PeopleSoft Campus Solutions 9.0

Release Value Proposition
August 2006

PEOPLESOFT ENTERPRISE

Purpose Statement:

This document provides an overview of features and enhancements included in release PeopleSoft Enterprise Campus Solutions 9.0. It is intended solely to help you assess the business benefits of upgrading to Campus Solutions Release 9.0 and to plan your IT. projects.

Disclaimer:

This document is for informational purposes only and is intended solely to assist you in planning for the implementation and upgrade of the product features described. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

Due to the nature of the product architecture, it may not be possible to safely include all features described in this document without risking significant destabilization of the code.

PeopleSoft Campus Solutions 9.0
Release Value Proposition

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Oracle is committed to the success of its higher education customers and is backing up its commitment with this next product release by planning significant customer-driven product enhancements to:

- **Protect your investment**
- **Extend value**
- **Evolve your product footprint**

EXECUTIVE SUMMARY

This document provides an overview of the new features and enhancements planned to be delivered in Oracle's PeopleSoft Campus Solutions (CS) 9.0 products. It is a roadmap intended to help you assess the business benefits of Campus Solutions 9.0 and plan your IT projects and investments.

The new features and enhancements that are intended to be included in this release are grouped by business processes to better demonstrate how these solutions can help you optimize your business. Our goal is to help your organization leverage technology to its fullest and increase the efficiency and effectiveness of your operations. The final release may not have every feature mentioned in this document, and a specific feature may become part of a different application or have a different product name than those cited in this document.

The enhancements included are grouped by the following functional areas:

- Campus Community
- Recruiting & Admissions
- Student Records & Advisement
- Student Financials
- Financial Aid
- Contributor Relations

EPM 9.0 for Campus Solutions was released in August 2006. Release Notes, Datasheets, and other information about the powerful analytics/business intelligence release for Campus Solutions can be accessed on Customer Connection or at www.oracle.com/industries/education/highered.

INTRODUCTION: PEOPLESOFT CAMPUS SOLUTIONS 9.0 OVERALL VALUE PROPOSITION

PeopleSoft Campus Solutions 9.0 is Oracle's newest planned global solution suite for intuitive and effective management of all your campus constituents including applicants, students, faculty, alumni, and donors. Creating a rapid return on investment, PeopleSoft Campus Solutions applications automate business processes, reduce operational costs, and increase efficiencies by continually defining and leveraging industry best practices.

In response to customer and market demands, Oracle continues to lead and innovate—creating products, features, and functions that set the foundation for supporting the unique academic mission of its higher education customers. As a result, Campus Solutions 9.0 plans to build on the innovations in 8.9 by extending functional excellence, adding powerful business intelligence, and improving collaboration tools to enhance usability and the customer experience.

PeopleSoft Campus Solutions 8.9 was made available in December 2004. Since the release of the innovative architectural and technological advances and dramatically improved usability in 8.9, many of Oracle's Campus Solutions customers have either upgraded or are planning to upgrade to this new release.

Campus Solutions 9.0 Business Process Enhancements have been planned for the following functional areas:

- **Campus Community**
- **Recruiting & Admissions**
- **Student Records & Advisement**
- **Student Financials**
- **Financial Aid**
- **Contributor Relations**

Oracle's PeopleSoft Campus Solutions 9.0 is a robust product suite within the overall enterprise strategy of Human Capital Management (HCM). Information about the HCM Release 9.0 can be found in a separate HCM Release Value Proposition document on Customer Connection.

Superior Ownership Experience

PeopleSoft Campus Solutions 9.0 continues its commitment to quality – the Superior Ownership Experience (SOE). An extension of the Total Ownership Experience, the Superior Ownership Experience is intended to be a set of delivered technologies aimed at improving the user experience; touching the installation, configuration, automation, integration, and documentation of Oracle applications.

A company-wide initiative, Oracle's Superior Ownership Experience initiative has touch-points across all applications, from development to delivery, installation to implementation, and support to lifecycle management.

PeopleSoft Campus Solutions 9.0 Drivers

Today's education environment calls for institution management to go beyond the basics. With highly diverse and changing student population compositions, institutions must focus on attracting, nurturing and retaining the best students, faculty, alumni, and staff. Because of increased scrutiny, accountability, performance, and cost controls to guide operations, technology investments must be strategic and provide demonstrable ROI—or value—to the institution.

The PeopleSoft Campus Solutions 9.0 design was based on extensive customer feedback, industry best practices, analysts' research, and Oracle's own commitment to industry leadership.

Campus Solutions 9.0 represents a continued commitment to excellence and quality, and is inspired by three key themes:

Protecting Your Investment

- Supporting your current products
- Ensuring customer-paced upgrade paths to future applications

Extending the Value

- Adding customer-driven features, significant enhancements
- Increasing involvement in industry standards
- Introducing next-generation capabilities

Evolving to the Next Generation

- Evolving to information age applications
- Providing clear and supported upgrade path to Fusion products

Customer Commitment – Protecting Your Investment

Oracle has worked closely with all its higher education advisory groups to greatly enhance the power and usability of the Campus solutions applications in this new release

PeopleSoft Campus Solutions 9.0 plans to offer enhancements to key business processes across the applications as well as some new utilities to allow institutions to extend existing capabilities. The expected scope of this release is centered on the highest priorities of Oracle's customer advisory groups with input from the Higher Education team at Oracle. Oracle expects to provide students and advisors with a powerful tool, based on Academic Advisement, to assist in planning how to meet academic goals. Enhanced flexibility in processes such as Financial Aid packaging, fee assignment, transcript creation, and production, are also planned for this release. New tools, such as the Communication Generation engine and Population Selection that Oracle intends to provide will greatly enhance the power and usability of the Campus Solutions applications.

In addition to the enhancements planned for the core applications, another PeopleSoft product family, Enterprise Performance Management (EPM) added three new datamarts based on the Student Administration application. These datamarts, released in August 2006 in PeopleSoft EPM 9.0, augment the EPM solution for Higher Education customers, which includes the warehouse content for HRMS, Financials, CRM and now Student Administration data.

As stated previously, more detailed information about the EPM 9.0 Campus Solutions Warehouse can be found on Customer Connection.

Extending the Virtual Campus

PeopleSoft Campus Solutions 9.0 intends to deliver significant extensions to the existing Student, Faculty, and, Administrative "center" approach to information organization and deployment. This concept is realized in Contributor Relations with the Organization, Prospect, and Person Profiles which provide 360 degree views into the activities and key information about these elements of your campus community. The goals of the self-service enhancements we plan to include in this release will reduce administrative burden while providing relevant and accessible content and transactions for your constituencies.

Path to a Service Oriented Architecture

PeopleSoft Campus Solutions 9.0 plans to deliver the first benefits of a Service Oriented Architecture (SOA) including solutions such as Oracle XML Publisher. Campus Solutions Release 9.0 provides integration to XML Publisher, which provides a new approach to report design and publishing by integrating familiar desktop tools with enterprise application reporting. This flexible publishing solution is the result of the separation of the presentation of the report from its data structure, thus enabling the use of XML and desktop tools to present the report as a PDF, HTML Web page, Excel spreadsheet, or other predefined document format.

Oracle XML Publisher delivers ease and flexibility in communication, reporting, and forms management.

XML Publisher has been integrated in Campus Solutions 9.0 for use with correspondence management specifically to generate Acrobat (PDF) documents. Use of XML Publisher for this purpose provides improved performance, scalability, and real-time merge and preview of correspondence documents. XML Publisher provides organizations more flexibility in how they generate merged documents. Processing PDF documents can be accomplished using the process scheduler for batch merge, which is ideal for merging large numbers of documents, or using the application server for synchronous merge. Another benefit of this technology change and use of XML Publisher is that no additional hardware is required .

XML Publisher (XMLP) is delivered as part of PeopleTools 8.48 and provides additional functionality as a template-based reporting solution. Oracle's XML Publisher is a standalone java-based reporting technology that streamlines report and form generation. A primary feature of XMLP is the separation of the data extraction process from the report layout. XMLP provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, it can generate reports in many formats (PDF, RTF, Excel, HTML, etc.) in many languages. This approach to reporting can dramatically reduce report maintenance allowing power business users to adjust report templates without involvement of IT resources.

Select features of XMLP have been integrated into and enhanced for use with PeopleTools. XML Publisher for PeopleSoft Enterprise makes Oracle XMLP technology natively accessible from PS Query as well as any PeopleTools 8.48-based applications providing XML data. XML Publisher for PeopleSoft provides an environment for the user to manage templates, data sources, reports, translations and content components. It also offers an electronic bursting capability to produce reports according to user-defined criteria and the reports can be secured using an application's security join table. A set of PeopleCode APIs for runtime report generation is also provided.

CAMPUS COMMUNITY 9.0

Campus Community is the foundation for the entire Campus Solutions suite. As such, the enhancements Oracle plans for this release provide value to many business processes beyond the core module. For this next release, Oracle was careful to concurrently explore requirements within each module as it planned enhancements or new capabilities within this central component. In this section, we provide more detail on the benefits we expect customers will see in the following areas:

- Communications and Checklists (3C)
- Population Selection and Update
- External Organizations

- Service Indicators
- Self-Service Enhancements

3C Enhancements (Communications and Checklists)

Campus Community planned functionality enhancements include:

- **More powerful and flexible communication generation process**
- **Dynamic group creation**
- **Added flexibility to external organization processes**
- **New and consistent service indicators**
- **Improved self-service experience**

While the Communication process within Campus Solutions has provided a means for customers to generate letters via Word templates, customers have asked for a more streamlined way to produce multiple types of communication, in a variety of formats. Oracle's response is the planned addition of a new Communication Generation process. This process is not intended to replace the existing Letter Generation process or communication structures, but instead is planned to provide much greater power and flexibility for creating communications. Communication Generation will do everything that the Letter Generation process does, but with additional flexibility.

One of the most important benefits of the planned new communication generation process is the ability to produce email communications. Users create templates for email communication just as they do now for Microsoft Word-based letters. The formats for creating a communication are planned to include Adobe PDF, RTF, eText, and XSL. Users are expected to be able to create the templates using a combination of Microsoft Word and a new java-based technology available with PeopleTools 8.48, called XML Publisher. With Oracle XML Publisher, customers can produce communications in any format and in the preferred language of the individual to whom the email or letter is assigned.

The new Communication Generation process is expected to be delivered as an Application Engine program that is constructed using the Oracle XML Publisher tool. The new process is planned to allow customers to decide in advance which fields to extract for a letter. By contrast, all the fields for an Administrative Function are extracted for Letter Generation regardless of how many might be needed for a specific letter. Since you can now choose only the fields you need for a particular communication, the system won't be extracting as much data, reducing the size of the download and addressing customers concerns about possible security exposure with large files of extracted data.

Finally, users will also be able to take advantage of Oracle's flexible report-creation tool, XML publisher. Utilizing a set of familiar desktop tools such as Adobe Acrobat and Microsoft Word, users can create and maintain their own report formats based on development-delivered XML data extracts. XML Publisher will convert these report formats to the XSL-FO format. Users can also obtain third-party provided PDF forms, such as government tax forms, and merge XML data generated from any PeopleSoft application to populate the forms with the required data.

Not only have the capabilities of the type of communication been enhanced, but Oracle has also made improvements to the storage and retrieval options for the outputs. Communication Generation allows an individual to:

- Preview the outputs prior to printing or emailing them

- Store the extracted data as well as the template information inside the individual communication record
- Send the outputs directly to a specific printer path
- E-mail the outputs

The preview option takes advantage of the PeopleTools Report Manager functionality (formerly called the report repository). It provides a central place to view the extracted outputs and can be accessed by anyone with appropriate security. In the current version of Campus Solutions, the user sees the complete file of all letters produced in Microsoft Word, but in Release 9.0 the user will see just the letter or email for the individual specified.

The individual communication is planned to be accessible through a hyperlink inside the Person/Organization Communication Management pages called "view generated output" to retrieve the exact output that was created for the ID and re-print it if needed. In comparison with the Letter Generation process, some or all extracted data could be retrieved from the Communication Letter Data component but no template information was stored in the database which made it difficult to recreate the output.

Another area where users are expected to see improved capabilities in communication is in the process for determining recipients for External Organizations. A combination of contact names, department names, and location names can be selected to send the communication. The External Organization Communication page remains the same, but a new page is planned to be added, Organization Communication Recipient, which allows the user to select from more options for the recipient, including:

- All Recipients
- Primary designee
- Custom list of contacts (including the contact marked Preferred)

The planned new release greatly improves an institution's ability and flexibility to communicate with external contacts, groups, and organizations.

Further, the user is expected to also control selection from one or more Departments and Locations. Prior to this release, recipients were limited to one person, one department, or one location. Now it is expected to be possible to send communications to multiple contacts, departments, or locations. For example, if an organization has 10 contacts and you are not sure who the appropriate contact is, you can send the same communication to all 10, or you can select a custom list using the Primary contact and the contacts with a specific title such as Director. Another way the use of contacts is intended to be improved for External Organizations is in the new Organization Recipient Usages where users can select from choices such as Primary, Preferred, or Custom List for Contacts Departments and Locations. In prior releases, there was no flexibility in which an entity could be chosen as the recipient. Now, using the new Organization Recipient Usage capability, it is intended that the user set up a usage pattern to determine the sequence of how the recipient is assigned. The usage capability would be accessed when no recipient information was entered or known at the time of assigning the Organization communication

As you begin to explore the use of the planned new Communication Generation capabilities, you probably will want to convert and migrate some of your existing Microsoft Word templates. During the migration, you may want to select the specific fields you use for each communication, improving the performance of the communication generation process. There are four planned steps involved in the migration:

1. Identify the fields you want to use, by creating a Data Source, using PS Query or an App Class to perform the selection.
2. Create the template, choosing from the Data Source you have created.
3. Create a Report Definition to upload your templates and tie them with the data source.
4. Tie the Letter Code with the Report Definition to use.

Since Oracle is committed to supporting both the existing Letter Generation process as well as the new Communication Generation process, customers can continue to use the existing Letter Generation process initially with 9.0 to give themselves time to convert their Microsoft Word templates. However, since Communication Generation is such a powerful tool, Oracle plans to focus its enhancement efforts on that tool for future releases.

In addition to a new Communication Generation engine, other 3C enhancements that Oracle expects to provide include:

- Preferred method for communication so the users can select whether they prefer to receive communications from you as email or letter which can be set either from the self-service or from an administrative page.
- Preferred language for communication where the users specify in which language they prefer to receive communications. Each institution will have to decide which languages it will support. The Campus Community Installation page allows you to select the languages you elect to support and have translated templates for. At the time of generating the communication you can select to use the template that corresponds to the preferred language selected for the User IDs or force a language if no translation has been created. The preferred communication language can be set either from the self-service or from an administrative page.

With this planned release, users can indicate how they want to receive communications from you for more personalized and targeted messages.

- Link to open documents directly from the Communication Management pages, if the Letter Code is setup with the Letter Printed Data option set to All or Name/Address Only.
- Improved usability of Person Communication Management and Organization Communication Management pages. For example, Person Communication Management used to be a 2-tab component; now the data is planned to be organized on one tab. The second tab is intended to show the recipient information along with a link to view the output.
- Enhanced 3C Engine so you use Population Selection to select the IDs of those to whom you are going to assign a communication.

- Ability to produce a Communication tied to Checklists coming from multiple Administrative Functions. For example, you could combine checklist items from Financial Aid and Admissions into a single communication. This planned enhancement would improve the professionalism of your communications as well as reduce the number of communications you need to produce and track.
- Support for your control of which Checklist items the student can view in self-service is also planned. Oracle intends to introduce a new setup page that would allow schools to choose which checklist items they want to display in self-service.

Population Selection

The ability to identify sets of prospects, applicants, students, alumni and contributors and use these results within other applications was among the highest of priorities indicated by our user community. The introduction of Population Selection planned in Campus Solutions 9.0 represents an important response to user suggestions and needs. Population Selection is intended to be a powerful, flexible, and easy-to-use tool that would provide this dynamic capability.

Population Selection is intended as a framework that exposes population selection results to user processes. The Population Selection framework supports the collection of individual IDs, organization IDs, or any other field that a process might need by providing integration with selection tools. Population Selection has been designed to be configurable, extensible, and easy to integrate with existing processes. For example, individual IDs for a select set of students could be "fed" into a process that would use the IDs as a basis for assigning those same students to a specified Student Group.

With this planned new release, colleges and universities will be able to group contacts by a variety of criteria for more efficient, dynamic and targeted communications.

The most powerful advantage of the planned Population Selection is that it will provide users with the ability to choose the population they wish to process and to preview that population before the process is executed. Population Selection is planned to be contained within the run control components for easy and efficient use.

Population Selection is an extensible framework that has been designed to allow institutions to include it with a variety of processes. In response to prioritized requests or suggestions from our customers, Population Selection planned for the Campus Solutions 9.0 release will deliver the following processes:

- Admissions and Recruiting — Applicant/Prospect Delete
- Campus Community — 3C Engine
- Campus Community — Communication Generation
- Campus Community — Service Indicators
- Campus Community — Student Groups
- Campus Community — User ID Replacement Security
- Campus Community — Population Update.

