balance	Low	SQR	None	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	560 985-8316
SF	Tuition Calc	Tuition Calc Flag Flip	Eliminated the need to manually tuition calc students.	From a list of student ID's the process places or removes the tuition calc check box for a specified term.	Low	SQR	None	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	561 985-8316
SF	Payments	Update Item Term	Excessive student phone calls regarding Account Summary and Payments not applying to the correct term.	The process syncs the account term with item term on all payments.	Low	SQR	None	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	562 985-8316
SF	Term Withdrawal/Pro-rata	Withdraw Process Request	Students that drop to zero units need to be term withdrawn for pro-rata refunds to calculate.	The process creates an Enrollment ID batch for students that are at zero units. Records posts the Enrollment ID batch and the student is term withdrawn.	Med	SQR	None	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	563 985-8316

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Module	Sub-Module	Modification Name	Business Challenge	Modification Description	Effort	Technology Used	Dependencies	Campus	Campus Contact Name	Campus Contact email	Campus Contact Phone
SF	Enrollment Cancellation	Enrollment Cancellation Warning	Notifying students that are going to be enrollment cancelled for nonpayment of fees.	The process emails students that are a specified number of days past due that they are subject to enrollment cancellation for nonpayment of fees.	Low	SQR	Jet Forms/Jetrak	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	564 985-8316
SF	Enrollment Cancellation	Enrl Cancel Letter Gen	Notifying students that they have been enrollment cancelled for nonpayment of fees.	The process emails students that have been enrollment cancelled based on enrollment cancellation batch ID.	Low	SQR	Jet Forms/Jetrak	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	565 985-8316
SF	Bill Customers	3rd Party (Sponsor) Billing	Provide a JetForm invoice for billing sponsors, organizations, and other third parties.	The user has the option of billing a single organization, a selected subset of organizations, all organizations, or a single contract. Each submittal is assigned a unique batch ID. Within a single batch ID, each org may be billed one bill page per student or all students on a single bill. This can be set intermittently within the batch (different for each org).	High	SQR, JetForms	1) Create a Corp Billing Request (delivered USE process). 2) Process the Corp Billing Request (delivered PROCESS process).	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	565 985-8316
SF	Enrollment Cancellation	Disenroll Student	Establishes a batch request to the Mass Enrollment Engine that will drop all classes for delinquent students.	This program replaces the term withdrawal/cancellation process. By doing so, the students will remain active in the term being cancelled after all of their classes are dropped. This program uses the request (BATCH_ID) made for a term cancellation to copy class information to the staging tables used by the Mass Enrollment process. The class cancellation is then run by the Records Team.	Low	SQR	1) Run the delivered Term Cancellation Request process to establish a Batch ID.	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	565 985-8316
SF	1098T	1098T Reporting Tool	Creates several reports for testing and validating different groups of students.	The report breaks down the population in several different categories. The different categories can then be validated as needed.	Low	SQR	1) Run the 1098T delivered process.	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	565 985-8316
SF	Parking	Self Service Parking Mod	Allow students to request & pay for parking online to avoid long lines for parking permit purchases.	The Modification contains a self service portion where a student can request and pay for parking online and also a process to extract a flat file for the parking vendor.	High	PeopleTools/SQR	PeopleSoft Portal & CashNet Smart Pay/ eCheck	LB	Nancy Eckhous	<a href="mailto:neckhous@csulb.edu">neckhous@csulb.edu</a>	566 985-8316
SF	Self-Service	Allow students to get refunds electronically deposited into their bank accounts	Allows the students to get their refunds faster and also it reduces the time for the Bursar's team to mail the refunds.	Two step process: 1) Created a real time interface to Cashnet for the students to elect for eRefunds. 2) Daily export and import of the eRefund files to the Cashnet.	High	PeopleTools and SQR	CashNet eRefund	LB	Sandhya Prakash	<a href="mailto:spakash@csulb.edu">spakash@csulb.edu</a>	562-985-7136
