2009 North Dakota HEUG Conference

March 16 and 17, 2009
NDSU Memorial Union
Fargo, ND

The ConnectND User Groups present the 3rd Annual
North Dakota Higher Education Users Group Conference

There will be a social from 4:30 p.m. - 7:00 p.m. on Monday, March 16. The social will be held at the NDSU Alumni Center and is sponsored by TouchNet.

2009 ND HEUG Conference Schedule

Monday, March 16

7:45 a.m.	Continental Breakfast
8:30 a.m. - 9:45 a.m.	General Session
10:00 a.m. - 4:00 p.m.	Concurrent Sessions
11:50 a.m. -1:00 p.m.	Lunch
4:30 p.m. - 7:00 p.m.	Social (NDSU Alumni Center)

TRACKS for Concurrent Sessions

** Sessions are 50 minutes each

Financials

10:00 a.m.	The PeopleSoft Vendor Registry (Part I)
11:00 a.m.	The PeopleSoft Vendor Registry (Part II)
1:00 p.m. or	Question & Answer Session for Vendor Registry
1:00 p.m.	Finance Reporting Options using Web-based Distribution
2:00 p.m.	Intermediate Excel Topics for Financials Users
3:00 p.m.	Advanced Excel Topics for Financials Users

Student Admissions

10:00 a.m.	Application Entry Round Table Discussion (Part I)
11:00 a.m.	Application Entry Round Table Discussion (Part II)
1:00 p.m.	Coding for International Students
2:00 p.m.	Office 2007 Excel Data Analysis for the Timid (Part I)
3:00 p.m.	Office 2007 Excel Data Analysis for the Timid (Part II)

Student Records

10:00 a.m.	Academic Advisement
11:00 a.m.	Setting up pre-requisites and co-requisites
1:00 p.m.	Class Permissions
2:00 p.m.	Office 2007 Excel Data Analysis for the Timid (Part I)
3:00 p.m.	Office 2007 Excel Data Analysis for the Timid (Part II)

Grants Management

10:00 a.m.	Retroactive Distribution Process
11:00 a.m.	Moving Forward With Effort Reporting
1:00 p.m.	Grant Accounting Entries in Grants Management
2:00 p.m.	Using Excel in Grants Management / Grants Management Queries
3:00 p.m.	Overview of Project Resources Tables - Queries and Functionality

HRMS

10:00 a.m.	E-apps
11:00 a.m.	E-Verify Information and Implementation
1:00 p.m.	Reports: Which Ones Will Work for You?
2:00 p.m.	Taxation of International Employees
3:00 p.m.	Persons of Interest & Contingent Workers

Student Financials

10:00 a.m.	Service Indicators: The Easy Button
11:00 a.m.	TouchNet Information Systems-What's New for CMS 5
1:00 p.m.	From THD to DIM to PS...The Whole Story
2:00 p.m.	Payment Plan Working Session (Part I)
3:00 p.m.	Payment Plan Working Session (Part II)

Financial Aid

10:00 a.m.	Financial Aid Roundtable (Part I)
or	Satisfactory Academic Progress (SAP) in 9.0 (Part I)
11:00 a.m.	Financial Aid Roundtable (Part II)
or	Satisfactory Academic Progress (SAP) in 9.0 (Part II)
1:00 p.m.	Satisfactory Academic Progress (SAP) in 9.0 (Part III)
2:00 p.m.	Single Term Mass Packaging
3:00 p.m.	Tips and Tricks - Technology uses for Financial Aid

Query Writers

10:00 a.m.	Student Records Query Writers One-On-One (Part I)
11:00 a.m.	Student Records Query Writers One-On-One (Part II)
1:00 p.m.	Student Records Query Writers One-On-One (Part III)
2:00 p.m.	Student Records Query Writers One-On-One (Part IV)
3:00 p.m.	Query Writers Tips and Tricks

2009 ND HEUG Conference Schedule

Tuesday, March 17

7:45 a.m.	Continental Breakfast
8:15 a.m. - 9:45 a.m.	General Session
10:00 a.m. - 11:50 a.m.	Concurrent Sessions
11:50 a.m. -1:00 p.m.	Lunch
1:00 p.m. - 1:50 p.m.	General Session
2:00 p.m. - 3:50 p.m.	Concurrent Sessions

TRACKS for Concurrent Sessions

** Sessions are 50 minutes each

Financials

10:00 a.m.	Remote Deposit Capture
11:00 a.m.	Uploading Purchasing Card Transactions
2:00 p.m.	Commitment Control Budget Import
3:00 p.m.	Roundtable Discussion on Financials Issues

Student Admissions

10:00 a.m.	Graduate School Roundtable: The Online Application
11:00 a.m.	Duplicate Identification Clean Up

Financial Aid

10:00 a.m.	Introduction for External Aid Functionality
11:00 a.m.	Commonline Loan Change File Processing
2:00 p.m.	ImageNow Document Imaging
3:00 p.m.	Academic Competitiveness Grant (ACG)

Grants Management

10:00 a.m.	Grant Closeout/Cleanup
11:00 a.m.	Milestones for Grant Users
2:00 p.m.	Tips and Tricks - Pre-award Issues
3:00 p.m.	Training Departmental Grants Users

Sessions listed under the specific modules are the primary sessions for users in those areas, and will be using data from those areas. However, we encourage all users to participate in any session (in any module) that may benefit them. Please read session information under all the modules and select the sessions that you feel would be most beneficial to you regardless of the module.

HRMS

10:00 a.m.	Commitment Accounting - Making "As delivered" work for you (Part I)
11:00 a.m.	Commitment Accounting - Making "As delivered" work for you (Part II)
2:00 p.m.	Tips and Tricks - HRMS Update
3:00 p.m.	"I Can See Clearly, Now:" Org Charting Solutions

Student Records

10:00 a.m.	Dynamic Dating
11:00 a.m.	UND's use of Lapse Grading
2:00 p.m.	Term/Session Setup
3:00 p.m.	Ad Astra Regions & Events Decentralizing Room Scheduling

Student Financials

10:00 a.m.	TouchNet Information Systems - PCI/PA-DSS Rules Overview
11:00 a.m.	Ins and Outs of Creating UPay Site
2:00 p.m.	Collections
3:00 p.m.	1098-T Self-Service

Query Writers

10:00 a.m.	Beginning Query Writing for the Functional User
11:00 a.m.	Intermediate Query Writing for the Functional User
2:00 p.m.	Advanced Query Writing for the Functional User

Monday, March 16 Concurrent Session Summaries

8:30 a.m. General Session

Opening Remarks and Overview of ConnectND

Module: General
Audience: All
Description: Welcome by Chancellor Goetz. Brief introduction of ConnectND staff and overview of things to come by Mick Pytlik.

