16 Week Calendar Implementation: Impact on PeopleSoft

Overview

Long Beach City College would like to implement a 16 week academic calendar starting from fall 2010 term instead of the usual 18 week. This document is the first attempt towards getting an initial overview of the estimates of the effort required in changing the PeopleSoft software from technical and functional perspective and a very high level overview of the overall tasks. Please note that this document is getting updated on a regular basis as and when new information is available and new tasks are identified. We have tried to consolidate the overall effort required in all implemented modules in PeopleSoft to try to make this as, as much realistic estimation as possible. Please also note that the total person hours cannot be estimated at this time however only “Elapsed” times are estimated. Detail estimates for individual tasks will be done after the project is initiated and a detail WBS is created.

Please note that this is just an effort from PeopleSoft development perspective. It does not include the effort needed to actually schedule the classes in the new format from the academic services department perspective. This is an estimated effort from ACIT perspective for the 16 week calendar implementation. Impact on individual departments and their individual effort is not included in these estimates and need to be done by the individual departments.

Overview of the Estimates

Following is a rough estimate of the elapsed times for tasks involved. Please note that some of these tasks are performed in parallel and hence the overall estimate of the total elapsed time from the project initiation stage to the sign-off stage would be about 25 weeks.

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Impact on Student Records and Campus Community

When the academic calendar is changed from 18 to 16 weeks with an additional winter intersession added, the major impact is on student records as most of the data from student records is based out of the term session records. Following is the list of areas impacted due to these changes:

**Setup Level Changes**

- Term Values Table
- Term Session Table
- Academic Calendar

**Data Maintenance Business Process related changes**

Following areas or components will get affected due to an introduction of an additional term/sessions and business process needs to be changed for each of these areas.

- Student and staff Application Processes
- Student Grades, Drops and Attendance
- Student Appointments
- Term Roll Process
- Dynamic Dates
- Scheduling and Maintenance of Classes
- Maintenance of Combined Sections
- Instructor Term workload
- Term Activation/Withdrawal/Cancellations
- Maintain EOPS and Care Data components
- End Of term processing
  - Repeat Checking
  - Academic Standing
  - Drop Purge
  - Honors and Awards
  - Waitlist Purge
**Process and Reporting Level Changes**

Following processes need to be tested and in some cases modified.

These are the identified changes from processes and reports due to the introduction of a different term/term category and changes to the sessions. Please note that this list will get updated as and when new processes get identified for impact assessment.

- Testing of Online Grades and Drops for the new category of term
- Discontinue regular and High school student
- Update Completion Ratio Process
- Progress Probation Process
- Consolidated Statistics Process
- Degree Verify
- Degree Honors Update Process
- Room Roll
- Schedule Printer Proof
- Schedule Output
- WSCH By Section
- LBCC Student Letter Generation Process
- Equal Pay Load Schedule Data
- Instructor Load By Department

**Impact on Financial Aid**

Due to an introduction of a new term, new term category there will be major impact on financial aid on areas such as financial Aid term setup, budgeting, item type setup, Pell Payments, Awarding, disbursements and Satisfactory Academic Progress processes. Following are identified level changes.

**Setup Level Changes**

- Valid Terms for career
- Term Values Cross Reference
• Financial Aid Term Setup
• Budget Groups
• Disbursement ID Table
• Disbursement Split Codes
• Disbursement Split Codes Formula
• Financial Aid Item Types
• Disbursement Calendars
• Item Type Rules

**Process and Reporting Level Changes**
Following processes need to be tested and in some cases modified.

• SAP Update Process
• BOGG Application Processing
• BOGG C Load
• Lock Budget Process
• Correct Weeks Of Instructions
• LBCC Pell Chart
• Packaging Staging Process
• Checklist Item Update Process
• Post Packaging Process

Due to the fact that there will be an additional term as well as the fact that the begin and end dates for the existing terms will change, it will have impact on the overall packaging and disbursement schedule. The following processing schedule needs to be reworked out in terms of the dates:

• ISIR Load
• Budget Processing
• Loan Processing
• Financial Aid Term Activation
• Packaging
• Award Letters
• Disbursements
• Pell Payment Processing
• SAP

Impact on Student Financials
Again due to an introduction of a new term and new term category there will be changes in business processes in Student Financials related to Beginning Of term processes, SF Term Defaults, Billing and Adjustment Calendars, term fee setup etc.