SR	Official Transcripts	Self- Service Official Transcript Request and real-time payment	Delivered "Request Official Transcripts" doesn't provide a fee payment link nor the ability to confirm payment.	Cloned and modified Self-Service "Request Official Transcript" pages. Real-time payment step was inserted into the process.	Med	PeopleTools, CashNet eCheckout	CashNet eCommerce	LB	Glendon Lin	<a href="mailto:glin@csulb.edu">glin@csulb.edu</a>	562-985-8325
SR	Registration Appointment assignment	Assign specific letter codes to appointment population selected	Delivered Appointment process only allows for one generic communication. CSULB sends appointment information designed for specific student populations	We cloned the enrollment appointment process and added Admin Function and Comm Speed Key to assign different letter codes	Med	SQR	Hard copy and Email notifications use JetForms	LB	Leah Nieto	<a href="mailto:lnieto@csulb.edu">lnieto@csulb.edu</a>	562-985-2822
SR	CPP	Discontinuation of Stack	CSULB needed a way to automatically close (discontinue) a student's program/plan stack when they are no longer eligible to enroll	SQR to insert discontinue row on stack for students who meet selection criteria.	High	SQR	None	LB	Leah Nieto	<a href="mailto:lnieto@csulb.edu">lnieto@csulb.edu</a>	562-985-2822

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SR	Student Groups	Student Group Delete	CSULB uses Student Groups that are term specific. These groups must be re-populated each term. Maintenance of the delivered component is a manual process. We needed an automatic way to delete (clean-out) a whole group.	SQR to delete students from a specified student group	Med	SQR	None	LB	Leah Nieto	<a href="mailto:lnieto@csulb.edu">lnieto@csulb.edu</a>	562-985-2822
SR	Student Groups	NSC Degree Verify	CSULB needed to method to send an extract file to National Clearinghouse to verify graduation.	SQR to create degree verification extract for National Clearinghouse.	Low	SQR	None	LB	Leah Nieto	<a href="mailto:lnieto@csulb.edu">lnieto@csulb.edu</a>	562-985-2822
SR	Waitlist	WaitList Result Communication	The delivered Waitlist process has no communication functionality. CSULB wanted to notify students of their status, positive or negative, after the process was run	The LB process selects enrollment request details that were generated by the PS Waitlist process. It uses those enrollment details and related messages to create communication records. LetterGen is run to send the email communications to students via JetForm.	High	PeopleTools, Application Engine, JetForm	PS Waitlist Process, LetterGen, JetForm	LB	Leah Nieto	<a href="mailto:lnieto@csulb.edu">lnieto@csulb.edu</a>	562-985-2822
SR	Cancel Classes	Notification to Student of Cancelled Class	The delivered Class Cancellation process has no communication functionality. CSULB wanted to notify students of their class cancellation.	The LB process selects enrollment request records to extract class cancellation details. It used those details to create communication records. LetterGen is run to send the email communications to students via JetForm.	Med	PeopleTools, Application Engine, JetForm	LetterGen, JetForm	LB	Leah Nieto	<a href="mailto:lnieto@csulb.edu">lnieto@csulb.edu</a>	562-985-2822
CC	Self Service	ART 089 - Addresses/SON_CC115	The main problem we had with the delivered SS_ADDRESSES page was that the view behind it grouped addresses into one display under two or more address types when the addresses were identical.	Modify SS_ADDR to Ungroup the addresses. We created a new view that did not group the addresses even if they were the same. Each address type a user has appears separately, and the user can make changes to them individually throughout the Change Address hyperlink, or as a group through the ADD a New Address hyperlink. *Updated this in 8.9 to disallow the end user to save an address without anything in the address 1, city, state, or postal fields	These changes are maintained by the campus and applied directly to production when required. Effort to maintain: less than 4 hours average if required after baseline upgrade.	Application Designer		Sonoma	Carey King/Amanda McGowan	<a href="mailto:carey.king@sonoma.edu">carey.king@sonoma.edu</a>	707.664.2286
CC	Communication	Mass Email solution	The SSU policy is to communicate with students officially via email and we required a method with which to track and send emails en mass.	Allows user - to load the results of a query into the communication tables via FTP. - to create a custom letter gen extract (admin function GEN) via FTP with a reduced number of fields and the personal and confidential data fields masked. - Outside PS the resulting data source file is then merged with mail merge template and converted to text file. - The merged text file is then sent through a custom CGI via a departmental mail box.	Med	SQR, related SQCs, PS Pages, MS Word, PERL	Third party products	Sonoma	Sophie Summers	<a href="mailto:sophie.summers@sonoma.edu">sophie.summers@sonoma.edu</a>	707.664.3356
