May 2013

Oracle PeopleSoft Campus Solutions 9.0
Statement of Direction 2013 - 2014
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Due to the nature of the product architecture, it may not be possible for us to safely include all features described in this document without risking significant destabilization of the code.
Student Financials – Planned Features ................................................. 47
Contributor Relations – Planned Features ........................................... 49
Legislative and Regulatory Updates – Planned Features (all except U.S. Financial Aid) ............................................................................ 51
PeopleSoft CRM for Higher Education................................................. 54
CRM for Higher Education – Planned Features ..................................... 54
Business Intelligence and Analytics ....................................................... 57
PeopleSoft EPM 9.1 Campus Solutions Warehouse – Prior Year Updates ......................................................................................... 57
Oracle Business Intelligence Student Information Analytics (SIA) – Phase 1 ......................................................................................... 58
Conclusion ............................................................................................... 59
Purpose

This document provides an overview of features and enhancements included in Oracle PeopleSoft Campus Solutions. It is intended solely to help you assess the business benefits of planning for the implementation of the product features described.

The purpose of this document is to provide an annual update to the Oracle PeopleSoft Campus Solutions (Campus Solutions) customers about activities impacting their use of the Campus Solutions applications and related products. The document will provide an overview to the enhancements and other updates that have been delivered since the last Statement of Direction document, as well as an overview of features and enhancements planned for the Campus Solutions codeline within the next 12 months. It is intended solely to help you assess the business benefits of applying new maintenance and planning for the implementation of the product features described.

Oracle plans to issue this document annually, targeting the second quarter of each year. Additional, more detailed documentation will accompany the actual release of new features.
Executive Summary

Institutions of Higher Education around the globe are faced with unprecedented change. The economic uncertainty of the last few years, combined with rapid technology changes, is forcing institutions to grow and adapt in many new ways. As Oracle works with Higher Education customers around the globe, we see a wide variety of reactions to these challenges, but a few themes occur repeatedly and appear to have the broadest impact globally.

First, institutions are facing an increased demand for new business and academic delivery models to enable them to diversify their offerings, increase their revenue streams, and tap into the large, global demand for education. Second, institutions are grappling with changing student demographics and the changing expectations of those students. And third, institutions around the globe are facing increasing levels of scrutiny and accountability from governments, students and their families, and even employers.

As Oracle provides the technology, tools and functionality that institutions of Higher Education need to address these challenges and manage this change, we recognize the imperative to build systems that are flexible and adaptable to a wide diversity of customers and business needs not only today but for the future as well. Over the past several years we have invested heavily in building out a new architectural foundation for Campus Solutions, based on web services and we are now benefitting from that investment by being able to deliver more flexible, extensible features on a regular basis. Some of the highlights of what we have planned include:

• **Student Completion and Success**. Higher education institutions today are under more and more pressure to show the value of their academic offerings and to be able to graduate students on time. We are delivering new functionality called Program Enrollment to assist institutions in these efforts. Program Enrollment provides a new enrollment structure and processes to support both very structured curriculum requirements and limited enrollment options based on program of study requirements. We plan to continue this rollout with additional features over the next year.

• **Student Assessment**. With the increased diversity of the student population and academic offerings, many institutions need alternative ways of tracking and assessing
student outcomes and competencies. Our new Activity Management feature enables you to define the course activities (such as, assignments, exams, attendance, participation) as well as how you’ll assess the results (grades, marks, competencies) of each activity; you will also determine how to calculate different interim and overall course grades. We have delivered significant portions of this new feature already and are planning to deliver the remainder over the next year.

• Constituent Engagement. Student, applicants, faculty, alumni all expect to interact with your institution in new and unique ways. Tools like Twitter and Facebook and the proliferation of mobile devices have all changed user’s expectations for how they interact with institutions. To help your institution address these needs we are planning to deliver a number of new features, including Campus Self Service Mobile smartphone applications for students, a Notification Framework that will enable you to push out notifications and workflow for individual transactions, a new Task Management Framework to enable you to notify groups of students of specific information or updates they need to provide to you, tying those requirements to specific processes such as enrollment, and a Delegated Access Framework to enable students to delegate access to their information to specific individuals, such as a parent or spouse.

• Preserving Key Local Needs. Despite their many commonalities, most institutions have some unique requirements, whether driven by institutional needs, or a state system, or regional or national government. We want to provide you with the ability to implement these local requirements while at the same time avoiding costly and troublesome customizations. We recently introduced the Common Attribute Framework, which allows you to extend the Campus Solutions data model by adding your own unique data elements, without customization. We plan to continue to extend this capability to a number of key records in the system over the next year. In addition, we recently introduced a new Rules Engine, built specifically for Campus Solutions, to enable your business users to define business rules and logic for specific processes. Over the next year we plan to further enhance this new framework and integrate it into a number of key processes such as Program Enrollment, Activity Management, Research Enrollment Tracking and the Evaluation Management System.

In this annual Statement of Direction document, Oracle is providing information about significant updates to Campus Solutions delivered during the previous 12 months as well
as looking forward to planned enhancements and regulatory updates for the next 12 months.
Oracle PeopleSoft Campus Solutions: The Year in Review

This section of the annual Statement of Direction provides descriptions of features and functionality that Oracle delivered for Campus Solutions over the prior 12 months. Please refer to the Bundle documentation on My Oracle Support or PeopleBooks for more detail about a specific feature.

Campus Solutions Common Elements – Prior-Year Updates

The core capabilities of the Campus Solutions product continue to expand by delivering frameworks that are or will be leveraged by all the modules in our product family, and that can provide significant benefits to you as you begin to leverage them for your own purposes. Since no one business area “owns” these frameworks, we think it appropriate to call out these frameworks and common elements in a separate section of this document. We will reference the application of these common elements to specific business processes in the appropriate section for that business process (e.g., if Financial Aid has leveraged one of the frameworks, we’ll note that usage in the Financial Aid section).

The architectural approach we are taking as we transform Campus Solutions to the next generation student system is evident not only in the services-oriented architecture that you see realized through the increasing number of web services but also in the innovative approach to enabling customer extensibility. This is where the “framework” concept stands out! As we build out support for new business processes in areas like enrollment, tuition waivers, assessment, and so on, we focus on how best to enable your ability to extend the solutions. This has the benefit of ensuring a new feature will “fit” your institution’s business needs while reducing the cost of implementing and maintaining a feature by reducing the need to do expensive customizations. Enhancements delivered in the prior year for the frameworks are noted in this section.

Campus Solutions Frameworks

As new features are developed, the architecture team looks for ways to reuse utilities and capabilities created for a particular business need. Wherever possible, the Campus team creates a framework so that utility can be used in other business processes internally and also extended by you. A number of frameworks were introduced or enhanced in the prior year.

Common Attribute Framework

Requests for new data fields throughout Campus Solutions are fairly common from our global customer base. In many cases, individual areas of an institution have very valid business needs to add one or more fields to a component. For example, the Admissions Office might want to include a Passport Number in the General Materials component or the Dean’s Office might require the display to faculty users the expected time they will need to devote to a specific coursework activity. However, our ability to deliver, test, and document new fields is very much
dependent on their common utility and impact on existing batch processes, components and core functionality. The goal of the Common Attribute Framework (CAF) is to allow you and your implementation teams to easily add fields to existing tables via configuration rather than through a custom development process.

A common attribute is like a field; it has a data type (e.g., number, date, string), it may have a set of valid values, and it can be associated with a record in the system. You create the new attribute and associate it to one or more records and pages through configuration pages. We anticipate that CAF will have utility across Campus Solutions by providing:

- A method for you to add your own unique, user-defined fields to a PIA page without resorting to customization.
- An alternative approach to adding data fields associated with regional or country specific extensions for national, provincial, or state reporting or other localized business processes.

Each of the Campus Solutions functional areas has begun the process of enabling the Common Attribute Framework to high priority pages in their respective areas.

**Entity Registry**

An entity is an object that provides access (view, create, update) to data in a record and is implemented through an application class. By design, an entity is the primary point of access to the underlying records so that we avoid potential inconsistencies from having the same logic in multiple places. This helps ensure the code is reusable and maintenance is easier. Beyond providing access to records, the entity structure also normalizes abstract data (example: the Program Enrollment and Activity Management structures) and provides means of structuring and transporting data (such as with the Enrollment Web Services and the new Rules Engine Data Sets).

In July 2010, we introduced an innovative structure called the Entity Registry in which data is defined and organized. The Entity Registry stores entity records, application classes, properties and entity relationships. It stores the information relevant to building XML and has utilities for generating schemas and base code which can then be modified. The Entity Registry is a comprehensive source that defines the XSD (XML Schema Definition) for Campus Solutions core tables and the data they contain. The entities for all core data records within the enrollment and course areas are delivered within the Entity Registry component. The entity data is considered system data and the registry is necessary for the correct functioning of many of the Campus web services (including Admissions Application Web Services, FERPA service and the Enrollment Web Services).

In the prior year, we added entity “categories”, which will be used in conjunction with the Rules Engine for classifying entities (e.g., Person entities, Student Record Entities, etc.) and granting security to write rules only around specific entities.

Additional features we added to the Entity Framework include:
• Integration between the Entity Registry and the new Common Attributes Framework. Attributes will automatically be handled as properties on the entity.

• Entity Views and Profiles: The ability to only view/edit a subset of the entity tree from a service or the Rules Engine.

• Data Sets: Currently used exclusively by the Rules Engine, provide a means of structuring and moving data without an underlying record.

• Entity Component Adapter: Allows entity logic to be accessed via a component. The component structure binds to entities and we can use that to invoke logic such as pre-save and validation logic, allowing us to further avoid having the same logic in multiple places.

• Preliminary JSON (JavaScript Object Notation) support: While we support XML, JSON provides a slimmed down way of transporting data, most commonly used with REST based services.

• Performance Enhancements: Mostly made around fill and LOV integration.

• GenericParentEntity: Allows querying where we may want to retrieve multiple instances of a given entity (i.e. retrieve multiple constituents).

• Dynamic Properties: Code no longer has to be updated to reflect changes made to Properties, via a sync or the UI. Properties can be dynamically accessed.

• Generic Defaults: Most entity types support having a default application class. Code is only necessary if custom logic (i.e. pre-save or validation) is needed.

• Entity API: The ability to access and create entities programmatically. This allows for things like Program Enrollment Sync, where we dynamically create entities behind the scenes.

Delegated Access Framework: Enhance Collaboration and Service to Constituents

Delegated Access is a framework that standardizes "who can delegate what access to whom" for the Campus Solutions self-service components. The feature allows you to define what data (components) a student (the Delegator) can delegate access to his/her parents, spouse or any other person of their choice (the Proxy). We plan to deliver this feature over several phases: the capabilities we delivered in the prior 12 months focus on the framework aspect, or building blocks, of the functionality. So far we have delivered the ability to:

• Identify the components your institution wants to make available for delegation and define who can delegate them.

• Define security Roles for proxies.

• Force delegators to accept terms and conditions specific to your institution before delegating access to a new proxy.

• Enable the delegator to grant and revoke access to one or multiple proxies.
• Notify both the proxy and the delegator when new access has been delegated (leveraging the Notifications Framework to send the emails).

• Notify the proxies when access has been revoked.

• Put in place security mechanism to ensure the right person (proxy) tries to access the delegator’s data and tie the proxy/delegator relationship together.

• Consume the New User Registration framework to allow a proxy to either create a user account to access your system or to use an existing one (for example the proxy is an alumni or an employee at your institution).

• Force the proxy to accept terms and conditions specific to your institution before granting access to the delegated transactions.

• Optionally create and associate an Emplid with the proxy by consuming the Constituent Transaction Manager framework.

• Allow an administrator to review the delegator’s shared information (Review Shared Information component). This component can serve as a “Help Desk” page where the Administrator can:
  o Delegate additional transactions or revoke delegated transactions from an existing proxy on behalf of the delegator.
  o Delete a proxy on behalf of the delegator.
  o Send email notifications using the Notifications Framework to the delegator and the proxy when new access is granted or revoked.
  o Help the proxy with delegated transactions.
  o Ensure at all times the proxy has the proper access to a delegated transaction. This is done through the Proxy Access Validation (PAV) process. Based on conditions to revoke a proxy access defined at the transaction level, the PAV process runs real-time at the time the proxy, the delegator and the administrator access their respective Delegated Access pages. The PAV process can also be run in batch mode.

**New User Registration**

We first delivered New User Registration (NUR) functionality in 2010 with the Admissions Application Web Services (AAWS). It allows a person unknown to the Campus Solutions to create a User ID and a password to access the application. In the context of AAWS, NUR is used to allow a new applicant to register and get authenticated to your system so he or she can create and submit an online application.