Setup Level Changes
• SF Term Default
• Adjustment Calendars
• Billing/Due Calendars
• Tuition Calculation Controls
• Term Fees
• Waivers
• Copy Term Fees
• Class Fees
• Optional Fees/Terms

Process and Reporting Level Changes
Following processes need to be tested and in some cases modified.
• Service Indicator Removal
• Pre Enrollment Cancellation
• Process ASB/Hold Waivers
• Delete Service Indicator SFS
**Impact on Self Service**

Due to an introduction of a new term and a new term category there will be an impact not only in terms of setup level changes but also from the perspective of business process, data maintenance, User Help documentation and Training when it comes to Self service.

**Setup Level Changes**

The setup level changes are the same as Student Records, Student Financials and Financials Aid Term setup level changes. The new term and term category must be setup in all three areas and tests for non-self service related transactions must be carried out before the Self service testing starts. i.e From the student records perspective, student application, Quick admit, enrollment, grading must be carried out first before self service transactions are tested. Same is true for Student Financials, Payments, Cashiering, Enrollment Cancellation etc. must be tested first. From Financials Aid perspective ISIR load, budgets, FA Term build, Awarding, Disbursement and Pell Payment processing must be tested before the self service testing is carried out.

**Student Self Service**

Following areas need to be tested for student self service:

- Viewing Enrollment Appointments
- Viewing class schedule
- Enrollment Functions: Add, Drop, Edit and Swap Classes
- Class Search
- Account Inquiry
- View Financials Aid
- Make a Payment
- Opt for Parking

**Faculty Self Service**

Following areas need to be tested for Faculty self service:

- Faculty Center-Change term
- Class Search
- Enrollment Summary
• Student Grades
• Term History
• LBCC Specific Processes
  o Online Grading
  o Class Enrollment Summary
  o Student Email Phone by Class
  o Facility Use By Term
  o Load Report By Department

MIS and 320
Due to an introduction of a new term and new term category most of the term-specific processes in MIS will be affected. Due to an introduction of winter intersession first of all an assessment needs to be performed as to how the intersession will be reported and then each of the SQR needs to be modified/tested to make sure that it works well with the new term as well as an existing term.

Setup Level Changes
• College Calendar

Data Maintenance Component Level Testing Required
• DSPS
• EOPS
• VATEA
• Calworks

Process and Reporting Level Changes
Following processes need to be tested and in some cases modified.
• Session, Section and Assignment Extract (XB)
• Course Basic Extract (CB)
• Calworks Extract (CW)
• PreCollegiate Basic Skills Extract (PS)
• Student Basic Extract (SB)
• Student DSPS Extract (SD)
• Student EOPS Extract (SE)
• Student Matriculation Extract (SM)
• Student Vatea Extract (SV)
• Student Enrollment Extract (SX)
• Employee Basic Extract Term Based (EBT)
• 320 Report Process
• 320 Detail/Audit Process

List of Processes Affected
Following is the list of processes being identified to be changed or modified or tested to make sure it works properly when an additional term is introduced.

List of LBCC Specific Processes:
LBCAD001.SQC
LBCAD001.SQR
LBCAD002.SQR
LBCAD182.SQR
LBCAPPNT.SQR
LBCAPTD.SQR
LBCASBWV.SQR
LBCBGG2.SQR
LBCCAPP.SQR
LBCGEX.SQR
LBCCOD.E.SQR
LBCCLLD.SQR
LBCPRNT.SQR
LBCRSCR.SQR
LBCSTAT.SQR
LBCANO12.SQR
List of Delivered Processes customized By LBCC that may need changes or need testing