10:00 a.m. Concurrent Sessions

The PeopleSoft Vendor Registry (Part I)

Module: Financials
Audience: This presentation is designed to provide users with a basic understanding of the PeopleSoft vendor database.
Description: The course will cover basic information concerning the vendor database:

- Sharing the database with other business units
- Management of the database
- Support provided to end users
- How to search for vendors
- How to enter a new vendor
- How to update a vendor
    - ACH/Banking Information
    - Changing addresses
- How to record receipt of forms W-9
- How to enter comments
- How to record 1099 information

Renee Walery - Vendor Registry - OMB & Linda Romuld, NDUS ConnectND Financials

E-apps

Module: HRMS
Audience: This course will give a preview of the self service component of HRMS.
Description: This overview of the self service component will go through all three sections of the application.

- Personal Information
- Payroll & Compensation
- Benefits

Presenters will discuss the changes that employees are allowed to make, as well as those that require approval from centralized offices.
In addition, presenters will discuss how this feature is being implemented. Discussion will include experiences from the pilot campus, MSU-B that went live January 29, 2009.

Brittnee Steckler, NDSU & Cheryl Widman, UND

Application Entry Round Table Discussion (Part I)

Module: Student Admissions
Audience: Those that would like to learn more about the application entry process and discuss the processes that we use now and/or maybe should be using.
Description: We will be showing the basic application entry procedures done by Bismarck State College. We will then have discussions on any ideas individuals have on how shortcuts could be utilized that different institutions use, that BSC may not be using yet. We would like to get input on information that all the institutions should be entering that is not being entered to possibly try to mainstream the applications throughout the NDUS system.

Jodi Rathjen, Karla Gabriel, BSC

Monday, March 16 Concurrent Session Summaries Continued

Service Indicators: The Easy Button

Module: Student Financials
Audience: This session will be useful to anyone interested in assigning or releasing service indicators with ease by uploading an electronic file. Basic Excel knowledge is helpful to begin to use this easy tool.
Description: This course will cover the basics of using the Mass Assign/Release functionality of Campus Community to quickly and easily assign/release service indicators to and from customer and external org accounts.
Items to be covered include:

- Basic population selection using a spreadsheet
- Uploading the spreadsheet
- Previewing the selection prior to posting
- Basic service indicator information

Chelsea Larson, UND

Academic Advisement

Module: Student Records
Audience: A beginner's overview of how to analyze student data against the requirements on an academic advisement report in order to evaluate degree progress. We will outline the basic advisement structure including examples of requirements unmet, requirements completed and student exceptions.
Description: Using basic setup this session will explore the use of the Academic Advisement Report. Examples of the report that the Registrar's Office and advisor's use to help students meet progress toward degree requirements will be shown. The report will include University Requirements, General Education Requirements and Program Requirements. Experiences working with departments and advisors will be shared.

Patty Dorsher, UND & Deb Ott, NDUS ConnectND Campus Solutions

Financial Aid Roundtable (Part I)

Module: Financial Aid
Audience: Open discussion/sharing of general financial aid topics
Description: This session roughly emulates the format of an Alliance conference "Birds of a Feather" session, where participants bring questions and, hopefully, other participants have answers or can compare notes about the same problems.

Sandy Hill, Mary Gerardy, NDSU

Satisfactory Academic Progress (SAP) in 9.0 (Part I)

Module: Financial Aid
Audience: This discussion on SAP is intended for those who manage the delivered SAP in 9.0 and those who are interested in SAP management details.
Description: This extended session will provide an opportunity for SAP managers to share their experience with the new PeopleSoft delivered SAP in 9.0. Moderators will facilitate discussion on topics such as:

- SAP setup
- NDU Sat Progress Extension
- Batch Processing
- Managing Report Information
- Communications
- SAP Overrides
- Career and Term Exceptions

Records information affecting SAP will be brought into the discussion with topics such as:

- W vs drops for term withdrawals
- S and other grades
- Remedial credits

Issues determined to need further attention will be noted and forwarded to the FA FUG group.

Brigit Sprenger, NDSU & Lynn Aaberg, WSC

Monday, March 16 Concurrent Session Summaries Continued

Retroactive Distribution Process

Module: Grants, Financials, HRMS
Audience: Basic introduction to the retroactive distribution process intended for users that do not use the HRMS module on a daily basis.
Description: Brief presentation will cover information required in order to complete a retro, steps taken to proof retros before they are entered, and common reasons retros are done. After presentation there will be a question and answer period.

Aubrey Ketterling, NDSU

Student Records Query Writers One-On-One (Part I) (Please register for only ONE session.)

Module: Query, Student Records
Audience: Each session limited to 3-4 participants. Participants bring query questions, queries they want modified, or queries they want written. Presenter will sit at terminal, write or modify a query, and explain while doing.
Description: This session is intended to practically show participants how to do the specific things they may be interested in relative to query writing. There is no presentation, as such, and participants must have some Student Records query writing problem that they want to solve. The presenter is not conversant with Student Accounts or FA records, so participants should only bring Student Records questions and problems.

Ray Pospisil, UND

11:00 a.m. Concurrent Sessions

The PeopleSoft Vendor Registry (Part II)

Module: Financials
Audience: This presentation is designed to provide users with a basic understanding of the PS vendor database.
Description: The course will cover basic information concerning the vendor database:

- Sharing the database with other business units
- Management of the database
- Support provided to end users
- How to search for vendors
- How to enter a new vendor
- How to update a vendor
    - ACH/Banking Information
    - Changing addresses
- How to record receipt of forms W-9
- How to enter comments
- How to record 1099 information

Renee Walery - Vendor Registry - OMB & Linda Romuld, NDUS ConnectND Financials

E-Verify Information and Implementation

Module: HRMS
Audience: This session is designed for Human Resources and Payroll personnel that are involved in the I-9 verification process for new employees and would like to know more about the E-Verify process. Participation in the E-Verify Program is required for federal contractors.
Description: This course will:

- Provide the background of the E-Verify program
- Explain the interaction with the I-9 Form
- Applicant notification requirements
- Explanation of how E-Verify works
- How E-Verify was implemented at UND
- Discussion about what was learned since implementation
- Question and answer session

Pat Hanson, UND

Monday, March 16 Concurrent Session Summaries Continued

Application Entry Round Table Discussion (Part II)

Module: Student Admissions
Audience: Those that would like to learn more about the application entry process and discuss the processes that we use now and/or maybe should be using.
Description: We will be showing the basic application entry procedures done by Bismarck State College. We will then have discussions on any ideas individuals have on how shortcuts could be utilized that different institutions use, that BSC may not be using yet. We would like to get input on information that all the institutions should be entering that is not being entered to possibly try to mainstream the applications throughout the NDUS system.