We enhanced the capabilities of this functionality by removing any dependencies to a self-service transaction (AAWS) and allowing security provisioning setup specific for the consuming transaction. Our goal is to deliver robust and flexible new user registration applicable to a variety of online transactions and compatible with critical security identity management solutions. Over this past 12 months, we’ve continued to enhance this functionality in the following ways:
• A NUR sample logon page built with PeopleSoft Internet Architecture to allow either a guest to create a new user ID or a returning user to enter an existing user ID and access your system. The NUR sample page uses all the functionality contained inside the NUR framework. It is a delivered example of how a NUR logon page can be deployed in your environment when the user accessing the logon page is anonymous (for example from a kiosk set outside of your firewall) and when successfully authorized and authenticated, gets signed into your system.

• A NUR tester sample page. Similar to above, the sample page allows you to gain familiarity with the logic delivered with the NUR framework without fully deploying it in your production environment.

• A New User Registration context setup component (and enhanced web services) to optionally define a set of default role(s) for the new user as well as a target page to which the new user should be transferred for each of the calling online transactions.

• A “Forgot Password” utility where the user is asked to enter his/her User ID and respond to a security question they previously answered. If answered properly, an email message is sent with a temporary password. This functionality utilizes the PeopleTools forgotten password utility.

• A “Forgot User ID” utility where the user is asked to provide his/her email address. If the email address matches a User ID, the Notifications Framework is triggered to send the user an email message with his/her User ID.

Notifications Framework

The Notifications Framework provides a consistent, extensible communication mechanism that supports a broad set of interactions between the Campus Solutions system and users and also between users themselves. We released the first iteration of the framework to support triggered email for Delegated Access in October 2012. In April 2013, we significantly enhanced the framework to extend the email channel and add new channels for:

• Email

• SMS

• Alerts (informational message that appears on a portal homepage)

• Worklist Items (an actionable hyperlink that appears on a portal homepage)

The Notifications Framework architecture makes use of the Campus Solutions Entity Registry to generalize all notifications into a single structure and is modeled on a pluggable channel based approach. Each notification type is supported by a dedicated channel that supports the requirements of the particular notification type. It enables projects in Campus Solutions, such as Evaluation Management, to easily provide notification and worklist capabilities.
See the sections where the Notifications Framework was leveraged for more detail. Features making use of the Notifications Framework include:

- **Email channel**: Delegated Access, Evaluation Center, Campus Self-Service Mobile and Research Enrollment Tracking
- **SMS channel**: Campus Self-Service Mobile
- **Worklist channel**: Evaluation Center
- **Alert channel**: Program Enrollment

**Rules Engine**

Many institutions have unique rules and business requirements. Many features in Campus Solutions require the ability to support these unique needs. For example, Program Enrollment requires the ability to support rules that evaluate and calculate student tracking, progress, and policy enforcement. Typically, these rules are unique to your institution, are complex in nature and may be subject to frequent change. In the Student Records area, examples of such rules are; calculation of student grades for assessments and examinations, control of curriculum planning or enrollment, progression evaluation based on credits, GPA and grades, and determining probationary, awards and honors classifications. These business rules need to be highly configurable, easily expressed by functional experts and easy to define and implement across Campus Solutions.

The initial installment of the Rules Engine (delivered in April, 2013) was focused on delivering a robust framework that allows you to build rules in the Rules Engine Manager using delivered entities in the Entity Registry. The Rules Engine Manager user interface offers functional experts and developers the ability to construct and test comprehensive business rules in a logical way using predefined statements and delivered functions, apply these rules to relevant data, and insert the results into specific tables (for example the Academic Progress Tracker) using delivered Entity Statements. Use of delivered Entity Statements ensures that inherent business logic and data integrity is enforced. The Rules Engine feature requires PeopleTools 8.53.

We expect specific functional application adoption of the Rules Engine to follow in subsequent Additional Feature bundles including enabling rule execution directly from components or pages.

**Evaluation Management System (EMS)**

With the initial foundation for EMS provided in 2011-12, we continued to deliver phased functionality in 2012-2013 with primary focus on the critical component for fully realizing the vision for EMS: The Evaluation Center. In order to meet the needs of various evaluative practices, evaluators and administrators now have an Evaluation WorkCenter for conducting and managing all forms of evaluations. The Evaluation WorkCenter incorporates workflow and notifications to drive transaction sequence, alerting evaluators that evaluations are ready for their attention by placing an item in their worklist and sending an email notification. We have utilized native
PeopleTools WorkCenter functionality as the basis for this Evaluation Center. In addition we are utilizing the Notifications Framework to handle the notification portion of this deliverable. While we deployed a number of self service pages which integrate into the center, you can configure the Evaluation Center to meet your business needs by using PeopleTools and PeopleTools Portal Technologies. Features of the Evaluation Management WorkCenter include:

- The Evaluation Center Landing Page: The starting point for an Evaluator or Administrator after logging into the system and navigating to the Center.
- Evaluation Decision Entry Pages: Accessed easily from the landing page, the evaluator can view details regarding the evaluation and use delivered functionality to enter evaluation results for ratings, recommendations, etc.
- Evaluations Summary: Managers who are responsible for the oversight of evaluation procedures require special views in order to track various evaluation processes. The Evaluation Summary presents to the administrator all levels of work done in the evaluation.

Other enhancements for EMS in 2012-2013 included:

- Batch update of evaluation statuses
- A Copy function to copy setup components from one Evaluation Category to another.
- Functionality that will ‘lock down’ various levels of the evaluation as each level is completed and the evaluation status is set to the final default value as designated on the Evaluation Code setup.
- Links for the assignment of Attachments at every level of the Evaluation component so that attachments can be aligned to the evaluator who submitted them.
- Updates to existing EMS setup structures, notably the Evaluation Code setup in order to provide configuration options for workflow and notifications.

**Campus Self Service Mobile – Prior-Year Updates**

Last year we introduced a new Section in the Statement of Direction to focus attention on the investment in the usability of our applications. The Campus team has devoted effort to modernize the user experience of Campus Self-Service, especially around the idea of device-agnostic access (i.e., designing access via a smartphone and tablet). This project will extend over several years, will likely leverage technologies in addition to PeopleTools and has been informed from working closely with customers and students and our User Experience team at Oracle. The prior year updates includes our first phase of delivering solutions designed for the student using a smartphone.

Many aspects of collegiate life are managed by students with the use of mobile phone applications. Most of our students expect mobile access to the library, emergency contact numbers, staff contact details, and campus maps, along with class-related information and
transactions. With the introduction of Campus Self Service Mobile in Additional Features April 2013, we are not simply redelivering the Campus Solutions experience on a mobile phone device; we are attempting to redefine how users interact with Campus Solutions by redesigning business processes, making the system a more active participant in the experience and taking advantage of the multiple user interaction gateways that mobile devices offer.

Campus Self Service Mobile allows a student to conduct key transactions in a native, secure, smartphone application. The features already delivered will allow students to:

- View their class schedule meeting patterns, instructors and locations.
- View the building locations in their schedule on a map and view a route from their location to a building on the map (taking advantage of another April 2024 Additional Feature: latitude and longitude fields in the Building Table).
- Receive notifications on important transactions such as when final grades are posted.
- View final grades.
- Search the schedule of classes with title keyword search and filtering options.
- Conduct enrollment: add and drop classes, with enrollment options.
- Manage the enrollment shopping cart (add and remove classes) and enroll all classes from the shopping cart.

The Campus Self Service Mobile application is built with Oracle’s Application Development Framework (ADF) Mobile framework which enables deployment to both iOS and Android native application types. The ADF Mobile framework allows you to easily extend the Campus Self Service Mobile application to include mobile websites and other content.

In addition to the functional features delivered, we also are providing a solid technical foundation for mobile that you can easily manage and extend. Features that support the technical foundation include:

- Optimization of delivered web services through support for RESTful web services and entity profiling.
  - In Additional Features July and October 2011 we delivered the SOAP based Enrollment Web Services: Course Catalog Web Service, Class Search Web Service, Shopping Cart Web Service and Enrollment Web Service. Taking advantage of PeopleTools 8.52 (the minimum requirement) functionality we are able to deliver RESTful versions of the Enrollment Web Services. RESTful web services require lower overhead than SOAP based services, thus lowering the bandwidth requirement for delivering data to a mobile device. Further, in April 2013 Additional Features we released an Entity Profiling feature for the Campus Solutions Entity Registry. The ability to create profiles of entities means that we can deliver a mobile profile that will limit the amount of data
delivered in the Enrollment Web Services payload to the subset of data that
Campus Self Service Mobile needs. Thus again lowering the bandwidth
requirement for delivering data to a mobile device.

• Utilization of the Campus Solutions Notifications Framework.
  o The Notifications Framework provides a consistent, extensible communication
    mechanism that supports a broad set of interactions between the Campus
    Solutions system and users and also between users themselves. (See the Section
    above for more detail on the Notifications Framework.) Each notification type
    is supported by a dedicated channel that supports the requirements of the
    particular notification type. For Campus Self Service Mobile, this framework
    allows us to send notifications via SMS (using a 3rd party SMS delivery service)
    or email. With Campus Self Service Mobile, we delivered one notification to
    take advantage of the notification framework: final grade posted. This
    notification will be particularly valuable at the end of a term when students are
    anticipating their final grades. The notification is triggered when a grade is
    posted to the student’s record and (depending on the student’s preference and
    the system configuration) the student will be notified that their grade is
    available.

Campus Community – Prior-Year Updates

Many customers are in process with or have completed projects to separate the Campus
Solutions and HCM applications into separate instances. We have been following their progress
and engaging with the HEUG community to assess areas for which we may need to provide
additional support. In the prior year, we focused on the campus ecosystem needs, evidenced by
delivering integration from Campus Solutions to Oracle’s Identity Management (OIM) solution.
We also delivered new functionality for Affiliations and regulatory updates for SEVIS. We
continued our focus on enhancing the frameworks we’ve delivered; you’ll note in the Planned
Features section that we’ve now devoted a separate section, “Campus Solutions Common
Elements” to better organize information about these frameworks that are used throughout the
Campus Solutions product.

CS–HCM Integration: Providing the Tools and Guidance

NOTE: For customers considering an upgrade to HCM 9.2 please note that Oracle has
extended the time period and waived the fee for Extended Support for HCM 9.0 through June
2015. This means that you may continue using the combined version of CS/HCM 9.0 through
June 2015. As of July 2015, HCM 9.0 moves to Sustaining Support. For more details, see the

Another important clarification for you involves the need to apply core HR and North American
Payroll (NAP) maintenance to the Campus Solutions 9.0 instance. Campus Solutions customers
are entitled to the core HR and NAP maintenance as part of their limited use license to those two applications. Therefore, you will continue to apply core HR and NAP maintenance to your CS 9.0 instance through June 2015. No Extended Support payment is required. As of July 2015, the Campus Solutions team will provide support for the HR and NAP objects, as necessary. For more information, see Doc ID 1437607.1 in My Oracle Support.

Support for integration between Campus Solutions and PeopleSoft Human Capital Management (HCM) has been introduced over several phases. The initial release of integrations in late 2010 (in CS 9.0 and HCM 9.0, 9.1 bundles) provided support for priority integrated CS-HCM business processes. These delivered integrations provide a way to keep mission-critical setup, person, and job related data synchronized between separate CS and HCM database instances.

The recently delivered Integration Integrity Utility provides tools to help maintain high quality data in integrated environments. As with most integration, unplanned scenarios can sometimes occur which leave data “out-of-sync”; for example, messaging errors due to data corruption, business logic differences, or customizations. The Integration Integrity Utility can be used in development, testing, and production instances by providing:

- A configurable and secure compare process which detects data differences at row and field level between separate CS and HCM databases.
- Pages to review data that is detected to be “out-of-sync”.
- A secure process using user-defined “winner” rules to re-sync and reconcile impacted data in separate CS and HCM instances.

As more institutions undertake the separation of their Campus Solutions and HCM instances, we continue to look at what capabilities can be added to the existing Split integration tools and framework to ease the ongoing support for integration between the systems.

Identity Management Integration with Campus Solutions

Ensuring robust security processes on campus is an area of critical concern. Campus Solutions, working with the Oracle Identity Manager (OIM) team, provided enhancements to existing Constituent and Affiliation messaging capability to provide an out of the box integration with a new OIM Campus Solutions Connector. This capability allows you to manage in Campus Solutions the affiliations that an individual has with your institution, and publish that information in such a way that identity records can be created and updated. Provisioning and access decisions can seamlessly be made in OIM based on that information.

