

PeopleSoft Resolution Team Issues Log

Dept.	Priority	Assigned To	Task Description	Risks/Consequences of Incompletion	Status Reports	Next Steps	Esti. Hours
Student Admin.	1	Joyce Brown-Willis	PROGRESS PROBATION IMPLEMENTATION		In Progress	Just finished testing and it is now working. Need to test some more in different environments and will be working with Ram from IT.	80
HR/Finance	2	David Betts	PERSONNEL ACTION REQUEST FORM - Implementation Plan				TBD
Admissions/Counseling	3	IT	SARS/PASSPORT INTERFACE - ensure accuracy of reporting student: counselor contact MIS data to State.	This information is supposed to be reported to the state and has not been since go-live of PeopleSoft.	This is #2 on the Counseling CFT Priorities List	It is currently in testing, having been developed by Jo Ann and Gopaal.	100
Fac./Instructional	4	IT	ROLLBOOKS - Create Rollbooks in Instructor portals without having to use Excel	The state requires this information and many instructors are not submitting them because they are not easily accessible in PeopleSoft.	There is currently a temporary fix in the form of Excel and a video tutorial online.	It is noted that A&R is requesting that the green bar/roll book that was previously used before PeopleSoft went live are the required specs needed for the Rollbooks in PeopleSoft.	160
Admissions/Counseling		Mike Orkin/Research	REPORTS - Re-establishment of "standard" reports (i.e. Probation/Dismissal, 45+ units, missing Matriculation data, etc.).		This is #3 on the Counseling CFT Priorities List - Click here to view an email from Jo Ann Phillips about the status of this item.	Reports & Queries need to be reviewed	TBD
Admissions/Counseling		IT	PREQUISITE DROP PROCESS: Identify students notified about failed grade on prerequisite(s); perhaps soft hold like a Service Indicator that a counselor can remove.		This is #4 on the Counseling CFT Priorities List	This process is somewhat done and was processed F10-S11. It worked but need it to still identify the students but not drop the students that don't have grades posted.	TBD
Admissions/Counseling		Ed Services	DEGREE AUDIT - Because the Academic Advising Component/Degree Audit is a crucial function of the PeopleSoft student records, it should be implemented as soon as possible, including provision of sufficient support in the form of personnel (i.e. adequate A&R evaluation staff) and resources (i.e. transcript imaging) to make it fully operational.		This is #5 on the Counseling CFT Priorities List & a Phase 2 implementation & .	Having completed the Fit-Gap report and met with functional users for many weeks, PineTree is entering the testing phase for their project. It is slated for completion by the end of June.	TBD
Admissions/Counseling		IT/Ed Services	MILESTONES - Notification of updates; master list in drop-down menu in PS; list must agree with what is in the catalog.		This is #6 on the Counseling CFT Priorities List		TBD

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Admissions/Counseling		IT	MILESTONE ID TRACKING - Identification of counselor clearing Milestone; modify reason drop-down menu to include <u>only</u> appropriate reasons per security profile.		This is #7 on the Counseling CFT Priorities List. Counselor ID on Milestone Navigation: Records and Enrollment>Enroll Students>Student Milestones. On the second tab, Advisors/Completion Info there is a place to record the EMPLID of the counselor. We would like this to be modified so that it automatically saves the EMPLID and the date when saved. We do not want this to be something that the user inputs, it needs to be automatic when saved.	Need to create technical specifications. Contact jwillis@peralta.edu to view an example of where the ID's should appear.	TBD
Admissions/Counseling		IT	PASSPORT LOGIN/RESET ISSUES: A&R is getting many calls/emails from students being able to see account information of other students when logging into Passport.	This needs to be fixed ASAP seeing that this can lead to identity theft and the Peralta District can be at risk of being potentially sued.		Contact jwillis@peralta.edu to view the emails regarding this issue.	
Admissions/Counseling		Sheryl Queen	GE DESIGNATION NOTES (i.e. CSU GE, IGETC, etc.) in course descriptions in PeopleSoft.		This is #10 on the Counseling CFT Priorities List. This task is not applicable to PeopleSoft. In 2005 Ed Services determined this was not a viable option and we will need to explore other possibilities.		TBD
Admissions/Counseling		IT/Sheryl Queen	"HONOR ROLL" designation on the transcript as in legacy.		This is in the "Other" section on the Counseling CFT Priorities List.		TBD
Admissions/Counseling		IT/Sheryl Queen	CLASS CODE & INSTRUCTOR NAMES on the transcript as in legacy		This is in the "Other" section on the Counseling CFT Priorities List.		TBD
Admissions/Counseling		IT/Jacob Ng	CCCApply NON-HS STATUS - When a former HS student submits a new application the system should automatically change their previous status in the system from SPX to MATRIC and remove the HS hold which prevents them from adding classes online.		The discontinuation process is a modification and a programmer will need to work on this. If the student does not put on the application that they are a H.S. then their record needs to be updated.	Technical Specs need to be developed. Click here to view the Email thread regarding the discontinuation process and deactivating students.	160
Business Managers		IT	PS SYSTEM DELAY - PROMT is soooooooooo SLOW. Approving BTR's is a very slow process. "PROCESSING, PROCESSING, PROCESSING!"			Additional application servers should have mitigated this matter. Awaiting responses from functional users.	
Business Managers		IT	BTR & REQUISITIONS - These do not show the current balance of the budget.				