Jodi Rathjen, Karla Gabriel, BSC

TouchNet Information Systems - What's New for CMS 5

Module: Student Financials
Audience:
Description: This session will discuss what the new enhancements coming to Bill + Payment Suite and Market-place Suite.

Ryan Bunch, Jennifer Kaiser, Aaron Wadle, TouchNet

Setting up pre-requisites and co-requisites

Module: Student Records
Audience: This session is designed for users in the records area that work with catalog set-up.
Description: This session will cover the process of setting up pre-requisites and co-requistes for various conditions and attaching course(s) in the catalog. Steps covered include:

- How to create enrollment requirement groups
- Creating different types of requisites with various conditions
- Attaching enrollment requirement groups to the catalog

Ramona Breuer, NDSCS

Financial Aid Roundtable (Part II)

Module: Financial Aid
Audience: Open discussion/sharing of general financial aid topics
Description: This session roughly emulates the format of an Alliance conference "Birds of a Feather" session, where participants bring questions and, hopefully, other participants have answers or can compare notes about the same problems.

Sandy Hill, Mary Gerardy, NDSU

Moving Forward With Effort Reporting

Module: Grants
Audience: This topic will explore various features we need in an Effort System as we move forward. Anyone who has Grant or Contract Activity maybe interested in attending.
Description: This session will explore various vendor systems available and the functionality available. We hope to create a wish list of items needed for an Effort System for NDUS.

David Schmidt, UND

Student Records Query Writers One-On-One (Part II) (Please register for only ONE session.)

Module: Query, Student Records
Audience: **Each session limited to 3-4 participants.** Participants bring query questions, queries they want modified, or queries they want written. Presenter will sit at terminal, write or modify a query, and explain while doing.
Description: This session is intended to practically show participants how to do the specific things they may be interested in relative to query writing. There is no presentation, as such, and participants must have some Student Records query writing problem that they want to solve. The presenter is not conversant with Student Accounts or FA records, so participants should only bring Student Records questions and problems.

Ray Pospisil, UND

Satisfactory Academic Progress (SAP) in 9.0 (Part II)

Module: Financial Aid
Audience: This discussion on SAP is intended for those who manage the delivered SAP in 9.0 and those who are interested in SAP management details.
Description: This extended session will provide an opportunity for SAP managers to share their experience with the new PeopleSoft delivered SAP in 9.0. Moderators will facilitate discussion on topics such as:

- SAP setup
- NDU Sat Progress Extension
- Batch Processing
- Managing Report Information
- Communications
- SAP Overrides
- Career and Term Exceptions

Records information affecting SAP will be brought into the discussion with topics such as:

- W vs drops for term withdrawals
- S and other grades
- Remedial credits

Issues determined to need further attention will be noted and forwarded to the FA FUG group.

Brigit Sprenger, NDSU & Lynn Aaberg, WSC

1:00 p.m. Concurrent Sessions

Question and Answer Session for Vendor Registry

Module: Financials
Audience: This is designed for any one who is entering vendors into the PeopleSoft vendor database.
Description: This is a question and answer period. To help those users who are having issues in or with the vendor database. Will provide information on the following and answer any questions related to the database.

- Searching for vendors
- Entering new vendors
- Updating Vendors (i.e. ACH/Banking Information)
- The relationship between Locations and Addresses
- Recording the receipt of paperwork
- Entering comments
- Recording 1099 information
- Reactivation of inactive vendors
- Employee vendors (state versus higher education)

Renee Walery - Vendor Registry - OMB

Reports: Which Ones Will Work for You?

Module: HRMS
Audience: For anyone using Peoplesoft HRMS in their daily work.
Description: An open discussion on HRMS Peoplesoft-generated reports: What is available and which ones make our work easier.

Diane Nelson, UND

Monday, March 16 Concurrent Session Summaries Continued

Finance Reporting Options using Web-based Distribution

Module: Financials
Audience: This course is intended for Controllers and other finance personnel who are interested in using the monthly reporting tool developed by NDSU.
Description: This course will briefly describe the process that NDSU went through to develop a reporting database that creates monthly financial reports for all funds and departments centrally.
NDSU would like to make this reporting tool available to any campus interested in using it, and NDSU would host the website where the reports are stored.
The website is a secure sight where users can view pdf reports of the following on a monthly basis:

- Appropriated fund budget to actuals report
- Local fund budget to actuals report
- Local fund balance summary report

BSC is in the process of migrating to the web-based system and Greg Ross will be presenting their experience with this tool and provide some additional background on the project.

Karla Mongeon-Stewart, Britt McAlister, NDSU & Greg Ross, BSC

Coding for International Students

Module: Admissions, HRMS
Audience: This session will address a variety of issues related to information entered for non-immigrant, international applicants.
Description: We will go over information such as visa status, citizenship, residency and admission and how international students may be coded differently. In some cases, such as admission, the general process may be the same, but other areas required when admitting are much different. Other covered information will include queries used and where information is accessed to produce such queries. There will be time for questions following the presentation. Specific topics and navigation to be covered in this course:

- Entering/editing visa permit data
- Entering/editing citizenship data
- Address format for international addresses (varies from country to country)
- Variations in residency data for international students
- Queries for tallying enrollment of international population and what different fields can be used to gather information

Alicia Kauffman, Marilyn Dowdy, NDSU

From THD to DIM to PS… The Whole Story

Module: Student Financials, Financials
Audience:
Description: We all know how our part of the process works. In this session we'll find out how the pieces come together to form the whole system for housing billing. Housing and dining transactions will be created in The Housing Director (THD), go through the Data Interface Module (DIM) and end up on the student's account in PeopleSoft (PS). Procedures will be demonstrated and the integration of the various components will be explained. There will be time for discussion and questions.

Suzy Belyea, UND & Maria Saucedo, Sheri Gilbertson, NDUS ConnectND Campus Solutions

Class Permissions

Module: Student Records
Audience: Individuals who work in Student Records offices.
Description: This session will cover the features and advantages of using electronic class permissions in Campus Connection. The assignment of individual class permissions and using permission numbers will be discussed in contrast to using traditional paper permits. Training academic departments on using this function will be covered, as will impacts of electronic permissions on add deadlines, waitlists and course requisites/restrictions.

Kristi Wold-McCormick, NDSU

Monday, March 16 Concurrent Session Summaries Continued

Satisfactory Academic Progress (SAP) in 9.0 (Part III)

Module: Financial Aid
Audience: This discussion on SAP is intended for those who manage the delivered SAP in 9.0 and those who are interested in SAP management details.
Description: This extended session will provide an opportunity for SAP managers to share their experience with the new PeopleSoft delivered SAP in 9.0. Moderators will facilitate discussion on topics such as:

- SAP setup
- NDU Sat Progress Extension
- Batch Processing
- Managing Report Information
- Communications
- SAP Overrides
- Career and Term Exceptions

Records information affecting SAP will be brought into the discussion with topics such as:

- W vs drops for term withdrawals
- S and other grades
- Remedial credits

Issues determined to need further attention will be noted and forwarded to the FA FUG group.