Constituent Transaction Manager (CTM)

There are many scenarios within the Campus Solutions breadth of business processes in which you want to allow an anonymous user to be able to interact with your system. In many cases you want to capture who that person is and allow them to continue with other sorts of interaction. And, if you already have a record of them in CS (i.e., they already have an Emplid) you want to
be able to match up their current information with the existing record without creating a delay in the current interaction.

In the past year, we delivered some maintenance related to Constituent Transaction Manager; however, the most important thing we did was to isolate CTM to become its own framework. Starting with the October 2012 bundle, CTM is consumed by AAWS and New User Registration, as well as by the newly delivered Delegated Access Framework.

See the section “Common Elements” above for more information on Delegated Access and New User Registration.

Some of the other enhancements delivered in the prior year for Campus Community include:

**Affiliations**

Several enhancements were delivered for the Affiliations feature. These include:

- View Person Affiliations – Chart View
- Inclusion of Affiliations within CS Product
- OIM Connector
- Research Enrollment Tracking – Supervisor Setup
- Context Data Inclusion – An additional element of the Affiliation definition is “Context Data”. This allows the specification of additional record/field pairs to be associated with the affiliation code and included as part of the data when the affiliation message is published. This enhancement enables more flexibility and definition when the affiliation is used in conjunction with other business processes such as Identify Management.

**Common Attribute Framework Enablement**

For Campus Community we have CAF-enabled the External Organization record.

**Recruiting and Admissions – Prior-Year Updates**

**Sample Online Application (SOLA)**

Admission Applications Web Services (AAWS) has been successfully implemented by a number of customers since its delivery in July, 2010. We have been working to improve the offering since that time including redesigning and delivering new documentation to support its implementation. However, we have also recognized that there may be considerable gaps in your readiness and required depth of understanding as you attempt to take advantage of this important technology and functionality. Some of you have struggled with understanding Service Oriented Architecture (SOA), WSDL, XML etc. while building an application user experience during your implementations. In order to address this and to promote and support AAWS uptake, we delivered an “out of the box” sample online application that you can use for reference, training,
deconstruction, and testing. This unique deliverable is not intended to be deployed to applicants but rather to be used as an example for technical implementers to examine and understand how delivered web services operate. By providing readily available tools like an admission application sample, we hope to greatly increase the probability of successful implementations, reduce the time to their completion, and increase your confidence to uptake future SOA based projects.

The Sample Online Application (SOLA) is a unique deliverable that represents an “out of the box” sample for technical implementers to examine and understand how delivered web services operate. SOLA provides:

- A user interface built in PIA in a familiar PeopleTools package that can be easily understood and referenced.
- A UI-SOA sample in which all of the web services (with the exception of List of Values (LOV) in AAWS are working.
- The ability to use SOLA as a learning tool for AAWS Setup, Constituent Transaction Management (CTM) Setup and administration.
- A working sample that can be used to create data in CTM and Application staging.
- A testing device for a locally customized user interface.
- Accompanying documentation that will assist implementers with useful reference in addition to the content we have already provided.

Revised Test Score Layouts Delivered in 2012-2013

- Educational Opportunity Service (EOS)
- Student Search Service (SSS)
- Graduate Management Admission Test (GMAT)
- ACT

Update Admissions Program Action/Reason Processing

Most admissions administrators utilize automated batch processing to apply admissions program actions and action reasons to selected applicants. In order to streamline the update processing that can be applied to admissions application actions, we delivered a new solution that utilizes the integration between application engine technology and Population Selection functionality. This efficient process for batch updated admissions applications provides:

- A new run control component that allows the user to specify what values should be inserted to ADM_APPL_PROG.PROG_ACTION and ADM_APPL_PROG.PROG_REASON for the IDs specified by the Population Selection results
• Standard Campus Solutions Population Selection architecture allows a user to specify which Selection Tool they will use and identify the applicants to which Program Action and Action Reason values will be assigned and inserted to Admissions Maintenance, Program Application.

Student Records – Prior-Year Updates

Program Enrollment

Using our continuous delivery model we continued with our efforts to deliver this comprehensive functionality in 2012-2013 which included:

• Ability to create Academic Item Registry Course items from the Course Catalog
• Ability to create and assign an Academic Progress Tracker (APT) Instance in batch or for an individual student from the Program/Plan component
• Ability to define an individual student ‘term map’ which allows for adjustments for individual students, e.g. if student stops out for a year.
• A new API that manages the creation and updating of APT data from sources outside of the APT component (or student self-service). This API inserts and updates APT tables to create new APT instances and will be used in the following areas:
  o Batch processing to create APT Instances for a population of students which uses population selection functionality to define a group of students, for which a new APT instance will be assigned.
  o Batch processing to activate students in the next planning node of their program of study making that segment of the program available for planning and enrollment.
  o Provide the ability to create an APT instance from the Student Program/Plan component. The API is used to create APT instances when students are matriculated.

Program Enrollment: - Student access to Program Enrollment transactions is supported by:

• Program Enrollment “Landing Page”
• Linkage to Course Detail and Activity Management Data
• Student Self Service Program Curriculum View
• Student Self Service Enrollment Schedule Builder (includes exam enrollment)
• Student Self Service view of APT
Activity Management

Activity Management allows you to use extensive feature functions to construct basic course structure and its attributes and to define the result structure that maps marks, grades and outcomes that are required by various academic areas, programs, and courses applicable to your institution. We continued to deliver Activity Management functionality in 2012-13, a summary of which appears below.

• Examination Management functionality including:
  o The Academic Period Table
  o Scheduled Activity Security
  o The Section Manager where exam sections are associated with a facility, date and time.
  o Updates to the Activity Definition to support the creation of exam sections.
  o Updates to the Activity Registry to support exam only courses and content conditions.
  o Updates to the Activity Generator to support exam sections and exam only courses.
  o Updates to the Activity Manager to support exam sections and content conditions.

• We introduced the Individual Activity Manager (IAM) which populates the student record for Activity Management including exam activities. IAM Generation was introduced with the following methods supported:
  o Manual – add class or Exam Only Course (EOC) enrollments to create the IAM for an individual student.
  o Batch – processes to generate IAMs based on class enrollment and Exam Only Course enrollment.
  o Enrollment Event – automatic generation based on class enrollment (does not address EOC).

• The Common Attribute Framework was incorporated into Activity Management and is tracked at various levels.

• The ability to create Exam Only Course was introduced and enhanced.

• We introduced Content Conditions which allow schools to present optional coursework items.

• We introduced Activity Rosters and User Access to Activity Management including:
  o Rosters Summary Component
  o Activity Roster
  o Result Roster
  o Activity Management Work Center

• The Extenuating Circumstances component was introduced.
Research Enrollment Tracking

In 2011-2012, we introduced the first installment of the Research Enrollment Tracking feature, providing the fundamental structures for addressing the unique requirements of candidates pursuing research and the administration of their academic life cycle including the management and evaluation of their thesis. Candidate Management and Thesis development and enhancements continued in 2012-2013 and included:

- Integration of the Common Attribute Framework within the Candidate Management component: common attributes can now be defined within Research Components
- Updates to Thesis Submission and Final Result pages
- Updates to default values, data validation, and delivered error messaging controlled with setup parameters added to the Academic Program and Academic Plan setup.
- Ability to manage both internal and external organizations and contacts related to research topics.
- Ability to define, calculate, and track the time towards completion (consumption) of research
- Administratively tracking special requests from research candidates
- The definition and management of Research Supervisors and Evaluators.
- The introduction of Candidate Self Service enabling candidates to perform various functions and transactions through a series of student-accessible pages. These allow the student to view, create, and edit Service Requests which are used to notify the need for such things a Leave of Absence, Extensions, etc.
- A Research Dashboard containing pagelets to assist the administrator in managing their assigned workload of service requests.
- The Administer Service Request page for administrators to review and update candidate service requests. If necessary, the administrator can reassign the service request to another administrator. Reassigning a service request will trigger an email notification to the new owner and the service request will then appear in that owner’s dashboard
- The Research Topic Search to enable candidates to view the research topic you have available at your institution. Search setup allows you to select the topics you wish to display to students and applicants and provide downloadable attachments of additional information.

With the delivery of the features through April 2013 we are pleased to note that Research Enrollment Tracking is ready for implementation and deployment at your institution.
Student Academic Projects

For 2012-2013, we delivered a new feature called Student Academic Projects. This feature allows schools to administer non-research student projects utilizing enhanced Research Tracking and Evaluation Management System functionality.

Milestones

In conjunction with our efforts to extend the functionality for managing advanced research students, we enhanced existing milestone setup and delivered new functionality and accessibility for Milestones in 2012-2013. These included:

• Enhancements to Milestone Setup and the Milestone Template
  o Additional fields to the milestone setup table and the milestone template to calculate completion dates and terms.
  o Ability to add attachments to a milestone so that the student can access relevant content such as instructions or reference materials.
  o Ability to define if milestone data and messages are to be deployed to students via the Student Center and to Advisor Self Service.
  o Add the milestone level to the milestone template.

• Enhancements to Student Milestones
  o Redesign the existing student milestones page to improve usability.
  o Allow the ability to have more than two advisors on a milestone.
  o Add attachments to student milestone page.

• Ability to attach milestones to a course in the Course Catalog. When a student enrolls in a scheduled section of that course, an assigned course milestone will automatically be assigned to the enrolled student.

• Provide a batch process using population selection to insert and update milestones.

• Milestones in Self Service
  o Provide self service pages to display milestones in both the Student Center and the Advisor Center.
  o Allow for the student to download documents, such as instructions.
  o Allow for the student to upload their documents to a milestone.

XMLP Transcripts

In 2012-2013 we continued our practice of providing yearly enhancements and updates to flexible XMLP Transcript. Following the suggestions from a number of our customers, we expanded the descriptive free form Transcript Text size from 90 to 1000 characters.
Student Administration Integration Pack – Prior-Year Updates

Campus Solutions delivered a significant milestone in the roadmap for the Student Administration Integration Pack (SAIP) last year; that was the updated functionality to come into conformance with the final public version of the IMS LIS 2.0 specification (see more information on the specification at the IMS site at http://www.imsglobal.org/lis/alliance.html). Because of the increasing adoption of this specification within the learning management system (LMS) vendor community, we expect to see more of the LMS vendors create integration to the LIS specification and therefore enable supported integration with Campus Solutions class, instructor, enrollment and outcomes information.

Financial Aid – Prior-Year Updates

Financial Aid provides support for automating U.S. federal and institutional financial aid processing to ensure more efficient operations. Many regulations are built into the software, so your institution has the tools to obtain and remain in compliance. Below are some of the more significant enhancements delivered in the prior year.

- PELL Lifetime Eligibility Used tracking: Updates to aggregates processing and FA packaging to allow users to incorporate PELL lifetime eligibility data coming from NSLDS.
- External Awards Processing: Enhancements to allow users to process External Awards in “offer only” status.
- Satisfactory Academic Progress: Ability to post career and term exception values on the Career and Term Exception pages for Satisfactory Academic Progress.
- July 2012/Regs 4: New 3C administrative function FINT to allow Satisfactory Academic Progress communications to be processed by term (instead of current aid year).
- October 2012/Regs 1: Multiple enhancements to FA Status page and auditing of Fiscal Item Type setup.
- January 2013/Regs 2: Allow increases to Direct Lending PLUS loans so that they work like Stafford Loans.
- Population Updates: The following fields were added in the Regs1/October 2012 bundle:
  - FA_LOAD
  - OVRD_CENSUSDT_LOCK
  - OVRD_EXP_DT
  - NSLDS_LOAN_YEAR
  - OVRD_NSLDS_LOAN_YEAR
  - DIR_LND_YR
  - OVRD_DIR_LND_YR
• PROFILE Delete: Functionality to allow users to delete PROFILE application records.

Financial Aid Shopping Sheet

The U.S. Department of Education and the Financial Consumer Protection Bureau have developed a Financial Aid Shopping Sheet. This serves as a standardized format for providing information on the cost of the student’s educational program and the amount of that cost that may be covered by available Federal education benefits and financial aid. The Shopping Sheet is intended to assist students in comparing financial aid packages and may also be used to replace or supplement an institutional award letter. While not a requirement for the 2013-2014 Award Year, our Financial Aid Product Advisory Group has suggested that the Shopping Sheet is a valuable feature for Campus Solutions to provide to you. Delivered functionality included:

• New Shopping Sheet Group setup component that provides the ability to configure what information is displayed on the Shopping Sheet(s).