CC	Service Indicators	Service Indicator Load	Manual entry of Service Indicators in bulk was too labor intensive.	Allows user to load service indicators using the results of a query via FTP.	Med	SQRs and related sqcs		Sonoma	Sophie Summers	<a href="mailto:sophie.summers@sonoma.edu">sophie.summers@sonoma.edu</a>	707.664.3356
CC	Self Service	Self Service Privacy Information (FERPA)	Delivered FERPA not user friendly and did not accommodate SSU policy	Created new Self Service FERPA pages to create all or nothing option for students. Student can release all protected information or none.	Med	Application designer		Sonoma	Amanda McGowan	<a href="mailto:amanda.mcgowan@sonoma.edu">amanda.mcgowan@sonoma.edu</a>	707.664.3361
CC	Utility	Load/Match NID/EMPLID	Sometime we have the need to pull queries on predetermined lists of students that have no logical grouping within PS.	This process enables you to load a list of SSN/NIDs or EmplIDs into a temp table and then use it to query out a predetermined group of students.	Minor	SQR, temp table		Sonoma	Sue Bennett	<a href="mailto:sue.bennett@sonoma.edu">sue.bennett@sonoma.edu</a>	707.664.3093

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SR	Self Service	ART 076 Request Enrollment Verification	Students were frequently requesting an enrollment verification via mail and we do not offer this service. Solution sought to remove this option and then also default in other fields that most students would want.	Default "Allow to print from my browser" field. Default the "Include My Term and Cum GPA" checkbox to Y Removed "request report to be mailed" option	These changes are maintained by the campus and applied directly to production when required. Effort to maintain: less than 1 hours average if required after baseline upgrade.	Application Designer		Sonoma	Carey King	<a href="mailto:carey.king@sonoma.edu">carey.king@sonoma.edu</a>	707.664.2286
SR	Self Service	Art 072 View My Advisors	Campus still working through getting faculty and advisors to use SSU email address. This page accesses the official SSU email address. Do not want to create communication issues for students until policy is better rolled communicated.	Hide "Notify Selected Advisors" and "Notify All Advisors" button. Hide the select checkboxes off to the left side of the grid.	Maintained through COMR process: Cloned component and page (SS_STDNT_ADVISR), search view (SS_PERS_SEC_VW), and record DERIVED_SSE_DSP)	Application Designer		Sonoma	Carey King	<a href="mailto:carey.king@sonoma.edu">carey.king@sonoma.edu</a>	707.664.2286
SR	Self-Service	ART 076 View Unofficial Transcript	Students frequently find it difficult to understand the structure of, and to interpret, the delivered PS transcript. Solution is to provide a link to explanatory text on how to read the delivered transcript.	On the SS View Unofficial Transcript page, added external link to How to Read an SSU Transcript. Academic Institution defaults to Sonoma State University. Report type defaults to SSU Unofficial Transcripts.	These changes are maintained by the campus and applied directly to production when required. Effort to maintain: less than 2 hours average if required by after baseline upgrade.	Application Designer		Sonoma	Carey King	<a href="mailto:carey.king@sonoma.edu">carey.king@sonoma.edu</a>	707.664.2286
SR	Student Groups	Student Group Load	Manual entry of student groups in bulk was too labor intensive.	Allows user to load, update and delete student groups using the results of a query via FTP.	Med	SQRs and related sqcs	Needs work	Sonoma	Sophie Summers	<a href="mailto:sophie.summers@sonoma.edu">sophie.summers@sonoma.edu</a>	707.664.3356
SR	Transcripts	SSU Official Transcript	PS delivered transcript did not meet SSU needs	Created custom SSU transcript	High	PL SQL		Sonoma	Sue Bennett	<a href="mailto:sue.bennett@sonoma.edu">sue.bennett@sonoma.edu</a>	
SR	Self Service	Default view all sections view on class search	Class Search return of 3 sections caused confusion for students	Changed default to immediately display all sections. Removed career from defaulting to user's last career.	Low	Application Designer		Sonoma	Sophie Summers	<a href="mailto:sophie.summers@sonoma.edu">sophie.summers@sonoma.edu</a>	707.664.3356
CC	Duplicate IDs	SMACC102 - ID Search Report	Needed a way to identify records involved when a duplicate ID was located	Report lists all records an emplid resides in	Low	SQR and related SQCs		Sonoma	Amanda McGowan	<a href="mailto:amanda.mcgowan@sonoma.edu">amanda.mcgowan@sonoma.edu</a>	707.664.3361