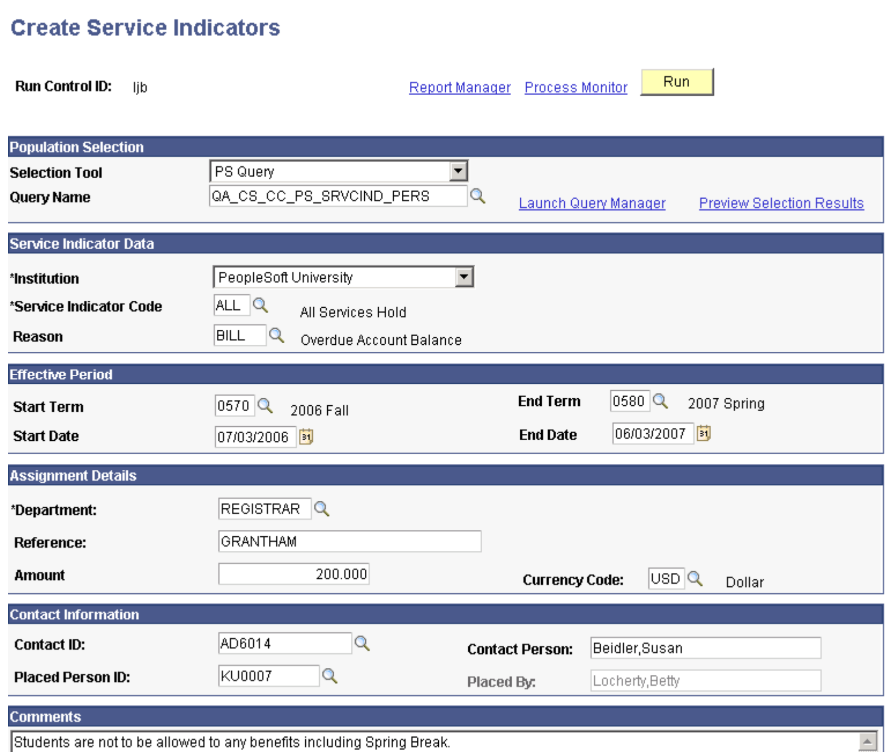
- Contributor Relations — Audience/Initiative
- Academic Advisement — Academic Advisement Batch Reporting
- Enrollment Services — Batch Transcripts
- Financial Aid — Mass Packaging selection
- Financial Aid — Mass Repackaging
- Financial Aid — Aid Year Activate
- Financial Aid — Satisfactory Academic Progress
- Student Financials — Payment Plan enrollment
- Student Financials — Third Party contract enrollment

To provide users easy specification of population criteria, the following three selection tools in Population Selection are planned:

- PeopleSoft Query
- Equation Engine
- External File

PeopleSoft (PS) Query

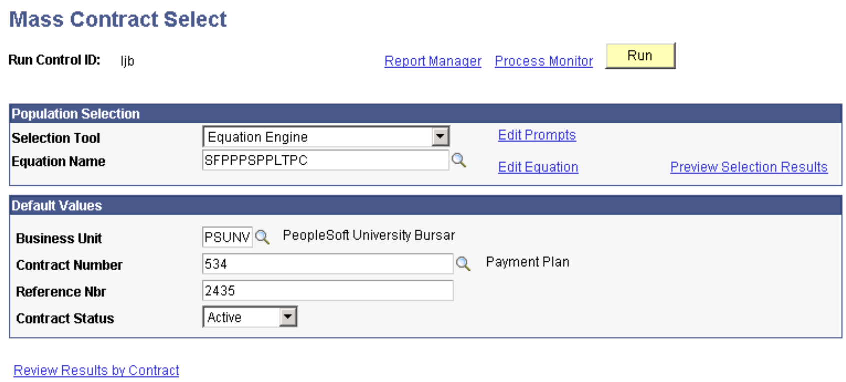
PeopleSoft Query is a PeopleTools selection mechanism that allows the user to identify selection criteria to select the IDs. Defining a predefined query for this purpose is a familiar process with which users can easily build run-time prompt queries. Population Selection is planned to be tightly coded to use all the benefits of PS Query, including its security.



PeopleSoft Query tool lets users easily run reports on student populations you specify.

Equation Engine

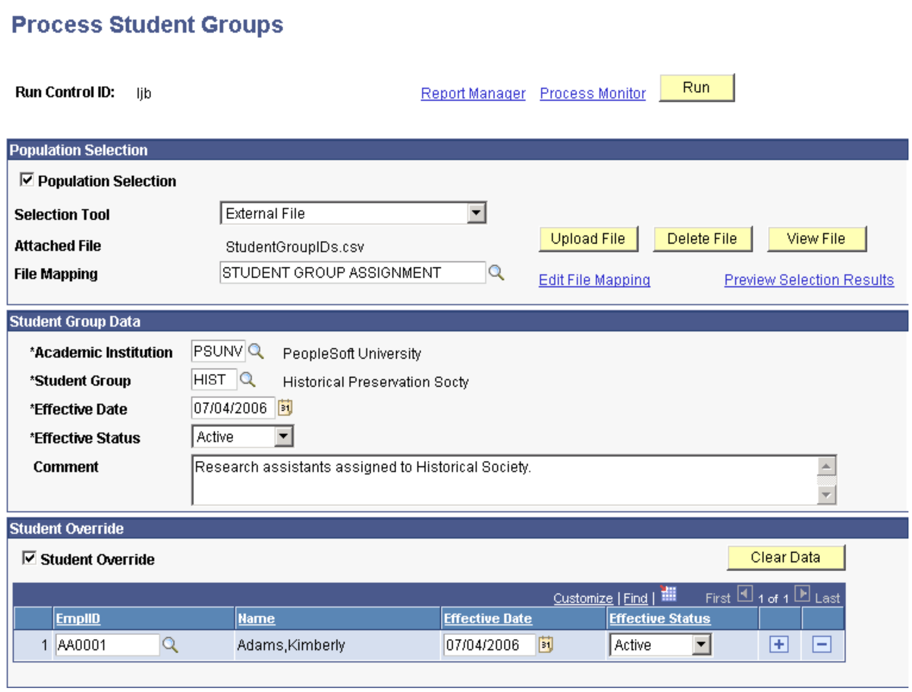
The Equation Engine tool is intended to allow users to select IDs using complex criteria and manipulate the data associated with those IDs as they pull the data into the Population Selection preview page. An added value of the Equation Engine is its ability to manipulate the data selected, such as adding together the value of two fields. Security features are also planned to be built into this tool.



The Equation Engine tool allows use of complex criteria to select IDs.

External File

The External File tool is intended to provide users with the ability to acquire an external file, map its contents, and use its contents as the basis for the population that is being selected. For example, the user can attach a spreadsheet that might come externally from an academic department or university division outside of the user's system or application and bring that data directly to the process.

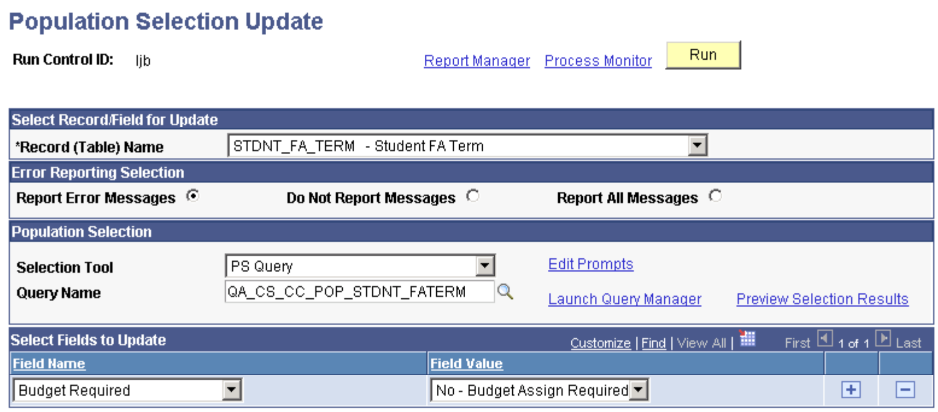


The External File tool allows data to be uploaded and used in the population selection process.

Population Update

With Campus Solutions 9.0, Oracle is planning to deliver new functionality, Population Update, to enable administrators to update certain records and fields for defined populations of students. This new functionality plans to utilize Population Selection tools to provide institutions with flexibility and control in the management of their business processes.

Designed to be a two-step process, Population Update is intended to allow a user to first specify the selection of a population, and then choose the field values to be updated or inserted for that population.



Users will have more flexibility in assigning and updating student populations.

In order to assist institutions in managing and protecting the integrity of their data, we are initially planning to restrict the use of Population Update to certain records and fields.

In Campus Solutions 9.0, Population Update is planned for the following functional areas:

- *Student Financial Aid Term*—Budget Required and Financial Aid Statistics Required fields. Population Update is planned to allow the school to define populations of students for whom it wishes to reset the value to 'Assign' or 'No Assign' based on the business process requirement.
- *Student Packaging Variables*. Population Update is intended to provide institutions the flexibility to populate variable data fields for specific populations of students deemed necessary by the institution but not accessible through the packaging process.
- *Admission Application Recruitment Category*. The field Recruitment Sub-category is intended to be eligible for batch updating.
- *Person Relationships with Institution—All fields*. Population update is intended to be a tool to create and update the Person Relationships with Institution Record.
- *Packaging Status Summary*. Many of these planned fields would be used by institutions to tailor their packaging process to meet specific business needs. For example, the institution could use Population Update to define a unique population for an institutional verification process by updating the INST

Verification Status field to 'Select'. Or the institution could use Population Update to define a population of students who are ready to be packaged by updating the Aid Processing Status field to 'Ready to Package'.

- *Term Activation*. The fields Tuition Calculation and Eligible to Enroll are planned to provide for batch update using this process.
- *Student Equation Variables*. Many institutions intend to use the Student Equation Variables fields to store data that is otherwise inaccessible to the Tuition Calculation process. Population Update is planned to provide a method to populate these fields for specific populations of students.

(For more specific details on Population Update for Financial Aid, please see the Financial Aid section in this document.)

External Organizations

The External Organization component is used by several business processes within the Campus Solutions suite. This feature is planned to be re-architected to streamline data entry and to add more flexibility to how External Organizations are used. Some of the intended changes include:

- Effective dating added to the External Organization, Location, Contact, and Department components
- Contact-type enhancements to allow greater control over Communication selections
- Addition of External System Organization ID
- Business process-specific navigation such as support for External Education and Contributor Relations

(For more detail on enhancements to External Organizations for Contributor Relations, please see the Contributor Relations section later in this document.)

Planned Service Indicator (Holds) enhancements include:

- **End Date and End Term Consistency**
- **Mass Assignment/Release Batch Process**
- **Extension to External Organizations**
- **Visibility/display controls**
- **Security controls**

Service Indicators

Service Indicators (holds) have been inconsistently used within the Campus Solutions modules, and the absence of clear date controls has contributed to confusion in how best to assign and release Service Indicators. Examples of this confusion include how Financial Aid defined Active Term as the single term for which a Service Indicator was in effect, while Student Records defined Active Term as the first term for which a Service Indicator was in effect and it remained in effect until released.

Schools have requested control over access to Service Indicators. Previous to the planned Campus Solutions 9.0, customers could not control whether or not self-service users or administrative users could view a Service Indicator assignment.

Planned enhancements to the Service Indicator feature include:

- *End Date and End Term with consistent validity logic in processes that react to Service Indicators*. All feature implementations of Service Indicators are intended to treat date and time periods the same way. We are planning to modify the definition of Service Impact to support this functionality by pushing the date-driven functionality of Service Indicators down to the Impact level. Impacts are now planned to be categorized as Term-based, Date-based, or both. The implications are that each process that uses Service Indicators would look at the Impact, determine if the Service Indicator is Term-based or Date-based, and look at relevant values to determine if the Service Indicator is in effect.

Institutions have asked for control of who can view and be alerted to Service Indicators (Holds). Planned enhancements in CS 9.0 gives institutions greater flexibility and control of this feature.

- *Mass Release batch process.* Using the new Population Selection functionality, this process is intended to allow the user to periodically clean up the Service Indicator table by removing Service Indicators programmatically based on a defined expiration criteria such as End Term, End Date, or a variety of other criteria. The record of the Service Indicator's existence would continue, as it always has, in the Audit record. For example, assume a date-based Service Indicator is in effect. Once the End Term date has passed, the online process will read that date and determine if the Service Indicator is in effect or not. The Service Indicator will still appear on the table, but processes will observe the dates. The Mass Release process then periodically cleans up the table to avoid confusion in cases where the user tries to access the Service Indicator to look for an individual.
- *Service Indicators extend to External Organizations for use throughout Campus Solutions.* All Service Indicators in Campus solutions are intended to be accessed from centralized tables so any module can make use of them and all user interfaces are aligned. This centralized set-up is planned to simplify and streamline maintenance of this feature.
- *Mass assigning and releasing Service Indicators.* Population Selection is planned to be used to provide a new way to mass assign or release Service Indicators. When you assign a Service Indicator to a group using Population Selection, it is intended that you would use the same data values as if you were assigning the Service Indicator manually. In addition, it is intended that the user be able to release or remove a Service Indicator based on a number of criteria, including Service Indicator Code, Reason, Term, and Date value combinations. We plan to deliver some sample queries for Service Indicator 'add' or 'release' which customers will be able to augment.
- *Visibility into assignments and changes to Service Indicators and enhanced audit capabilities.* Release 9.0 plans to expand the search criteria available when you are looking for a historical value – such as individual ID, time, or All – by a Service Indicator code. Also, we plan to enhance the Results Set so that it takes advantage of the full grid capabilities through standard PeopleTools functionality, as well as other general enhancements to the usability experience.
- *More granular security controls for Service Indicators.* It is planned that customers will have the ability to control the display of specific Service Indicators to self-service users. This aspect is intended to be controlled at the level of Service Indicator by using a check box to indicate whether it should be seen

or not be seen in self-service. The system is expected to no longer limit display to Negative Service Indicators. Now the user is intended to define which they want to display. (Oracle continues to label this feature 'Holds' in self-service, even though Positive Service Indicators can be tagged for self-service access).

- *Display or not display the Service Indicator on administrative pages based on role.* An example of how this planned feature could be used is in the world of Contributor Relations. An individual could have a positive Service Indicator due to a significant relationship with, or contribution to, the institution. The institution may consider the contributor's information to be sensitive and want to limit visibility. This new security capability would allow the institution to define the Service Indicator as viewable by only certain staff members by role. Currently, if a user has access to the Service Indicator page, that user could see all the Service Indicators (There is a separate sub-page from the Service Indicator icon that lists all the Service Indicators.) With the planned new release, the administrator navigation and icon-based navigation are intended to go to the same page, and both access paths would take the user to the Manage Service Indicator page where the user's security would be observed. The new page, under Setup SACR, Security, Service Indicator Display, is planned to allow you to choose by Institution, Service Indicator. There it is expected that you would define the roles which can view that Service Indicator and you would not have to define each role for each Service Indicator. If a Service Indicator does not have any defined roles for display security, the system would assume all roles can view it. If a row (with role) is added, then just that role could see the Service Indicator. From an upgrade perspective, the customer won't have to do anything unique, as this feature will be something they set up when they implement 9.0.

Finally, during our update of the Service Indicator functionality, we intend to address a number of usability enhancements to the Service Indicator pages. The general flow of the pages and data layout on the summary and transactional pages are also expected to be improved.

Self-Service

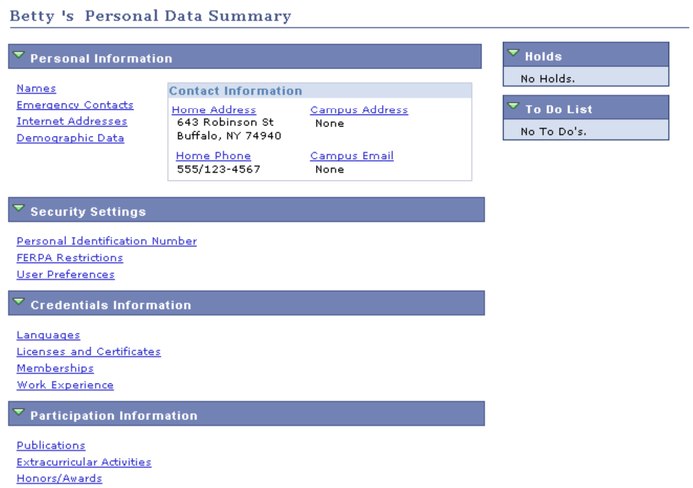
The Personal Data Summary page is intended as the jumping-off point for all self-service information related to a person's bio-demographic and résumé-type information.

Building on Campus Solutions 8.9 improvements to the user experience, new display and controls for self-service in Campus Community are planned to include:

- Personal Data summary page, modeled on the Student Center design
- Configurable display of Service Indicators (Holds) and Checklists (To Dos)

Personal Data Summary Page

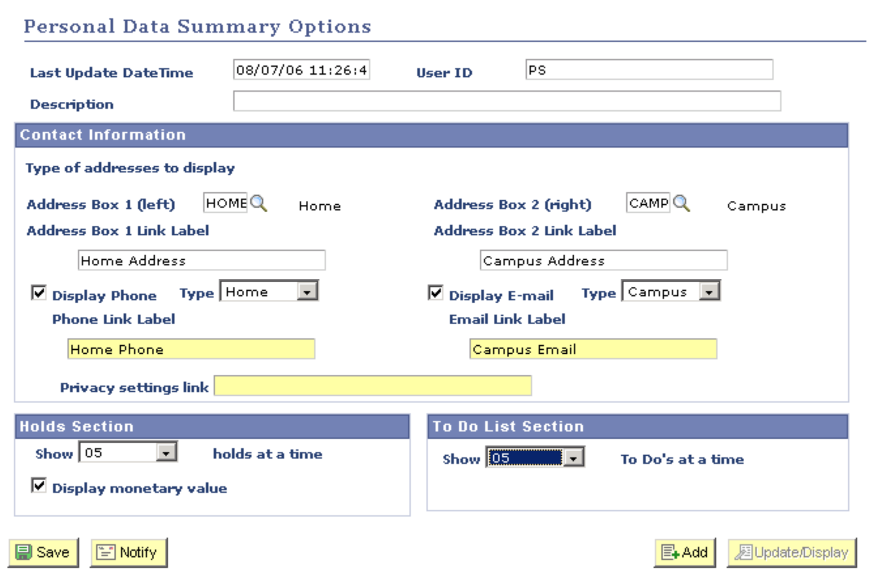
A clear benefit to these planned enhancements is the improved consistency between all the modules within Campus Solutions as well as simplified navigation within Campus Community self-service.



