

SF User Group Meeting
October 15 2008 9:00 A.M.
Minutes
Recorded by MSU

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

General Agenda Items

1. Provide inquiry access to SLSC to see the reason for the Loan Default service indicator – Angela

Dennis Junk requested SLSC to have security to inquiry on Service Indicator with loan defaults. Discussion was held and all campus' were in favor. Next step would be to submit a remedy ticket with code and reason for loan default. Mary suggested that the SLSC request this from each school.

2. TouchNet & PeopleSoft Payment Plan demos

Rich Lehn request demo from Oracle and has not heard back yet. Dee will try to set up demo with Erik from TN. TN conference in Kansas City, Dee will attend and let people know any information on payment plans they receive. Dee and Karin will be presenting at the conference. Conference will be held Nov 10-13.

3. Marketplace sales tax – Karin

Product does not allow functionality sales tax or reports as needed for multiple institutions, a possible query is available to implement sales tax and get reports as needed, get information by zip code and store, working on the cost to implement this. How often would you need sales tax report? Discussion was held on who uses and who would like to use this, anyone interested email Karin

4. Security for mid level role to have access to do individual sponsor refunds

Discussion was held as to if this is ok, vote was taken and all in favor. Dee will add to permission list

5. Security for cashiers to use "create student job data"

Need this to add direct deposit for students, vote all in favor Dee will update, **Mary requested the addition of inquiry access for all set up screens to super user role, Dee will check with Barb Rask and have it added if possible, approval given by all campuses.**

6. Other:

AI portal for billing Air Force tuition assistance, Janet will send information to MSU

Development requests:

Marie is working on the following DRs:

1. Removing the dollar amounts from the service indicators on the credit history process
Coming along /will need good testing
2. Reviewing the instance column on the g/l query
DR to change column and any other modifications (submit as ticket to Angela or Dee) Chelsea will do the DR request set up so acct number not required, query 0046/ update 112 too? MSU requested fund and date range added to 112. Team to look at 0046 and 112 (Robin) Chelsea Kim and Marie, Chelsea will take the lead

Karin needs to submit DRs for the following:

1. NDU_0107_sf – service indicator balance – include a column that contains the placement date
2. On the billing statement increase the font on the address. (This has been requested from the American mail house.
3. Query NDU_0086_SF can the field “timing” be added as a column
Karin will submit the above DRs

Wish list:

1. Automatic posting of all groups (especially for FA groups)
Discussion was held on this to write down our what if questions?? Do all schools have to do this?
2. Include the EMPL ID in the self service page in 9.0
3. Implementing an account summary page
4. Set Up SACR>Product Related>Student Financials>Course and Class Fees>class fees: when pulling up a class can it pull it up by term there are too many rows pulling up which causes processing problems. This is because there are multiple sections per class per term.
5. Can the “View statements/pay online now” TouchNet link be added under the student center (under finances/my account)? Also maybe split the link into two links.
6. Develop a query to find direct deposits that have not been used for 24 months
7. Adding names to the tuition calc error report
8. Reviewing the TouchNet email statements.

Angela just wanted to remind of the team for tomorrow Web Ex to look at the student center. Some discussion was held.

Mary brought up the red flag issue, discussion was held on how campus' are going to handle this, each campus will check in to this.

Marie stated that P over Q will be refreshed on Nov 5th she would request modification by this date so we can do testing, Karin and Chelsea and Mary at BSC will be testing. Same modification as last year. New feature is to access your own 1098T.

Refund issues, Oracle has not been able to help so Angela is working with Terry McAlister , Senior Principal Consultant, CMB Enterprise Solutions, LLC

Weekly TouchNet meeting at 10 on Tuesdays

Adjourned 10:17

Next meeting November 19th

Minutes NDSCS