• A preview screen on the setup component users can use to ensure their static data is represented correctly on the Shopping Sheet before assigning it to students.

• Population Update process to assign Shopping Sheet Groups which are used to associate students to a particular Shopping Sheet.

• A hyperlink from Self Service to provide student’s access to their electronic Shopping Sheet once they’ve been assigned to a Shopping Sheet Group.

Since the Shopping Sheet is not a Federal requirement for the 2013-2014 Award Year, we anticipate that our Financial Aid user community will test and implement the solution delivered in Additional Features January 2013 and begin to offer their feedback for enhancements.

Common Attribute Framework Enablement

(See information in the section Common Elements above about the Common Attribute Framework.)

As a starting point to enable this new framework within Financial Aid, the Financial Aid team enabled two records which should have high value to the FA community.

• The View Packaging Status Summary page is a common record for Financial Aid which holds attributes about the student such as statuses, overrides, matches, etc. at the institution and aid year level.

• The Assign Packaging Variables page is a component where we have a fixed set of user definable fields. We have received suggestions from customers to expand the number of fields on STDNT_PKG_VARS and we anticipate that the Common Attribute Framework will serve to address these localized requests.
Financial Aid (U.S.): Regulatory Updates

Campus Solutions maintains a rigorous schedule of updates, endeavoring to enable your timely compliance. We work closely with our customers and the Financial Aid Product Advisory Group to determine which regulatory and legislative updates are the highest priority and attempt to support the required timing of those changes.

We deliver regulatory updates in each of the four scheduled maintenance bundles per year:

- **October Bundle/Regs 1:** ISIR load, INAS-IM, PROFILE, Return of Title IV
- **January Bundle/Regs 2:** Database Match and Eligibility updates, NSLDS, Verification, COD Processing updates for Direct Lending, Pell Grants
- **April Bundle/Regs 3:** Redeliver INAS-FM, Pell Schedules, CommonLine Updates
- **July Bundle/Regs 4:** FISAP, Satisfactory Academic Progress

We also post additional individual updates, as required:

- Pell Schedule Updates
- INAS-FM (multiple technical updates from College Board)
- Perkins and Direct Lending promissory note updates
- Loan Origination Fees: we delivered updates in reaction to the requirements of sequestration to extend the decimal places for calculating the loan origination fees.

Student Financials – Prior-Year Updates

Over the last year, the focus for Student Financials has been on updates to the Tuition Waiver processing; this new flexibility is satisfying a demand from customers in multiple regions. The phased approach to Campus Solutions enhancements allows you to evaluate, test and deploy new capabilities in increments that are easier to manage than a major upgrade event. The past year’s efforts in the Student Financials are a good example of this phased approach.

Group Data Entry

Most institutions have transactions that need to be posted to a specific set of students outside of tuition calc. The delivered enhancement to Group Data Entry and Group Corp Data Entry makes use of the Population Selection tool. Student Financials provided the capability for you to use a query or an equation to write the criteria to identify the population for a specific transaction. In addition, the file load capability of Population Selection can be used.

Tuition Waivers

One of the top enhancement requests from our expanding global customer base using Student Financials is in the area of Tuition Calculation Waivers. Use of this functionality continues to
expand, with different models of usage found in different countries. In Additional Features October 2012, we delivered new functionality that enhanced Tuition Calculation Waiver processing that provides the option for applying the waiver on tuition “gross amount” or the “net amount” and to allow for prioritizing multiple waivers, prorating dropped units and overriding a waiver at the student assignment level. In Additional Features April 2013, Campus Solutions delivered new functionality to enhance the Posting Select Charges to Pay and Tuition Calculation Waiver processing to provide the ability to restrict the payment or waiver.

**GL Reconciliation**

Reconciling accounting entries between Campus Solutions and PeopleSoft Financials General Ledger (GL) is an important and necessary activity. Accounting transactions in Campus Solutions are held in the SF Accounting Line Transaction (SF_ACCTG_LN) table and the Batch Publish utility is used to send these transactions and receive information from the PeopleSoft Financials General Ledger. In response to suggestions from the Student Financials Product Advisory Group and other customer input we enhanced the GL Reconciliation process to improve usability. We updated the SF_ACCTG_LN table to include the four fields ITEM_TERM, ITEM_TYPE, REF1_DESCR and RECEIPT_NBR. The Generate Accounting Entries and Generate Cashiering Entries processes have also been updated to populate these new fields.

**Contributor Relations – Prior-Year Updates**

Contributor Relations provides support for the constituent, focused on the status associated with the alumni or friend of the institution. Of course, the reach of the Contributor Relations application extends beyond the traditional alumni to support the comprehensive ability to fund-raise and friend-raise.

The Contributor Relations team works very closely with the customer community to prioritize product areas for enhancement each year. The enhancements that were delivered over the course of the last 12 months for CR are listed below.

**Long Name Field**

The Campus team added the ability to add the long name fields to person and organization records.

Each of the business areas has begun the process of adding the Common Attribute Framework (CAF) to the high priority pages in their respective areas. For Contributor Relations, the Person to Organization and the Organization Relationships pages have been CAF enabled to provide a formal long name field for organizations.

Also, additional fields were delivered to allow the entry of long name fields for a person.
Prospect Management Enhancements

By effective dating the Prospect Overall Status, Contributor Relations now has the data to allow users to calculate the number of days that a prospect has remained within a particular status, the data to determine an average time for moving a prospect from one status to another, and the ability to calculate close rates within particular prospect groups. In addition, Oracle delivered the ability to set Prospect Resource Goals within the system for each prospect management resource (including units and volunteers) and track by campaign, where the prospects are in the cycle, etc. Combined with the prospect status feature and the closed loop between prospect management and gift/pledge entry, users now have the data to create accountability reports based on local practice.

Academic History Extensions for Person Profile

The Person Profile was enhanced by adding the constituent’s academic history within a new grid. In addition, a grid was added that displays the academic history for any relationship that also has academic history on record. This allows the user to quickly assess how close the constituent’s academic ties are to the institution by considering legacy/family degrees as well.

In addition to the above enhancements, the CR community can take advantage of the updates to the functionality contained in the Campus Community module.

Affiliations

- Several enhancements were delivered for the Affiliations feature. Those include:
  - View Person Affiliations – Chart View
  - Inclusion of Affiliations within CS Product
  - Oracle Identity Management Connector
  - Context Data Inclusion – An additional element of the Affiliation definition is “Context Data”. This allows the specification of additional record/field pairs to be associated with the affiliation code and included as part of the data when the affiliation message is published. This enhancement enables more flexibility and definition when the affiliation is used in conjunction with other business processes such as Identify Management.

Campus Solutions Frameworks Enablement

As new features are developed, the architecture team looks for ways to re-use utilities and capabilities created for a particular business need. Wherever possible, the Campus team creates a framework so that utility can be used in other business processes internally and that you can extend to meet the unique needs of your institution. Some of the CS frameworks were enhanced in the prior year. Please see the prior section Common Elements for a description of the enhancement to the frameworks.
Of special interest to the Contributor Relations customers, the Person to Organization Relationships and the Organization Relationships pages have been enabled in the Common Attribute Framework.

### Legislative and Regulatory Updates – Prior Year Updates (all except U.S. Financial Aid)

**Australia**
- SA HELP (Student Amenities - Higher Education Loan Program) Update
- Queensland Tertiary Admissions Centre (QTAC) Updates
- Victorian Tertiary Admissions Centre (VTAC) Updates

**Netherlands**
- Continued support for the BRON process
- Studielink
  - Extension of Studielink messaging framework for BRON-HO
  - Studielink regulatory update 4.3
  - Enhanced usability for Studielink processing and monitoring

**United Kingdom**
- Universities and Colleges Admissions Service (UCAS)/Graduate Teacher Training Registry (GTTR) Updates and Paperless Processing
- Student Loan Company (SLC) updates for the Attendance Confirmation process, HEI Course Database Web Service and Higher Education Bursary & Scholarship Scheme (HEBSS) import.
- Tier 4 Points-Based Immigration(PBI) Updates
- Higher Education Statistic Agency (HESA) Updates
- Destination of Leavers from Higher Education (DLHE) Survey updates
- HESA Key Information Set (KIS) Return 2013/14

**United States**
- 1098-T updates
- National Student Clearinghouse; process that recognizes units that have been designated as “withdrawn”
• National Student Clearinghouse (NSC) reporting enrollment changes required by the National Student Loan Data System (NSLDS)

• SEVIS Release 6.12 updates included changes to the Export Process for F/M Visa to support required schema changes.

Oracle PeopleSoft Campus Solutions – Planned Features

Oracle PeopleSoft Campus Solutions planned features represent an ongoing commitment to provide best-in-class products that provide real business value. The Planned Features section provides descriptions of features and functionality that Oracle expects to provide in Campus Solutions over the next twelve months.

Campus Solutions Common Elements – Planned Features

The core capabilities of the Campus Solutions product continue to expand by delivering frameworks and other common elements that are or will be leveraged by all the modules in our product family, and which can also provide significant benefits to you as you begin to leverage them for your own purposes. Since no one business area “owns” these frameworks, we think it appropriate to call out the planned enhancements to these utilities and frameworks in a separate section of this document. We will reference specific business process application in the appropriate section (e.g., if Financial Aid has leveraged one of the frameworks, we’ll note that usage in the Financial Aid section).

Please see the Prior Year section above for details of what we’ve already delivered for these common elements. Additional enhancements and updates planned for these common elements are noted in this section.

Entity Registry

We plan to enhance the Entity Registry to enable a more general purpose import/export framework. So while you will be able to import/export entities, we will also be able to use the framework with other new functionality being delivered, such as the Delegated Access framework and Common Attribute framework. This means rather than using a dat/dms approach we will allow certain objects to be exported and imported as xml. This has numerous functional benefits:

• Exporting data is simplified: Data is exported as a full object, so an entity is exported rather than individual rows of a record.

• In this vein, it should also provide suggestions. For example, if you export a rule from the Rules Engine, it may also suggest you export associated entities and List of Values.
• Controlled Import: A comparison report will be provided when importing data and the user has a choice of how to handle conflicts (ignore, merge).

• Replace functionality: This is the ability to wipe out the existing entity and replace it with a new one. Overall this should make it easier for you to migrate your data from development to production, which is crucial for the entity registry, the rules engine etc.

Additional features planned for the Entity Registry framework include:

• A more formalized way of querying for entities. This can be used by services and the rules engine to retrieve entity data in a more standardized way.

• Better integration of the xml schema with the message schema. Customers should be able to see all entities that have message part schemas associated with them and more easily update the schemas when the entity changes.

• More performance enhancements.

• System data tracking. Since we deliver data that you may need to change (e.g., adding a child to a delivered entity), we will also provide a way for you to see what you have changed and possibly revert those changes back to the delivered state.

Delegated Access Framework

We have delivered the basic ability to have the student (the delegator) indicate who the delegated person (the proxy) is and their access to certain components. Planned phases for Delegated Access, which likely will extend beyond just the next 12 months include:

• Deployment of a ‘Parent Center’ or a ‘Delegate Center’ which would display all the delegators a proxy has delegated access to as well as links to the components to which they have been granted access.

• Delivery of a predefined list of Campus Solutions self-service components ready for a proxy to view or update (this list will serve as examples of how you can deploy a desired Campus Solutions self-service component to proxies).

New User Registration

Campus Solutions plans to release additional functionality for New User Registration in upcoming bundles including:

• Change Password utility at logon time to support expired or soon-to-be-expired passwords.

• Campus Solutions version of the PeopleTools “My System Profile” self-service page. This new simplified self-service page will be used by Campus users to answer a security question to retrieve their forgotten password.
Notifications Framework

Campus Solutions plans to release additional functionality leveraging the Notifications Framework in upcoming bundles including:

- **SMS channel**: Task Management, Academic Advisement
- **Alert channel**: Activity Management, Simplified Student Experience, Program Enrollment, Task Management and Academic Advisement
- **Email channel**: Activity Management, Simplified Student Experience, Program Enrollment and Academic Advisement
- **Worklist**: Activity Management, Research Enrollment Tracking, Program Enrollment, Academic Advisement and Research Tracking

Rules Engine

The initial installment of the Rules Engine (delivered in April, 2013) was focused on delivering a robust framework that allows you to build rules in the Rules Engine Manager using delivered entities from the Entity Registry. Planned deliverables in 2013-2014 will focus on extending and enhancing the Rules Engine Framework while providing support to different product areas as they integrate with and adopt the Rules Engine into their functional applications as noted in other sections of the document. Please note that use of the Rules Engine requires PeopleTools 8.53.