The personal data page contains résumé-type information.

For example, we plan to update the Personal Information section of the Student Center by adopting a consistent style sheet. Then, we plan to create the Personal Data Summary page, intended as the jumping-off point for all self-service information related to that person's bio-demographic and résumé-type information.

From the Student Center, we plan to add a Go To link to Personal Data Summary. If the user clicks on any of the hyperlinks in the Personal Information section of the Student Center, they will be taken to the new pages, which are organized in the multi-tab format. The new page tab headings are expected to be: Personal Information, Security, Participation, and Credential. Sub-tabs are planned under each of those headings as well. Within these planned, newly-designed pages, are links to pages where the user can update their information.



The summary pages are conveniently accessible so student information can be easily updated.

A major benefit of this planned re-design is that any person authorized by the institution can use this page, not just students. In fact, the Personal Data Summary page is likely to be more useful for non-students, since students can easily access the same transactions and information directly from the Student Center. Customers who are also using the HRMS application could use this page for employees if they grant access or move the components to another menu. This page would supplement existing HRMS Self-Service, so customers will need to evaluate if there is value in adding access to this new set of components.

Oracle's applications strategy is to continue to increase configurability capabilities so institutions can change and adapt to user needs without customization.

Configurability

As is the case with all of the Campus Solutions 9.0 self-service, Oracle's goal is to provide as much configurability as possible, reduce the need for customizations, and enhance the experience for your users.

Planned configuration options the Personal Data Summary would allow users to:

- Configure the order and label of the primary and secondary Tabs, set a Default Tab to be the one 'open' when they access the component, and use the Navigation Tabs Setup for Campus Community Self-Service to adjust the Common Definitions, Self Service, and Personal Data Summary Options page.
- Control the Description fields and labels for contact information. Within the Setup for Personal Data Summary Options, the administrator is intended to have the ability to configure the types of addresses, phone, and email address to display, in what order they are to display, and specify the labeling for this contact information.
- Control the number of Service Indicators or Checklists that are displayed, and whether or not to display the monetary value for Service Indicators In addition, a setup page, To Do List Display Controls, is planned which enables the administrator to select which Checklist Items should be displayed on the To Do Self Service List.
- View a summary of the Emergency Contacts page and easily make changes. These pages are planned to re-organize the data on the page to enhance usability. For example, on the first page of Emergency Contacts, the user would see the summary of all the contacts with each contact name and associated phone number listed and the Primary Emergency Contact indicated. The user would then be able to click on the contact name to navigate to the detail page and make necessary changes.

(Please see the information above for more details on the other enhancements planned for Service Indicators.)

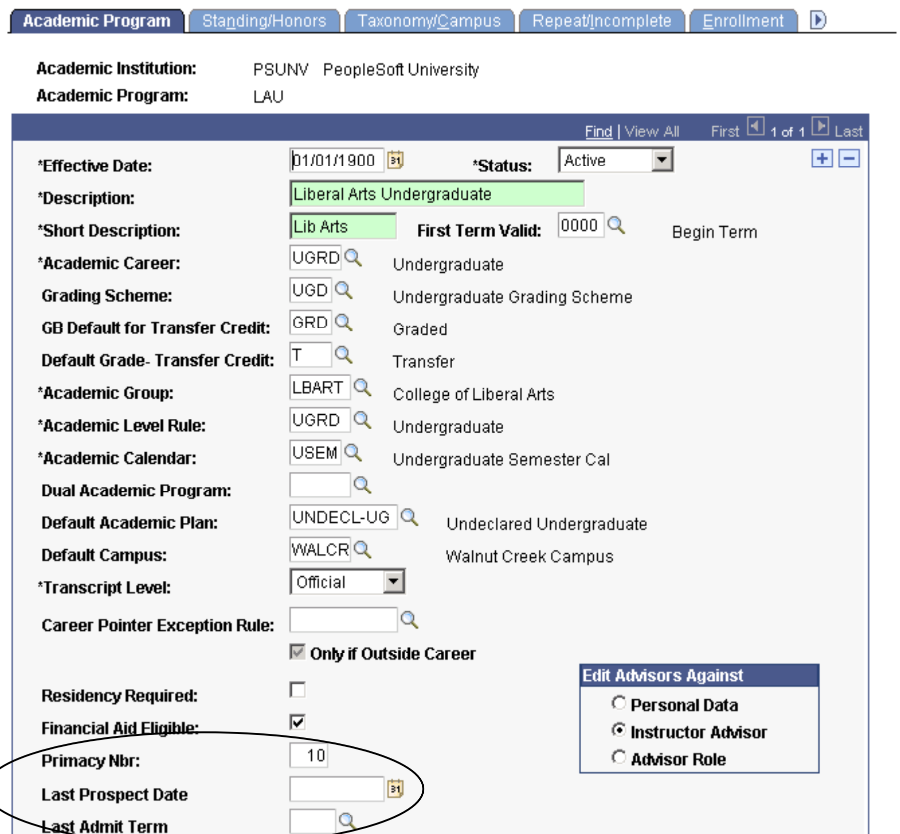
Admissions and Recruiting enhancements planned for Campus Solutions 9.0 are the result of customer input and Oracle's ongoing efforts to extend functionality for administrators.

RECRUITING AND ADMISSIONS 9.0

Higher Education institutions continue to face increased global competition for recruiting and retaining students, a sea change for education that demands better tools with increased capabilities to build relationships with prospects, monitor progress, and measure the effectiveness of multiple and complex programs and interactions with prospective and accepted students.

Academic Program, Plan, Sub-Plan Deactivation Control

Institutions need the ability to adapt to changes in curricula, resources, and demand. Administrative systems must accommodate that adaptability as well. As academic programs change or terminate, institutions need a way to continue to manage the previously-offered programs in which students are active and continuing to complete requirements. At the same time, these structures need to be discontinued so that they are not used to recruit new students or applicants. The feature Oracle intends to provide in the next release allows structures to be deactivated for use in Admissions and Recruiting but include the ability to keep Academic Programs, Plans, and Sub Plans.



Administrators can continue to manage student activity in programs that are no longer being offered to new admissions.

In past releases, when Academic Programs, Plans, and Sub-Plans became obsolete, traditional Effective Date use and Effective Status deactivation prevented using them throughout the database. With Campus Solutions 9.0, these values are planned to remain active for current students, but no longer appear for admissions processing. For example, when an admissions application is being processed, if the

Last Admission Term is less than the admit term entered on the application, the Program, Plan, and Sub-Plan values will not appear as valid options.

This new functionality is planned to impact the following:

- *Transaction pages:* Add Application, Quick Admit, Maintain Applications, Program Additions, Action/Reason Entry and Define Enrollment Targets, and Transfer Credit Modeling. Also, users of the Student Program/Plan component in Student Records will be prevented from adding discontinued Programs, Plans and Sub-Plans.
- *Processes:* Application Status Update, Activate Applicants, Assign Alternate Evaluation Codes, and Alternate Program Additions.
- *Batch application:* Batch application processing incorporating this new functionality into their logic will include TS 189.

Tracking and evaluating external courses and credits is increasingly important in today's global education environment. The planned new features in Campus Solutions 9.0 will make it easier for administrators and students to manage course credits earned outside the institution in which the student is currently enrolled.

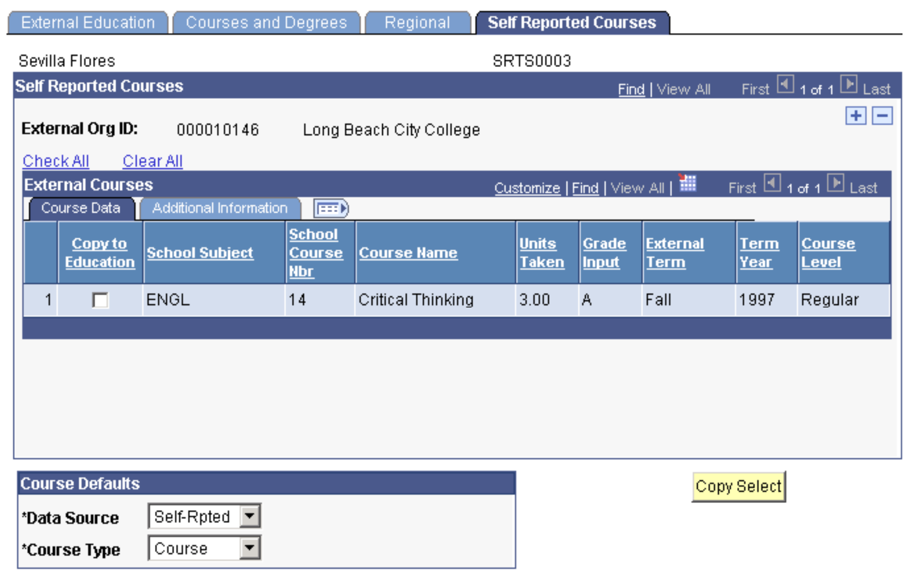
External Education Component

Data entry and external course management in preparation for transfer credit processing and evaluation analysis are critical activities for most Admissions operations. The focus of the reconfiguration of the External Education Component is to make it a more efficient data entry tool for end users. The planned redesign takes advantage of the newest technical capabilities available and adds functionality.

The extensive planned redesign includes the following features:

- The number of pages in a component is planned to be reduced to three. Instead of the end user having to move from tab to tab, it is planned to be possible to stay on fewer pages for data entry. Each page is planned to be designed to contain expandable grids for external transcript summaries, compiling information on external subjects, courses, and degrees. These grids are expected to offer the user the ability to customize the order of fields, sort order, multiple row insert, grid contents downloads to spreadsheets, and a text find feature.
- Tracking desired and received external transcript status information is planned to be streamlined for easier maintenance.
- Better usability for data entry on external courses. Planned enhancements to improve and add user-defined default values could be applied at the click of a button to increase efficiency.
- Free-form comment fields at the transcript level and at the individual external course level are intended to be improved to include a set of predefined comments that can be changed or augmented by the user as needed.
- As external course data is recorded, grade changes may occur. These changes are planned to be automatically stored by the system and are conveniently accessible via a hyperlink for each course.

- Typically, external course data is directly related to transfer credit evaluation. For each recorded external course, a hyperlink is planned to be available which indicates the transfer status of the course to the user. In addition, a link to the transfer credit course credits component is expected to be provided for a handy link to transfer credit modeling.
- Because international processing of external courses is a growing need, the External Education Component is planned to now have a Regional tab for providing additional country-specific functionality.
- In order to save time, an institution could choose to take advantage of the planned Student Center feature that allows students to enter external courses for transfer modeling. Once a student has done the data entry, an administrator could review courses on a separate page and decide which to import into the External Education Component.



Admissions administrators and students are expected to be able to better track and manage transfer credits.

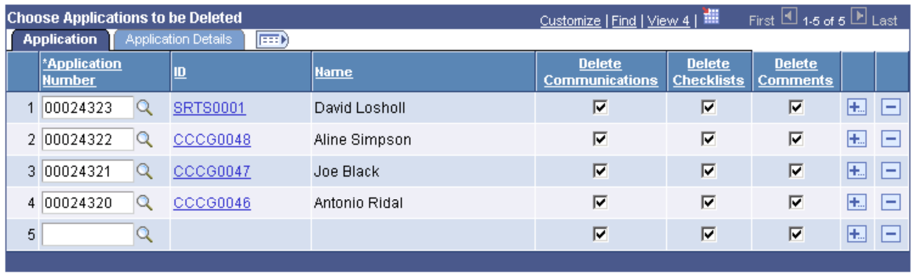
Prospect and Application Deletion Process

Most institutions face the challenge of managing increasingly large and complex databases. As the number of prospects and admission applicants grows, so does the need to utilize a more automated method of deleting records when they are no longer useful or necessary. The ability to delete an individual Prospect or Application has been a delivered feature in previous releases. Planned for Campus Solutions 9.0, however, is the ability to delete prospects and application records using a new batch process. This new feature is expected to include:

- Two new processes are planned (one for prospects the other for admissions applicants) that would allow the user to use Population Selection to designate a group of Prospects or Applications for deletion. This process is intended to load the set of prospects or applications into a holding table so that the final deletion process can be run.

- Two convenient transaction tables are expected in which the user can easily specify which prospects or applications are to be deleted by inserting multiple rows. These handy components are planned to be completely redesigned for better usability.

Delete An Application



Choose Applications to be Deleted — Customize | Find | View 4 | First 1-5 of 5 Last

Application | Application Details

	*Application Number	ID	Name	Delete Communications	Delete Checklists	Delete Comments		
1	00024323	SRTS0001	David Loshoil	☑	☑	☑	+	−
2	00024322	CCCG0048	Aline Simpson	☑	☑	☑	+	−
3	00024321	CCCG0047	Joe Black	☑	☑	☑	+	−
4	00024320	CCCG0046	Antonio Ridal	☑	☑	☑	+	−
5				☑	☑	☑	+	−

Expected improved process for deleting individual prospects or groups of prospects to keep data current

- A redesigned Prospect or Applicant Holding component is planned in which the record, once marked for deletion, is accessible. This component is also planned to allow changes to 3C delete options or the removal of the prospect or application record from the holding table.
- The redesigned delete process is expected to no longer require that an application number be removed from a prospect record before a prospect or application can be deleted.

Student Records enhancements planned include:

- **Flexible transcripts**
- **Academic progress tracking**
- **Improved self-service experience**
- **Student group flexibility**
- **Improved class-permissions management**

STUDENT RECORDS

Processing and maintaining student records is more than an efficient automation of the management of student information. Institutions today are facing the complex and sometimes conflicting demands for more security around access to student data and, at the same time, improving an authorized user's experience to access the information they need, when they need it. In addition, institutions are finding the need for more flexibility in the ways they maintain and deliver records as well as mange access to student information and self-service in a fast-changing, competitive, global environment.

With Campus Solutions Release 9.0, Oracle intends to increase flexibility, improve rule- and role-based access control, enhance the student user experience, and boost the capability of an institution to effectively manage the critical student information processes.

Self-Service Usability: Student Center, Faculty Center

While the introduction of the Student and Faculty Centers in Campus Solutions 8.9 was well received by users, functionality is planned in release 9.0 to support new capabilities, respond to customer suggestions, and add operational improvements.

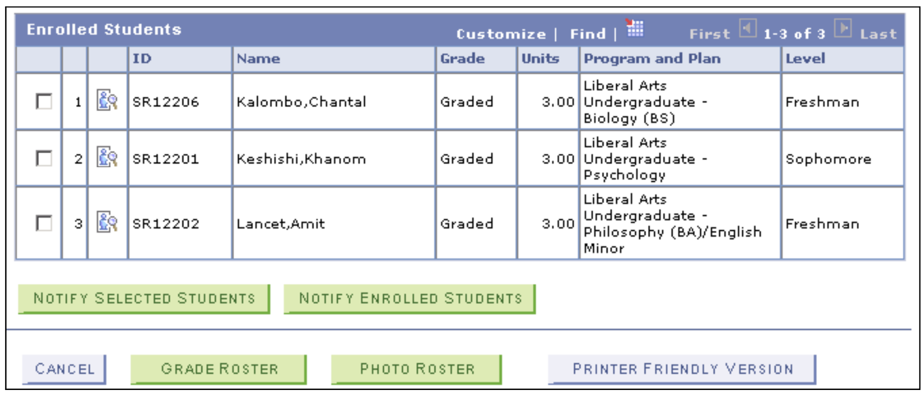
Faculty Center Enhancements

Planned enhancements to the faculty center include:

- Student photos on rosters
- Restricting grade values
- Viewing final exam schedule

Student Photos on rosters

Many institutions want to supply faculty with a photo of the student along with a name on a roster. Planned for Campus Solutions 9.0, Class Rosters and Advisee Rosters will contain convenient access to student photos. When an instructor accesses a class roster, a Student Photograph icon appears next to each student on the roster. If needed, the Photo Roster button allows faculty to view the roster with all photos displayed. Viewing student photos on rosters is a configuration option that an institution can choose.



Enrolled Students — Customize | Find | First 1-3 of 3 Last

			ID	Name	Grade	Units	Program and Plan	Level
	1		SR12206	Kalombo,Chantal	Graded	3.00	Liberal Arts Undergraduate - Biology (BS)	Freshman
	2		SR12201	Keshishi,Khanom	Graded	3.00	Liberal Arts Undergraduate - Psychology	Sophomore
	3		SR12202	Lancet,Amit	Graded	3.00	Liberal Arts Undergraduate - Philosophy (BA)/English Minor	Freshman

NOTIFY SELECTED STUDENTS | NOTIFY ENROLLED STUDENTS

CANCEL | GRADE ROSTER | PHOTO ROSTER | PRINTER FRIENDLY VERSION

Clicking on the icon displays the students picture and high-level academic information.