SCCACCCC.SQR
SCCACCCW.SQR
SCCACCEJ.SQR
SCCACCP5.SQR
SCCACCSA.SQR
SCCACCSB.SQR
SCCACSD.SQR
SCCACSE.SQR
SCCACSF.SQR
SCCACSM.SQR
SCCACSP.SQR
SCCACSV.SQR
SCCACSX.SQR
SCCACXB.SQR
SCCAEBT.SQR
SCFS320.SQR
SCFS320D.SQR
SCSTFUNC.SQC
SFTBLVAL.SQR
SRCLSRST.SQR
List of LBCC Customizations Affected

Following is the list of LBCC customizations that will be affected and need to be re-tested when additional terms will get introduced:

1. PMT_REVERSAL: Page: Need to retest the payment IDs for each term to properly show.
2. STDNT_EQUQTN_FLAG: Page: Retest due to additional term.
3. SF_VNDR_SYNC process
4. STUDENT_FIN_ACCTG_LINE: Application Package PeopleCode
5. Award Notification Detail: Component Record Field PeopleCode Change
6. STDNT_CAR_TERM.EMPLID.SavePrechange: PeopleCode
7. FUNCLIB_SR.WEEKLY_WORKLOAD: PeopleCode
8. DERIVED_TSCRPT.PRINT_ALL_PB: PeopleCode
9. DERIVED_REGFRM.SSR_PB_SUBMIT
10. CLASS_TBL.CRSE_OFFER_NBR.SaveEdit: PeopleCode
11. ENRL_EXTRCT_VW: Record View SQL

Detail Analysis of Individual Processes Affected

Following is the detail analysis of individual LBCC specific processes being identified to be changed or modified or tested to make sure it works properly when an additional term is introduced.

List of LBCC Specific Processes:

1. LBCAD001.SQC, LBCAD001.SQR, LBCAD002.sqr: Posting of CAPP scores from LBC_CAPP_SCORES table to the appropriate tables in PeopleSoft. The PeopleSoft Test Credit articulation terms will be different due to the additional term. Depending upon the decision as to which term the CAPP
scores need to be posted, will determine how to re-test this process. No changes will be needed as long as the input data received from the CAPP system is correctly putting the records in the appropriate articulation terms.

2. LBCBOGG2.SQR: This is a BOGG C load process. It selects the students that have a FED_NEED of over a dollar with a non-zero cost of attendance. Since it inserts records into the Student packaging and the student equation variable records, because there will be an additional term, this process just needs to be retested to an extent to see if the records get created for the new term and the records for the existing term are still valid or not. When it comes to creating equation variable record for the new term, the student financial system need to make sure that the tuition calculation setup is defined for the new term, any term fees etc. are setup that will eventually use these equation variables for BOGG C.

3. LBCSR726: WSCH by Section: This process heavily uses the PS_CLASS_TBL, PS_CLASS_MTG_PAT, CLASS_ATTRIBUTE, SCTN_CMBND and SC_FS320_AUDIT records set by the 320 process. All these processes will use the new term and will need to be retested with respect to making sure term dates, FTES generated, Instructor workload hours, session dates are correctly reported from the report.

4. LBCFA001: The LBCC Satisfactory Academic progress Update process is heavily based on the use of Fall and Spring terms in the program logic. It determines the fall load, spring load and compares what got paid to the student for those individual terms and what should have gotten paid based on the load for each term. It also makes use of the LBCC Pell chart to determine the correct award amount that needs to be paid. In the 16 week situation, since there will be an additional term, decision as to whether this winter term will affect the disbursement schedule will determine if the load for the winter term needs to be used for any calculations. If not, then this process will just need to be retested with the new term values in place. If however the winter term load needs to be accounted in to the fall or the spring load, then changes need to be done in the program as follows:

   First determine if the winter load is to be counted in the Fall or Spring
   Get Winter Units from the Get-Enrollments Procedure
   Get Winter GPA from the Get-Car-Terms procedure.
   Get Winter Term in the Get-Terms Procedure
   In the Process-SAP procedure use the Winter Units as part of the units completed for Either Fall or spring to determine SAP eligibility.