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Business Managers		IT	PAYROLL INFORMATION - Need an easier way to see current information & needs to be uploaded to PROMT in a timely manner.				
Business Managers		IT	WAREHOUSE ORDERS - Need to be online				
Business Managers		David Betts	HR TIME & BILLING			Complete the RFP process	
Fac./Instructional		IT	ROSTER DUE DATES & DROP LINK MISSING - Every semester the roster due date that is in the memo to faculty does not match the due date that they see in PS on their rosters. Also, many faculty do not have the ability to drop students because the link is missing from their rosters.	This causes a serious back log of extra work for A&R and faculty are unable to submit their rosters in a timely manner.			
Fac./Instructional		Linda Sanford/Jo Ann Phillips	POSITIVE ATTENDANCE - Work to resolve some of the issues related to positive attendance reporting. Also, there is a problem with students dropping classes after having put in some hours; those hours aren't accounted for.	The hours are not being captured and we are losing money.	Currently investigating the issues and will report back.		TBD
Fac./Instructional		Minh Lam/Sheryl Queen	ROSTER SUBMIT BUTTON with Confirmation message. It would be ideal to have a "Save Work In Progress" button. Also a "Submit" button that will have a pop up box to state, "Your grade roster has been submitted and can no longer be edited."		The submit button is currently available for the Census & Attendance rosters.	Technical Specs are currently being reviewed	TBD
Fac./Instructional		Minh Lam/Joyce Brown-Willis	CAMPUS EMAIL ADDRESSES - Make them available on class rosters.		Peralta emails will be made available today and they will only be available on the instructor class contacts	Testing	40
Fac./Instructional		Minh Lam/Sheryl Queen	TERM ROLL OVER for "My Faculty Center" vs. changing preferences each term		This may be a production schedule item and there is a patch/bundle that is available to fix this.	Sheryl Queen will test.	TBD
Fac./Instructional		Sheryl Queen	WAIT LIST PROCESS and testing. To be implemented for the upcoming semesters.			This process has been implemented and is now in productions. There are still some kinks to work out, but is somewhat functioning well.	TBD
Financial Aid		Laney & COA	Working on getting the MIS information from the SAFE system.		MIS extracting from SAFE.	In Progress	TBD
Matriculation		IT	PS SYSTEM DELAY - The Matriculation Committee, headed by Dr. Donald Moore, met on 4/1/11 & requested that the "slowness" of the system needs to be resolved and the issue be submitted onto the issues log.			Additional application servers should have mitigated this matter. Awaiting responses from functional users.	

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Matriculation		IT	COMPASS - Data from Compass needs to be uploaded into PS.				