Restricting Grade Values

Institutions that deploy the Faculty Center Grade Roster to faculty have asked that certain grades are not capable of being edited by faculty. An administrative grade like a “W” might be assigned to a student only when a drop is processed and should not be issued by an instructor on the grade roster. An important planned enhancement, the grade definition on the Grade Scheme, will impact the Faculty Center Grade Roster. A new flag is planned for the properties used to define a grade that will allow it to be excluded from self-service. This planned feature will prevent certain grade symbols, like a “W”, from being assigned or edited by faculty on the Faculty Center Grade roster. This enhancement will reduce confusion and administrative processing.

Viewing Final Exam Schedule

In addition to extensive, user-friendly information about their class schedule introduced in Campus Solutions 8.9, faculty are intended to be able to view their schedule of final examinations in an easy-to-read grid in Campus Solutions 9.0.

My Exam Schedule > 2006 Fall > PeopleSoft University

Exam Meeting Information	Location	Class	Class Name	Enrolled
12/12/2006, Tuesday 9:00AM - 11:00AM	King 200	HISTORY 100-1 Lecture 1620	Perspectives on the Present	3
12/12/2006, Tuesday 2:00PM - 4:00PM	Lindley 100	SOC 103-1 Lecture 1017	Social Problems	3
12/12/2006, Tuesday 6:00PM - 8:00PM	Lindley 100	SOC 103-1 Lecture 1017	Social Problems	3

View Weekly Exam Schedule   Go to top

A convenient hyperlink is planned that will take a faculty member to a view of the same schedule in a weekly format.

(For more functional enhancements, please see the Advisement Information for Advisors in the Academic Advisement section.)

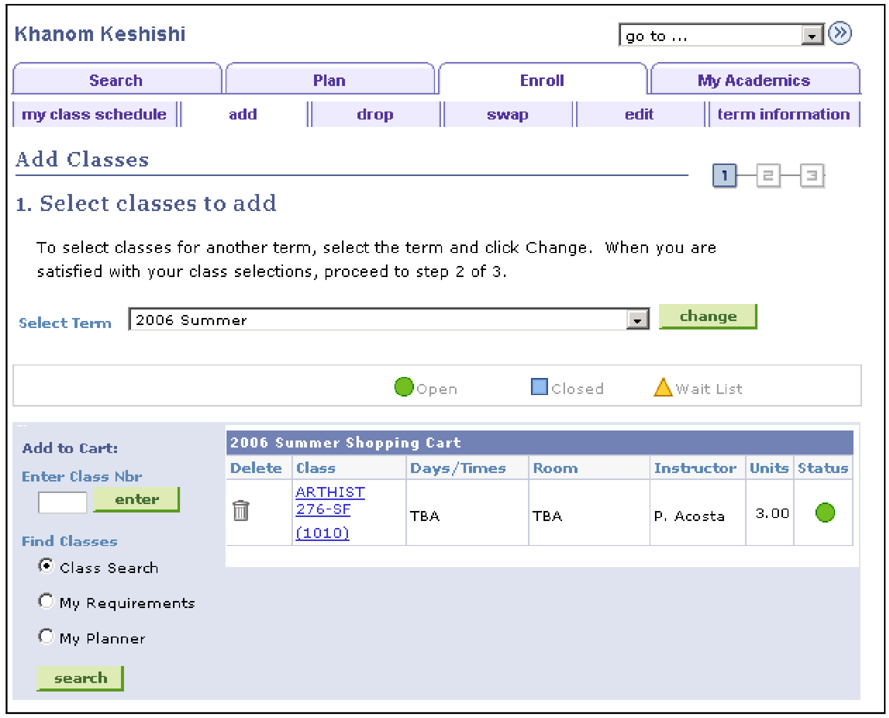
Student Center Enhancements

Enhancements in the Student Center are planned for the following processes:

- Navigation
- Student Grades in Self-Service
- Searching for Classes and Courses
- Setup to Support Class Searches
- Shopping Cart
- My Academics Tab
- Student Center Weekly Schedule
- Configuration Options

Navigation

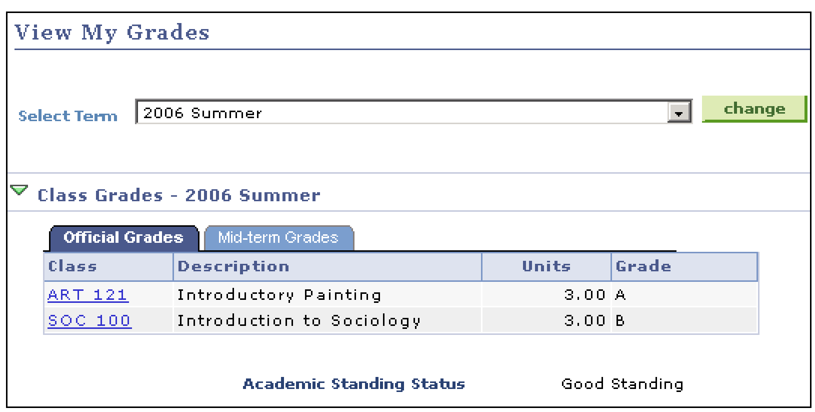
The Academics section of the Student Center is expected to include design changes that will allow for easier navigation and support extended enrollment functionality. Students are expected to be able to navigate directly to search for classes or courses, plan courses, enroll in classes, and view academic information. Each of these locations is planned to be organized with sub-tabs that are associated with pertinent transactions. For example, the Enroll tab is planned to contain specific tabs that would take the student into transaction steps for adding, dropping, swapping, and editing classes. Methods for finding classes for enrollment are planned to be conveniently located on this page and include entering a class number or selecting Class Search, or searching from My Requirements or My Planner. (For additional information about My Requirements and My Planner, please refer to the Academic Advisement section.)



Planned Student Center enhancements improve navigation and the user experience.

Student Grades in Self-Service

In addition to final grades, students can now view midterm grades. The View My Grades page has been re-designed with convenient tab space to view one or more mid term grade sets, to include the student's term academic standing, and to recognize service indicators that would prevent a student from viewing grades. This increased usability benefits the student by providing readily available information.



Student views of mid-term grades is planned in Release 9.0 self-service.

Searching for Classes and Courses

The new Search hyperlink and tab contains the search engine for scheduled classes in a term. In Campus Solutions 8.9, students can use criteria like meeting time, campus, meeting days, etc. The planned addition in CS 9.0 is the ability to search for class sections based on a range of credit units. Students who might be looking for a class meeting on Tuesday evenings for 3 credits can now easily search using a combination of values.

Also located in the Search tab is the Browse Course Catalog engine. Instead of searching for specific classes in a term, this browse capability allows the student to find a course in the course catalog. In Campus Solutions 9.0, this is planned to be enhanced so that a student can select a course for inclusion in a planner or search for scheduled sections of the course in a specified term.

Setup to Support Class Searches

Most institutions desire the ability to limit the term values that appear for class searches on both the Student and Faculty Centers. In order to support configurable control of class searches, enhancements have been made to both the Term Values Component and to the Self-service Student Center Setup Component Class Search Page. The Display in the Class Search tab is planned to be added to the Term Values component. For each term value defined on the Term Values component, two date ranges can be defined for its display on class searches performed on the Student Center or on the Faculty Center. This planned feature would allow institutions the ability to control when a term value begins to appear and when it stops appearing. It also would allow for these dates differences to be applied to students and faculty. The design of the Class Search Page is planned to be updated to follow this same granularity. Optional class search options are intended to display so that they can be flagged for use on the Student Center, Faculty Center, or both.

Shopping Cart

Planned Student Center enhancements are expected to improve navigation and enhance the user self-service experience.

The concept of an enrollment Shopping Cart is expected to be redefined with additional functionality. The Shopping Cart is planned to be part of the planning tools found under the Plan tab and used to build a term class schedule that can be validated for use in the enrollment engine without actually enrolling in classes. (This same functionality was introduced in Campus Solutions 8.9 as the Wish List.) Courses in the shopping cart are intended to be kept (saved) for use when the student is ready and able to enroll. The Shopping Cart is expected to be populated with courses from My Academic Requirements and My Planner. At the suggestion of many customer institutions, when a student places a class or classes in the shopping cart from these pages, a message instructing the student to enroll is displayed. In this way, a student is informed of additional necessary steps.

My Academics Tab

The contents of the My Academics Tab is planned to provide students with a convenient launching point to degree audit information, advisement what-if functions, transfer credit, course history, transcripts, enrollment verification, and graduation. This tab is also planned to contain the student's academic information for convenient reference.

Student Center Weekly Schedule

The weekly schedule on the Student Center has been planned for redesigned for better usability. Easy-to-use buttons are planned to quickly move the student from week to week. The weekly schedule is planned to recognize holiday schedules and term/session beginning and ending dates. The list view of the schedule is planned to include a printer friendly version hyperlink for convenient printing from the student's browser.

Configuration Options

Configuration option enhancements are planned that would allow institutions control over defining the Student Center tabs to suit their unique requirements. These enhancements include a navigation tabs setup component that will allow the definition of the main tabs of Search, Plan, Enroll, and My Academic; and the sequence and label message of the tabs and definition of secondary or sub-tabs.

Flexible Transcripts

Most institutions want to easily and efficiently produce academic transcripts for their students. In Campus Solutions 9.0, Oracle expects to redesign transcript request, generations, and processing to support greater adaptability, control, and flexibility.

Enhancements to Transcript Production

Oracle's planned enhancements to the transcript process and production is intended to add greater flexibility, ease-of-access, and personalization to the finished document.

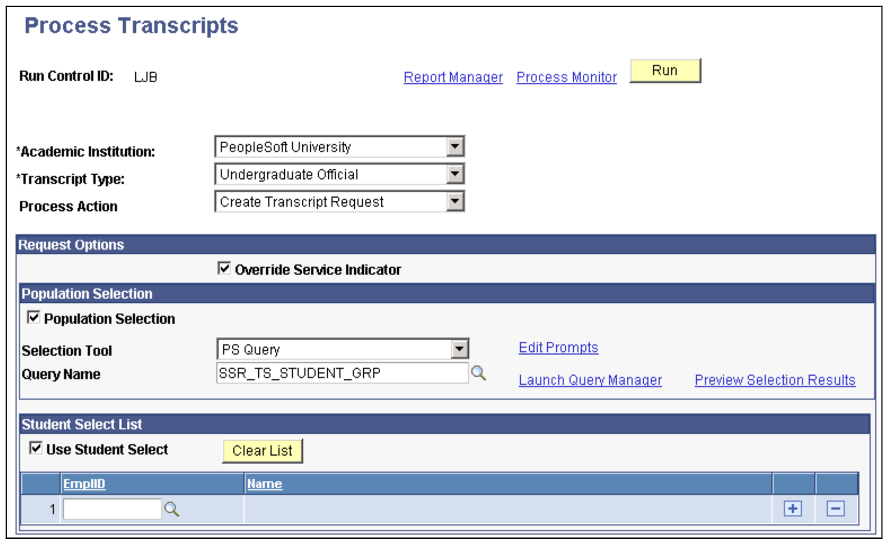
The production of academic transcripts planned in Campus Solutions 9.0 is expected to include new, more adaptable, and more efficient technology. A new application engine process is planned to replace the original COBOL-based engine traditionally used to generate transcripts after they have been requested. A better, hierarchical table structure containing extensive fields for greater flexibility is planned for delivery in this new release. Oracle's XML Publisher is being delivered as the application that will produce the transcript document. This powerful reporting tool is built on open standards technology and supports multiple output formats. One of the advantages of using XML Publisher as the reporting tool for transcripts is its use of templates so institutions can design the look of the finished document. Planned for delivery are two pre-defined transcript templates—a portrait and a landscape orientation. Transcripts are expected to be available in a PDF format to administrators and also to students using self-service.

Processing Batch Transcript Requests

Most institutions produce transcripts for many purposes. In Campus solutions 9.0, batch processing of transcripts is planned to be streamlined and designed for greater flexibility.

A new run-control component for processing batch transcripts is planned which will allow a user to create a transcript request, generate the transcripts from that request, and print the transcripts from a single location. This planned improved usability streamlines this end-to-end process.

In order to deliver a flexible way for users to select batches of transcripts, Population Selection is planned to be included in, and applied to, transcript processing. (For more details, please see the Population Selection section of this document.) Population Selection is intended to allow the user to use PS Query, External File upload, or the Equation Engine to create specific groups of students for whom to order transcripts. In addition, the user is expected to be able to create a population or augment results by using a Student Select List section that allows inserting individual rows of employee IDs as necessary. There are several advantages of this planned feature. First, it is intended to allow the user to create and control very specific selection and sort criteria for a set of transcripts. Second, an Edit Prompt hyperlink is planned to appear so that run-time prompts can be utilized and selected. Third, the population for which transcripts are to be generated are planned to be made available for preview.



Streamlined, flexible transcript processing is planned for Campus Solutions 9.0.

Transcript Type Component Enhancements

Defining the contents, design, and form of the many transcripts that an institution can issue remains the function of the Transcript Type component. However, to support the increased flexibility required by institutions, significant additions to the Transcript Type component have been planned in Campus Solutions 9.0.

To support more efficient setup, a new page called View Sort is planned. The contents of this page are intended to display, in a single location, which transcript data has been selected to appear, in what location it will appear, and in what sequence it will appear in relation to other information.

A Test Scores page is planned to provide an easy way to include test data on a transcript. A user is expected to be able to select from any of the valid tests that an institution has defined for display.

A Special GPA page is planned so that defined special grade point averages, such as Academic Program and/or Plan GPAs that have been assigned to students, can be included on a defined transcript for a term.

Planned options for additional fields to include when defining transcript-type are Contact Hours for each class and Academic Sub-Plans (concentrations or specializations).

Transcript Request Inquiry

When students or alumni request transcripts to be forwarded to other institutions, internal departments, external employers, or other recipients, administrators frequently need to access a single source of information about the transcript request that will indicate status, pertinent dates, recipient information, and request circumstances. The Transcript Request Inquiry component planned for Campus Solutions 9.0 represents a quick and convenient way for staff to find this information. In a readable grid format, the Transcript Request Inquiry is planned to allow the user to access the student's history of transcript requests, filter them by transcript type, sort the results, and personalize the sequence of grid columns in order to provide better service.

Class Permissions

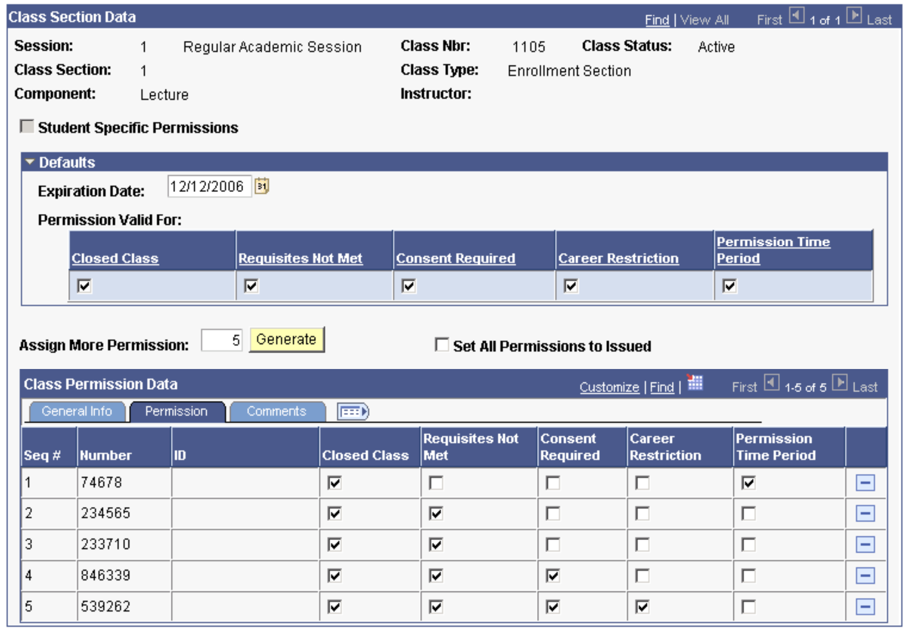
A more flexible class permissions process is planned for Campus Solutions 9.0 that will allow for better service while maintaining the ability to track, monitor, and manage the process.

In Campus Solutions 9.0, class permissions are expected to receive a major redesign. The intended class permission enhancements would allow class administrators to specify under what conditions a class number may be overridden. In response to suggestions from customers, a class permission number or a set of permission numbers are planned to be configured to override:

- Closed class section
- Requisites not met
- Required consent
- Career restrictions
- Time period restrictions

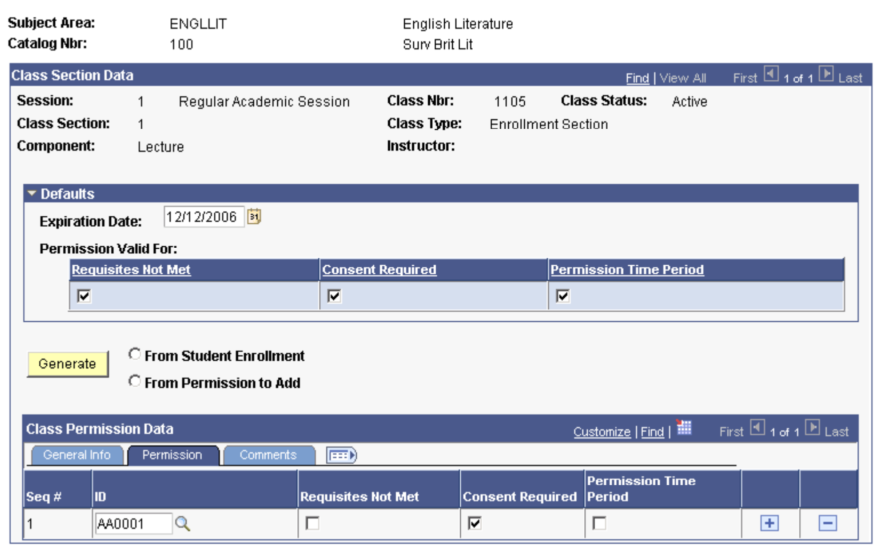
With this new design, single-class permissions are expected to be configured to override a class section closure or any combination of restrictions as necessary. The permission expiration dates feature is also planned to be set for each permission number. This granularity is intended to be accomplished by providing a new page where the user can specify various attributes for each class permission number. A convenient set of defaults is planned to be assigned for efficient data management.