5. LBCFA003: Post-ISIR Load process to Update SAP, Update Phone and Insert PIN Numbers. This process is no longer using the update of the student Car term record and is solely using the aid year throughout the processing, so it should not be affected by the 16 week calendar implementation.
6. LBCFA005: Cal Grant GPA Verification: This file output process is term based and it gets the data from Student Career term record as well as the student enrollment record. So with the addition of a new term, first of all the data requirements need to be verified for the new winter term and then re-testing of the process for the existing and the new terms must be done.

7. LBCFA008: LBCC Prepackaging staging process: This process only references the student term budget and student FA term records within the SQR. Therefore with the 16 week calendar implementation the only test that needs to happen for this process will be to verify how the new FA term will be built and how the student budgets will be built. If the financial aid processing will happen irrespective of the term and the student FA and Budgets will not get built for the winter term, then there should not be any issues/modifications related to this process.

8. LBCFA010: Reset Budget Assign Flag process: This process will reset the budget assign flag on the student FA term record for the students whose budgets have already been built. As this process heavily depends on the student FA term and the student term budget records, this process will need to be rested with the introduction of a new term. Also since the process also has a trigger for "Spring Only" based on the term category from the PS_TERM_TBL, care needs to be taken to code the winter intersession term category appropriately. Again, if the financial aid processing will happen irrespective of the term and the student FA and Budgets will not get built for the winter term, then there should not be any issues/modifications related to this process.

9. LBCFA011: Correcting Weeks of Instruction. This Process corrects the weeks of instruction to 18 for regular terms and 9 for the summer term for Student FA term record. Now this is where we need to get a decision from the FA folks as to whether the disbursement schedule will include the winter intersession or not. In that case the winter term FA term record needs to get built. If that is the case then the regular term weeks of instruction will be updated as 16 instead of 18 and there will be an additional update for the term category as winter for which the appropriate number of weeks of instruction needs to be updated. Now, in order to update this process, first we need to analyze how financial Aid processing will get affected. If the financial aid processing will happen irrespective of the term and the student FA and Budgets will not get built for the winter term, then there should not be any issues/modifications related to this process.

10. LBCFA014: LBCC Aid Year Rollover process: The only aspect of this process that may get affected will be if we decide to disburse for the winter term, then the winter category needs to be setup under the LBCC Pell Chart and this process needs to be tested to see if the aid year copy works for the winter term.

11. LBCFS017: Post Packaging Award adjust: If FA continues with this process in the new aid year, then the only testing that needs to happen will be similar to any other process that involves the Student FA term record updates. If the financial aid processing will happen irrespective of the term and the student FA and Budgets will not get built for the winter term, then there should not be any issues/modifications related to this process.
12. LBCFA018: Prepackaging Fall Load protection: This process is used to protect the fall load as the fall disbursements have already been made. In order to use this process with the 16 week calendar implementation we need to first check if the disbursement schedule is going to be different for the winter term and for the spring term. This process may still be needed, so if a new term is going to be added, we still need to test this process out. However, if the financial aid processing will happen irrespective of the term and the student FA and Budgets will not get built for the winter term, then there should not be any issues/modifications related to this process.

13. LBCFAN1.SQC: This SQC essentially prints the LBCC Financial Aid Award Notification letter. If we decide to modify the disbursement schedule to include winter terms then obviously this process needs to be modified to include the winter term award and disbursement information. The procedure print-FA-Offer needs to be modified as follows to include the new term category:

```python
if $TermCategory = 'W' 
    let $Wintererm = rtrim(&AYCT.STRM, ' ') 
    let $WinterTermDescr = rtrim(&TERMTBL.DESCR, ' ') 
    let $WinterTermExists = 'Y' 
...
```

Then appropriately code the logic for $WinterTermExists variable, similar to the $SummerTermExists variable in the same procedure to actually print the award and disbursements associated with the winter term.

14. LBCPENRC.SQR: This process puts SFS service indicators on students who have made partial payments before the enrollment cancellation process runs. This is a term based process, hence when the enrollment cancellation process needs to be tested for the winter term, this process needs to be tested as well. No need to modify anything in this process, just check out if the service indicators are placed for the appropriate term.

