

SF USER GROUP MINUTES

March 21, 2007

Present: BSC, DSU, LRSC MASU, MISU, MISU-B, NDSCS, NDSU, UND, VCSU, WSC, NDUS- Tamara, HECN-Angela, Marie

Records Module request for creation of “diploma” address –a concern with the complexity of addresses with staff and students not understanding what the definitions of the current addresses are. It was brought up that we rush into decisions of approving complex processes only making them more complex. For 1098T’s we didn’t add a new address, we used what was out there.

Instead of creating a new address we should take care of the address problems we currently have. Angela indicated that the Campus Records Offices requested the “diploma address” and we should check with our Records people for a definition. It was recommended that each campus check with their Records Office and each campus respond to the SF Listserve with a “yes” or “no” by Friday to determine if the SF Module would like a Diploma Address added.

A concern came up that when issues come up we are provided sufficient time to research and discuss items/issues with the other SA people on our individual campuses if needed with enough time to bring back the knowledge we have gained to the user group. A knowledgeable discussion would than be able to happen within the SF User group before any decisions are made. Sharing of information gives us the ability to look at the whole picture, looking at valid points that an individual may not have thought of.

Addresses are a good example of the need for cross module discussion, looking at what the impacts of changes are in every module will prevent issues/problems before changes are made.

Campus Community User Group - it was requested that a user group be created and two representatives from each SA User Group be a part of this. Janet from DSU and someone from UND will be a part of this group. There was a concern that every campus is represented within this group. Angela will bring this forward at her meeting today.

App Messaging, GL Interfacing, Cashier Interfacing Issues – Update from Angela. This is not just happening in SF, but also the Ancillary systems. This started on January 12, 2007, and it is a result of a purge process that starts at 1:00 a.m., clearing out the processing set tables. This purge blocks the processor scheduler table; this is only a symptom not a cause. A PS case has been submitted, no clear cut answer as to why this is happening. Update meeting will be on March 28 to see what they have found. **Angela will give us an update after March 28.**

Canadian Tax Forms – T2202A - PS delivered process is for schools in Canada using PS. Not meant for US schools with Canadian students. Some schools are requiring the student to bring the form in and others pull the information off the website and the students must come in and request the form.

Alliance HEUG Conference - Brandy at NDSCS, Heidi and Mary at UND, and HECN went. UND brought back information about corrections that need to be completed at UND before we go to Version 9. It was enforced at HEUG that Table Validation should be run at least weekly if not more often. It is recommended that Table Validation be run in report mode and corrections should be completed manually. Some campuses are having difficulty with the running of Table Validation and its complexity. Angela indicated after discussion with Peggy Lucke yesterday, she dropped everything and is working on a more user friendly document. She sent it to Peggy and Marie for suggestions. **Angela will resend this in a more user friendly document to the SF User Group once she gets the recommended changes from Peggy and Marie.**

HECN staff will be meeting today to discuss what they learned at the HEUG conference this year. **Angela was asked and agreed she would put together a report of those items that they discuss today and share them with the SF User Group.** Angela has a lot of information she would like to share with us, and she has a very good one that she wants to share with Records. The power point hand outs are available on the HEUG list serve. HECN will let the SF User Group know when this is available on the list serve. **Angela has the PDF file on Integrating with Student Finance and Records- what sets off the tuition calc flag, what issues with program/plan causes student finance problems. Angela will email this and the Table Validation presentation to the SF User Group.**

Collaborative meeting will be on March 22, 2007. Karin asked if campuses were in agreement to use Census Date instead of a set date. Campuses did not question or ask for any change.

Update on Touchnet- PS is not PCI compliant. Touchnet is PCI compliant and until a determination of what products will be purchased is made this is on hold. Bill and Payment Suite is a required piece for PCI Compliance.

ND HEUG will be held on October 1 & 2 in Bismarck at the Ramkota. Possible presentations: Karin and Marie - Manipulating data to put into an External File Load and how to load the file into PS. Angela-Version 9.0 and sharing what she learned about 9.0 during her 2 week implementation in Chicago. Any other ideas send to Mary.

Letter from CAC Co-chairs- review letter and look at the "Steam Valve" Issues
Add to this list: PCI Compliance is the top list.

On the current "Steam Valve Issues" Performance issues we need to go through another Fall Semester, as fall is the most critical time, to determine if this has been resolved.

Other issues for Student Finance. Enhancing reports and queries, table validation report, balancing a/r, training for new people and a review of the system, manuals for new people, students should be forced to up-date addresses periodically when they sign in, HR and SF are not talking, therefore addresses are not being updated for employees in SF, more access to correct history and set-up. Table Validation and running report and than finding the time to make the corrections, Write-offs. Reconciliation processes in SF and the timing of running everything to obtain current information (**DSU will share there Reconciliation to GL process as they are not running all the steps previously needed.**)

Robin at MISU reported a problem with the new Aging Report - rounding errors on Item types with multiple accounts due-Marie will look into this. Once the other report that is being developed to balance to the GL is available this should not be an issue.

#118- Credit History DR will be moved to Q environment in the next day or two.

#116 - Touchnet- modify so the students can pick a school to view the account information if a student has multiple schools.

#136 - **GL Reconciliation Report** (Kim, Joan, Chelsey, Marie, Janet) developed a DR worksheet - **Marie will send out to the rest of the schools to determine if anything else is needed.** Marie will work on this one and put into Q as soon as the Credit History DR is completed. DR needs to be written up and finalized.

#133- Credit History SQR -Angela needs to write the HECN DR and it needs to be approved before Marie can start working on this.

#45_5 SF Acctng Line mod - to rearrange output columns should be migrated to Q today and ready for testing.

#134 Touchnet mods - on hold - waiting for other modifications after we know what approach we will be taking.

#129 Add name to tuition calc page – no approved DR- Angela will be researching this
#137 Unpaid Tuition Report – will assist with cancellations. Wanda, Mary, Janet will work on this.

GL Reconciliation Report- NDSCS uses SF750A to reconcile cash to the bank statement. It was suggested that NDU125 be changed to have a to and from business date. After discussion it was decided that **NDSCS would submit paperwork to add a date range to NDU125.**

Brandy asked what the status of the DR for approved Room and Board Waiver she submitted in November 2006 was. Angela indicated that was put on the board yesterday and will be #135.

Collaborative Meeting comments must be submitted by the end of today. Book charging was brought up and will be a campus decision.

Diploma Address – NDSU asked the Registrar's Office and they said they do not use this address and do not really know the reasoning for the request. Mayville Registrar's Office also said that they did not know the reason for the request. It was indicated the addition of the diploma address request was from UND- Wanda will check with her Registrar's Office.

1098T file will be submitted to the IRS on Monday. 1098T's created after this date will need to be kept track of so they are submitted in the next submittal, sometime in May.

Panel Discussion for ND HEUG regarding the International Scholarship tax. A/P also has questions on the different forms and how to pay from different country.