Brigit Sprenger, NDSU & Lynn Aaberg, WSC

Grant Accounting Entries for MiSU, NDSU and UND

Module: Grants, Financials
Audience: An overview of the grant accounting entries created systematically for the institutions that use the grants modules (MISU, NDSU, and UND). This session should be jointly attended by the grants officers and their controllers, etc.
Description: Accounting Entries

- Cost Reimbursable Contracts
  - Expenses/ Revenue Recognition/Billing/Accounts Receivable
    - Advance Payments
    - No advance Payments
- Non Cost Reimbursable Contracts
  - Expenses/ Revenue Recognition/Billing/Accounts Receivable
    - Scheduled Payments

Pam Hurdelbrink, NDUS ConnectND Financials

Student Records Query Writers One-On-One (Part III) (Please register for only ONE session.)

Module: Query, Student Records
Audience: Each session limited to 3-4 participants. Participants bring query questions, queries they want modified, or queries they want written. Presenter will sit at terminal, write or modify a query, and explain while doing.
Description: This session is intended to practically show participants how to do the specific things they may be interested in relative to query writing. There is no presentation, as such, and participants must have some Student Records query writing problem that they want to solve. The presenter is not conversant with Student Accounts or FA records, so participants should only bring Student Records questions and problems.

Ray Pospisil, UND

2:00 p.m. Concurrent Sessions

Intermediate Excel Topics for Financials Users

Module: Financials, HRMS
Audience: This Excel course is designed for Intermediate Excel Users who are familiar with some basic functions and are everyday users of Excel. This is NOT a beginner Excel course.
Description: This Excel course will begin to explore the more intermediate functionality of Excel 2007. Course will cover many shortcuts and uses for many of the functions available in Excel. Presenters will use financial data from PeopleSoft for examples so users can learn tools firsthand and can take these tips and tricks back to their offices for immediate use.
Excel Functionality to be covered in this course:

- 2007 Interactive: Excel 2003 to Excel 2007 command reference guide
- Converting files from .csv to .xlsx
- Using Double-click for filling cells
- Using the Fill-handle for copying and highlighting cell ranges
- Using Shift-End-UP/Down Functionality for copying
- Using the F4 key to create Absolute References-when and how to use
- Using the autofill handle for copying dates or other lists
- Using the Control-A function for navigation
- Shortcuts for navigating in an excel spreadsheet
- Using the Control-F functionality for searching
- Filtering tips and tricks
- Subtotaling tips and tricks
- Sorting and Custom Sorting tips and tricks

Detailed information on some Excel functions for finance as well as more advanced topics will either be covered in this session or during the next 1 hour session immediately following.

Karla Mongeon-Stewart, Ramona Adams, Michele Kuppich, NDSU

Taxation of International Employees

Module: HRMS
Audience: An intro to paperwork and taxation rules for international employees in F-1, J-1 and H1-B immigration statuses, including an overview of federal, state and FICA taxation and tax treaties; how to set the employees up in HRMS; demo of Windstar tax software used by some NDUS campuses
Description: Overview of hiring paperwork and procedures required for international employees, including:

- Immigration status requirements and restrictions
- W-4, I-9 compliance
- Dept of Homeland Security documents
- FICA taxation
- Tax treaties

Set up of international employees in HRMS on the citizenship and tax screens
Demo of Windstar tax software

Tricia Johnson, Laura Garske-Hermanson, NDSU

Office 2007 Excel Data Analysis for the Timid (Part I)

Module: Student Admissions, Student Records
Audience: This session is for anyone who has a needed to work with the analysis and reporting of data available via Campus Connection. Whether you use the standardized reports or receive data sets through your query writer, this session will help you make mounds of data meaningful.
Description: Microsoft Office 2007
(continued next page)

- Importing data
- Organizing data.
- Using the Pivot tables
- Displaying data.
- Saving your steps so you don't have to rethink it all over.

Linda Baeza, UND

Payment Plan Working Session (Part I)

Module: Student Financials
Audience: This will be a working session on payment plans as well as the self-service associated with payment plans.
Description:

- Will facilitate discussion and testing of the payment plans and any issues that have come up through testing. This will include self-service.
- Kelly Bisek from NDSU and Mary Eisenbraun from BSC will be available to offer insight into their current business processes that they have been using with payment plans.
- Attendees should come prepared with payment plans already set up in Stage and some testing already accomplished in order to facilitate effective discussion and further testing.

Deidre Holth, NDUS ConnectND Campus Solutions & Kelly Bisek, NDSU

Single Term Mass Packaging

Module: Financial Aid
Audience: Group discussion on Single Term Mass Packaging which is being implemented in the Fall 2009 semester. A listserv reminder will be coming out before the conference so you may submit your questions to be discussed during this session.
Description: This session will be used as a group discussion to talk about Single Term Mass Packaging.

- Set Up
    - Split Codes
    - Selection Criteria
    - Award Messaging
- Order of Processing
- Packaging Equations
- Packaging Philosophy

Chris Meek, DSU & Rohit Kulkarni, UND

Using Excel in Grants Management / Grants Management Queries

Module: Grants
Audience: This Excel course is designed for Intermediate Excel Users who are familiar with some basic functions and are everyday users of Excel. This is NOT a beginner Excel course.
Description: This course will explore the more advanced functionality of Excel. Presenter will use financial data from PeopleSoft for examples so users can learn tools firsthand and can take these tips and tricks back to their offices for immediate use. Excel Functionality to be covered in this course:

- Using Sorts
- Using Subtotals
- Using Filters
- Using Formulas
- Using Functions
- Using Pivot Tables

This course will also be an opportunity to review some grants management queries and how to use and manipulate the data they provide.

Wayde Anderson, UND

Monday, March 16 Concurrent Session Summaries Continued

Student Records Query Writers One-On-One (Part IV) (Please register for only ONE session.)
Module: Query, Student Records
Audience: Each session limited to 3-4 participants. Participants bring query questions, queries they want modified, or queries they want written. Presenter will sit at terminal, write or modify a query, and explain while doing.
Description: This session is intended to practically show participants how to do the specific things they may be interested in relative to query writing. There is no presentation, as such, and participants must have some Student Records query writing problem that they want to solve. The presenter is not conversant with Student Accounts or FA records, so participants should only bring Student Records questions and problems.

