SF User Group Conference Call
February 18, 2009
Minutes recorded by UND

Attendees: UND, BSC, NDSU, DSU, MISU, NDSCS, LRSC, MISU-B, Gar, Angela, Dee

Absent: MASU, VCSU, WSC, Marie

**Update on Account Summary page in self-service**

Information was sent through SF-HEUG listserv regarding Acct Summary page that was in 8.0. It is possible to make it available on the portal. Angela and Gar have been testing. As administrators, we can use that page like we had used it in 8.0. Allowing student to use in self-service is another issue. It will take some work to give to students because, currently, students would be able to view any student’s information. We need to set the security to default to the individual student’s name/ID, so they can only see their own information. Students would also need to be able to see multiple institutions if they are enrolled at more than one.

Report works just like it did in 8.0. It would have same issues we used to have with charges and credits possibly showing in different terms. Every school would have to agree to turn on – global.

It was discussed that we could choose to have both the Account Summary page for administrators and still work on having the customized report for both students and administrators. That would meet all campuses’ needs at this point. Many campuses would like to be able to print the Account Summary page for students and third parties until the customized report is available.

DR has been submitted for the customized report, and Angela is writing up for Marie to get an estimate of time to complete project.

Proposal: Start working on setting up the customization page for admin and students. Turn on Account Summary page for administrator, so we can print it off for 3rd parties and students in the meantime. All campuses voted in agreement.

Account Summary should be available by early next week in STG. Dee will send message to User Group when available, and users should test and respond to her if okay to move to Production.

The report will then be available in Prod until User Group decides we no longer need it.

**ND HEUG**
Collections – will be high-level. Angela will cover how we run our collections, table set up, and a dry run through. She will not be running each process due to the time constraints. She
will provide a reference manual. If campuses want to implement, we can arrange a working group after the conference.

1098T – session will focus on what students see including consent, and how it looks and feels.

Payment plan – will be mostly a working session. Kelly and Mary will give their views on what their campuses have done. *Please come with student ID’s in STG to test and with a payment plan and item types set up in STG and some testing already completed.*

Angela will be arriving late but plans to be available around 10 a.m. each day at the conference.

Remote Deposit Capture session is at 10 a.m. on Tuesday – for SF users, in case anyone interested. This overlaps with the Touchnet PCI compliance session, but if you have multiple attendees from your office, you may want to consider splitting up during this time.

**Campus Community User Group Update**

Janet: Nothing to report

Joanne asked if Hobsons would change other campuses’ processes for application fees. NDSU uses Marketplace – Hobsons won’t change process much – just how to get info to GL. Joanne does not have Marketplace and would have to buy it – doesn’t make sense for them. Karin stated that you only need Marketplace if a campus wants to accept online payments. If not, then it’s not needed.

Gar gave details on the possible “guest role” for PS. The current Student role has access to the “pay online now” link. Others don’t have link. It would require that a non-student who has data in Account_SF would get a userID and password to log in and view account, which is easy. They would need an institution set of NDUS. Then, they need access to a link to make payment. We would want to create a separate link just for these people to keep from mixing up non-student and student payments. These users would also need to be weeded out before they go to TN – to prevent heavy load on the system, we would not want to send everyone to TN if they don’t actually owe balance. If no charges, the non-student would receive a message that keeps them out. Non-students cannot get the student role because they are not matriculated. It is possible to set up this access, but more testing is required.

Karin stated that users need to get into PS to view their account and set up payment plans as well. Per Gar, it is a different task to allow parents/3rd parties to log in and see student’s account, grades, etc. Karin reiterated that we’re interested in both items.

Non-students would obtain a user acct – Gar could write up how to get one. There are 3 links to certain parts of the system:

1) Public
2) Visitor – put this TN access there, so everyone could get it – but edit them to prevent a lot of traffic. Still want them to view their PS page of their account. These people don’t have an institution yet. Could give them additional security to be able to view that info.

3) Student – do not want to mess with this

NDSU would like to try it; UND agrees and would like to see how it would work.

Next step: SF group would work on – out of CC group – Janet will give an update to next CC call. We would want to tell other modules because this could impact all. Angela will take to her next staff meeting and will update our group.

DR update – see attached list

Aerospace outbound file – Angela will talk to Marie tomorrow – should be able to move to Prod. Dotty will visit with Chelsea after call. Chelsea will send email to Angela to give okay on moving to Production.

Angela is writing up DR for student center account summary customization and will give to Marie.

1098T – Cont Ed – Chelsea will talk to Marie about new problem

Other Items

Angela will be out of the office 2/20-3/4.

Next meeting: Wed, March 18, 2009