AA	Self Service	New message in New Drop-In Advisees	Searching for a student is not clear on the advisement tab in the Faculty Center, on the New Drop-In Advisees page	Added message that explains "Click Search to identify advisee. Then select information from Student Details dropdown & click go."	Low	Application Designer		Sonoma	Carey King	<a href="mailto:carey.king@sonoma.edu">carey.king@sonoma.edu</a>	707.664.2286
AA	Catalog Build for Degree Audit	Reverse Engineering report	Locate where individual courses are members of course lists	Identifies all course lists that a course is contained in		SQR	None	SLO	Maureen Muller	<a href="mailto:mmuller@calpoly.edu">mmuller@calpoly.edu</a>	805-756-2038
AA	Process Transfer Credit	Transfer Credit Batch	To model large number of students' transfer credit.	A PeopleSoft bolt-on batch process to simulate the Fetch, Calculate, Post/UnPost functions performed online. There are 2 types of selection criteria where user defines it at run time: 1. Scores processed by list of EMPLID 2. Scores from suspense table Creates output file of how each student's model status	Med	Application Engine, Component Interface	None	SLO	Maureen Muller	<a href="mailto:mmuller@calpoly.edu">mmuller@calpoly.edu</a>	805-756-2038

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AA	Graduation	Diploma Order	Create export file for 3rd party diploma vendor	Creates a preview report and error file in PDF format for review and a CSV file on ftp site for vendor		PeopleSoft pages custom tables	2 requires detailed knowledge of what information is on diploma	SLO	Maureen Muller	<a href="mailto:mmuller@calpoly.edu">mmuller@calpoly.edu</a>	805-756-2038
AD	Checklists	AD03-v1FS-Education Data and Checklists	Needed an automated assignment of checklists for admissions processing	Assign checklists to applicants based on a variety of criteria including but not limited to plan, admit type, and academic level. Add rows of transcript checklist items when the need for more official transcripts has been recorded on the external education data pages by staff or the CSUMentor post process. Remove transcript checklist items when the need for the transcript has been removed by staff. Associate names of external organizations from which transcripts are needed with the appropriate checklist items. Update the status of the checklist item as transcripts from specific external organizations are received.		SQR		SLO	Donna Amos	<a href="mailto:damos@calpoly.edu">damos@calpoly.edu</a>	805.756.5824
AD	Self Service	AD08-8.9-FS-Self Service Application Status	Information displayed on self service application status did not meet Cal Poly's needs. Wanted all applications to display and wanted flexibility on the messages that are displayed regardless of the applicant's status.	Added fields to what is displayed on the application status page. Added setup table to display and control messages in self service based on the admissions program action/reason. Within the setup table added PS url links so that the self service page could link to more information on our website depending on their status. Removed the To Do List from the application status page as it did not use the cms modified functionality. Added links for EPT and ELM if the applicant was required to take either.				SLO	Donna Amos	<a href="mailto:damos@calpoly.edu">damos@calpoly.edu</a>	805.756.5824
AD	Self Service	AD10-89FS-Self Service Accept Decline Admission	Accept Decline page in self service did not meet Cal Poly's needs.	Page links to the emergency contact information. Also, changed the way the questions were asked when someone declined our offer. Removed functionality where it updated the admissions program action to DEIN as utilize a separate process for this that is better timed with our process. Changed the message catalog to have the messages better reflect our communication needs. Added action reason of AUTO to the admissions program action of WAPP when the applicant declines our offer. Added functionality to "Complete" our accept/decline checklist item once the applicant submits response. Added link to our Terms and Conditions url once applicant accepts our offer.				SLO	Donna Amos	<a href="mailto:damos@calpoly.edu">damos@calpoly.edu</a>	805.756.5824
AD	Application Maintenance	AD025 Admin Withdrawal Cond Admits	Needed a batch process to withdrawal admitted applicants who did not respond to the Accept/Decline.	Created process to batch withdrawal applicants who did not respond to our offer of admission.		SQR for the report and App Engine for the update process		SLO	Donna Amos	<a href="mailto:damos@calpoly.edu">damos@calpoly.edu</a>	805.756.5824
AD	Checklists	AD027 Cancel Outstanding Checklists	Needed a way to cancel checklists for cancelled applicants.	Finds cancelled applications for a specified term and completes admissions checklists and sets associated items to cancelled.		SQR		SLO	Donna Amos	<a href="mailto:damos@calpoly.edu">damos@calpoly.edu</a>	805.756.5824