Ray Pospisil, UND

3:00 p.m. Concurrent Sessions

Advanced Excel Topics for Financials Users
Module: Financials, HRMS
Audience: This Excel course is designed for Advanced Excel Users who are familiar with basic functions and are everyday users of Excel. This is NOT a beginner Excel course.
Description: This Excel course will begin to explore the more advanced functionality of Excel 2007. Course will cover many of the functions available in Excel that can be used in conjunction with PeopleSoft data. Presenters will use financial data from PeopleSoft for examples so users can learn tools firsthand and can take these tips and tricks back to their offices for immediate use.
Excel Functionality to be covered in this course:

- VLOOKUP
- IF
- Embedded IF statements and using AND and OR functionality
- CONCATENATE
- LEFT/MID/RIGHT functionality
- Global Rounding
- Conditional Formatting
- Removing Duplicates
- Using Templates in Excel
- Pivot Tables
- Advanced Pivot Table functionality

Karla Mongeon-Stewart, Ramona Adams, Michele Kuppich, NDSU

Payment Plan Working Session (Part II)
Module: Student Financials
Audience: This will be a working session on payment plans as well as the self-service associated with payment plans.
Description:

- Will facilitate discussion and testing of the payment plans and any issues that have come up through testing. This will include self-service.
- Kelly Bisek from NDSU and Mary Eisenbraun from BSC will be available to offer insight into their current business processes that they have been using with payment plans.
- Attendees should come prepared with payment plans already set up in Stage and some testing already accomplished in order to facilitate effective discussion and further testing.

Deidre Holth, NDUS ConnectND Campus Solutions & Kelly Bisek, NDSU

Monday, March 16 Concurrent Session Summaries Continued

Persons of Interest & Contingent Workers

Module: HRMS
Audience: This is a roundtable discussion on the use of Persons of Interest vs Contingent Workers in HRMS.
Description: This discussion will explore use of Persons of Interest and Contingent Workers in HRMS and in NotiFind. The goal is to develop consistent use throughout the campuses.

Joy Johnson, Cheryl Widman, UND

Office 2007 Excel Data Analysis for the Timid (Part II)

Module: Student Admissions, Student Records
Audience: This session is for anyone who has a needed to work with the analysis and reporting of data available via Campus Connection. Whether you use the standardized reports or receive data sets through your query writer, this session will help you make mounds of data meaningful.
Description: Microsoft Office 2007

- Importing data
- Organizing data.
- Using the Pivot tables
- Displaying data.
- Saving your steps so you don't have to rethink it all over.

Linda Baeza, UND

Tips and Tricks - Technology uses for Financial Aid

Module: Financial Aid
Audience: This is a session that will demonstrate how to use a formula comparison within an Excel spreadsheet. It is designed for beginner to intermediate Excel Users who are familiar with some basic functions.
Description: Tips and Tricks - "How To" Session on 1) using a spreadsheet comparison formula in Excel and 2) ACG/SMART processing practices at NDSU - for Financial Aid Users
This session will demonstrate how to use a formula to compare one list of data to another within an Excel spreadsheet. Specific examples will include how it is commonly used at NDSU to compare State Grant lists to determine new recipients, as well as those no longer on the list. Other examples of its use will be also be discussed.
An overview of the ACG/SMART processing practices that are used at NDSU will also be discussed.
Time will be allowed at the end of the session for colleagues to share other "Tips and Tricks."

Bonnie Litton, NDSU

Overview of Project Resources Tables - Queries and Functionality

Module: Grants
Audience: This course is designed for Grants Officers and those who run queries to review data related to Grants and Contracts.
Description: This course will explore the functionality of Excel features such as sorting and filtering as it applies to Project Resource Tables Queries. Financial Data from PeopleSoft will be used as examples so the users can learn Tools firsthand.

Jill Unruh, NDSU & Pam Hurdlebrink, NDUS ConnectND Financials

Query Writers Tips and Tricks

Module: Query
Audience: Facilitator will present a short update on query sharing within the institution. Beyond that, this is a Query Writer question and answer sharing session.
Description: This session roughly emulates the format of an Alliance conference "Birds of a Feather" session, where participants bring questions and, hopefully, other participants have answers or can compare notes about the same problems.

Ray Pospisil, UND

Tuesday, March 17 Concurrent Session Summaries

8:15 a.m. General Session

Providing Great Customer Service to Today's Students & Parents

Module: All

Audience: The session is valuable for any student services administrator in higher education. It will be a broad session that will review the changing demographics and needs of today's students and how higher education administrators can help promote student success through customer service, technology, and other collaborative and creative ways.

Description: This session will provide an overview of the changing demographics and needs of today's students and their families and how we, as higher education administrators, can promote student success through streamlined student services models, enhanced technology and self-services, and other collaborative and creative ways. The presenter will discuss integrated service models that have proved successful, as well as online student self-services and portals that have been developed to provide personalized information and communications to students. The presenter will provide online views of various University of Minnesota web applications that have been highly successful including Financial Aid Status, a web application for students that has helped to demystified the complex financial aid process and Parent/Guest Access, an online web process allowing students to share information about student grades, holds, financial aid information, enrolled courses, and student financials to their parents or other guests.

Julie A. Selander, University of Minnesota

10:00 a.m. Concurrent Sessions

Remote Deposit Capture

Module: Financials, HRMS

Audience: All entities that would like to scan their checks at their place of business and electronically transmit a file to their financial institution for deposit.

Description:

- This demonstration will show you how you can take advantage of electronically processing your checks saving you time and transportation costs.
- You scan your checks at your location
- Checks are imaged and endorsed as they are scanned
- You have extended cutoff times
- You can deposit checks from an out-of-town location
- You can create your own detail deposit reports
- You can export your deposit information to excel for an audit trail
- You retain the original check and purge on a pre-determined schedule
- Copies of the imaged checks can be obtained from the Bank's archive for 7 years

Dale Eberle, Linda Rosen, Bank of North Dakota

Graduate School Roundtable: The Online Application

Module: Student Admissions, Student Records

Audience: This session is for anyone interested in the Hobson's application as it pertains to graduate education.

Description: This session is a preview and discussion group for the Online application as it is implemented at the Graduate Level.

Linda Baeza, UND

Dynamic Dating

Module: Student Records

Audience: A guide to setting up and using dynamic dating, as well as an overview of some of the problems we have encountered in using this feature.

Description: This is a PowerPoint presentation covering all the steps necessary to set up and implement dynamic dating at your institution.