15. LBCSR001: LBCC Progress Probation Update Process: After a thorough analysis of this process, it seems that we just need to re-test this process once the new winter term in built. Since the rules for academic and progress probation and academic standings are going to be the same irrespective of the term, we need to just make sure that the academic standing codes get inserted properly to the respective winter and other regular terms when this process runs.
16. LBCSR002: Degree Honors update process: Since this process is run by an individual term and accesses student car term, there is just a need to re-test this process once a new term is introduced to check if the PS_ACAD_DEGR_HONS record gets updated appropriately.

17. LBCSR003: LBC Equal Pay Schedule Compare process: This is one of the processes that need to be carefully analyzed and tested as it has a huge impact on the Equal Pay processing. This process is run by a term and it accesses STRM field from PS_CLASS, PS_CLASS_INSTR and PS_CLASS_MTG_PAT records. So with the introduction of a new term, the data input from the new term needs to be first verified. Then it needs to be checked if and how the Winter term will play a role in Spring equal pay processing. If it is going to include winter terms then, overlapping the term begin and end dates for the spring term need to be taken into consideration when it comes to inserting into the LBC_EQP_COMPARE record.

18. LBCSR004: New Student ID Communication Load process: This process is run by an individual term. So with the introduction of a new winter term and a new STDNT_CAR_TERM record for this new term, just re-testing of this process is necessary to make sure that the records get properly inserted in the PS_COMMUNICATION record.

19. LBCSR005: Instructor Class Record Report: This report references PS_CLASS_TBL, PS_CLASS_ASSOC, PS_CLASS_MTG_PAT, PS_ACAD_CALESES_TBL, PS_DYN_CLASS_DATA, PS_CLASS_PRMSN, PS_STDNT_ENRL and PS_CLASS_INSTR records all of which reference the STRM field and also this process is run by an individual term, so re-testing of this process is necessary.

20. LBCSR006: Instructor Class Record Report for waitlist: Same as above.

21. LBCSR007: LBCC Appointment Process: This process is run by a term and it also references STDNT_ENRL_APPT and EOPS records for specific terms. When a new winter term is added, this process needs to be retested to check if the student groups get created appropriately for the new term as well as for the existing term. The term begin date also plays a role, so special attention needs to be provided to see if these values come out accurately.

22. LBCSR008: Instructor Load By Department Report: This report references PS_CLASS_TBL, PS_CLASS_ASSOC, PS_CLASS_MTG_PAT, PS_TERM_TBL, PS_CLASS_ATTRIBUTE, PS_SCTN_CMBND, PS_STDNT_ENRL and PS_CLASS_INSTR records all of which reference the STRM field and also this process is run by an individual term, so re-testing of this process is necessary. Moreover this process references PS_INSTR_TERM_DETAIL record which holds the instructor workload information. So decisions as to how the workload will be updated for the winter term will greatly affect the outcomes of this process. If the winter term workload will work just like the workload for summer terms then this should be a straightforward testing effort, if however the winter term is to be excluded or the workload needs to be counted partly in spring and partly in fall, then there will be a change in coding required.
23. LBCSR009: LBCC Prerequisite Error Check report: The report is run by term and also references PS_CLASS_TBL and PS_CLASS_TBL_SE_VW, therefore with the introduction of a new term, this report needs to be re-tested for the new term as well as the existing terms to make sure it produces valid error transactions.

24. LBCSR010: Loading scantron application data into PeopleSoft: This will depend upon if the scantron application will be designed for the winter term. If that is the case then, this process needs to be modified to accommodate this new type of term when running the process. The process needs to be tested for the fall/spring as well as the new winter term to make sure that the application data gets loaded into the appropriate buckets such as PS_RESIDENCY_OFF, PS_DIVERSITY, PS_ETHNICITY_DTL, PS_LBC_SA_ADM_APP1, LS_LBC_SA_ADM_APP2 etc.