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AD	ERSA	AD28 ERSA Data Population	Needed an automated way to populate specified fields for ERSA reporting.	Depending on an applicant's admit type, academic level and residency this process automatically populates the Basis of Admission for the "non-exception" Basis of Admission cases. Exceptions are handled manually. Populates other fields such as admission status override, citizenship status, credential status, checks primary box for ethnicity if not checked.		App Engine		SLO	Donna Amos	<a href="mailto:damos@calpoly.edu">damos@calpoly.edu</a>	805.756.5824
AD	Personal Comments	AD033 Fix doublespaces	PS doesn't like double spaces in the comments field in Personal Comments. Double spaces were present in converted data and users often use double spaces in the comments they manually enter.	Process cleans up double spaces in the comments field in Personal Comments.		SQR		SLO	Donna Amos	<a href="mailto:damos@calpoly.edu">damos@calpoly.edu</a>	805.756.5824
CC	Self Service	CC011 (AD004-FA003-v89) Self Service Checklist	Admissions checklists do not need due dates. In addition the display of institution was confusing. Financial Aid needed a process to prevent the disbursement of financial aid until verification has been completed and all federal database matches have been resolved.	Masked the due dates for ADMA checklists. Removed the institution column from the To Do page for all items. Added 'Received' status to the logic that is applied for the 'Completed' and 'Waived' statuses.				SLO	Donna Amos for Admissions and Katie Schrempp for Financial Aid	<a href="mailto:damos@calpoly.edu">damos@calpoly.edu</a> and <a href="mailto:kschrempp@calpoly.edu">kschrempp@calpoly.edu</a>	805.756.5824 805.756.5880
CC	Self Service	CC012 Self Service Student and Student Services Center	Student Center/Student Services Center did not account for all of Cal Poly's needs.	Modified the Student Center/Student Services Center to incorporate all PS self service and related functions in a single page.				SLO	Lygia Smidt	<a href="mailto:lsmidt@calpoly.edu">lsmidt@calpoly.edu</a>	805.756.5507
FA	Aggregate Aid	Aggregate Aid Update	To update the Aggregate Levels for all EmplIDs or a Single Student in the Aggregate Area	All tables in the Aggregate Aid Area get resynched. At times if a student is in multiple aggregate aid levels for the aid year, the system gets out of synch, so this process resynchs them.	Low	SQR Report	None	SLO	Katie Schrempp	<a href="mailto:kschrempp@calpoly.edu">kschrempp@calpoly.edu</a>	805-756-5880
FA	Packaging	Aid Year Activation	To Aid Year Activate a group of students from a text file	As part of the SAP DISQ Rollover Process, students need to be Aid Year Activated. This process will Aid Year Activate a group of students in a text file	Low	SQR Report	None	SLO	Katie Schrempp	<a href="mailto:kschrempp@calpoly.edu">kschrempp@calpoly.edu</a>	805-756-5880
FA	Packaging	Cal Poly Packaging Variables	To populate the Packaging Variables before we run the Packaging Processes.	Determines if the student is a new or continuing student, EOP Student, FWS from last year, FWS Waiting List and updates the Packaging Variables	Low	Application Engine	None	SLO	Katie Schrempp	<a href="mailto:kschrempp@calpoly.edu">kschrempp@calpoly.edu</a>	805-756-5880
FA	Packaging	Cal Grant Rollover	To rollover Cal Grant information to the next year	From the Run Control, the process looks at Percentage available and if certain program code flags should not be rolled over. The student just have one of the Cal Grant Item Types with an offer amount greater than zero to be rolled over. The amounts for the rollover are include in the Run Control.	Low	SQR Process	None	SLO	Katie Schrempp	<a href="mailto:kschrempp@calpoly.edu">kschrempp@calpoly.edu</a>	805-756-5880
FA	Cal Grant	Cal Grant Unclaimed Awards	To create a file to send to CSAC	The process determines students to have sent to CSAC as Unclaimed awards. The Student must not be on the Cal Grant Roster for the University and must be enrolled at the University.	Low	SQR Report	None	SLO	Katie Schrempp	<a href="mailto:kschrempp@calpoly.edu">kschrempp@calpoly.edu</a>	805-756-5880
FA	Federal Work-Study	SLO Capture Pay	Updates the FWS Disbursement from the LCD Fields	The process looks at the LCD fields to determine what amounts will be put into the FWS Disbursement.	Low	Application Engine	None	SLO	Katie Schrempp	<a href="mailto:kschrempp@calpoly.edu">kschrempp@calpoly.edu</a>	805-756-5880

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FA	Packaging	Database Match Override	To check all the Database Match Override Flags for Packaging before verification is completed.	Sets the Database Match Override Flags to Override when a student is set to Ready to Package, so a student can be packaged with federal aid before verification is completed.	Low	Application Engine	CSU Ready to Package Process	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880