Ray Pospisil, UND

Commitment Accounting - Making "As delivered" Work For You (Part I)

Module: HRMS, Financials
Audience: This Commitment Accounting course is designed for intermediate to expert CA Users who are every-day users of CA and are familiar with the functionality.
Description: This CA course will review the project list of issues and development requests to provide delivered functional solutions to many of the challenges users face daily.
This CA course will illustrate the benefit of using the PS delivered Reversal/Adjustment process to correct current calendar year funding sources and/or earnings such as:

- Combination Code change
- Earnings Code change
- Employee under payments
- Employee overpayments

This CA course will illustrate ways of eliminating the need for a separate check in the following situations:

- Additional Pay with retirement
- Additional Pay without retirement

This CA course will attempt to restore your faith in the delivered Retro Distribution process.

Karin Stinar, NDUS ConnectND HRMS & Alicia Baltimore, Consultant

Introduction for External Aid Functionality

Module: Financial Aid
Audience: Intended for Financial Aid users who receive external aid information from students or on lists and who are faced with entering the information into the system.
Description: In V9.0, Oracle gives users a number of ways to enter "external" aid, which is usually loan or scholarship information reported by the student or a third party. With the new functionality, staff can manually post the awards student by student; manually enter the award information onto a "list" page; import a list, such as the State Grant roster, and batch award from the list; work with information reported through self-service; or work with information such as waivers from Student Financials. This presentation will provide an introduction to the new functionality.

Dennis Junk, NDUS ConnectND Campus Solutions

TouchNet Information Systems - PCI/PA-DSS Rules Overview

Module: Student Financials
Audience: This session will explore the Payment Card Industries Data Security Standards (PCI-DSS) for institutions accepting credit cards on campus
Description: We will also discuss
-Payment Application (PA-DSS) requirements, which apply to all of your campus vendors accepting credit card payments in their applications.
-Investigate strategies to help you meet these requirements.

Ryan Bunch, John McElroy, TouchNet

Grant Closeout/Cleanup

Module: Grants
Audience: This course is design for Grant and Contract Officers that are responsible for maintaining grant awards.
Description: The course will go over the grant closeout process and the importance of the trial balance as a decision making tool in the close out process.

Eric Exner, NDSU

Beginning Query Writing for the Functional User

Modules: All
Audience: This session is designed for a Functional User with no experience with PeopleSoft Query writing. Familiarity with PeopleSoft screens necessary. This is a session for beginners in Query Writing.
Description: This session is designed for PeopleSoft Functional Users with no Query writing experience. The course will cover the basics of PeopleSoft Query writing and the presenter will demonstrate how to write a query and extract data out of PeopleSoft.
Topics covered in this session

- How do I determine which PeopleSoft Table/Record to use in the query and which Fields to extract.
- What is special about Control+J Keys.
- Write a sample query and extract data out of one table

Rohit Kulkarni, UND

11:00 a.m. Concurrent Sessions

Uploading Purchasing Card Transactions

Module: Financials
Audience: Individuals interested in the process to upload purchasing card transactions into PeopleSoft.
Description: This course will walk you through the process of uploading the Purchasing Card transactions from the Purchasing Card Providers database into Accounts Payable in PeopleSoft.
Processes to be covered in this course:

- Export of cardholders & running the mapper files from Purchasing Card Provider's database.
- Demonstrate various processes used to load and stage transactions in PeopleSoft.
- Voucher Build in Accounts Payable
- How to access voucher information via a query to view transactions, vendor name, etc. where the purchasing card transactions were made.
- Demonstrate how to make chartfield transactions in the credit card database prior to loading the transactions into PeopleSoft.

Dawn Lommen, Allison Peyton, UND

Duplicate Identification Clean Up

Module: Student Admissions
Audience: Individuals who would like to learn how to search for duplicate identifications and how to clean them up when/if they are found.
Description: Round-table discussion on avoiding duplicate identifications and the cleaning up of duplicate identifications.

Jodi Rathjen, BSC

UND's use of Lapse Grading

Module: Student Records
Audience: At UND at the end of each major semester, 800-900 incomplete grades are assigned to students. This prompted us to test Lapse Grading features in PeopleSoft 9.0 and implement them despite some system limitations. Join us as we share our experiences.
Description: PowerPoint presentation covers UND's I to F policy, system set-up, how the lapse features work, queries to support processing, and system limitations, omissions and bugs.

Sharon Bruggeman, Ray Pospisil, UND

Tuesday, March 17 Concurrent Session Summaries Continued

Commitment Accounting - Making "As delivered" Work For You (Part II)

Module: HRMS, Financials
Audience: This Commitment Accounting course is designed for intermediate to expert CA Users who are every-day users of CA and are familiar with the functionality.
Description: This CA course will review the project list of issues and development requests to provide delivered functional solutions to many of the challenges users face daily.
This CA course will illustrate the benefit of using the PS delivered Reversal/Adjustment process to correct current calendar year funding sources and/or earnings such as:

- Combination Code change
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This CA course will attempt to restore your faith in the delivered Retro Distribution process.

Karin Stinar, NDUS ConnectND HRMS & Alicia Baltimore, Consultant

Commonline Loan Change File Processing

Module: Financial Aid
Audience: This session is designed for participants familiar with the Commonline Loan certification and change file processes.
Description: We will review Commonline Loan certification, change file processes, error reports and discuss ways to identify and resolve change files that were not successfully processed.

Laurie Weber, MiSU

Ins and Outs of Creating a UPay Site

Module: Student Financials
Audience: This presentation is designed for users who will be creating UPay sites for conferences, workshops, etc. Some computer programming knowledge is required. In addition to the set up of the UPay site, General Ledger reconciliation processes will be reviewed.
Description: This presentation will walk you through how to create a UPay site to accept online credit card and E-check payments and the reconciliations process for these transactions. Topics will cover:

- Create a UPay site
- Connect the UPay site to an online conference registration site
- Gather relevant information for cross referencing between UPay and conference database
- Make a payment
- UPay site reports
- Reconciliations spreadsheets
- Balancing between UPay and the GL

Madhavi Marasinghe, Emily Goodoien, UND

Tuesday, March 17 Concurrent Session Summaries Continued

Milestones for Grant Users
Module: Grants
Audience: Show grants officers how to enter Milestones into PeopleSoft and how to use the reports productively.
Description: Enter Milestones for awards and use the reports to your advantage
- Run queries to see what milestones are needed
- Run queries to see what milestones are complete
- Run notify to receive emails
- Use email to notify PI, Co-PI, Grants Officer – Tech reports, financial reports, etc

Laurel Hyatt, MiSU

Intermediate Query Writing for the Functional User
Module: Query
Audience: This session will be most beneficial for a functional user who has basic knowledge of SQL and the PeopleSoft Query Tool. However, query writers of all levels are welcome.
Description: In this session, we will:
- quickly review some basic query writing techniques
- focus on extracting data from multiple PeopleSoft records using natural joins and outer joins
- if time permits, we will also discuss the use of subqueries

Viet Doan, NDSU

1:00 p.m. General Session

Integrated Document Management 101: Taking Control of the Paper Trail
Module: General
Audience: Many ImageNow college and university users experience ImageNow efficiencies in enrollment services and the business office, but some haven't fully optimized the impact of ImageNow campus-wide. In this session, you will learn how ImageNow speeds processes, improves student service and cuts costs in departments across campus, including advancement, residential life, facilities, athletics, and the president's office.
Description: Take control of the forms and documents that overwhelm your administrative offices on campus The ImageNow enterprise document management, imaging, and workflow solution deploys quickly and easily, creating a direct and effortless connection between you, your colleagues, and the documents you use daily. Learn how the transactional and administrative tasks typically associated with your daily work can be reduced or eliminated, so you can focus your efforts on achieving organizational goals. Also learn how our ImageNow's patented technology can integrate with your PeopleSoft application without any programming.