Initiatives for enhancement and extension of the Rules Engine framework are planned for the following key areas:

- Provide ability for rules to be run and scheduled via batch processing.
- Extend and enhance Rules Engine Manager functionality.
- Provide ability for Rules Engine usage to users in skill levels other than developer or expert.
- Provide tools for migration of rules and functions as well as identify system-delivered rules.
- Provide additional system delivered functions and rules.

Provide Ability for Rules to Be Run and Scheduled via Batch Processing

The Rules Engine Framework provides the tools with which rules can be called directly from the user interface to perform various tasks. However, many of you have indicated that a number of business processes exist for which batch processing is the preferred method of execution. For example, in Program Enrollment a process is needed that can apply rules to determine whether students who have completed the first year of their academic program are eligible to progress to the second year of that same program. The initial phase of batch processing for the Rules Engine is targeted to provide a means of running one or multiple rules in batch as well as providing the ability to schedule these processes where appropriate.
Extend and Enhance Rules Engine Manager Functionality

In 2013-2014 we plan to facilitate the Rules Engine Manager user experience by providing additional context-sensitive hover-over help text which can guide the user when using functionality such as Statements and Variables. We plan to enhance existing functionality to include the following:

- Enhancements to Rules Engine variables and access to Rules Engine variables
  - Addition of contextual help and instruction text
  - Enhancements to Data Sets (grouped variables) including the ability to copy existing data sets or create data sets by copying from records. Copy functionality will allow users to clone existing data sets. Copying from records will allow users to select a record and create a data set using that record structure.

- Enhancements to the Rules Engine Tester and logging of test results
  - To enhance the usability of Rules Engine test results we plan to introduce the ability to save a log file from the tester and indicate where logs are to be stored.

- Enhanced Rules Engine Manager user experience
  - We intend to provide users with a view of all functions associated with one rule. For example if one rule calls multiple functions we will provide the ability to view the entire rule hierarchy flow.
  - We plan to provide a means of viewing the Base Entity Registry Hierarchy view associated with the rule or function that is being built. This view will provide the user with more information on which data is available having selected the Base Entity for the rule.

Enable Rules Engine for Users with Skill Levels Other than Developer or Expert

In April 2013, the Rules Engine Manager was delivered with the skill levels of Expert and Developer. With the Developer level, technical staff and programmers are able to leverage Application Package PeopleCode when creating rules. At the Expert skill level users are able to apply all delivered statements and functionality as authorized via the Rules Engine Category Security setup without any limitations. During early adoption we anticipate that technically astute functional experts will start to evaluate the new capabilities delivered in the Rules Engine and begin their analysis on how to leverage this feature. In 2013-2014 we plan to gradually introduce new skill levels which provide access to the Rules Engine on a more limited basis excluding access to more complex concepts and statements. This will enable less advanced users with an appropriate skill level mode which will provide them with a more guided approach to rule building.

Migration Tools for Rules and Functions, Identification of System Delivered Rules

The initial release of the Rules Engine included an extensive library of system functions that can be used “out of the box” to perform mathematical functions, date and time manipulations as well
as formatting strings. We also provided other related objects such as Rules Engine categories and List of Values prompting functionality. As you start to create your own objects such as Categories, List of Values, rules and functions, the ability to identify system-delivered functions versus institution-specific rules and functions becomes important. Furthermore, as rules are created, users will also want to propagate them between environments. Maintaining existing rules and their versions becomes a key factor for object maintenance. In 2013-2014 our plan is to deliver an import and export framework that will differentiate between system objects and rules and institution-created rules/objects, provide a means of preventing access to system objects where necessary and to ensure that rules and related objects can be migrated between environments.

Provide Additional System-Delivered Functions and Rules

In 2013-2014 we plan to continue to identify how we can provide rules and functions which perform common tasks and will help functional experts to create institution-specific rules more efficiently.

Evaluation Management System (EMS)

The functionality we delivered in 2013 for the Evaluation Center and Workflow and Notifications represented a significant first phase for those areas. In 2013-2014, we plan to enhance the WorkCenter and Workflow and Notifications in the following ways:

Evaluation WorkCenter:

• Alternate views of the evaluation. Currently an evaluator or committee member can only see their portion of the evaluation. We plan to provide configurable access, so an administrator can decide, for a particular evaluation, whether evaluators can see other evaluators’ results and comments.

• Enhanced search/filter capabilities for the worklist items.

• Search/filter capabilities to view completed evaluations.

• Deployment of data (which exists in the system) relevant to the evaluation in a view mode in the Evaluation center. Evaluators will be able to view content that assists with their evaluation decision.

• Ability for an administrator to drill down on a singular evaluator’s section in order to view, correct or complete that evaluator’s evaluation.

Workflow and Notifications

• Reminder processing will allow a configurable setup to send reminders to evaluators of an upcoming evaluation due date.
• Timeout processing to notify an evaluator and evaluation administrator that an evaluation has not been completed by the due date.

• In a multi-tiered evaluation setup, it may be possible that an evaluator in the first stages of the evaluation has the authority to make a final determination and have no need for the evaluation to go forward to other levels in the evaluation. We intend to provide configurable setup to control the workflow process and set rules about when an evaluation flow may be ended before moving to all levels of the evaluation.

• Ad-hoc notification capabilities from the Evaluation WorkCenter. This planned capability will allow an evaluator to send a notification to an administrator or another evaluator associated with the evaluation. For example, an evaluator might need a clarification from the evaluation administrator on completing an evaluation procedure. The evaluator can choose from a list of contacts an email address and send an email without leaving the self service page.

Rules Engine Integration

While many evaluation models are very manual and rely on human intervention, there are also many types of evaluations that can rely on programmatic assessment of data from within the system. A major component of evaluation processing is to define institutional policy into rules and criteria and to automate their application to part or all of an evaluation. We plan on integration with the Rules Engine to provide the capability to automate evaluations based upon user-developed logic that is applicable to their business needs for an evaluation.

Task Management Framework

Our customers have identified a number of tasks with a similar structure or content that requires students or other users to review, verify, update or take action on tasks at various prescribed points in time. For example, for each year or term students may be required to confirm their contact details (address, phone, email etc) and/or emergency contacts prior to commencing enrollment. Students may also be required to periodically confirm their agreement to your institution’s financial or academic regulations prior to enrolling. A financial agreement may include a promise to pay fees and to abide by your institution’s financial regulations, and may also include providing details of sponsor(s) who may be paying fees on their behalf. In many cases, you require the ability to configure a sequenced set of actions for completion that has been assigned to the student or group of students based on particular characteristics. For example, you may have different requirements for new and continuing students; international students; study abroad students; research students etc. This important feature in which tasks are defined and assigned to appropriate students or other audiences for their completion is called Task Management. Task Management is intended to support step-by-step self service processes in Campus Solutions using a flexible framework that allows you to determine the structure and content of guided tasks and to “plug-in” existing pages or records as well as your own customized pages or records as required. The delivery of Task Management functionality is
planned for a number of bundles starting in 2013-2014 with the initial focus planned for the periodic assignment, required verification, and possible update of relevant student information prior to being allowed access to enrollment transactions. Information to be deployed to students is planned to include:

- Ability to display existing Emplid, Gender, Date of Birth
- Ability to display existing data (primary ID) National ID.
- Ability to display existing photo and add/replace photo as attachment.
- Ability to configure and display which data is displayed and to require allowable adding/edits for:
  - Names
  - Addresses
  - Phones
  - Email
  - Emergency Contacts
- Display existing data and require allowable adding/edits for:
  - Birth Country
  - Citizenship
  - Residency
  - Visa, Permit Data
  - Marital Status
  - Ethnicity
  - Religious Preference
  - Impairment or Disability data
  - Regional or Country Specific information (Examples: Australian Student Data DIISRTE and Tax File Number, NLD GBA Nationality, Correspondence Number, Studielink Number, Prior Education, Student Information, Scholarship Information, GBA Reporting Name, U.K. - Person HESA Data)
- Tuition Charges
  - Ability to display existing tuition and other charges (if already calculated).
- Fee Payment
  - Ability for the student to indicate fee payer (e.g., self, sponsor etc.).
  - Ability to provide sponsor information (including attachment of sponsorship letter).
  - Ability to indicate payment by installments and view payment plan.
Ability to complete a direct debit mandate.

In the future, we plan to expand the scope of tasks that can be deployed by the Task Management Framework. By providing the fundamental structure in which you can configure the content and timing of the task assignment, the sequential display and completion of these assignments, and the administrative tracking and management of these tasks, we are addressing important global requirements that will foster more timely and accurate data gathering and improve the efficiency of interactions with users.

Campus Solutions Self Service User Experience – Planned Features

Last year, we introduced a new section in this Statement of Direction to focus attention on our work with the usability of our applications. Our focus is on a role-based, simplified interface, which promotes efficiency and productivity. The roadmap includes investment in mobile access (tablets as well as smartphones) as well as enhancements to browser-based access on a laptop or desktop. This project will extend over several years, will leverage technologies in addition to PeopleTools and will be informed from working closely with customers and students.

Two distinct sets of deliverables are planned for the next 12 months. Both of these deliverables are based on the delivered web services from Campus Solutions. Both deliverables leverage the Application Development Platform (ADF and a subset of ADF, referred to as ADF Mobile); this is the development platform upon which the Oracle Fusion applications are built. Customers will have the choice of deploying the new role-based access via a smartphone or tablet/browser mode or they can leverage the web services and the ADF platform to extend the user experience themselves. Both solutions allow you to brand and tailor the solutions to reflect your institution’s identity.

The new functionality is delivered as part of the Campus Self Service product; no new application license is required.

Campus Self-Service Simplified Experience for Students

We plan to deliver a new interface for the student role to include access to high frequency content and transactions. The goal of this new interface is to provide the student with a simple navigation paradigm, icon-based, that leads to pages that display the content and transactions from Campus Solutions that the student needs most frequently. This new interface also provides links to the existing Campus Solutions content, so the student still has easy access to the full breadth of self-service functionality.

We plan to deliver functionality within this new interface in phases. We are focusing first on the Student role; we plan to address other roles (Faculty, Applicant, Alumni, Donors, etc.) in future phases. The planned content in the first phase includes:

• Personal Data view and update
• Notifications and To Do items
• Academic Data view (Course Catalog, Schedule of Classes)
• Schedule/Calendar, including views of enrollment information
• Student Account data view
• Financial Aid data view

Campus Self-Service Mobile for the Smartphone

As noted in the Prior Year section, you have set a very high priority on the delivery of Campus content on mobile devices. Our research indicates that students want to be able to use their phones to get reminders and alerts about what they need to do; they want ready access to status information about their grades, their accounts, etc. and they want to use their phone to seamlessly connect from one app to another. We strongly encourage you to provide feedback to us on this dynamic area so we can best meet your students’ expectations. Some of the functionality that we plan to deliver in the next 12 months includes:

• Contact info
• Actionable links in notifications
• More delivered notifications
• Add schedule to calendar
• View schedule in calendar format
• View Holds
• View To Dos
• View Financial Aid Award Status
• View Student Account balance
• Ability to launch Campus Self-Service Mobile from another app
• Ability to launch another app from the Campus Self-Service Mobile app

Later planned phases will focus on the Faculty, Applicant, Alumni and Staff roles.

Personalizing How Users Work in Campus Solutions

In addition to these projects focused on providing device-independent access for the student population, we plan to continue our efforts to enhance the usability of new features as well as leverage PeopleTools functionality to increase efficiency and productivity. We plan to create pagelets for the sections of the existing Student Center, providing an alternative, more flexible way for you and your students to manage the user experience. New pagelets are planned for the
new student enrollment capabilities, too (i.e., Program Enrollment) to enable students to define how they want to see the Campus transactions and content that applies to them.

We plan to leverage the PeopleTools WorkCenter containers in a number of features to maximize the productivity and efficiency of the interactions your staff and faculty have with Campus Solutions.

Customers will see more specific information about how the Campus Solutions user experience focus is being realized in the documentation for each Additional Feature bundle.

**Campus Community – Planned Features**

The focus for Campus Community continues to be in the areas of improving access to Person data, both through enhancements to integrations and existing functions but also through the new capabilities in the revamped student experience.

**CS-HR Instance Separation**

The major pieces of integration support have been delivered to support the integration between Campus Solutions and PeopleSoft HCM. Looking forward, the Campus team is evaluating utilities and analytics that will help you understand the status or health of this integration. Our focus is on improving the efficiency of your efforts related to this integration and improving the confidence in the accuracy of the integration results.