FA	Loans	Entrance Counseling Complete Update	To update the Entrance Counseling Checklist when the Entrance Counseling Exam has been completed on the EdFund Site.	From the Entrance Counseling File that is received from EdFund, data is put into a table. The Process then updates the Entrance Counseling Checklist if the student completed the correct Entrance Counseling Exam. If the process is not able to find a matching SSN in the personal information table, then the SSN and last name appear on the Message Log, so it can be researched.	Low	Application Engine	Entrance Counseling file from EdFund	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880
FA	Loans	Entrance Counseling Update	To assign the Entrance Counseling Checklists to students	The process determines which students should receive the Entrance Counseling Checklist because the student does not have a Stafford Loan on the NSLDS Loan Pages and has been awarded a Loan. If the loan was declined/cancelled and then awarded again, the process determines that the student should have the Entrance Counseling Checklist if there is not one already initiated.	Low	Application Engine	The 3C Engine will need to be run to assign the Checklist.	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880
FA	Notification	FA Notification Update	To assign the FA Notification communication, so an e-mail can be sent to the students stating that they have been awarded and the check Self-Service	The process determine which students have been awarded by the range of Item Type that has been put into the Run Control. A Communication 3C Trigger is created and then the 3C Engine is run to assign the Communication.	Low	Application Engine	The 3C Engine will need to be run to assign the Communication.	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880
FA	Budgets	FA Term Update	To find students that need to have their Budget Flag flipped to either not be assigned a new budget or to be assigned a new budget	The process determines if a student needs to have a budget assigned or not assigned and flips the Budget Assign Flag appropriately.	Low	Application Engine	None	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880
FA	Federal Work-Study	FWS Community Service Flag Update	Sets the Community Service Flag for FWS Students working on a Community Service Program	The process determines from the Job Code if a student is working in a Community Service Program and changes the Community Service Indicator on the Work Study Monitoring View Page to Community Service Placement.	Low	Application Engine	None	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880
FA	Checklists	Imaging Daily Docs Received	Sets the Checklists Item Status to the correct status depending on the checklist that was imaged into ImageNow	Checklists are scanned into the ImageNow software. ImageNow creates a file that is loaded into PeopleSoft and the process reviews the Checklist Item Status compared to the file and determine what the new Checklist Item Status should be.	Medium	SQR Report	ImageNow Software	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880
FA	Admissions Scoring	MCA Score Update	The Admissions Process determines an MCA Score that is then used in the Financial Aid Office for evaluating and awarding scholarships	The Admissions Office runs a process that determines an MCA Score. This process is housed in a different server and the score needs to be moved into PeopleSoft, so the Financial Aid Office can use the score when evaluating and awarding scholarships	Low	Application Engine	Admissions running their processes	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880
FA	Loans	No Loan Waive FENT	The process waives the Entrance Counseling Checklist if a student does not have a Stafford Loan for the year.	The process determines if the student has no Stafford loans offered greater than 0 and has an Entrance Counseling Checklist that is initiated. If so the process waives the checklist so the student will not view the Entrance Counseling Checklist on Self-Service.	Low	SQR Process	None	SLO	Katie Schremp	kschremp@calpoly.edu	805-756-5880