Kevin Tews, Perceptive Software (makers of ImageNow)

2:00 p.m. Concurrent Sessions

Commitment Control Budget Import
Module: Financials, HRMS
Audience: Campus Budget personnel
Description: This course will provide an overview of the finance budget import process. The process uses an excel file to create a .csv file that can be imported into Peoplesoft.
Campus budget personnel will be using this process for entering annual budgets beginning FY2010 budget cycle. The process could also be used to enter budget journals throughout the year.

Nicci Strand, NDUS ConnectND Financials

Tips and Tricks - Pre-award Issues
Module: Grants
Audience: This session is designed for individuals familiar with grants and contracts.
Description: This session will be a roundtable discussion of pre-award topics such as queries and reports.

Amy Scott, NDSU

Tuesday, March 17 Concurrent Session Summaries Continued

Tips and Tricks - HRMS Update

Module: HRMS
Audience: This session is for core users of the HRMS system (HR, Payroll, Budget)
Description: This session includes:

1. Discussion of current status of HRMS
    - HE Student Tax Update functionality,
    - FLSA functionality (or lack thereof)
    - Payroll Calendar
    - CS/Fin/HR data sync
2. Overview of potential next upgrade (9.1) and what may be included in that version, and
3. Participant guidance on what users want CND to focus on between now and the next HRMS upgrade:
    - Recruiting Solutions
    - Training Administration
    - Manager Self-Service
    - Other?

Kate Greicar, Kelli Heiser, Carla Vail, Karin Stinar, Teri Thorsen, NDUS ConnectND HRMS

Term/Session Setup

Module: Student Records
Audience: This session is designed for those in the Records Office who are responsible for term/session setup on their campus.
Description: The term/session table provides the ability to set various dates related to dropping and withdrawing from school. This session will demonstrate table setup and then show how transcripts appear under the various setups. This session will also show how class rosters and other associated objects in the system would appear in each setup situation. It will be a demonstration/discussion style session.

Charles Fjeld, Deb Ott, Jan Solem, NDUS ConnectND Campus Solutions

ImageNow Document Imaging for Financial Aid

Module: Financial Aid
Audience: The presenter will demonstrate how the UND financial aid office is using the ImageNow document Imaging system and the workflow feature to increase process efficiency.
Description:

- ImageNow General information
- Demonstrate some of the available features in ImageNow and discuss which ones are currently being used
- How can I tie ImageNow to PeopleSoft/Other Applications [In Access/Visual Basic etc]
- What are Workflows and demonstrate the usage
- Discuss how are documents stored
- Q&A

Rohit Kulkarni, UND

Advanced Query Writing for the Functional User

Module: Query
Audience: This session will be most beneficial for a functional user who has working knowledge of SQL, the PeopleSoft Query Tool, and extracting data from multiple records. However, query writers of all levels are welcome.
Description: This session will:

- review and expand upon selection criteria
- introduce aggregate fields
- introduce expressions
- introduce unions

Viet Doan, NDSU

Collections

Module: Student Financials

Audience: The Student Financials Collection module has the capability to track and record all communications on outstanding AR that may go to collections. Defining a process and procedure will allow daily activity in the Business Office to become more effective and efficient. The Collections module allows AR to become more organized and will streamline tasks and collections to particular collectors.

Description: If you have many collectors working in the Business Office and need to "fine-tune" the tracking of tasks for each, this session is for you. There will be six areas discussed in the collections module to assist the Business Office staff to organize and streamline tasks. Areas that will be covered are:

- Credit History
- Process Collections
- Collector Queue- Customers
- Begin Customer Collections
- Update Customer Collections
- Put Customers in Collections

Angela Uhlenkamp, NDUS ConnectND Campus Solutions

3:00 p.m. Concurrent Sessions

Roundtable Discussion on Financials Issues

Module: Financials

Audience: This course is intended for all finance users attending the conference

Description: Session is intended to provide time for networking and for discussing financials issues with other NDUS users. There will be no particular topics scheduled, but rather, session is intended to provide a platform for discussion and sharing

Tamara Barber, BSC

"I Can See Clearly, Now:" Org Charting Solutions

Module: HRMS

Audience: This session is for Human Resource staff

Description:"Please attach an Organizational Chart." Those words, at the end of the University System common Position Description form, strike terror in the hearts of departmental staff. They've tried using Word, Excel, Visio or Omnigraffle. They've purchased Org Charting desktop software, and wrestled with it. Then they resign or retire, and their replacement gets to start over from scratch.

It doesn't need to be so hard. This session will give a glimpse of a system-wide solution, through software that can integrate with PeopleSoft using the "Reports to" field to draw the charts for you. The charts can be as simple, or as complex, as needed. Either way, they will quickly give a visual representation of your campus or departments.

Teri Thorsen, NDUS ConnectND HRMS

1098-T Self-Service

Module: Student Financials

Audience: Student Financials users that deal with 1098-T forms.

Description: As a student will walk through the consent form via self-service. We will discuss the setup of 1098-T self service and run through the process. Walk through the consent a student will need to accept prior to receiving an electronic 1098-T form. Review basic set up and dry run through of the 1098-T process.

Angela Uhlenkamp, Deidre Holth, NDUS ConnectND Campus Solutions

Tuesday, March 17 Concurrent Session Summaries Continued

Ad Astra Regions & Events Decentralizing Room Scheduling

Module: Student Records
Audience: This session is intended for those currently using Ad Astra Room Scheduler to introduce and demonstrate the use of Regions decentralize room scheduling of events to departments.
Description: Presentation on the results of a pilot at UND that implemented the use of Regions and Events to assist departments in managing rooms outside of the realm of the Registrar's Offices Room Scheduler. We will demonstrate the steps required for set-up of the regions and examples of how Ad Astra Regions can make scheduling easier on both the department and the room scheduler.
Topics to be covered include:

- What are Regions
- Who would be in a Region?
- Using Regions to secure access to a particular building.
- What are Events?
- How can Events be used in a department?
- How will Regions and Events help the room scheduler?