**Common Attribute Framework Enablement**

We expect to add the Common Attribute Framework to more Campus Community tables. For example, there is a high priority to have customer-unique attributes stored with the Residency tables. We also may enable additional tables based on your priorities.

**Name Display Enhancements**

**Note:** The Name Display enhancement was delivered for the Contributor Relations administrative and secondary pages. We will continue to work with you to prioritize the modules to be targeted for this update.

We will evaluate our ability to extend these controls for all the Campus Solutions Self Service pages. This means that you will be able to configure the Name Type and how the person’s Name displays on these specific pages. These controls are set at the Installation level; they are not user-specific. A high priority request is to allow users to have their Preferred Name display on the Self-Service pages. In this case, if you determine that Preferred Name is the Name Type that should appear, then this Name Type will display for all individuals in Campus Solutions Self-Service pages.
Communication Generation
We continue to seek performance enhancements for Communication Generation and investigate ways to improve its ease of use.

Affiliations
We plan to enhance the View Affiliations component to show the values of the new Context fields, if used.

We also plan to deliver the ability to specify a cross-institution “Primary” indicator for Affiliations. This enhancement will provide a cross-campus attribute that would inherently define a “primary” affiliation for an individual who is affiliated with multiple institutions in a multi-institution Campus Solutions deployment.

Delegated Access
See the Common Elements section above for more details. We plan to deliver some key Bio-Demo data pages to support Delegated Access over the next 12 months.

Admissions and Recruiting – Planned Features
Prospect/Admissions Data Load (PDL)
Campus Solutions supports a number of test and data loads in the current code line which frequently require mandated file layout changes as their sponsoring third party agencies update, add and re-design them. The demand for new data and test score loads continues to grow from our global customer base which continues to express the need for a number of additional data loads including new test data (IELTS, Pearson Test of English, COMPASS) as well as the need to load data on prospective students from a variety of external data sources. It is apparent that a new approach to supporting data loads from external sources is required in order to keep pace with your changing needs.

Prospect/Admissions Data Load (PDL) is an innovative tool that utilizes existing architecture and functionality including Constituent Transaction Management, the File Parser, Entity Registry, 3C Events and Triggers and the Common Attribute Framework. It is designed to provide new structures that will allow you to define and map almost any external file containing data that requires staging, search/match processing, and posting to production records. This could include but is not limited to admissions test scores, prospects, placement exams, internal academic knowledge test results, etc.

PDL represents a common approach for capturing externally provided test data and other data that:

- Utilizes the Constituent Transaction Management (CTM) data structures and staging components to capture bio/demo data.
• Utilizes the existing Transaction Setup and Transaction Management Process to enable staging and posting of data.

• Utilizes the existing Data Update Rules feature to allow the user to determine how existing constituent data should be updated.

• Provides the ability to create prospects via appropriate mapping definitions.

• Provides new application packages to post test scores, prospect data and other data to Campus Solutions as part of the existing Transaction Management Process.

• Utilizes the existing Enterprise Integration Points (EIPs) to exchange data between Campus Solutions and CRM for test scores, prospect data, academic interests, education data and extracurricular activities.

• Utilizes the Common Attribute Framework to extend the existing prospect and test score records allowing you to store additional test and prospect data not supported in the current structures.

• Provides a security structure for the staging components to restrict access to only those transactions a user can process.

In 2013, we plan to deliver the initial phase of PDL functionality. To help you understand this innovative feature, we intend to provide examples using recognized test and data with the setup completed for File Parser; Field Conversion Definitions, Context Definitions and File Mapping Definitions components to set up and map test layouts.

This initial phase is targeted to provide examples for International English Testing Service (IELTS), Pearson Test of English (PTE) and College Fair Automation (CFA). This is anticipated to include:

• File Parser setup for IELTS, PTE & CFA (Test Only, Test/Prospect & Prospect Only)

• New Prospect/Admission staging component

• New Transaction application package

• New Transaction Security component

• New Prospect Configuration component

• New records for Common Attribute Framework: Test Score Candidate Data & Prospect Data

This initial phase is also being deployed to allow you to build other test score and prospect loads as needed for your institution.

The second phase is targeted to begin the migration of currently supported test score loads to the new the PDL process in addition to enhancements to existing functionality. This is anticipated to include:
• File Parser setup for TOEFL, GRE, GMAT, ACT and EOS (Test Only and Test/Prospect)
• Enhancements to the Transaction Management process for Search/Match Only capability
• Enhancements to User Security Replacement and Mass User Security Replacement to include Transaction Security
• New Transaction Purge process

PDL represents an important step towards ending your reliance on Campus Solutions continuous support for various existing test score load processes. Working closely with the HEUG Admissions Product Advisory Group (PAG), during 2013-2014, we intend to begin the migration from currently supported test scores to this new form of processing. It is our intention that in the future this new paradigm will be used for loading all currently supported admissions related test score and data loads. This migration will occur over a number of bundles. It will introduce initial file mapping definition templates for currently supported test score loads which will serve as the basis for load procedures. It is important to recognize that, as each new template for a test load is delivered, you will have the ability to respond to layout changes as announced by various test agencies. Campus Solutions will no longer update the individual test load after its related PDL template has been deployed.

By creating a common data load mechanism, we can provide a paradigm changing methodology that will allow you to control and respond to outside test agencies and to create your own data loads to meet your individual business needs.

**Planned Revisions to Delivered Test Score and Other Data Loads**

Over time, the introduction of PDL (see previous section) will reduce our revisions to delivered test score and other data loads. However, until we introduce the appropriate PDL template to the codeline, we will continue to update individual load processes. At the time of publication, we are aware of the following upcoming layout change:

• Student Search Service (SSS): Modify the existing External Test Score Load and Post processes to support the new Student Search Service layout effective September 2013.

**Common Attribute Framework Enablement**

The Common Attribute Framework is an innovative architecture which provides you with the ability to easily add data elements to enabled components without having to invest in customizations or modifications. Working with our Product Advisory Groups, we are collecting and considering additional component to which to apply the Common Application Framework during 2013-2014. Some of these include:

• Application Program Data (ADM_APL_PROG and SAD_APL_PROG_STG)
• Application Data (ADM_APL_DATA and SAD_APL_DATA_STG)
• Residency (Official) (RESIDENCY_OFF and SCC_STG_RES_OFF)
• Residency (Self Reported) (RESIDENCY_SELF and SCC_STG_RES_SLF)
• Emergency Contacts (SCC_EMERG_CNT_2 and SCC_STG_EMG_CNT)
• Relationships (RELATIONSHIPS and SCC_STG_RLSHIPS)

Student Records – Planned Features

Program Enrollment

In 2013-2014, our goal is to complete the delivery of the Program Enrollment feature. We will continue to build and expand upon Program Enrollment features focusing on the enablement of the Rules Engine functionality into all areas of the existing feature set and the expansion of self-service offerings. A summary of targeted deliverables follow.

The Rules Engine and Program Enrollment

The Rules Engine is an integral part of tracking and controlling how students enroll and progress through the curricula that Program Enrollment manages. We plan to leverage the Rules Engine to support administrative functions including result calculation and posting and academic item retake processing. In self-service, Rules Engine enablement will provide support for pre-requisite and other planning and enrollment requirement checking. In order to support deployment of this important and innovative functionality, we plan to deliver sample rule set up that can be examined, copied, altered, and applied. Targeted sample rules include:

• A “Pre-Condition” rule: Attached to the delivered COURSELIST item, this sample rule will evaluate whether a student has met a simple condition, such as a specified number of courses in their curriculum (as specified in their Academic Progress Tracker (APT)) or the required declaration of a specific sub-plan.

• Pre-Requisite rule: Attached to the delivered COURSE item, this rule will provide requisite checking based on APT items (as distinct from core Academic Advisement Enrollment requirements). The rule will check for the existence of a specific course item or items in APT when a student selects a course on the My Education Plan component.

• Parameter-based rule: Attached to the delivered COURSEGROUP item this rule will evaluate if a student has satisfied a requirement defined using delivered Academic Item Registry parameters. For example, when selecting courses from the group the rule determines if the student has selected the minimum number required by the parameters of the Academic Item.

• Result Calculation rule: A rule attached to any delivered item (e.g. Program of Study, Course List), which can calculate a result based on child items. Such a rule might be attached to an entire program and be used to calculate an overall program result based on the results for all of the courses a student has completed in their program.
Program Enrollment Self Service

We intend to continue to expand student self service for Program Enrollment, including support for more flexible program structures and the provision of date and other controls for planning and enrollment tasks. Planned features include:

- **Program/Curriculum information:** Provide summary and detail views of program requirements for a variety of roles: e.g., Prospect, Applicant, Student, Advisor.

- **Class Search for Program Enrollment Students:** The ability to further control class searches based on characteristics of the student and classes (from the self-service Schedule Builder component). Planned “matching” functionality is targeted to match Common Attribute Framework based attributes of the student with those for searchable classes thereby restricting students to view only appropriate class sections.

- **Self service support of curriculum requirements that do not have a prescribed completion schedule.** For example, if a student needs to complete a list of courses at any point in a program, the user interface will walk the student through the steps necessary to choose when a course will actually be taken.

- **Rule invocation directly within self service that provides triggers to a Rules Engine evaluation when a student takes a particular action in self service such as selecting a course.**

- **Enhancements to delivered AIR pages to provide item specific data and links to Activity Management data for course items (when available).**

- **Notification Framework Integration:** Application of the delivered alerts channel to push out student notifications to student pagelets.

- **Faculty and Advisor User Experience:** We will also begin the roll-out of additional user interfaces for the Faculty, Advisor and Administrator roles with a primary focus on components that support program and individual course selection approval, advisement, and exception tasks.

Academic Progress Tracker (APT) Request Updates

Introduced in 2012, the batch process APT Request allows program curriculum administrators to perform a variety of functions including assigning a program curriculum to a select group of students and activating segments of the curriculum (program nodes) for enrollment or planning purposes. In 2013-2014, this important process is targeted for the following enhancements:

- **Allow users to seed (add program nodes) to an instance using user defined criteria, based on the program format structure.** Also provide greater flexibility for creating repeat attempts against a specific program node.

- **Allow users to assign term values when seeding program nodes, as an alternative to Enrollment Cohort or a student based timeline.**
Activity Management

In this past year we have solidified the use of Activity Management with Program Enrollment and the Academic Progress tracker. In this next year, we anticipate that we will utilize Activity Management for defining and assessing student performance for class assignments, exams, and other content for all courses in which students are enrolled. Our efforts for completing the development of Activity Management will focus on several areas summarized below.

The Rules Engine and Activity Management

Incorporating the Rules Engine with Activity Management will include delivering integrated calculation methods to generate official course results as well as provide sample rules that you can clone and use for your own purposes. In order to assist you in implementing the Rules Engine with Activity Management, we plan to deliver evaluation rule examples that will use criteria such as common attributes, extenuating circumstances, and prior assignment scores to calculate results. Other examples targeted for delivery are:

• Primary Course Result
• Late Assignment Penalties
• “Resit” Eligibility and Calculation
• Extra Credit
• Class section averages

Self Service for Activity Management

As the Activity Manager WorkCenter design for administrative and faculty users reaches its completion in 2013-2014, we anticipate shifting our focus towards the self service experience for students.

• Enhancements to the Activity Manager WorkCenter for administrative and faculty users will be finalized, with users able to define coursework, assign activities to students, and apply and record results to activities.

• Student Access to Coursework: The student experience and access to Activity Management data and transactions is targeted to be delivered in several bundles. By providing students access to view Activity Management information from the Activity Registry, the Activity Manager and the Individual Activity Manager, we will enable them to review coursework requirements, select optional activities, and view results. Attention will be given to user configuration that will control release of information to self service applications. In addition, students will be provided with the ability to enroll in specific examinations.
Result Rosters

Result roster enhancements will be applicable to both the self service Activity Management WorkCenter and the administrative Result Roster component. These enhancements will provide the user a comprehensive solution for entering results for students. This is targeted to include:

- The ability to add supplemental grading elements (requirement designation, milestones, transcript text) to courses.
- Functionality to support the export of activities from the system and the importation of results into the system for users who prefer entering results via a spreadsheet.
- An Anonymous Grading feature allowing results to be entered without knowledge of the student’s identity.
- The assignment and receipt of attachments, allowing faculty to push out syllabi and students to electronically link assignments to their activities.
- The ability to assign Extenuating Circumstances to results. Extenuating circumstances are institutionally-defined values that when placed against individual student results can drive additional processing (via rules engine setup).
- A comprehensive view of all activity results on a Master Roster. Unlike the already delivered result rosters which are by individual activity, the master roster will display all activity results for all students in a course.
- Student photographs on the Activity Manager WorkCenter Activity Roster.