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FA	Packaging/Scholarships	Outreach Student Variables	Sets the Packaging Variable Flag to Yes if the student is determined an Outreach Student for Scholarships.	The process views the Honors and Awards Table for the Outreach Award Code and then compares the student against the Admit Term from the Run Control. Then the process sets the Packaging Variable Flag to Yes and the Packaging Process will then award the Outreach Scholarship to the correct students. The process also has a Purge function so it can be run numerous times.	Low	Application Engine	Admissions has assigned the Outreach Code on the Honors and Awards Page	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Packaging	Ready to Package Update	Sets the Aid Processing Status to Counselor Review	The process checks to see if a student is almost at their Stafford Aggregate Max, has multiple careers for one aid year, not all academic FA Terms are active or not in the same PBAC Program for the full year. If yes, then the process sets the Aid Processing Status to Counselor Review. The process only looks at students that have already been set to Ready to Package.	Low	Application Engine	CSU Ready to Package Process	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Self Service	Roll Lender Names	Rolls the CP Lender Table that is used with the Select Lender Population Process	The CP Lender Table is used with the Select Lender Population Process and is the table that the students see in Self Service when determining their Lenders. The process rolls the lenders to the new aid year.	Medium	Application Engine	Select Lender Population Process	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Packaging	SAP DISQ Rollover	Sets the SAP Status to Not Meets and adds a row to the CSU SAP Status of DISQ	The process determines which students were disqualified in the past year by either the status if Disqualified, Max Term Exceptions or will be at Max Term after this year. The process creates a text file to run through the Aid Year Activation Process to aid year activate the student for the upcoming year. Then the Process is run again and sets the SAP Status on the Packaging Status Summary Page to Not Meets and adds a row to the CSU SAP Page with a disqualified status and a comment.	Low	SQR Report	Aid Year Activation Process	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Self Service	Select Lender Population	Enables a student to select their Stafford lender on Self Service and populates the Origination Page for Stafford Loans	From the Accept/Decline Awards page, a student that has not had loans at Cal Poly is able to select a Stafford Lender from a selection of lenders. The student can not accept the loan unless the student has chosen a lender. For students that have had previous loans, the past lender is visible on the page. After Origination is run, the Select Lender Population is run and populates the Loan Dest Number on the Origination Page.	Low	SQR Process	Origination Process is run before this process	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Transfer Monitoring	Transfer Monitoring	Selects New, Transfer and Continuing students to send to NSLDS	The process selects first-time freshman and transfer student plus continuing students that were not enrolled at Cal Poly the previous term and creates a text file to send to NSLDS.	Low	SQR Report	None	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Packaging	VA Benefits Update	Selects students that stated they have VA Benefits on the FAFSA and populates the Education Resource Page	If a student has entered VA Benefits on the FAFSA the process multiplies the number of months (up to 9) with the amount and populates the Education Resource Page	Low	Application Engine	None	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Pell	Verification Status Code	Changes the Verification Status on the Packaging Status Summary Page to Verified once verification has been completed	The process checks the Verification Flag on the Packaging Status Summary Page. If it is set to Completed, then the process changes the Verification Status to Verified.	Low	Application Engine	None	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880

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FA	Packaging / Scholarships	Wrasse Student Variables	Sets the Packaging Variable Flag to Yes if the student is determined to be eligible for the Wrasse Scholarship.	The Process is run separately for New, Continuing and Grad Students. The Run Controls are Term, EFC, GPA, and date FAFSA Received by the processor. The process determines if the student is eligible for the Wrasse Scholarship and sets the appropriate Packaging Variable Flag to Yes. The process also has a purge so it can be run numerous times	Low	Application Engine	None	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Student Pay System	Student Pay System Modification	Views have been created so student information can be viewed in the Student Pay System	Views were created for student assistants and Work-Study students to feed information into the Student Pay System	Low		Cal Poly Student Pay System	SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
FA	Notification	Short FAN Letter	A short version of the PeopleSoft Long FAN Letter was created	The Long FAN Letter was modified to not include all the information. The Short FAN Letter includes the Awards per quarter and Award Messages. The same printing methods are used as the PeopleSoft Long FAN Letter.	Low			SLO	Katie Schrempp	kschrempp@calpoly.edu	805-756-5880