Kayla Hotvedt, UND & Maria Saucedo, NDUS ConnectND Campus Solutions

Academic Competitiveness Grant (ACG)

Module: Financial Aid
Audience: This will be a moderated discussion session for those who track, award and disburse ACG to eligible students.
Description: This session will provide an opportunity to share methods of tracking ACG eligibility and recipients. Possible discussion items will include:

- Who determines eligibility
- Eligibility Processes
- Equation Groups
- Student Groups
- Eligibility Page
- COD Reporting

Lynn Haverlock, WSC

Training Departmental Grants Users

Module: Grants
Audience: Grants & Contracts Administrators or Department Level Adminstrators who handle grants. This session is for anyone who deals with sponsored funding and wants to know where to find the budget, PI, time period, or Grants & Contracts officer.
Description: This session is an overview of the training tools that Grant Departments can provide to Departmental Users to manage sponsored funding. Items covered are set up of run controls, running a PI Report, and different finance screens.

Christin Nelson, UND

2009 ND HEUG Conference Registration

CONFERENCE FEE: $80.00 PER PERSON
REGISTRATION DEADLINE IS FRIDAY, FEBRUARY 27, 2009

Name_______________________________ Address____________________________________
City ________________________________ State ______________ Zip ____________________
Campus ____________________ Phone ______________ Email ________________________
Fax ____________________ Birthdate____

(Your birthdate is needed for accurate record keeping. It will be kept confidential and used **only** as identification at Williston State College.)

Payment _____ Check _____ Credit Card __________________ P.O. Number

Card Type _______________________ Card Number _________________________________
V-Code (last 3 digits on signature strip) _________ Expiration ___________________________
Signature____

Refund Policy: No refunds are guaranteed if the participant cancels less than 3 days prior. A $15 processing fee will be deducted from the amount to be refunded. Without a cancellation, participants will be responsible for full payment. Registrations are transferable.

I will be attending the following General Sessions and meals:

Monday, March 16
_____ 7:45 a.m. - Continental Breakfast
_____ 8:30 a.m. - General Session
_____ 11:50 a.m. - Lunch
_____ 4:30 p.m. - Social

_____ **I will need a parking permit.**

Tuesday, March 17
_____ 7:45 a.m. - Continental Breakfast
_____ 8:15 a.m. - General Session - Providing Great Customer Service to Today's Students & Parents
_____ 11:50 a.m. - Lunch
_____ 1:00 p.m. General Session - Integrated Document Management 101: Taking Control of the Paper Trail

Mail registration and check or money order to:

trainND NORTHWEST
1410 University Avenue
PO Box 1326
Williston, ND 58802-1326
Fax: (701) 774-4201

For questions regarding registration call TrainND at (701) 774-4235 or toll-free at 866-938-6963.

PRESENTERS MUST REGISTER FOR THE CONFERENCE

Please indicate the concurrent session(s) you plan to attend:

Participant's Name ____

Monday, March 16

10:00 a.m.

_____ The PeopleSoft Vendor Registry (Part I)
_____ E-apps
_____ Application Entry Round Table Discussion (Pt I)
_____ Service Indicators: The Easy Button
_____ Academic Advisement
_____ Financial Aid Roundtable (Part I)
_____ Satisfactory Acad Progress (SAP) in 9.0 (Pt I).
_____ Retroactive Distribution Process
_____ Student Records Query Writers 1-On-1 (Pt I)

11:00 a.m.

_____ The PeopleSoft Vendor Registry (Part II)
_____ E-Verify Information and Implementation
_____ Application Entry Round Table Discussion (Pt II)
_____ TouchNet Information Systems - New for CMS 5
_____ Setting up pre-requisites and co-requisites
_____ Financial Aid Roundtable (Part II)
_____ Satisfactory Acad Progress (SAP) in 9.0 (Pt II)
_____ Moving Forward With Effort Reporting
_____ Student Records Query Writers 1-On-1 (Pt II)

1:00 p.m.

_____ Question & Answer Session for Vendor Registry
_____ Finance Reporting Options using Web-based Distribution
_____ Reports: Which Ones Will Work for You?
_____ Coding for International Students
_____ From THD to DIM to PS...The Whole Story
_____ Class Permissions
_____ Satisfactory Acad Progress (SAP) in 9.0 (Pt III)
_____ Grant Acctg Entries for Grants Management
_____ Student Records Query Writers 1-On-1 (Pt III)

2:00 p.m.

_____ Intermediate Excel Topics for Financials Users
_____ Taxation of International Employees
_____ Office 2007 Excel Data Analysis for the Timid (Part I)
_____ Payment Plan Working Session (Part I)
_____ Single Term Mass Packaging
_____ Using Excel in Grants Management / Grants Management Queries
_____ Student Records Query Writers 1-On-1 (Pt IV)

3:00 p.m.

_____ Advanced Excel Topics for Financials Users
_____ Persons of Interest & Contingent Workers
_____ Office2007 Excl Data Analysis for Timid (Pt II)
_____ Payment Plan Working Session (Part II)
_____ Tips and Tricks - Technology Uses for FA
_____ Overview of Project Resources Tables - Queries and Functionality
_____ Query Writers Tips and Tricks

Tuesday, March 17

10:00 a.m.

_____ Remote Deposit Capture
_____ CA - Making "As Delivered" Work for You (Pt I)
_____ Introduction for External Aid Functionality
_____ Graduate School Roundtable: Online Application
_____ Dynamic Dating
_____ Introduction for External Aid Functionality
_____ TouchNet Info Systems - PCI/PA-DSS Rules
_____ Grant Closeout/Cleanup
_____ Beginning Query Writing for the Functional User

11:00 a.m.

_____ Uploading Purchasing Card Transactions
_____ CA-Making "As Delivered" Work for You (Pt II)
_____ Duplicate Identification Clean Up
_____ UND's use of Lapse Grading
_____ Commonline Loan Change File Processing
_____ Ins and Outs of Creating UPay Site
_____ Milestones for Grant Users
_____ Intermediate Query Writing for the Functional User

2:00 p.m.

_____ Commitment Control Budget Import
_____ Tips and Tricks - HRMS Update
_____ Term/Session Setup
_____ ImageNow Document Imaging
_____ Collections
_____ Tips and Tricks - Pre-award Issues
_____ Advanced Query Writing for the Functional User

3:00 p.m.

_____ Roundtable Discussion on Financials Issues
_____ "I Can See Clearly, Now:" Org Charting Solutions
_____ Ad Astra Regions & Event Decentralizing Room Scheduling
_____ Academic Competitiveness Grant (ACG)
_____ 1098-T Self-Service
_____ Training Departmental Grants Users