25. LBCSR011: NSC Extract file for DegreeVerify: This process references the PS_TERM_TBL to see if the student term data has the completion term in the term table listed. If we assume that the student's completion term will not be winter, then this process will not be affected at all, else it just needs be tested one time to see if the completion term as winter term is picked up for any student.

26. LBCSR012: High school student discontinue process: This process is run by an input term and it references term table to get the term end dates for comparing the inserting into the academic plan tables. First of all decision has be made if and how the discontinue process will work with the introduction of the winter term. If needed, since a new term gets introduced, this process needs to be retested for the new winter term as well as for the existing terms to make sure it works.

27. LBCSR013: Discontinue students not enrolled: This is similar to the process above. However in addition to the running it by term, the process has built-in logic for continuous enrollment. If the winter term enrollment needs to be considered for the purpose of continuous enrollment will decide if and how this process will be modified. This process references PS_STDNT_ENRL and PS_STDNT_CAR_TERM records to check if the student should be discontinued for non-continuous enrollment. Winter term enrollment will definitely make a difference in this decision making. So a modification and re-testing of this process will be necessary.

28. LBCSR015: Facility Use by Term: This process is run by an input term and it references PS_CLASS_TBL, PS_CLASS_MTG_PAT and PS_TERM_TBL. Re-testing of the process due to the introduction of a new term is necessary.

29. LBCSR016: Student Email and Phone by Class: This process is run by an input term and it references PS_CLASS_TBL, PS_STDNT_ENRL and PS_TERM_TBL. Re-testing of the process due to the introduction of a new term is necessary.

30. LBCSR017: Class Enrollments and Summary: This process is run by an input term and it references PS_CLASS_TBL and PS_TERM_TBL. Re-testing of the process due to the introduction of a new term is necessary.
31. LBCSR185: External Student Enrollment Block load process: This process is run by an input term and also references PS_CLASS_TBL, PS_STDNT_ENRL, PS_STDNT_CAR_TERM records. Re-testing of the process due to the introduction of a new term is necessary to make sure that the PS_STDNT_BLOCK_HDR and PS_STDNT_BLOCK_DTL records get populated for the new term as well as for the non-winter terms.

32. LBCSR191: LBCC Print Class Roster: Class Enrollments and Summary: This process is run by an input term and it references PS_CLASS_TBL, PS_CLASS_INTSR, PS_TERM_VAL_TBL, PS_STDNT_ENRL, PS_STDNT_ENRL_OEE, PS_STDNT_CAR_TERM and PS_TERM_TBL. Re-testing of the process due to the introduction of a new term is necessary.

33. LBCSR250: LBCC Attendance Scan-sheet process: This process is run by an input term and it references PS_CLASS_TBL, PS_CLASS_INTSR, PS_CLASS_ASSOC, PS_LBC_SCAN_SHEET, PS_CLASS_ATTRIBUTE, PS_STDNT_ENRL, PS_CLASS_MTG_PAT, PS_DYN_CLASS_DATA and PS_TERM_TBL. Re-testing of the process due to the introduction of a new term is necessary. Also how the dynamic dates are going to be calculated for the new winter term also will have an impact on this process output.

34. LBCSR251: LBC Attendance Scan Post: This process is run by an input term and just needs to be retested for the new winter term.

35. LBCSR270: LBCC Drop Scan Sheet Process: Similar to LBCSR250.

36. LBCSR271: LBCC Drop Scan Post: Similar to LBCSR251.

37. LBCSR310: LBCC Grade Scan Sheet Process: Similar to LBCSR250.

38. LBCSR313: LBC Grade Scan post: Similar to LBCSR251.

39. LBCSR500: LBCC Class Enrollment Export: This process is run by an input term and also references PS_CLASS_TBL, PS_STDNT_ENRL, PS_CLASS_ASSOC and PS_TERM_TBL. Re-testing of the process due to the introduction of a new term is necessary.

40. LBCSR502: LBCC Extract File Process for Voyager-Student: This process is run by an input term and also references PS_STDNT_ENRL. Re-testing of the process due to the introduction of a new term is necessary.