Synchronizing Activity Management to Core Processing and Program Enrollment

Ensuring that enrollment transactions are reflected in Activity Management is critical to timely and accurate academic record maintenance. We plan to continue synchronizing Activity Management between core student functions and Program Enrollment Academic Progress Tracker in 2013-2014. Specifically, our plans include continuing to enhance the batch and automatic processes to build an Individual Activity Manager (IAM) based on student enrollment and results generated in Activity Management will be reflected on a student’s APT and/or enrollment record (STDNT_ENRL). Specific targeted deliverables include:

- Supporting enrollment drops and swaps in the delivered batch process to generate IAMs.
- Supporting enrollment swaps by the enrollment event, enhancing messaging for IAM build errors and re-processing existing IAM activity requests, and synchronizing changes made in the Activity Manager to enrolled students’ IAM.
- Adding Common Attributes at the student level.
Research Enrollment Tracking

With the April 2013 Additional Features bundle delivered the core aspects of Research Enrollment Tracking that you need in order to implement the feature, we are targeting additional functionality for 2013-2014 that will further enhance and complete its design and usability.

The Rules Engine and Research Enrollment Tracking

Over the next year, we plan to support the adoption of the Rules Engine for the calculation of consumption or the time towards research activity completion. You will be able to choose from a set of planned consumption calculation methods performed by the Rules Engine. These calculation rules can be modified to meet your particular requirements without requiring customization. In addition, we plan to use the Rules Engine to execute data validation edits. You will be able to create validation rules that can be executed at key places in research business processes, for example before matriculation, before thesis evaluation, etc.

Ad Hoc Notifications

We plan to deliver a common methodology and user interface to initiate ad hoc notifications using the Notification Framework. This will enable you to create and generate email, alerts, SMS, and worklist notifications to students and other administrators on an immediate basis directly from the research components.

Population Selection

We plan to add Population Selection functionality to the Block Enrollment process. (See Population Selection and Block Enrollment section.)

Self Service Enhancements

Service Requests: Service Requests are important transactions that allow research students to notify and inform administrators, research supervisors and others of their intentions or to seek assistance or advice. In 2013-2014, we plan to add functional intelligence that will allow you to setup and manage automatic assignment of service requests to an appropriate designated administrator based on specified characteristics of the request.

Administrator Dashboard: We plan to add additional pagelets to the research administrator dashboard to display the administrator’s notification alerts and assigned worklist tasks.

Student Academic Projects

Introduced in 2013, Student Academic Projects represents a way to apply Research Enrollment Tracking functionality to non-research students. In 2013-2014 we plan to finalize Student Academic Projects design with:

• Planned support for group assigned projects.
• Add Rules Engine data validation. For example, planned Rules Engine functionality will enable you to check a project status against verifying data by constructing and deploying a rule that is triggered when a user initiates a save action.

• Ad Hoc Notification capability from the Student Project Management component.

Common Attribute Framework Enablement

The Common Attribute Framework is an innovative architecture which provides you with the ability to easily add data elements to enabled components without having to invest in customizations or modifications. Working with our Product Advisory Groups, we are collecting and considering applying Common Application Framework to a variety of additional components for 2013-2014. Initially some of these are to include structures associated with Academic Structure such as:

• Academic Program (ACAD_PROG_TBL)
• Academic Plan (ACAD_PLAN_TBL)
• Student Academic Program (ACAD_PROG)
• Student Academic Plan (ACAD_PLAN)

Population Selection and Block Enrollment

Since its introduction in 2006, Population Selection is a powerful framework that has been utilized for a variety of business processes throughout Campus Solutions. In 2013-2014, we plan to apply Population Selection functionality to the Block Enrollment process. This will allow you to use the PeopleSoft Query tool or an external file (such as a spreadsheet) to create a Student Block. We also intend to change the Course Block structure so it can be repurposed across multiple terms.

Delegated Access

See the Common Elements section above for more details. We plan to deliver some key student academic information pages to support Delegated Access over the next 12 months.

Academic Advisement – Planned Features

Academic Advisor Notes and Communications

Academic Advisors in most institutions provide many of the key services that promote retention, timely graduation, and mentorship. Advisors assist students in making significant academic decisions which require timely communication with their students and notation to student advisement records. Along with classroom instructors, academic advisors represent the most important human link between an institution and the student. It’s imperative that these advisors provide the best communication, the most timely information, and high quality interactions with
their advisees. In the coming year, Campus Solutions plans to focus on supporting and sustaining the services that your academic advisors provide. We plan to augment advisement functionality by delivering enhancements that enable advisors, faculty, and staff to record notes about their interactions with students when providing important information regarding discussions, decisions, and plans and to provide functionality that facilitates communication with students. Planned enhancements include:

- The ability for advisors to record notes and conversations and identify the type of conversation.
- The ability for you to define the types of notes, for example whether it is related to changes in program of study, exceptions, graduation, etc.
- Utilization of the Notification Framework channels to enable communication amongst advisors or between students and advisors, as driven by your preferred methods of communication.
- The ability for you to manage the respective users’ ability to view or edit advisor notes.
- Exposure of remarks and communications to users, as appropriate, according to institutional or external requirements.
- The ability to secure notes, as appropriate.

Student Administration Integration Pack – Planned Features

As adoption of the Student Administration Integration Pack (SAIP) solution expands, we plan to add a number of customer-driven enhancements in the coming year. Planned candidates include:

- Faculty Self-Service: Allow faculty members to define how and when class information is sent to an external system (now managed by administrators).
- Integration of User Name: Ability to define and pass a User Name (i.e., the User Name used to authenticate into an external system) to an external system. Many of the LMS vendor systems expect there to be a User Name to pass to their system as schools use different parameters for creating a User Name.
- Additional Scoping rules: Provide more granular control of scoping (defining parameters for which class sections participate in the integration).

Financial Aid – Planned Features

Financial Aid professionals live in an ever-changing world of highly-regulated compliance while striving to efficiently deliver financial aid to students, all the while counseling students and parents on financial options.

Regulatory Updates are delivered in each of the four scheduled maintenance bundles per year:
• October Bundle/Regs 1: ISIR load, INAS-IM, PROFILE, Return of Title IV

• January Bundle/Regs 2: Database Match and Eligibility updates, NSLDS, Verification, COD Processing updates for Direct Lending, Pell Grants

• April Bundle/Regs 3: Redeliver INAS-FM, Pell Schedules, CommonLine Updates

• July Bundle/Regs 4: FISAP, Satisfactory Academic Progress

There are often additional updates we deliver, based on mandates from the USED or other country’s legislative changes. Some of the enhancements (in addition to annual regulatory updates) planned for the next 12 months are listed below.

• Population Updates: We plan to deliver additional support for population updates based on customer input/priorities.

• Web Services: We plan to deliver new web services for Financial Aid business processes; the primary objective is to support the planned student experience capabilities on the smartphone and tablet (simplified experience).

**Student Financials – Planned Features**

Student Financials provides support for calculating, billing and collecting tuition and fees along with other related student charges, payment plans, refunds, global invoicing, and workflows. A key part of managing student receivables is disbursing financial aid. The following outlines the new capabilities we have planned for the next 12 months.

**Tuition Calc Associated with Program/Plan Change**

The Student Records and Student Financials Product Advisory Groups worked together to recommend this enhancement to Oracle, which we plan to deliver in the next 12 months. The objective is to call the tuition calc program from an update to the Academic Program/Plan stack. When you withdraw a student, or make a change that would impact their account, you will be able to ensure that you complete the tuition calc process first.

**Tuition Waivers**

Following the enhancements for increased flexibility with applying tuition waivers that were delivered in the prior year, we are evaluating additional options for the application of waivers within the tuition calculation process.

• Several institutions have requested that waivers be applied proportionally across the installments created through tuition calculation. Each of these waivers would “stick” to the installment so that the student’s bill reflects the accurate credits.
• In responding to the global business need for providing flexibility for the begin date of the waiver, we are planning to allow the Student Assignment Waiver component to provide for the beginning time frame for the waiver to apply proportionally.

BI Publisher Version of the Cashiering Receipt

At the request of the Student Financials PAG, we plan to convert the Cashiering Receipt to BI Publisher. A number of other high priority SF reports have already been moved to BI Publisher from Crystal.

Delegated Access Enablement

See the Common Elements section above for more details. We plan to deliver some key student account information pages to support Delegated Access over the next 12 months.

Enrollment and Financial Agreements: Leveraging the Task Management Framework

See the update on Task Management in the Student Records section for more details on our plans to provide support for these types of student “agreements”.

Enhancing Student Financials Core Banking

Recognizing the growing global footprint as well as requirements stemming from the Netherlands for SEPA (Single European Payment Area) compliance, we need to enhance the existing core banking feature in Student Financials. We need to provide a more generic, non-North American centric banking structure, to be used by all customers and for various features within Campus Solutions. Currently, the banking feature is very tightly coupled with the “Refunding through AP Direct Deposit” feature; this association needs to be relaxed. Expanding this capability for use by a global audience will allow for the creation of bank accounts for any country and currency, while enabling the compliance with SEPA regulations for the Netherlands (NLD) Banking Interface and other countries.

The Student Financials core bank record (SSF_BANK_ACCT) is SEPA compliant and already has the requisite IBAN and BIC details; it can hold all bank account related data. The IBAN and Bank Account Numbers are encrypted and stored. Some of the additional enhancements needed for this feature include:

• Open up the Country and Currency Code fields to allow selection for both Administrative user and Student (via self-service).

• Relax existing rules tightly coupling Student Financials with Refunding – AP Direct Deposit.

• Use the Student Financials core bank record (SSF_BANK_ACCT) to store the Netherlands banking information as well.
• Migrate the data from existing Netherlands banking tables to the Student Financials Core banking table.

• Modify existing Student Self Service pages for bank account creation to cater to broader needs beyond Refunding – AP Direct Deposit.

**Other SF Enhancements**

Web Services: We plan to deliver new web services for Student Financial business processes to support the planned student experience capabilities on the smartphone and tablet (simplified experience). You will be able to leverage these planned services for other purposes on your campus as well.

**Contributor Relations – Planned Features**

Contributor Relations customers have identified their top priorities for attention over the next year. Several of these enhancements are being designed now and others are under consideration for delivery in the next 12 months. CR customers need to extend the application to leverage third party solutions, such as social networking, automated contact systems and distinctive user interface for your communities. As such, you will benefit from the features and frameworks described in the Campus Community section above.

Some of the enhancements targeted for the next 12 months are listed below.

**Giving Clubs**

A top priority for the Contributor Relations Product Advisory Group is to focus on the Giving Club structure and support, primarily looking at ways to reduce manual entry to maintain the Clubs, to add better date control to the structure and to add more flexibility and rule-based processing in general. We are in the process of evaluating the entire Giving Club definition and processing controls to determine how to phase in desired enhancements.

**Workset Enhancements**

Worksets are a unique framework in CR that support the ability for a user to work through a set of selected records regardless of whether the constituent is a person or an organization. The number two priority from the CR PAG was to enhance the capabilities of this structure; some examples include:

• Sharing of worksets (public, secured and private options).

• Ability to add ID ids in a batch mode using Population Selection.

• View by Alpha within workset search lists.

• Join more than two worksets.
Publications Management
We plan to add the ability to track to which address a constituent wants a particular communication type sent.

Name Display Enhancements

Note: The Name Display enhancement was delivered for the Contributor Relations Administrative and Secondary pages. We will continue to work with Campus Solutions customers to prioritize the modules to be targeted for this update.

We are evaluating our ability to incorporate these controls for all the Campus Solutions Self-Service pages. This means that your institution will be able to configure the Name Type and how the name displays on these specific pages. These controls are set at the Installation level and are system-wide; they are not institution or user-specific. A high priority request is to allow individual users to have their Preferred Name display on the Self-Service pages. However in this case, since the control is at the Installation level, if you determine that Preferred Name is the Name Type to appear, then this Name Type will display for all individuals in Campus Solutions Self-Service pages.

New User Registration for Online Giving

We plan to provide access to CR Involvement and online giving using the New User Registration to allow you to engage more self service users in managing their donations.

Common Attribute Framework Enablement

Based on your input on their priorities, we plan to add the Common Attribute Framework to a selection of CR records.

Mobile Access

An evaluation of functionality to extend student mobile access for alumni involvement is under consideration based on requirements provided by the CR Product Advisory Group. The first step for this effort would be to create web services to support the content and transactions that we target for mobile access.