PeopleSoft Resolution Team Completed Tasks

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Admissions/ Counseling	IT	Modify the search variables/options for course search in schedule (i.e. changing college, searching all colleges, etc.)	100% Complete - #9 on the Counseling CFT Priorities List	This feature is now available in the class search with the ability to choose one college or all four colleges to search a class..
Admissions/ Counseling	IT & Joyce Brown-Willis	Identify students notified about failed grade on prerequisite(s).	100% Complete - #2 on the Counseling BT Priorities List	The ability to do this task is available in the system and done in a certain amount of time & will be scheduled for Summer/Fall 2010
Admissions/ Counseling	IT & Sheryl Queen	Milestones: Notification of updates; master list in drop-down menu in PeopleSoft; list must agree with what is in catalog.	This is #4B on the Counseling BT Priorities List.	The link to the milestones is available on the web. It was decided that it is unrealistic to have a drop down menu with 400 options.
Fac./Instructional	IT	Send out information about Peralta student email addresses on class rosters. Also will send out an announcement with the latest Peralta email information.	100% Complete	
Fac./Instructional	Sheryl Queen	Instructors need to know the dates that census rosters are available for dynamically dated classes. This process is not automated and the schedulers have to do it manually. Need to work on getting calendar posted on the portal with add drop dates for students as well for the dynamically dated classes	100% Complete. The due dates are now available on each class.	Follow up action required for verification. Sheryl Queen will test.
Fac./Instructional	Sheryl Queen	Variable Unit Classes - Issue, at end of term student may earn a different number of units than they enrolled in. Transferring from one section to another – would be a manually a & r thing, and positive attendance, coming up with incorrect number of hours and faculty don't have the ability to change within PeopleSoft. SARS is supposed to be able capturing hours need method to aggregate the data because there is other data other than SARS. There is one on one tutoring going on but those hours are not being captured, they have to be manually input. PC track, SARS and tutoring, no centralized check in place. Sheryl will follow up.	100% Complete. Variable unit classes will no longer be offered.	
Financial Aid	Brian D'Arcy	Send project development timeline to Jim Bracy	100% Complete	
Financial Aid	Brian D'Arcy	Send Jim Bracy a written explanation on SEOG awards	100% Complete	
Financial Aid	Daniel McCarthy	Send written response on action items to Dr. Mathews for approval	100% Complete	
Financial Aid	FAO's, CIBER, Peralta	Review of fitgap and milestones	100% Complete	

PeopleSoft Resolution Team Completed Tasks

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Financial Aid	Jim Bracy	Send email to Regent addressing outstanding issues and concerns	100% Complete	
Financial Aid	Jim Bracy	Set meeting with Regent, Ciber, Peralta IT, FAOs, Jim Bracy, Mickey Mathews for discuss student financial aid issues.	100% Complete	
Financial Aid	Jim Bracy	Review student issues and send to Regent, Ciber, Minh Lam, and Mickey Mathews.	100% Complete	
Financial Aid	Karen Croley	Add discussion on BOG waiver data to Student Issues agenda	100% Complete	
Financial Aid	Karen Croley	Send out Fit Gap review minutes	100% Complete	
Financial Aid	Mickey Mathews	Submit draft of Polices and Procedures manual to Jim Bracy for review.	100% Complete	
Financial Aid	Mickey Mathews	Submit a draft of the Financial Aid Handbook for review	100% Completed	
Financial Aid	Mickey Mathews & FAOs	Create a list of required documents to collect from FA students	100% Completed - Done in SAFE	
Financial Aid	IT	Submit Regent performance evaluation	100% Complete	
Financial Aid			100% Complete	
Financial Aid	FA Specialists	Put together a plan of action for the Fall '10-Spring '11 award year, including staffing needs and timelines & send to Jim Bracy	100% Complete	
Financial Aid	Financial Aid Business Team	Determination of required financial aid documents at FA meeting on 3/19/09.	100% Complete	
Human Resources	David Betts	Method to track TB testing	100% Complete	
IT	IT	Hiring of IT Analysts for Student, Finance and/or Technical	Application closes April 1, 2010	Submit a chart and progress reports of the tasks and who they will be assigned to the specific tasks on the issues log.
PIT	Eric Gravenberg	Create a one page summary of the recommendations for the role, name, composition, and scope of work of the proposed PIT structure. Dr. Gravenberg, Jim Bracy and Joseph Bielanski will meet with Dr. Allen prior to the next PIT meeting.	100% Complete	
PIT	Joyce Brown-Willis	Create working document to track ideas and tasks	100% Complete	
PS/CIBER	Chip Houlihan	Report on variable unit issue at next meeting	100% Complete	
PS/CIBER	Chip Houlihan	Provide issues log at next meeting	100% Complete	