In addition, the page for creating class permissions is planned to include the ability to record that a permission has been issued, when, and by whom. Comments about the permission could also be saved.



Planned enhancements in 9.0 include greater flexibility in granting and overriding class permissions.

Academic departments also need to control permission-to-drop class sections. A new value for Drop Consent has been planned for the Course Catalog and the Class Associations components so that class sections can be configured for this need. The capability to provide permissions is planned with the creation of a new page in the class permission component dedicated to this type of consent. Permission to drop a class is expected to be created and configured to override the required consent to drop, existing co-requisites, or the session drop time period. A convenient planned feature of the permission-to-drop a class section page is the option of generating class numbers for students who are already enrolled in the section.



Administrators are expected to be able to override defaults to add or drop classes.

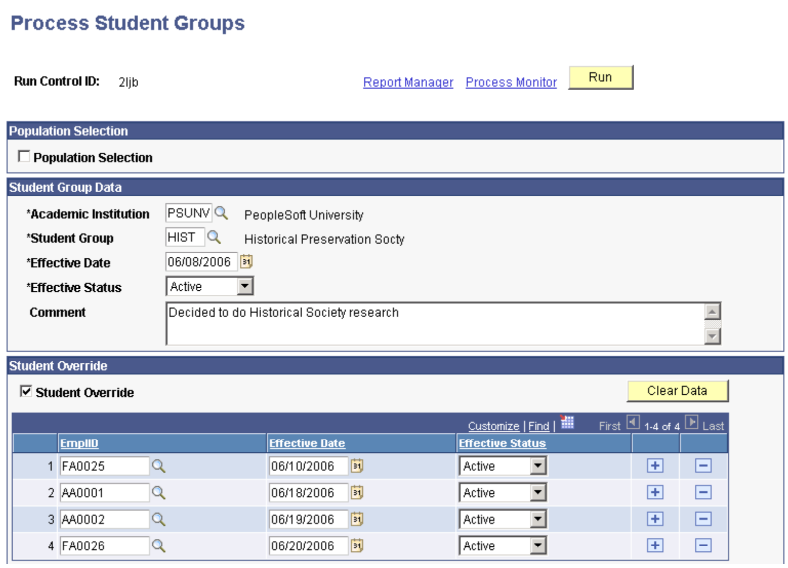
While permission-to-drop can restrict students from dropping individual class sections, many administrators have the additional need to control a student from dropping *any* class during a term. A new service impact is planned which, when attached to a service indicator that is assigned to a student, would prevent dropping *any* enrolled class without administrative override. The service impact, No Drop Activity - Add Allowed_(DENR), is planned for this purpose.

Usability and Security for Student Groups

Student Groups are utilized by most institutions throughout Campus Solutions for setup reporting and to track and control transactions. Student Group enhancements in Campus Solutions 9.0 are intended to increase data-entry efficiency and flexibility. New security options are planned to accommodate the creative ways in which student groups are used and accessed by functional users. New viewing components are intended to support administrative maintenance and management practices.

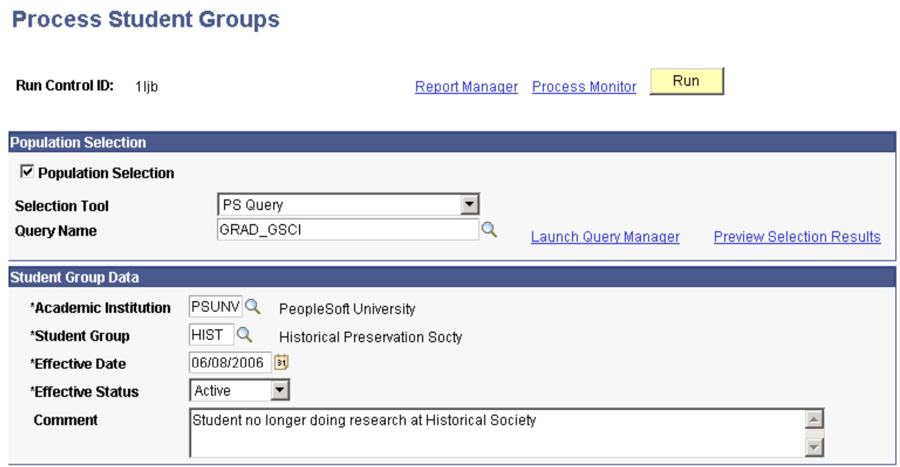
Student Group assignment continues to be supported by a transaction component in which functional users can manage student group information for individuals. Planned for Campus Solutions 9.0, student group assignment can be accomplished in two additional ways.

1. Using a new component a user will be able to easily insert multiple rows of individuals and run a process to assign them to the selected Academic Institution, Student Group, and default Comment values.



Easily insert multiple students and assign to a group.

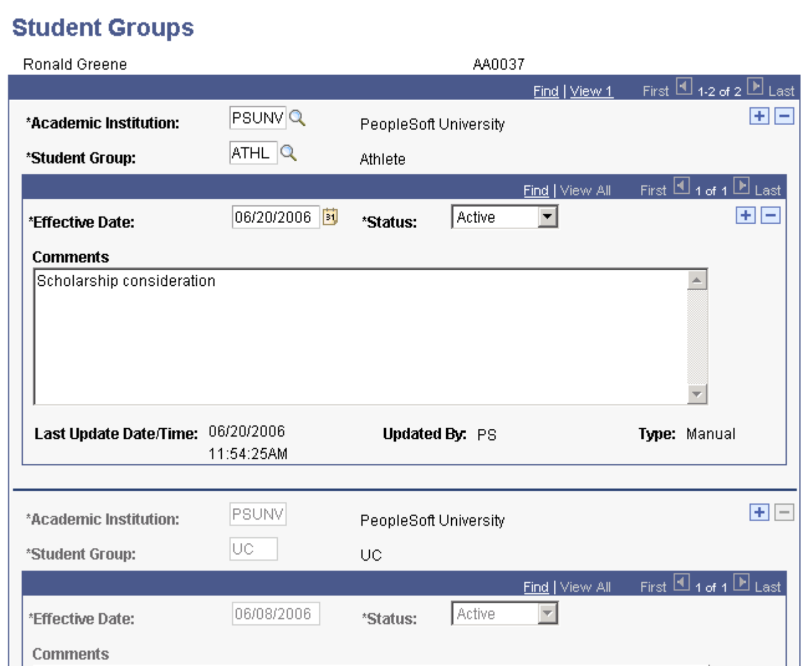
2. Another convenient method of assigning individuals to student groups is to use the Population Selection application which allows the user to choose either a PS Query, an External File, or the Equation Engine to create a group, specify assignment values for that group, and run an assignment process.



Easily insert multiple students and assign to a group.

Two new methods of viewing student groups and their members are planned for Campus Solutions 9.0. First, a convenient online listing of student group members is planned so that an administrator can use this handy online listing and its hyperlinks to access the transaction page for data entry. Second, a useful listing of Student Groups that have been defined for an institution is planned for online availability. Both components have available filters that provide high-level criteria to aid in selecting what lists to view.

Significant improvements to student group security access are also planned for Campus Solutions 9.0. The new, configurable security will provide the ability to control whether a user can view and update, view only, or have no access to an individual's student group assignment. A new setup table is provided to control these user settings for the student group values at an institution. This more granular security setup will result in greater control of sensitive student group data.



Access to student group views can be easily secured to limit views of sensitive information.

Campus Solutions 9.0 will continue offering the time-saving component User Security Replacement which will be updated to contain an option for Student Groups and allows the security administrator to identify the security configuration for an existing user and assign it to another user. Also planned is the handy Mass User Security Replacement process that allows a security administrator to select a group of users using Population Selection functions and set user security for select areas using a batch process.

Planned enhancements to improve the academic planning and advising process include an enrollment backpack and new 'what-if' capabilities.

Academic Advisement

Student Self Service in Campus Solutions 9.0 plans to deliver the next level of sophistication with the important integration of Academic Advisement and Enrollment to the Student Center. Enrollment functions on the Student Center are expected to be conveniently organized into tab options that include searching for courses and classes, planning to take courses in the near- and long-term, enrolling and maintaining term class schedules, and reviewing academic information and progress. The primary goal for this integration is to provide the student with accurate and timely information that has direct application for academic planning and enrollment.

In addition to this significant new functionality, enhancements to the advisement 'what-if' capabilities are also planned.

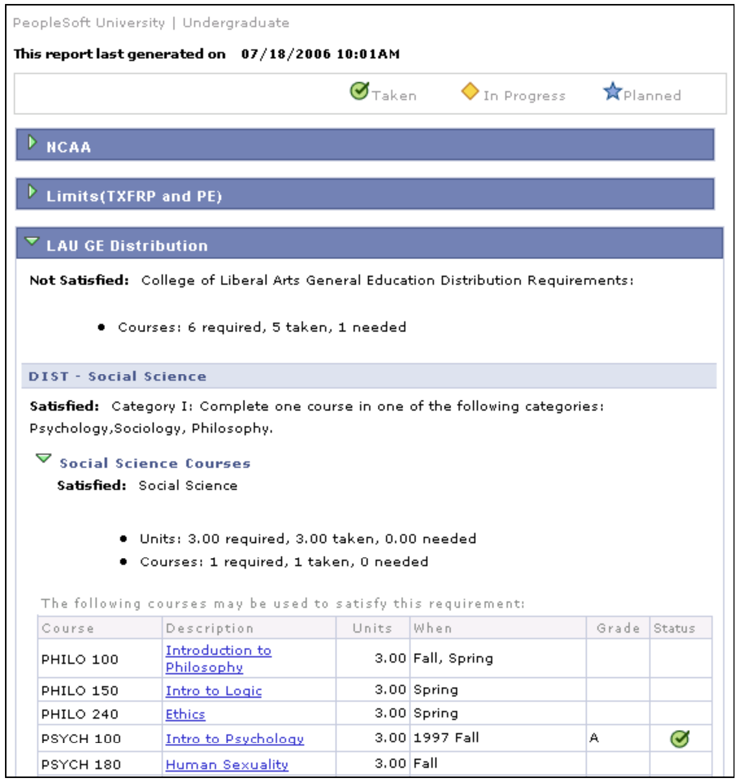
The Enrollment Backpack: My Academic Requirements

In Campus Solutions 9.0, the foundation delivered with Student Center enrollment functions in CS 8.9 is expected to be enhanced with an extensive set of new web pages that have been structured with a usable tab design. At the core of this powerful functionality is the My Academic Requirement page that is planned to provide extensive academic information and transactional capabilities. In previous versions of Campus Solutions, this report was an online version of the printed degree audit that many institutions found to be difficult to use. Like the degree audit report, My Academic Requirements is planned to be a detailed analysis of the student's progress towards satisfying academic goals as they are recognized by the rules in an institution's Academic Advisement setup. However, its planned easy navigation provides students with the data they need to make informed decisions about class enrollment. A student is expected to quickly ascertain a course or courses needed to satisfy an academic requirement and then use convenient action buttons and hyperlinks to explore course content, examine schedule alternatives, and select scheduled class sections for enrollment directly from this online interactive display.

Enhancements to requirement descriptions and to course properties are also planned to support this new design.

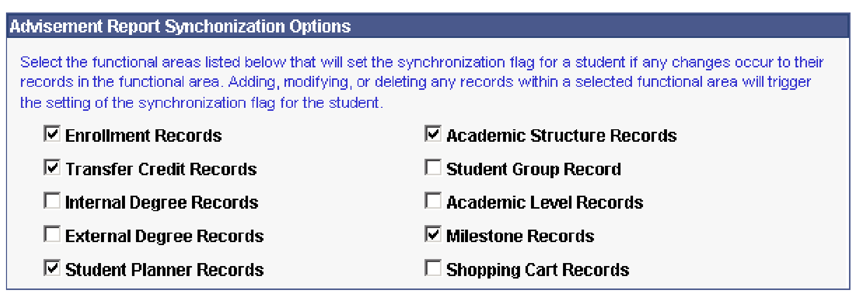
Institutions are expected to benefit from some planned additional setup options which control under what circumstances an updated view of the My Academic Requirements page is generated and whether it is accomplished in real-time or by batch processing.

The Installation Academic Advisement Component has 10 flags planned which control under what circumstances a new My Academic Requirement would be marked for processing.



This sample report shows courses and grades that apply towards an academic requirement and displays information about the in-progress or planned status of courses.

Planned for another component, the institution can identify whether it wants the degree progress report to be generated in real time or by batch process. If the institution wants to control the frequency with which the online report is generated, it can use new delivered batch processes to generate advisement reports. The benefit of using batch processing is a potential advantage in performance.

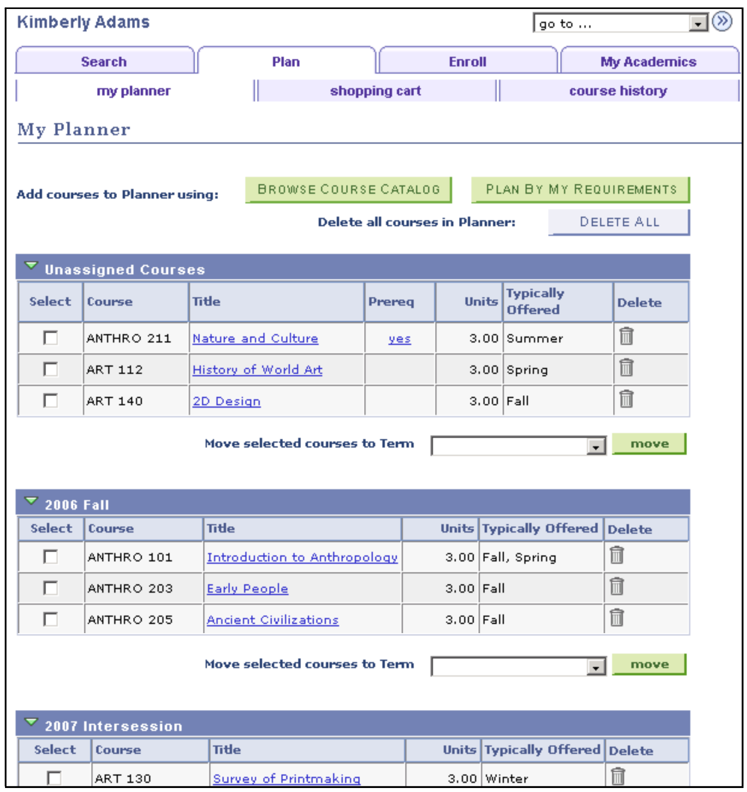


Options are planned in Release 9.0 for batch processing and updating of records.

Any time a new My Academic Requirements online report is generated, a time/date stamp marks it so that the student will know when it was last created.

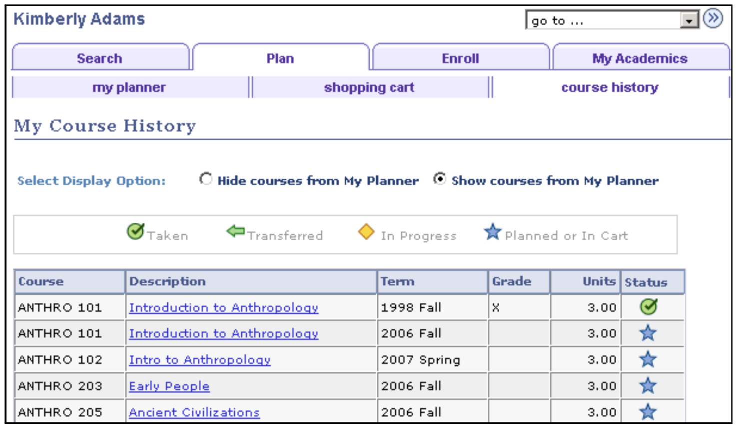
Enrollment Backpack: My Planner

The other major element of the Enrollment Backpack is the My Planner feature. This intended feature provides students with the ability to plan courses on a short or a long-term basis and to directly enroll in planned classes as terms become available. A student can easily select courses for their planner using the catalog browser and access My Academic Requirements to select courses based on Academic Requirements. Courses in the planner are expected to be displayed primarily on a term-by-term basis but can be kept in an unassigned area for later consideration. Course information is intended to be available directly through a course title hyperlink and pre-requisite information prominently noted and available. Information on when courses are typically offered is expected to be configured and displayed for each course. It is intended that students can easily change planned courses, assign them to different terms, or delete from their plans. Planned courses that have been inactivated by the institution are expected to be marked as such. The courses in My Planner are expected to be readily and easily usable for enrolling in a term. Planned courses are marked as such and are intended to appear in My Academic Requirements, the Course History page, and during the enrollment process.



Enrollment backpack is expected to allow a student to easily plan their courses.

