

Student Finance User Group  
Minutes – by UND  
November 23, 2011  
9:00-11:00 CDT

Attendees – BSC, DCB, DSU, LRSC, MASU, MISU, NDSCS, NDSU, UND, VCSU, WSC, Kraig, Angela, Dee

Not Present – Marie

Announcements:

- 1) Crystal/WSC – Effective Monday, she will be in a new position. Her replacement is Elena (?) from Russia. Crystal will be on calls with her for a little while. Crystal will be handling Collaborative and VA. Elena will take over other functions.
- 2) Margie/VCSU – retiring effective 12/15. New hire Katie Sather (?) will start and attend next meeting on 12/28. Kim (VCSU Controller) will be sitting on calls with Katie as well.
- 3) Angela/CS – accepted to Oracle PAG (Product Advisory Group)!

Congrats on new positions, retirement, and exciting opportunities for all! ☺

General Agenda Items:

- 1) 1098T Testing – volunteers to test manual and preliminary testing of system beginning Dec 1 – deadline to complete by mid-December
  - a. Crystal/WSC, Chelsea/UND, Mary/BSC, Karin?Carrie?/NDSU, Jennifer/Minot
  - b. Bundles are in STG and Production – STG will refresh next week - no testing til Nov 30
- 2) Bundle 21-23 changes
  - a. 3<sup>rd</sup> party contract enhancements – 3<sup>rd</sup> party invoice details are only available on XML because Oracle is moving to XML only. (Not available using SQR with Letter Gen).
  - b. UND viewed webinar but no testing of new functionality yet.
  - c. Should reduce workload in rolling over contracts.
  - d. We will not be able to use some functionality until we start using XML, the student records modules are using it already for transcripts. Discuss prioritizing development and testing of Comm Gen and XML.
- 3) Changes to collection mod
  - a. Reminder to always put in a comment category first before adding any comments to make sure the record is saved.
  - b. Collectors queue will not save the sort order that is customized when using “Next in List” – 2 options for improvement:

- i. Keep “Next in List” button – hardcode order to always sort the same – Next in List will follow that logic – all campuses must agree on sort order
  - ii. Remove “Next in List” button – restore delivered functionality. No “return to the Q” link
    - 1. Campuses agreed to remove “Next in List” because schools would want the sort order set differently (amount vs. aging category)
  - c. Other requests are completed in Dev and are working fine
  - d. Question – will system go back to last highlighted selection in order to easily find where collector was in the queue? Kraig looked into. Does not currently highlight last one. Sometimes, ID will disappear from Q, but not sure why – could be related to OperID/next review.
- 4) Table validation – request to add to Mid-Level role. Currently, only Super Users have access. Approved. Angela will make request to Security.
- 5) Security question - Mid-Level is just like Super User except for set-up capability? Angela will check with Security.
- 6) Tree Manager – Joann/LRSC – reviewing corp accts – objections to making 5999xxxxxx for bookstore credits so that they will apply to 3<sup>rd</sup> party contracts? Angela suggesting to put on hold until further testing is completed. Angela thinks some other set up may work to solve their issue.

Other Items:

- 1) Angela followed up with Mick on Financial Obligation Agreement . Did not get a response. She will try again to contact him.
- 2) Administrative Affairs conference call yesterday – SF group will be involved in reviewing our fee setup. T&F calculator is not pulling info correctly due to differences in setup. System office would like us to consider similar setup.
  - a. 11/30 Angela will be in Fargo – will work with Cameron on understanding the matrix of T&F info and how he is importing data.
- 3) Admissions looking at changes to app on Hobsons – possibly pulling in residency to populate automatically in PS. Suggested to discuss with your Admissions office.
  - a. Linda Baeza-Porter working with Board office (Aimee and Michelle) on Hobsons common app. Build logic into program to determine residency.
  - b. Not sure if there’s a review before importing into PS. Angela will ask Linda whether it will actually update residency table.
  - c. Not sure which committee members are working on.

- d. Need backing from System office that this is how we should handle and should withstand audit requests.
- 4) Question: Do students need to apply for MINNR to each school they are attending?
- a. Yes, they must apply for each one so that they pull in on your report.
  - b. Angela will check with Mary Bergstrom on collaborative process.

Development Requests:

- 1) 3 items into Prod since last meeting.
- 2) See DR listing attached.
- 3) Angela proposing that we add projects to the DR list to keep them on radar. SF team will discuss next week.
  - a. XML Publisher – new format for invoice generation that was delivered with 9.0
  - b. Archiving tables
- 4) Propose completing 4 items in Development and then make XML top priority after. Hope to collect more info on XML at Alliance in March. Keep in mind when suggesting new requests that there are also other projects on list. Will discuss more at next meeting.
- 5) NDSCS - Corporate payment – great to have names listed when applying 3<sup>rd</sup> party payment. However, if contract is not selected, will it apply to the right student under the right contract? *Should populate both ID and contract # in order for payment to apply correctly.*

Reminders:

- 1) STG is being refreshed next week and will be down for period of time.
- 2) Send in requests for Spring 2012 tuition calc

Next Meeting: December 28, 2011

Next Minutes: VCSU