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PS/CIBER	Chip Houlihan	Produce a report for issues of concern before he leaves.	100% Complete	
PS/CIBER	CIBER & Tina Vasconcellos	Arrange demo of PeopleSoft Academic Advisement application	100% Complete	
PS/CIBER	Joyce Brown-Willis and Janet Cragin	Look for the RWD flow chart that was created that could serve as a tool to identify the go-to person when something breaks down.	100% Complete	
PS/CIBER	Joyce Brown-Willis and Sheryl Queen	Provide information on the structure of the RWD model.	100% Complete	
Student Admin.	Anita Black & Gary Perkins	Set up faculty training at Laney, BCC, and COA	100% Complete	
Student Admin.	Gary Perkins	Send training calendar to Jim Bracy for broadcast	100% Complete	
Student Admin.	Janet Cragin	Set dates for MS student email training	100% Complete	
Student Admin.	Janet Cragin & IT	Drafting an email to send out to students advising them that their cards are ready and where to pick them up. There will also be emails sent with instructions and information.	100% Complete	
Student Admin.	Jim Bracy	Send out memo regarding ADD card procedures	100% Complete	
Student Admin.	Jim Bracy	Letter to go out to local superintendents and high school principals regarding the new concurrent enrollment form.	100% Complete	
Student Admin.	Joyce Brown-Willis	Update paper application to include signature.	100% Complete	
Student Admin.	Joyce Brown-Willis	Submit revised paper application by April 8.	100% Complete	
Student Admin.	Joyce Brown-Willis	Submit instructions about who will be using the paper application and for what purposes	100% Complete	
Student Admin.	Joyce Brown-Willis	Research CCCApply Spanish version	100% Complete	
Student Admin.	Joyce Brown-Willis	Test the prerequisite check process.	100% Complete	
Student Admin.	Joyce Brown-Willis	Email Jim Bracy an explanation of the prerequisite check process	100% Complete	
Student Admin.	Joyce Brown-Willis	Email a copy of the CCCApply Contract to Jim Bracy	100% Complete	
Student Admin.	Joyce Brown-Willis	Update the website and A&R Phone Voicemail to reflect peak enrollment	100% Complete	

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Student Admin.	Joyce Brown-Willis	She will send a copy of the CCCApply Spanish contract to Jim Bracy.	100% Complete	
Student Admin.	Joyce Brown-Willis	Send out a list of incomplete grade rosters for Spring to Wise Allen and Debbie Budd.	100% Complete	
Student Admin.	Joyce Brown-Willis	Update the website and A&R Phone message to reflect peak enrollment dates and times	100% Complete	
Student Admin.	Joyce Brown-Willis	Revise and email the concurrent enrollment form to the PIT for further review.	100% Complete	
Student Admin.	Joyce Brown-Willis	Fee Collection - Do the next steps for the proposal.	100% Complete	
Student Admin.	Kerry Compton	Discuss Spanish application at VPSS/Deans meeting	100% Complete	
Student Admin.	IT	Send out two lists: 1. All students currently enrolled 2. All students currently enrolled in 9 units or more	100% Complete	
Student Admin.	IT	Develop a web demo for how to create a roll book using Excel (this is a temporary fix.)	100% Complete	
Student Admin.	IT	Place the batch holds for on student accounts by the end of the day that have not paid their Easy Pass fees.	100% Complete	
Student Admin.	IT & Joyce Brown-Willis	Update returning student's addresses.	100% Complete	
Student Admin.	IT?	Establish final commitment process date for the Census Roster	100% Complete	
Student Admin.	Peralta & CIBER	Review discovery and previous Fit/Gap.	100% Complete	
Student Admin.	Regent and CIBER	Deliver final milestone	100% Complete	
Student Admin.	Regent, CIBER & Minh	Research student issues for discussion	100% Complete	
Student Admin.	Sheryl Queen	Check into Palomar College's wait list model.	100% Complete	
Student Admin.	Sheryl Queen	Draft a proposal about implementing the wait list function.	100% Complete	
Student Admin.	Sheryl Queen, IT & Anthony Powell	Run MIS reports to help finalize the production schedule	100% Complete	
Student Admin.	Victor Flint	Ambassadors will be trained and student business teams will be notified of all information.	100% Complete	
Student Admin.	VPs and Deans of Student Services	Take the concurrent enrollment form to the counseling department for review, and when it is finalized there will be training for all key users.	100% Complete	

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Student Admin.	Sheryl Queen	Check on adding ESL course to pilot test for wait listing	100% Complete	
Student Admin.	IT/Joyce Brown-Willis	Complete the Enrollment Fee Collection Process & Redesign	100% Complete	
Training	Anthony Powell	Talk with Jim Doty about meeting about SARS and early alert.	Issues Log Sub-Committee has discussed that this is a Matriculation issue and instructors need to be trained on how to do early alert in the rosters	Matric needs to revisit & report.