Two additional tabs are also intended for the planning function. The Shopping Cart tab allows a student to select classes for a specific term, validate them without enrolling, and when ready, enroll for the classes directly. The shopping cart is expected to be populated from My Academic Requirements or from My Planner. The course history tab is intended to provide a convenient online reference for students that produces a configurable list of all of the courses a student is currently taking, has taken, transferred, and planned.



The planned Course History feature is an easy online reference students are expected to use to help the plan future course requirements.

Program Guide

Most of the planned functionality that has been described heretofore requires that the Academic Advisement module be implemented. However, there are some institutions that may not wish to implement Academic Advisement or may be planning to do so in the future. Either way, these institutions can still offer their students the advantage of some of the powerful self-service functions by using the features of the Program Guide.

The Program Guide is planned to allow an institution to set up course lists, attach the course lists to requirements, and build requirement groups. Intended to be a simple setup, it does not carry the overhead found in the Academic Advisement setup.

The Program Guide includes the following planned enhancements:

- A special advisement usage automatically associated with course lists and requirements
- An option to set up a database to support Academic Advisement or Program Guide features on the Student Administration Installation Table
- Program Guide Requirements and Requirement Groups to recognize the academic structure and apply to students when in use
- Definitions using one or more course lists and providing extensive descriptive qualities but without the same complex intelligence or degree audit capabilities
- Visibility on self-service pages with course hyperlinks associated so students can choose them for enrollment and for use in the My Planner feature
- Listing courses in My Academic Requirements as taken or planned. (However, since no analysis is done, requirements are not expected to appear as satisfied or unsatisfied.)

While the Program Guide is not planned to be a replacement to the Academic Advisement module, it is intended to offer a sound alternative so students could still use the online planner and enhanced enrollment functionality planned in Campus Solutions 9.0.

Advisement Information for Advisors

Most institutions view the important relationship between student and advisor as critical to academic success and retention. In order to give advisors direct information about their advisees' progress, plans, and other pertinent information, a new component has been planned that is dedicated solely to supporting the advising process. In Campus Solutions 8.9, this component was originally planned as a tab on the Faculty Center, however it is now planned to be a separate, information-rich area that is available via a hyperlink from the Faculty Center. An advisor is intended to be able to see a full list of advisees, select one, and view a modified version of their initial Student Center Page with access to the student's My Academic Requirements and My Planner. In addition, it is planned that advisors will be able to easily access general, transfer credit, and other academic information.

Planned enhancements for advising reports will produce information about individual students or groups of students based on intuitive parameters established by the advisor.

Academic Advisement Reporting

In Campus Solutions 9.0, a new run-control component has been planned that is dedicated to the production of advisement reports. The Advisement Report Request component is planned to process reports for individual students and a Batch Advisement Report Request is expected to deliver the extensive flexibility of Population Selection to create ad hoc lists of students.

After entering specific parameters on the Advisement Report Request, a user simply clicks on a process button and is presented with a preview of the student's advisement report. If a printed copy is required, the user can request a PDF version of the report or send the report to a printer. A planned new advantage in both the individual and batch processes is a new field called Request Identifier, a user-defined value that is intended to allow a report or set of reports to be marked with a common value for later processing in one batch. Instead of having to remember request IDs, an advising administrator can simply enter an intuitive Request Identifier and run multiple advisement reports that have been marked with the same value. The Batch Advisement Report Request also offers this same functionality.

Advisement Reports themselves are planned to be enhanced to take advantage of the functionality provided by the XML Publisher reporting tool. Output is planned to be fully integrated with the advisement engine and will provide reports in PDF format for improved readability.

Academic Data Enhancements

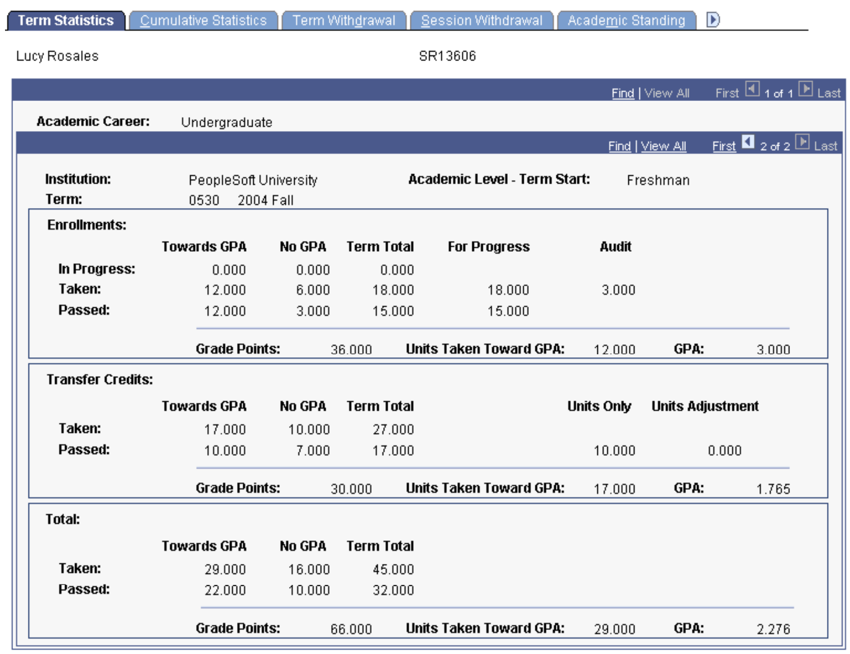
Several enhancements to academic progress metrics are planned for Campus Solutions 9.0 in the areas of Grade Point Average, Unit calculation, Repeat Checking, and Transfer Credit Grade recording.

Term and Cumulative Statistics and Grade Point

Many institutions separate and utilize credits and grade point averages earned externally (transferred) from those earned internally. Campus Solutions 9.0 intends to add several new fields and redesigned pages for easier use and display.

For each student for a term or on a cumulative basis, it will be possible to track the following:

- Term GPA for Transfer Credits
- Term GPA which combines Transfer Credits and for Institution Credits
- Cumulative GPA for Transfer Credits
- Cumulative GPA for Institution Credits
- Cumulative Units contributing to the Transfer Credits GPA
- Cumulative Grade Points contributing to the Transfer Credits GPA
- Cumulative Units contributing to the Institution GPA
- Cumulative Grade Points contributing to the Institution GPA



Term Statistics | Cumulative Statistics | Term Withdrawal | Session Withdrawal | Academic Standing

Lucy Rosales SR13606

Find | View All First 1 of 1 Last

Academic Career: Undergraduate

Find | View All First 2 of 2 Last

Institution: PeopleSoft University Academic Level - Term Start: Freshman

Term: 0530 2004 Fall

Enrollments:

	Towards GPA	No GPA	Term Total	For Progress	Audit
In Progress:	0.000	0.000	0.000		
Taken:	12.000	6.000	18.000	18.000	3.000
Passed:	12.000	3.000	15.000	15.000	

Grade Points: 36.000 Units Taken Toward GPA: 12.000 GPA: 3.000

Transfer Credits:

	Towards GPA	No GPA	Term Total	Units Only	Units Adjustment
Taken:	17.000	10.000	27.000		
Passed:	10.000	7.000	17.000	10.000	0.000

Grade Points: 30.000 Units Taken Toward GPA: 17.000 GPA: 1.765

Total:

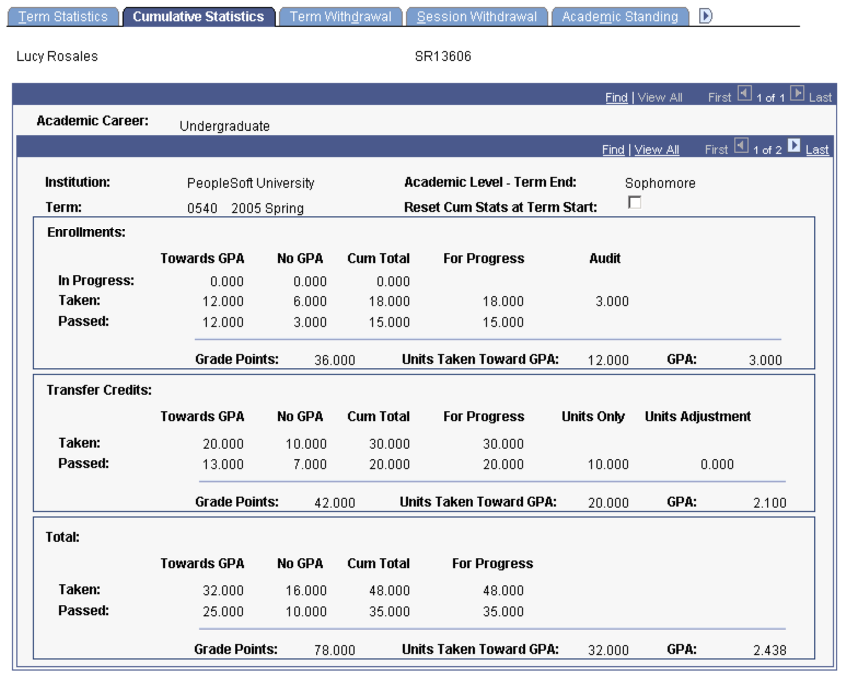
	Towards GPA	No GPA	Term Total
Taken:	29.000	16.000	45.000
Passed:	22.000	10.000	32.000

Grade Points: 66.000 Units Taken Toward GPA: 29.000 GPA: 2.276

Planned enhancements to student data make it easier to access and view term statistics on an individual student.

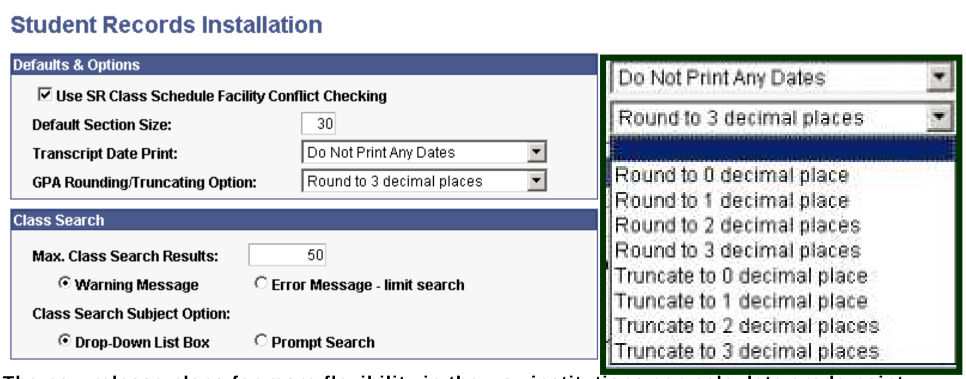
The Term History, Term Statistics Page is planned to be redesigned to display new fields and to be more readable for the user. A planned new Enrollments section indicates what has been earned for a term at the institution. Term transfer credits are planned to be displayed, and a Total section shows how both are combined. A user can easily see how all totals and GPA calculations have been made.

The Term History, Cumulative Statistics Page also is planned to be redesigned to accommodate new fields and to be more readable. The planned Enrollments section indicates what the student has cumulatively earned at the institution with transfer credits displayed and a Total section showing how both are combined to give a cumulative picture of units and grade point average as of the term displayed.



Planned enhancements to student data improve the way cumulative statistics on an individual student are accessed and displayed.

Institutions often vary in the way in which grade point averages are created. To accommodate these variations in rounding and truncation, a high level option is planned on the Student Records Installation component that allows for easy setup.



The new release plans for more flexibility in the way institutions can calculate grade point averages.

The GPA Rounding, Truncating Option selected is intended to determine how a grade point average will be displayed in Term History and related components. For example, if the option 'Round to 2 decimal places' is selected, the GPA of 2.438 will appear as 2.440 on the Term History component pages. If the option 'Truncate to 2 decimal places' is selected, the GPA of 2.438 will appear as 2.430.

Repeat Checking

In order to make the repeat engine more useful, two enhancements have been planned for Campus Solutions 9.0. With the introduction of new online advisement and enrollment features (See the Enrollment Backpack section), in-progress classes being repeated are planned to be accurately evaluated and displayed. Also, refinements to the basic logic used in matching multiple class repeats are planned.

Repeat Classes on the Academic Advisement Report

Planned functionality includes flexibility and ease of use in the way students can plan for courses they need to repeat and how GPA is calculated for repeated courses.

As students are asked to take responsibility for planning and completing classes, accurate academic information must be available. In Campus Solutions 9.0, enhancements to advisement reporting are planned in order to apply repeat engine capability to classes in which students are currently enrolled. This intended enhancement will provide students who are repeating classes with real-time information about their progress as it relates to those repeated classes.

In order to accommodate this important planned functionality, in-progress classes will be assigned a default grade. This default grade will be assigned by using a planned new field on the Grading Basis called the Default AA What If Grade. When this field is populated with the best grade possible for the Grade Basis, an in-progress course can be analyzed by the repeat engine to allow advisement to properly evaluate a class.

When an advisement report is processed and recognizes in-progress classes for a student, the defined default grade is used by the repeat engine to evaluate and apply an appropriate repeat rule. An important advantage of this redesign is that a student or administrator will have immediate information as to the proper earned units for progress towards a degree or other credential.

Repeat Logic Extended

Institutions have various policies for recording repeated courses for students. Some institutions take advantage of functionality that allows classes to be repeated more than once with a limitation on the number of repeats. Currently, in the case of multiple repeated classes, the repeat engine's basic logic will seek and match the pairs of classes with the best, earned grades. For example, a student takes the repeatable course Piano 205 and earns grades in the following term sequence:

Fall, 2003: Piano 205 Grade: B

Fall, 2004: Piano 205 Grade: F

Fall, 2005: Piano 205 Grade: A

If institutional policy limits the repeat to two times, on the third repeat of the class, the repeat engine evaluates the repeats so that the Piano 205 with the earned grade of A would be matching to the Piano 205 with the earned grade of B. The class with the B would assigned the repeat code and not be used in the GPA calculation. Instead the Piano 205 with the earned grade of F would be used, much to the chagrin of the student.

Enhancements to logic rules in calculating GPA for repeated courses are planned to satisfy both students and administrators.

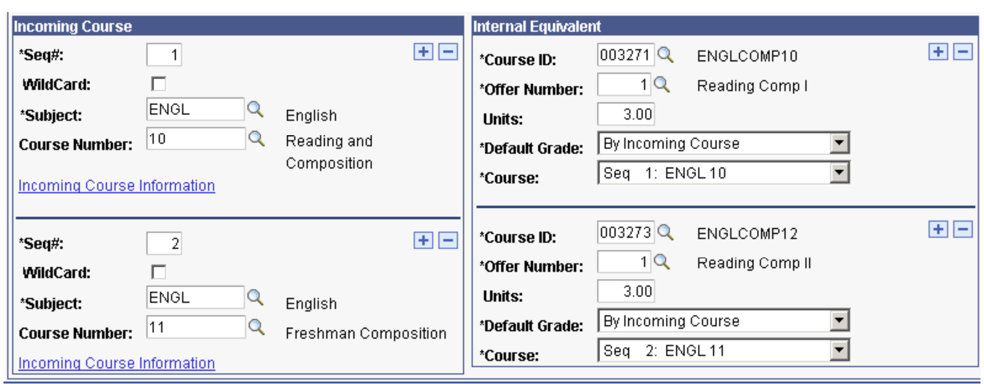
As a solution to this situation, a new setup option field called Grade Match Option has been planned for the Institution Table. The Grade Match Option field has two delivered values: Best Grade or Worst Grade. If the institution selects the Best Grade value, the course with the worst grade is tossed out. Using the example above, the repeat engine would match the Piano 205 with the A grade with the Piano 205 with the B grade and not use the B grade in a GPA calculation. However, when the institution selects Worst Grade, the class with the A grade would match with the Piano 205 with the F and not use the F grade in a GPA calculation. This accommodates a result that is satisfactory to both students and administrators.

Transfer Credit External Course Grade Setup

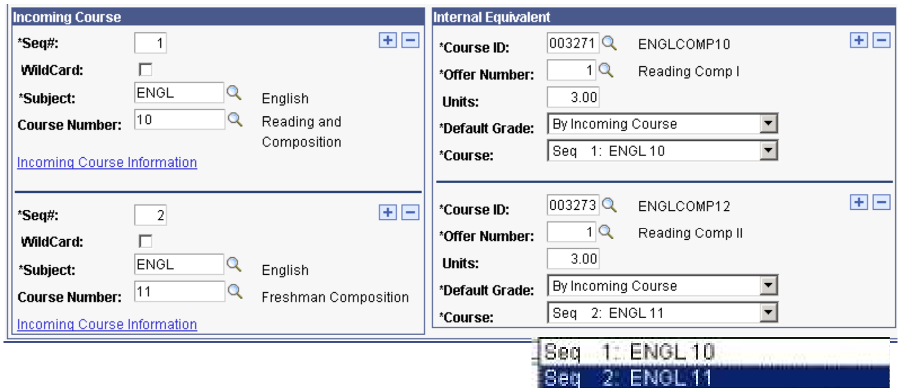
Institutions that recognize and use grades from external transfer credit courses need flexibility when creating equivalency rules that determine how those grades will be assigned. For Campus Solutions 9.0, new setup values are planned to provide flexible options when defining which external grades will be used for many- to-one or many-to-many equivalency rules.

In order to provide this functional adaptability, a new field in the Internal Equivalency Group Box called Default Grade is being planned for the Transfer Area Elements page of the Transfer Subject Area Component. This intended field will provide three setup options for defining how external grades will be used in the equivalency. The options are: By Grade Order, By Incoming Course, and By Transfer Equivalency Setup.