SF	3 C's	Document Tracking Checklist	Checklist needed for SF to manage institutional loan disbursements	Prevents institutional and Perkins loans from disbursing from financial aid module until student has completed the required SF checklist items related to the loans (Promissory note, Statement of Rights and Responsibilities, and Student Loan Worksheet)	Low	Application Engine	FA checklist setup	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	CashNet	CashNet Data Extract	Backup of PS balances for CashNet if real time component interface is down	Backs up account and student information to archive file for use if CashNet component interface is down	Low	SQR	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Tuition Calc	Student Equation Variable Load	Batch process for loading of equation variables	Allows batch loading of equation variables based on a list of emplids	Low	SQR	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Tuition Calc	Tuition Calc Flag Control	Tcalc required flag automatically checked for terms prior to PS implementation	Unchecks the tcalc required flag on terms prior to PS implementation so that errors are not encountered.	Low	Application Engine	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Mass Enrollment	Class Cancellation	Term cancelled students are not eligible to enroll	Enables term cancellations (done through the PS delivered cancellation process) to be treated as class cancellations so that cancelled students are still eligible to enroll after cancellation	Med	SQR	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Tuition Calc	Equation Variable Roll	Ability to roll equation variables from one term to another	Provides the ability to roll all equation variables (for all students) located in one of the variable fields from one specified term to another.	Low	Application Engine	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Service Indicators	Batch Financial Hold	Ability to place and release holds automatically during registration and non-registration periods	Places or removes certain financial service indicators for all students depending on account balances and meeting certain financial aid and minimum amount owed criteria	High	SQR	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Third Party	Third Party Contract Roll	No functionality for rolling of contracts from one term to another	Provides the ability to roll certain contracts from current term to future terms	Med	SQR	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Tuition Calc	Equation Variable Reference Table	No error checking when manually entering equation variables	Allows for setup of a table containing all allowable equation variables for a particular variable fields, to attach a definition to the variable, and to require that the variable be included in the table in order to the user to be able to input that variable.	Low	SQR	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Self Service	Direct Deposit Maintenance	Student Direct Deposit account signup in Self Service	Allows students to use self service to sign up for direct deposit, enter account information, change account information or delete their direct deposit account preference	Med	Application Engine	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417

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SF	Self Service	Self Service Account Mods	Account Summary in Self Service is insufficient	Creates a new Account Summary view similar to the customer account so that students can see their balance for each term. Also shows a credit or zero balance in the main Finances section of self service	Med	SQR	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	CashNet	IDC Component Interface	Component Interface for CashNet	Component interface for CashNet allows real time sharing of balance and payment information between PS and CashNet	High	Component Interface	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	ECSI	ECSI Loan Interface	Interface with ECSI for transfer of receivable information	Provides an interface with ECSI to transfer receivable and collections information	Med	SQR	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417
SF	Financial Aid	PLUS loan roll	If PLUS borrower has been changed to "student", that election does not get carried over for new or modified loans	Program runs automatically prior to PLUS (and other FA) disbursements to see if parent has elected to have PLUS loans disbursed to the student. If so, all subsequent plus loans will have the borrow flag changed to student on that student's account.	Med	Application Engine	None	SLO	Brett Holman	<a href="mailto:bholman@calpoly.edu">bholman@calpoly.edu</a>	805-756-7417