Reporting Tables

Customers are providing their priorities for the type of data access and reporting that would be most beneficial. We plan to create some views of CR data which will facilitate reporting and analytics. We plan to expand the accumulator process to pull in data which makes it easier to report on that information as well as provide some new reporting views that can make building queries more flexible.
Prospect Management

In PeopleTools 8.51, Oracle introduced a new construct called WorkCenters. WorkCenters are designed to simplify the administrative user’s experience working within a PeopleSoft application and are role-based. They are designed to be built and deployed by your institution with minimal involvement from IT resources. However, we also are evaluating the value of delivering pre-formatted WorkCenters for specific roles within Contributor Relations; the Prospect Manager role is one we’ll be looking at closely.

Legislative and Regulatory Updates – Planned Features (all except U.S. Financial Aid)

Australia

- Student Amenities Fee/Higher Education Loan Program Updates (SA-HELP): The SA-HELP functionality was delivered in April 2012. Since then customers have identified and requested enhancements that we are planning to address including:
  - Update the SA-HELP Deferral process to run the process multiple times so changes to the Student Amenities Fee (SA Fee) amounts can be considered and the SA-HELP deferral waiver amount be updated or completely deleted.
  - Improve performance for the SA-HELP Deferral process.
- Queensland Tertiary Admissions Center (QTAC) update for 2013
- Victorian Tertiary Admissions Center (VTAC) update for 2013
- HEIMS Student Data Collection (DIISRTE) update for the 2013/2014 reporting years
- Unique Student Identifier (USI): This is a new initiative that we plan to deliver. The USI will provide an accurate way to collect comprehensive information about students’ training achievements and movements within the VET system and will provide functionality to interface with the web services to create or verify a student’s unique student identifier.

Netherlands

- Update Studielink from version 4.3 to 5.0
- Support for enhanced Student Financial Core Banking (see the Student Financials Planned Features section for more detail)

United Kingdom

- Higher Education Statistic Agency (HESA); continued support for required returns including:
  - Student 2013/14
  - Aggregate Offshore 2013/14
  - Destination of Leavers (DLHE) 2012/13
• Initial Teacher Training (ITT) 2013/14
• Key Information Sets (KIS) 2014/15

• The Student Loans Company (SLC) has introduced regulatory changes to the HEI Course Database Web Services, which updates the service to version 3.0. Plans to address these changes include:
  o Review of current product feature against new web services version.
  o Updates required to the HEI Course Database pages and processes for Version 3.0 changes.

• Continued support for required updates for UCAS and GTTR admissions for the 2014 admissions cycle.

United States

• Veterans Benefits: In response to extensive requests from customers including the Student Financials and Student Records Product Advisory Groups, we are planning to deploy new functionality to support tracking educational benefits for U.S. Veterans and their families. Targeted functionality includes:
  o Benefits Summary: Provides for Federal and State Veterans Benefit eligibility data capture for a student in the context of a term.
  o Ability to attach required documents and notes to appropriate components.
  o Enrollment Certification displays the student’s enrollment information used to determine whether a class is eligible for Veterans Benefit reporting/funding.
  o Tuition Worksheet provides tools to assist an administrative user in the calculation of the Veterans Benefit net tuition and fees.
  o Veterans Payment History is a summary of payments and adjustments disbursed onto the student’s account.
  o Setup:
    o Instruction Mode Mapping
    o Net Tuition and Fees Calculation Setup
    o Payment Mapping
  o New processes:
    o Rollover Benefits Summary: Rolls over the Benefit Summary from one term to the next
    o Update Term: Creates and updates the Tuition Worksheet and Enrollment Certification pages.
    o Retirement of existing Veterans Report process
• SEVIS Release 6.13: SEVP has tentatively scheduled to go into production at the end of May 2013 with changes to the J Visa Alerts, export and import processes to support schema changes for Site of Activity as well as the import of the new Site ID assigned by SEVIS for each Site of Activity. The Site was also added to the Site of Activity review, history and master records.

• 1098T Delivery: We plan to make the appropriate update to this form in July of each year.
PeopleSoft CRM for Higher Education

PeopleSoft CRM provides you with a full suite of CRM products with specific features for Higher Education pre-built and with delivered and supported integration to Campus Solutions. These capabilities enable you to manage your CRM and Campus Solutions environments as a single, comprehensive solution to improve the support you provide to your constituents and enhance your recruiting, retention, and constituent success efforts throughout the lifecycle.

CRM for Higher Education – Planned Features

We plan to continue our strong momentum and roadmap for PeopleSoft CRM over the next year with the new 9.2 release. This major release includes a number of new features targeted at the Higher Education community.

Multi-Row Profile Enhancements

CRM Online Marketing is a powerful tool to create interactive web pages and forms as well as to create dynamic communication flows. With the 9.2 release we plan to enhance Online Marketing to leverage multi-row profiles when displaying merge content and also when determining when the graphical flow is based on decision points.

For example, if a prospective student applies for multiple programs within your institution, then all of those programs can now be displayed when sending prospect emails. In addition, you can now use one or more of the fields within the multi-row prospect profile when deciding what merge content to display in emails or web pages and finally, when building the graphical flow of the campaign, you can use the prospect fields to determine the decision point and therefore which branch the campaign flow should take.

With the planned introduction of these enhancements, your institution will have much greater flexibility when using profile data to create OLM communications.

OLM Email Interactions on the 360-Degree View

The 360-Degree View displays myriad data from both CRM and Campus Solutions to provide the administrative user with a simple, consolidated “snap-shot” view of the constituent to facilitate customer service efforts and decision-making. With the 9.2 release, we are planning to enhance the 36-Degree View to include all single and broadcast emails from Online Marketing, providing more visibility into all the interactions you have had with the constituent in order to facilitate better service and decision-making.

Hosted Credit Card Page from Online Marketing

The security of online payments is of critical importance to all organizations conducting any business online. With CRM 9.2, we are planning to provide additional support to help you maintain compliance with PCI regulations for online payments security. We are planning to
integrate the Online Marketing (OLM) Dialog Execution Server (DES) with the CyberSource Hosted Order Page (HOP). HOP refers to the third-party where payment processing takes place. This allows a dialog to be presented to a consumer which will allow them to provide payment as part of the dialog flow. The payment process takes place on a third-party system which returns receipt details to OLM. Only receipt details are stored in the PeopleSoft database; no credit card information is stored in PeopleSoft. This enhancement will allow PCI compliant payments from Online Marketing dialogs such as Event registration.

**Guest Registration for Events**

We introduced the CRM Events Management product with the 9.1 release. This new product is a comprehensive events planning and management tool, fully integrated with the other CRM products, such as Marketing and Online Marketing, and enables you to plan and manage any number of on and off-campus events, including Open Houses, New Student Orientations, campus lectures and concerts, graduation ceremonies, and reunions and fund-raising events. With the 9.2 release, we are planning to further enhance this functionality to enable attendees to register any number of anonymous guests or register specific guests for an event via their email. You can then communicate with them directly along with the other attendees. In both cases guests will be counted against the maximum capacity for the event.

**Update Bio/Demo Data from Prospective Student Import**

Higher Education institutions collect prospective student data from a variety of different sources. Many times this data is collected in a spreadsheet or is acquired in an electronic data file that is then loaded into the system in order to communicate with and manage those prospects. However, sometimes the prospective students on those rosters or files already exist in your CRM system and rather than creating a new record you want to update the existing record with any new information in this external file. With the 9.2 release, we plan to deliver new functionality to enhance the Prospective Student Import process to allow you to update the person’s existing biographic and demographic data with the data coming from the external file. This allows you to easily maintain your prospect records and ensures that you are communicating with them using the most current and complete data available.

**Student Self-Service for Higher Education Support Center**

We know that providing good, consistent, and relevant information is key to maintaining student satisfaction as is the ability to find that information when necessary, regardless of the time of day or night. For the 9.2 release, we plan to redesign and optimize the Support Self Service products to help users quickly resolve service issues and problems using more relevant and useful solutions. The highly-configurable solution content framework coupled with the robust knowledge management administration and efficient search powered by Oracle Secured Enterprise Search will provide organizations the unsurpassed self-service tool they need to make their work most productive.
We plan to include the following features:

- All new and improved Self-Service Home page
- Redesigned FAQ page
- Enhanced search with faceted browsing which includes Solutions, FAQ, Known Issues, and Branch Scripts
- Intuitive and guided case creation process.
Business Intelligence and Analytics

Being able to access the large amount of data contained in your Campus Solutions environment and use it for reporting, analysis, and decision-making is increasingly critical for Higher Education. To facilitate this, Oracle provides a variety of industry-leading reporting, business intelligence, and analytic tools that provide a powerful analytic platform to manage your institution’s business intelligence and analytic needs.

PeopleSoft EPM 9.1 Campus Solutions Warehouse – Prior Year Updates

The Campus Solutions Warehouse is a pre-integrated, comprehensive data warehouse built on the PeopleTools platform. Over the past year we have delivered the following enhancements and updates to the warehouse.

Complete Materialized View Log Solution for Campus Solutions Content

For customers on the Oracle DB platform, we delivered ETL maps that can take advantage of Oracle’s Materialized View Log to track data changes that occur on the Campus Solutions source. This level of tracking allows us to load changes to the Campus Solutions Warehouse in a fraction of the time it takes with our traditional incremental ETL maps.

Field Level Lineage Solution Including OBIEE Front-End Reports

Our new data lineage infrastructure and reports provides you the ability to visualize the end-to-end flow of data through the EPM database. You will be able to tell where data originates from, how it is transformed, and the different layers it traverses across the system. You can get this information at the field level, ETL map level, and OBIEE report level. For those of you not using OBIEE, a series of tables are populated with the metadata necessary for consumption via any BI tool. This new functionality will help research the affects of changes to the warehouse as well as help build lists of ETL maps and the order to run them in for specific load requirements.

Additional IR/Snapshot Content and OBIEE Reports

We’ve completed delivery of our ETL maps to capture snapshot data for Institutional Research. The solution enables you to snapshot data for Enrollment, Completions, Admissions, End of Term Performance, and Retention Cohort Tracking. It also includes prepackaged OBIEE reports to report on the snapshots of your choice.

Certification of OBIEE 11.1.1.6.2 and 11.1.1.6.5

We’ve certified our OBIEE metadata and reports for upgrade to OBIEE 11.1.1.6.2 and 11.1.1.6.5.
New Reports Across all Subject Areas for Campus Solutions Warehouse

We’ve re-organized our Campus Solutions Warehouse OBIEE dashboards for ease of use and added approximately 20 new OBIEE reports. Those areas with the most new reports include Campus Community and Student records.

Oracle Business Intelligence Student Information Analytics (SIA) – Phase 1

In addition to our ongoing support of the PeopleSoft EPM Campus Solutions Warehouse, Oracle has introduced a new student warehouse – Student Information Analytics (SIA) – as part of the Oracle BI Applications product line. This new warehouse is pre-integrated with Campus Solutions as well as the current Financials and Human Capital Management warehouses on the OBI platform and represents the latest and more current technology and warehouse designs. It will serve as the platform for your business intelligence and analytic needs across your institution.

For Phase 1 of SIA we delivered warehouse content, ETL maps, and delivered reports, dashboards, and KPIs to facilitate business intelligence and analytic needs around student recruiting and admissions, course utilization, enrollment analysis, student retention, time-to-graduation, and student tuition fees and payments.
Conclusion

This is a challenging, yet exciting, time for Higher Education. Ongoing global economic uncertainty, changing demographics, technology advances impacting the delivery of education and new business and academic models are all forcing higher education institutions and partners like Oracle to innovate and adapt to new ways of doing business. Through the close collaboration we have with our higher education customers and industry partners, we are executing and delivering the strongest roadmap in the industry. Campus Solutions’ strong architectural foundation coupled with innovative new features and flexible frameworks together enable you to grow and adapt your operations to fulfill the mission of your institution in innovative and distinctive ways.

How to Get Additional Information

As the pace of change continues to accelerate, it is more important than ever for us all to stay current and informed on what our plans are and what we are delivering. The following are some of the resources available to help you with this:

• Campus Solutions Newsletter published by the Support team

• Single page on My Oracle Support dedicated to Campus Solutions information (see DocID 1400681.2)

• Home Page for all documentation related to Campus Solutions (see DocID 751540.1)

• This Statement of Direction, published annually

• Detailed Pre-Release Notes published prior to the general availability of each Additional Features event (publication is highlighted through each Campus Solutions list serve on HEUG online)

• Multiple sessions at the annual Alliance Conference (and plans for presenting at other HEUG conferences throughout the year)

• Advisor calls and recorded webinars that accompany each Additional Features release.