The By Grade Order option will recognize the number of external courses that are defined for the rule and will dynamically assign a rank order for defining the grades being accepted for internal use. If there are three external courses, the values will be highest, 2nd highest, 3rd highest, and so on, with a maximum of ten.



The planned By Incoming Course option will recognize each external course and dynamically create a value for each. The equivalency rule can then be defined using the grade or grades for each external course.



The planned By Transfer Equivalency Setup option will assign each internal course in the rule the default grade specified in the rule's Program Source Equivalency.

On a one-to-one equivalency or a one-to-many equivalency, the choices for a Default Grade option will be By Incoming Course or By Transfer Equivalency Setup only.

STUDENT FINANCIALS 9.0

Campus Solutions 9.0 Student Financials are planned to include a number of enhancements that are in direct response to customer requests and feedback on current processes. With this next release, Oracle intends to build out its eCommerce and self-service capabilities, as well as focus on overall usability of the applications.

Enhancements to Student Financials in 9.0 are planned for:

- **Late Fee Processing**
- **Payment Plans and 3rd Party Contracts**
- **Billing**
- **Self-Service Miscellaneous Fees**
- **1098T Forms (U.S.)**
- **Global Invoicing**

Late Fee Process

Campus Solutions currently supports the calculation and assignment of Late Fees for delinquent student receivables. The current process is very detailed and compares the date an individual item was satisfied to the due date for that item. However, due to payment swapping and the application and reversal of financial aid funds or payment plans, the date an item was satisfied can change, resulting in changes to the Late Fee calculation.

After much discussion with customers and our Product Advisory Group, we intend to provide a new Late Fee process, which will greatly simplify the overall process and provide enhanced control and flexibility so institutions can better manage their student receivables.

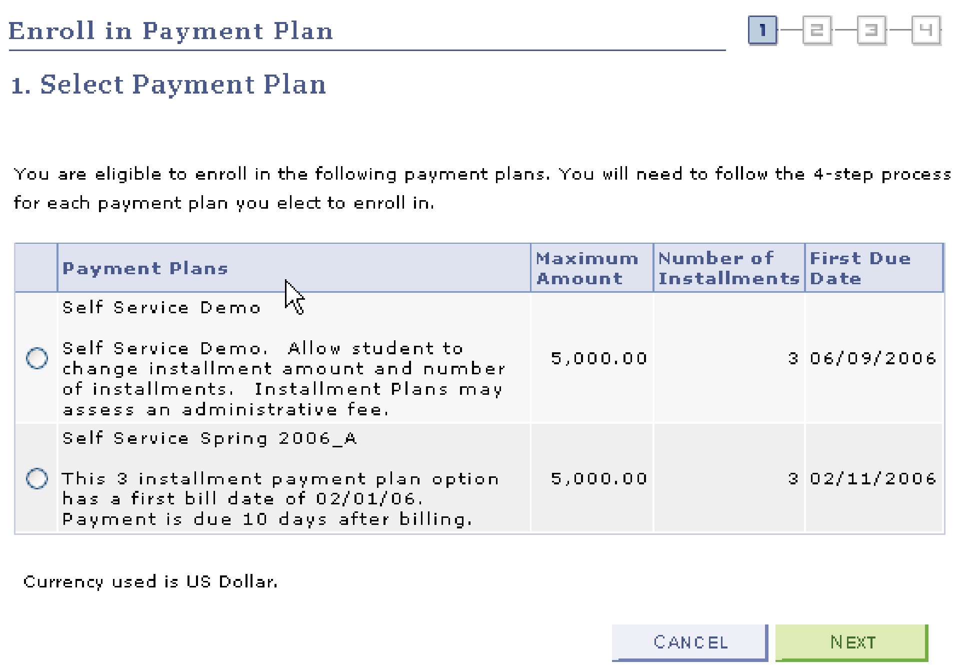
This new process is expected to:

- Compare the amount due from the most recent billing record with the amount of payments or credits on the account. If the payments or credits are less than the amount due, the student will be assessed a late fee.
- Allow the institution to define which payments and/or credits are considered in the calculation, using Item Type tree nodes.
- Allow the institution to define a threshold amount so if the unpaid balance is less than this amount, the student will not be assessed the late fee.

Payment Plan and Third-Party Contract

As tuition costs have risen and financial aid and scholarship funding have proportionally diminished, many students and institutions are turning to Payment Plans to assist students and families with paying their educational expenses. Similarly, more and more institutions are seeking to expand their markets and their revenue opportunities by developing academic programs and class schedules targeted to working adults and corporate training programs. To support these programs, institutions need increasing automation and flexibility in managing alternative Payment Plans and Third-Party Contracts and to accommodate direct billing to a student's employer.

To assist institutions in managing their Payment Plans and Third-Party Contracts, Oracle is planning to deliver enhanced functionality that is primarily focused on assigning students to the plans and contracts, managing the plans and contracts from one period to another, and enabling students to self-enroll in a payment plan via self-service.


Enroll in Payment Plan

1 2 3 4

1. Select Payment Plan

You are eligible to enroll in the following payment plans. You will need to follow the 4-step process for each payment plan you elect to enroll in.

	Payment Plans	Maximum Amount	Number of Installments	First Due Date
○	Self Service Demo Self Service Demo. Allow student to change installment amount and number of installments. Installment Plans may assess an administrative fee.	5,000.00	3	06/09/2006
○	Self Service Spring 2006_A This 3 installment payment plan option has a first bill date of 02/01/06. Payment is due 10 days after billing.	5,000.00	3	02/11/2006

Currency used is US Dollar.

CANCEL NEXT

Students will be able to self-enroll in payment plans.

The planned enhancements to the payment plan functionality include:

- Batch Data Entry Page
- Batch Assignment Using Population Selection
- Mass Cancellation
- Self-Service Enrollment

Batch Data Entry Page

Many institutions receive lists or rosters of students for assignment to Payment Plans. To alleviate the challenge of manually entering and posting each student to a plan one by one, we are planning to deliver a new data entry page to enter multiple students to a Payment Plan. The administrator will then run a new batch posting process to post those students to the plan, update their accounts and create the new payment plan accounts. This new functionality is a significant enhancement to help institutions streamline and simplify the management of their receivables and payment plans.

Since more and more institutions are asking for greater flexibility in billing and payment processing, Campus Solutions 9.0 has planned several enhancements to the Student Financials modules that will make the administrator's job much easier.

Batch Assignment Using Population Selection

Many institutions are seeking to further automate the assignment of specific populations of students to a payment plan or third-party contract. For example, some institutions wish to place all undergraduate students on a default installment payment plan. Other institutions want to be able to place all students in a particular Program or class section into a specific third-party contract. We are planning to deliver new functionality to enable the institution to place defined populations of students onto a payment plan or third-party contract using Population Selection to define the specific student populations.

Mass Cancellation

Just as institutions have the need to place populations of students on a payment plan or third-party contract in batch, they also have the need to remove populations of students from plans or contracts in batch. The same batch assignment process above can be used to cancel students from a payment plan or third-party contract. The administrator defines the appropriate population using Population Selection, then runs the process with the status set to 'Cancel'. The students are removed from the contract, the plan or contract is reversed, and the original charges reinstated.

Self-Service Enrollment

Oracle is also planning to deliver new functionality to enable students to self-enroll in a payment plan via self-service. Institutions will identify the plans they choose to make available through self-service (using either the lump-sum or calculated options). Then students can access a new self-service page to enroll themselves in a payment plan which streamlines the enrollment and receivables management processes and frees administrative staff for more value-added work.

Billing

Institutions today face many financial challenges and an institution's ability to collect fees from its students is critical to its financial health. To accomplish this, the institution must have the ability to produce clear, concise billing documents that provide adequate detail and other information about the student's charges, due dates, payment options, and other relevant information. The document must also reflect the institution's particular personality and brand.

To assist institutions in producing billing documents, Oracle is planning to deliver enhanced functionality using Oracle's XML Publisher tool. XML Publisher provides institutions with greater flexibility and options to produce professional documents in a variety of formats, including letter, standard forms, and PDF files.

XML Publisher also provides the ability to easily brand the document with the institution’s logo, message, or other unique identifying images.

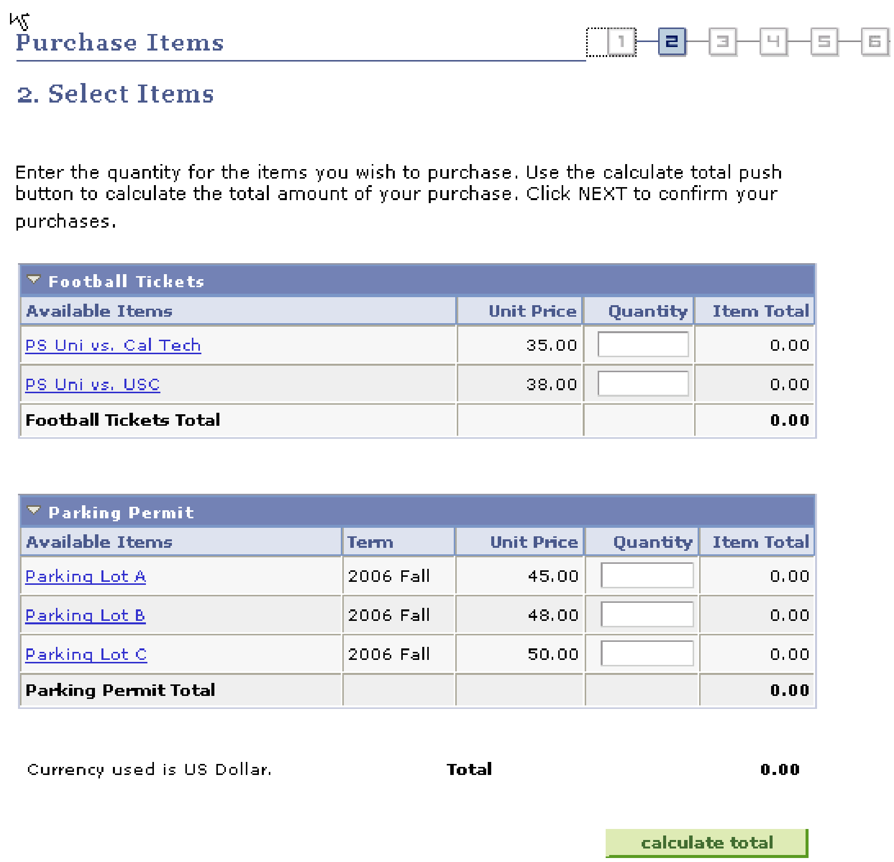
Because miscellaneous fees such as yearbook orders, parking permits, and athletic center memberships tend to be more ad hoc in nature, planned enhancements to Campus Solutions 9.0 are expected to include these choices in student self-service.

Self-Service Miscellaneous Fees

Most institutions have some sort of miscellaneous charges that they assess through the student receivables system. In many cases these miscellaneous charges are optional or triggered only when the student requests the service associated with the charge, such as purchasing a yearbook, a parking permit, or an athletic center membership. Because these items tend to be more ad hoc in nature, institutions would like to be able to have them available for students to select and pay for as part of self-service.

Oracle intends to release Miscellaneous Fees to enable self-service for this category of fees. Miscellaneous Fees is similar to the existing Optional Fees functionality, but it does not rely on the tuition calculation process to calculate and post the charges. Also, Miscellaneous Fees will require payment at the time the charge is selected.

To select one of the Miscellaneous Fees, the student will go to self-service and select the appropriate charge item. The system will then take the student directly to the Make a Payment process, where s/he will be required to pay for that charge before completing the transaction. Once the student has completed the payment process, both the charge and the payment are posted immediately to the student’s account.


Purchase Items

1 2 3 4 5 6

2. Select Items

Enter the quantity for the items you wish to purchase. Use the calculate total push button to calculate the total amount of your purchase. Click NEXT to confirm your purchases.

Football Tickets

Available Items	Unit Price	Quantity	Item Total
PS Uni vs. Cal Tech	35.00		0.00
PS Uni vs. USC	38.00		0.00
Football Tickets Total			**0.00**

Parking Permit

Available Items	Term	Unit Price	Quantity	Item Total
Parking Lot A	2006 Fall	45.00		0.00
Parking Lot B	2006 Fall	48.00		0.00
Parking Lot C	2006 Fall	50.00		0.00
Parking Permit Total				**0.00**

Currency used is US Dollar. **Total** **0.00**

calculate total

Students will be able to select and pay for miscellaneous charges through self-service.

Self-Service 1098T Forms (United States)

Institutions based in the United States are required annually to issue IRS Form 1098T to students so they can report tuition and fee amounts on their tax returns. Oracle plans to release functionality with the 9.0 release to enable students to display and print their completed 1098T forms in PDF format via self-service, thereby further supporting institutions and their efforts to reduce costs and streamline their administrative processes. This capability will utilize Oracle's XML Publisher tool to create the PDF document.

The following features will support this new functionality:

- Institutions will be able to control the display of the completed forms via a new option on the 1098T TIN setup page.
- Once the 1098T forms have been generated and printed, the student will be able to access a summary of the information from the completed 1098T form. The student can then select to print the completed form in PDF format.
- The student will be required to provide consent and eSignature before accessing the completed form.

Changes to the invoicing modules in Campus Solutions 9.0 Student Financials are planned to accommodate the growing global reach of most higher education institutions today.

Global Invoicing

Many institutions, especially those outside the United States, are required to bill and collect payments from students using an invoice model rather than the standard statements that are typically used in the U.S. In order to support our many customers outside the U.S., Oracle is planning to deliver new functionality for invoicing for student receivables.

Global invoicing planned features are:

- Charges are linked to a specific invoice with a unique invoice number. Subsequent invoices include only new activity and do not include any prior balance.
- If the student does not pay an invoice, the institution sends a reminder letter rather than including those unpaid charges in another invoice.
- The student makes a payment against a specific invoice rather than against the overall account. Any charge or payment priorities are applied only within the context of the specific invoice.
- If charges are reversed after being invoiced, there is a specific credit invoice created that references the original invoice.
- Excess payments or a credit balance from an invoice are refunded to the student unless the student authorizes the institution to apply that credit to a different invoice.
- With invoicing, charges are only passed to the General Ledger once they have been invoiced.

Institutions will have the flexibility to use this new invoicing functionality or to continue with the existing billing statements. We are planning to add a new option to the Student Financials Installation setup to activate the Invoicing functionality described above. In addition, we will be providing new setup so the institution will be able to define its banking information for inclusion on the invoice as necessary.

FINANCIAL AID 9.0

Enhancements planned in Campus Solutions 9.0 will make it easier for institutions to upload Financial Aid award information from a variety of sources and styles and consolidate into each student's record.

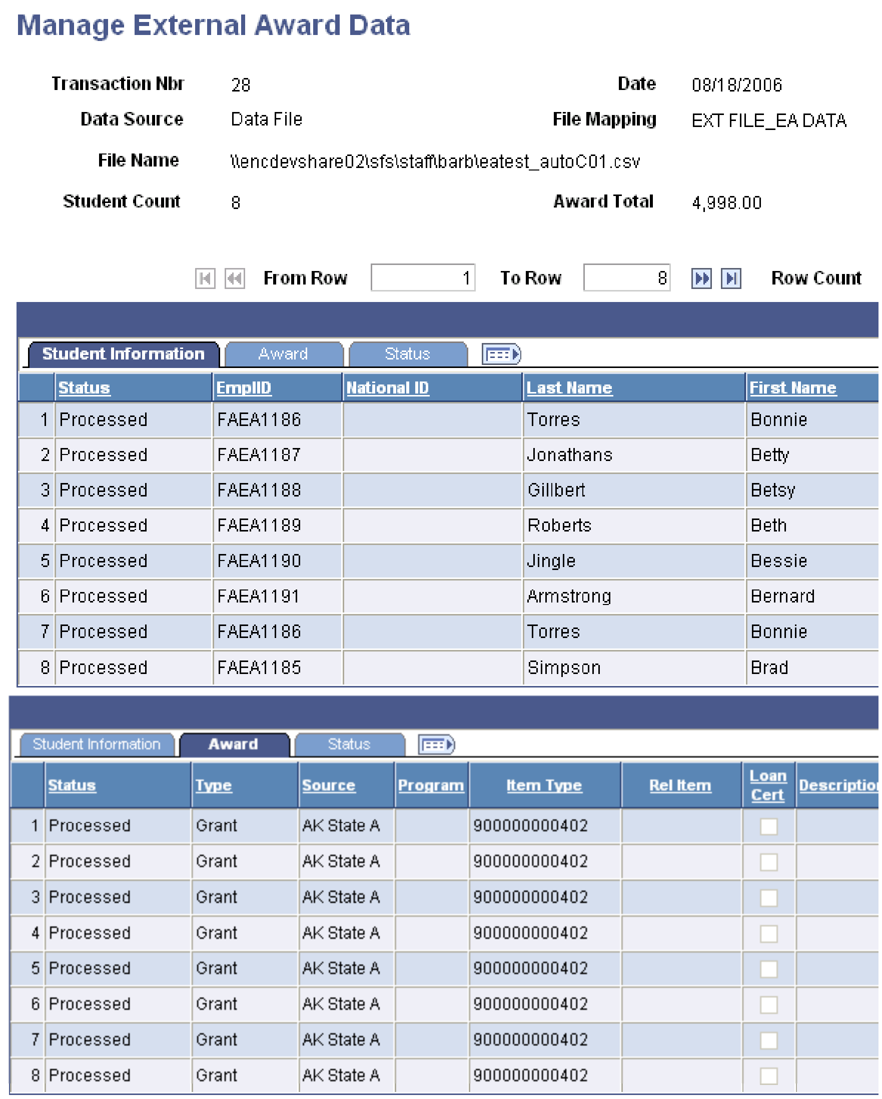
Planned Financial Aid enhancements will continue to build out self-service capabilities and additional functionality so institutions can better manage their packaging and award maintenance processes.

External Award Load Process

Many institutions face the challenge of managing awards coming from multiple sources. These awards frequently are communicated to the institution via electronic data files, from organizations such as state scholarship agencies, external scholarship agencies, or spreadsheets from various academic departments or schools within the institution. In order to facilitate processing these awards and placing them on the student's award record, Oracle is planning to deliver new functionality to enable the institution to automate this important step.

Included with this planned feature are:

- The ability for the financial aid office to define and maintain separate layouts for the different types and source of files to be processed. For example, the financial aid office may have one standard layout for awards coming from a state grant program, and another for scholarship awards from the university's school of business.
- The ability to identify Student Financial payments as an external award to be posted to a student's financial award package. For example, employee waivers and third-party contract payments are posted to a student's student financials account. A separate process to populate the staging tables is also planned.
- External awards are first loaded to staging tables, where the aid administrator can edit or place pending transactions on hold. In addition, the aid administrator can populate the staging tables directly through manual entry as a simplified way to enter ad hoc awards for a variety of students.
- After placing awards on the student's award record, the aid administrator can run the new Repackaging process to resolve any over-awards situations, if necessary (see below).



Manage External Award Data

Transaction Nbr	28	Date	08/18/2006
Data Source	Data File	File Mapping	EXT FILE_EA DATA
File Name	\\encdevshare02\sfs\staff\barb\eatest_autoC01.csv		
Student Count	8	Award Total	4,998.00

From Row 1 To Row 8 Row Count

Student Information | Award | Status

	Status	EmplID	National ID	Last Name	First Name
1	Processed	FAEA1186		Torres	Bonnie
2	Processed	FAEA1187		Jonathans	Betty
3	Processed	FAEA1188		Gillbert	Betsy
4	Processed	FAEA1189		Roberts	Beth
5	Processed	FAEA1190		Jingle	Bessie
6	Processed	FAEA1191		Armstrong	Bernard
7	Processed	FAEA1186		Torres	Bonnie
8	Processed	FAEA1185		Simpson	Brad

Student Information | Award | Status

	Status	Type	Source	Program	Item Type	Rel Item	Loan Cert	Descriptio
1	Processed	Grant	AK State A		900000000402		☐	
2	Processed	Grant	AK State A		900000000402		☐	
3	Processed	Grant	AK State A		900000000402		☐	
4	Processed	Grant	AK State A		900000000402		☐	
5	Processed	Grant	AK State A		900000000402		☐	
6	Processed	Grant	AK State A		900000000402		☐	
7	Processed	Grant	AK State A		900000000402		☐	
8	Processed	Grant	AK State A		900000000402		☐	

Users will have summary pages to review financial aid data loaded from external files.

Packaging

The Packaging process is one of the most, if not *the* most, critical processes for a Financial Aid Office. It involves an enormous amount of rules and criteria such as federal government requirements, institutional goals and objectives, and overall balance and equity in how funds are distributed. Also, students need to know the status of their awards in order to make their enrollment plans. For all these reasons it is critical that packaging be done correctly and efficiently. To assist schools with this process, Oracle is introducing a number of new enhancements and features to help schools to streamline their packaging processes.

Auto-Packaging

Currently, the aid administrator must first determine the correct Packaging Plan, assign it to the student, and then retrieve the associated awards, validate, and post the award package. Because of the manual intervention required to assign the Packaging Plan ID, this process is prone to error and inconsistencies with the Mass

Packaging batch process, which uses the criteria or equations from the Packaging Plan setup.

To address these issues, Oracle is planning to enhance the Auto-Packaging process to automatically select the Packaging Plan using the same criteria or equations from the Packaging Plan setup. However, this enhancement will not remove the ability for the aid administrator to manually assign the Packaging Plan ID as they do today.

Planned enhancements include customer-generated requests for greater flexibility in working with complex populations and financial aid criteria.

Mass-Packaging

With the previous release of Campus Solutions, we enhanced the Packaging Process by replacing the old criteria and equation processor selection with the Equation Engine. However, we did not extend this flexibility to the first step of defining the population to be packaged via the Mass Packaging Query Definitions. Many schools have requested additional flexibility to select complex populations and define complex criteria needed to correctly and equitably manage their funds. With the 9.0 release, the following planned enhancements will support complex population and selection criteria.

Ready-to-Package Field

Using the new Population Update tool (see below), the aid administrator will be able to update the Ready-to-Package field on the Packaging Status Summary page (STDNT_AID_ATRBT record) for defined populations. The administrator will have tremendous flexibility to define and manage the information and populations since the Population Update tool uses Population Selection, which in turn uses either the Equation Engine, PS Query, or an external ID file to define the population. (For more detail about this feature, please see the Campus Community section of this document.)

Mass-Packaging Query Definitions

The second enhancement provides schools with additional flexibility and control over the Mass Packaging process and enhances the Mass Packaging Query Definitions by replacing the existing criteria with Population Selection. Population Selection allows the institution to define their populations for Mass Packaging using the Equation Engine, PS Query, or an external ID file. This allows the institution to tailor their Mass Packaging runs and the overall packaging process to meet their specific needs and requirements.

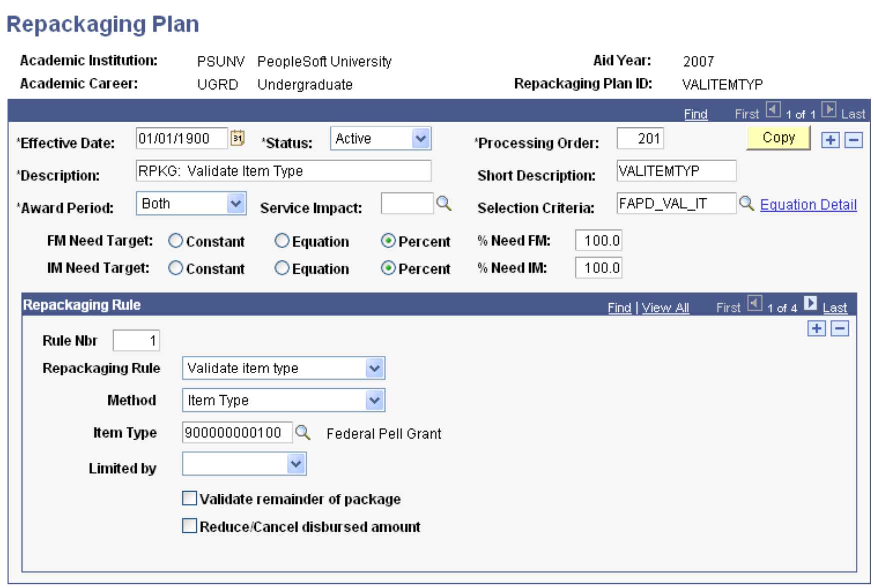
Repackaging

As part of the packaging process, institutions frequently need to revise the award package for a student due to a variety of changes, including new awards, changes in eligibility, or changes in funding levels. Currently, to repackage these students in an automated manner, institutions are required to run the same packaging process as for the initial award package. However, this does not allow the aid administrator to adjust the existing award package, but instead s/he must calculate an entirely new award package. Depending on the timing of the repackaging effort, this can result in the student receiving a drastically different award package. For example, if the institution has already awarded its entire pool of FSEOG funds, then a student who received the award initially may not receive it now since there are no funds remaining to award. Similarly, this process does not effectively recognize when a student has taken an action on an award, such as accepting or rejecting a particular award type. In order to work around these limitations, institutions have had to develop manual workarounds, or create customizations to support their repackaging needs.

To better enable institutions to meet their repackaging needs and to do so in a more timely and efficient manner, Oracle is planning to deliver extensive new functionality specifically for repackaging. This new functionality will allow institutions to define a series of Repackaging Plans similar to the current Packaging Plans with rules to control how the system adjusts the student's award package to resolve over-awards. Adjustment options include:

- Reduce self-help: loans
- Reduce self-help: work
- Indicate specific Loan Types or Item Types to be reduced and in which order, limit/maximum amount to reduce, and honor disbursement protection

The different sequences also can accommodate different rules for different types of new external awards. For example, if the student has received a new external scholarship, the institution may define different rules than if the student has received a new state grant. Based upon where the institution has sequenced any new external awards, the system will evaluate any awards that appear after that new external award (awards with sequence numbers greater than the sequence number of the new external award) for repackaging following the defined repackaging rules.



Users will have flexibility in determining the rules for Financial Aid Repackaging.

This new Repackaging Process will utilize Population Selection to enable the institution to identify a very specific population to be processed. Population Selection allows the institution to define the population to be processed using either the Equation Engine, PeopleSoft Query, or an external ID file.

Self-Service

Greater student self-service functionality in the financial aid process is planned.

Oracle intends to continue to build out the self-service design and functionality started with Campus Solutions release 8.9. Following are brief descriptions of the specific functionality we are planning to deliver in Release 9.0:

Report External Awards

Many institutions are moving more and more of their student interactions to the Internet. Campus Solutions 8.0 and 8.9 support the ability for students to accept their financial aid award offers via self-service. However, many institutions would like to provide students with the ability to notify the institution of any additional sources of funding as part of the financial aid acceptance process. Since the institution is required to track additional sources of funding, it is important that students have the ability to easily report any additional funds as soon as known so that the institution can make adjustments to the previously offered award package as promptly as possible. Ensuring that the student has the most current and accurate notification of their award package is critical so the institution receives prompt and accurate payment against any outstanding student receivables.

Oracle plans to assist institutions with this by providing new self-service functionality to allow students to report any additional sources of funding via self-service. To support this, new functionality is planned to include:

- Ability for the institution to define Item Types and make them available for students to select as part of the self-service data entry process.
- Addition of a description field for awards not already defined by the institution (not already defined by an existing Item Type).
- Ability for school to aggregate external awards into a single Item Type or maintain separately.
- New external awards reported via self-service will populate the external award suspense tables. The aid administrator will then review and verify submitted awards, map awards to Item Types as necessary, and then post those new awards to the student's award record via the new External Award Load process (see new External Award Load feature above).
- New self-service messages will generate if a new external award is in pending status and the student wishes to view their award via self-service.

View and Print Financial Aid Award Notice

Many institutions are continuing to seek ways to reduce administrative costs. At the same time, students are becoming more and more accustomed to interacting with the institution via the Internet and self-service. As a result, more and more institutions are seeking to provide information, documents and communications to students through self-service. To help institutions meet these goals and expectations, Oracle is planning to provide the ability for institutions to provide the financial aid award notice to students via self-service.

Using the Forms Engine version of the Financial Aid Award Notice (FE FAN), this new functionality will allow institutions to display a link for students on the Award Summary and Accept/Decline Award self-service pages. By clicking on this link, students will be presented with a PDF version of their most recent FE FAN for that Aid Year. They can then use the print functionality through the Adobe Reader viewer window to print a copy of the FE FAN as necessary. In addition, the aid administrator will be able to track which students have printed their FE FAN via new status fields added to the Award Notification inquiry page.

Select a Lender

Planned enhancements will make the loan process more highly automated and efficient.

Many institutions are seeking more automated and efficient procedures for loan processing in order to expedite the disbursement and delivery of loan proceeds to the institution and to students. To facilitate this, many institutions have begun to use preferred lender lists, or simply assign students to a lender. However, many institutions feel it is always the student's obligation to select a lender and require the student to do so prior to processing the loan. To assist those institutions that require the student to select their lender, Oracle is planning to deliver new functionality for institutions to provide this option in self-service.

To support this, the institution will define by loan type a new Lender Selection List, including institution-defined text about that lender, and specify the order in which the lenders are displayed in the list.

If the student has been awarded a loan for a loan type that requires a lender, the student will be presented with a link on the Award Summary and Accept/Decline Award pages. This link will take the student to the new Lender Selection page, which will display the lenders from the Lender Selection List for that loan type.

- If the system determines that the student has a prior lender, it will display this lender to the student (using the same logic as in the current loan origination process – looking for current loans, prior loans in PeopleSoft, or prior loans in NSLDS). The student can then make changes if desired.
- If the student wishes to change the lender, an institutionally defined warning message can be displayed providing the student with guidance on the risks or implications of changing the lender.
- Because of the challenges and the wide variety of business and loan processing options, the student will only be allowed to select or change the lender through self-service up until the time that the loan has been originated. Once the loan has been originated, the student will be presented with a message instructing her to contact the financial aid office to make any changes. This message is configurable by the institution.

Access Loan Counseling

Institutions are required to conduct loan counseling with their student loan borrowers prior to borrowing for the first time from a new loan program and then again upon leaving the institution. Institutions are required to track that the student has satisfied these requirements. Currently, institutions are able to track completion of entrance and exit counseling, but it is not tied to the specific loan program. In addition, institutions do not have a delivered mechanism to communicate the requirements to students and to alert students that they need to fulfill the counseling requirement.

To assist institutions in their compliance with the federal loan counseling requirements, Oracle is planning to deliver the following new functionality:

- Administrative pages to track completion of both entrance and exit counseling by loan program for each student.
- Setup pages to define those loan programs requiring counseling and the effective dates for displaying exit counseling dates.
- Hyperlinks to be displayed via self-service if the student has not already completed the required counseling. The links will take the student to the loan counseling site of the institution's choice such as the primary lender, Mapping Your Future, or others. Please note that Oracle is not delivering or supporting the actual loan counseling content.

Students are expected to be able to provide, through self-service, the required authorization for how to apply excess federal financial aid funds for the specific enrollment period in which the funds were awarded.

Authorize Application of Excess Financial Aid Funds

U.S. federal government regulations require that federal financial aid awards be used to pay only eligible charges for the period of enrollment covered by the aid year in which those funds were awarded. The regulations do provide the ability for schools to collect an individual authorization from a student to allow funds to pay for either eligible charges for a prior period of enrollment, or to allow funds to pay otherwise ineligible charges, such as parking or library fines. Campus Solutions provides the ability for the administrator to enter an authorization from the student. However, the institution must currently collect that authorization manually or through a custom web page.

With the 9.0 release of Campus Solutions, Oracle plans to deliver new functionality to enable the student to provide this authorization through self-service. To support this, we plan to provide:

- Student authorization supported by the system through the use of Student Permission Waivers in Student Financials. The existing setup for these will be modified to include a checkbox to indicate if that waiver should be made available in self-service. In addition, a long description field will be added so the school can provide a more detailed description of the waiver to be displayed in the new self-service page.
- Student authorization page for self-service. This page will include a disclosure statement along with the longer description of the waivers to be selected. The student will select the waiver(s), and then confirm the

selection. The waiver(s) will be posted real-time and will be used the next time activity occurs on a student's account.

Because of the complexities with the posting and payment allocation processes, once the student has confirmed her authorization, we will display her authorization to the student via self-service. However, if the student subsequently wishes to remove her authorization, she will need to see an administrator to do so.

Population Update

Financial aid administrators are intended to be able to flexibly update and manage certain fields in a defined population of students.

While much of financial aid is rule and regulation-driven, there are numerous times when the aid administrator needs to update data on a more ad hoc basis. For example, the institution may need to meet unique business requirements or adjust to changes in regulations or funding. In either example, Campus Solutions has previously provided relatively few options to enable the administrator to accomplish this. Most institutions have developed custom SQRs or other processes to support this need.

With Campus Solutions 9.0, Oracle is planning to deliver new functionality called Population Update to enable administrators to update certain records and fields for defined populations of students. This new functionality is intended to provide institutions with much needed flexibility and control in the management of their business processes. In order to assist institutions in managing and protecting their data integrity, we are initially restricting the use of Population Update to only certain records and fields. In the Financial Aid area, fields expected to be enhanced are:

- Fields that can be manually updated from the Packaging Status Summary page (PS_STDNT_AID_ATRBT). Many of these fields are important to enable an institution to tailor its packaging process to meet its unique business needs. For example, the institution could use Population Update to define a unique population it wants to target for an institutional verification process by updating the INST Verification Status field to 'Select'; or the institution could use Population Update to define a population of students who are ready to be packaged by updating the Aid Processing Status field to 'Ready to Package'.
- Financial Aid Term – Budget Required field. The Budget Required field is automatically set to 'Assign Budget' when other data in the system is changed and when that data might possibly have an impact on the student's Cost of Attendance budget. Population Update is planned to allow the school to define populations of students for whom it wishes to reset that value to 'No Assign' since, in many cases, the institution does not want to recalculate the budget.
- Packaging Variables. Many institutions use the Packaging Variable fields to store data that is otherwise inaccessible to the Packaging process. Although the use of the Equation Engine with Packaging now alleviates the need for much of this, many institutions still have the need to use Packaging Variables for various institutional reasons. Population Update is intended to provide

these institutions with the ability to populate these variables for specific populations of students.

(For more Population Update enhancements, please see the 3C's section in this document.)

Enhancements planned in Contributor Relations 9.0 will improve every business process area in the solution.

CONTRIBUTOR RELATIONS

The planned new release for Campus Solutions reflects the top priorities from Oracle's Contributor Relations customers. A number of enhancements are intended to streamline data entry and access to the system. In addition, Contributor Relations customers can expect to benefit from the foundational enhancements planned in the Campus Community module. Virtually every business process area in Contributor Relations is expected to have some enhancement in functionality as well as usability.

External Organizations

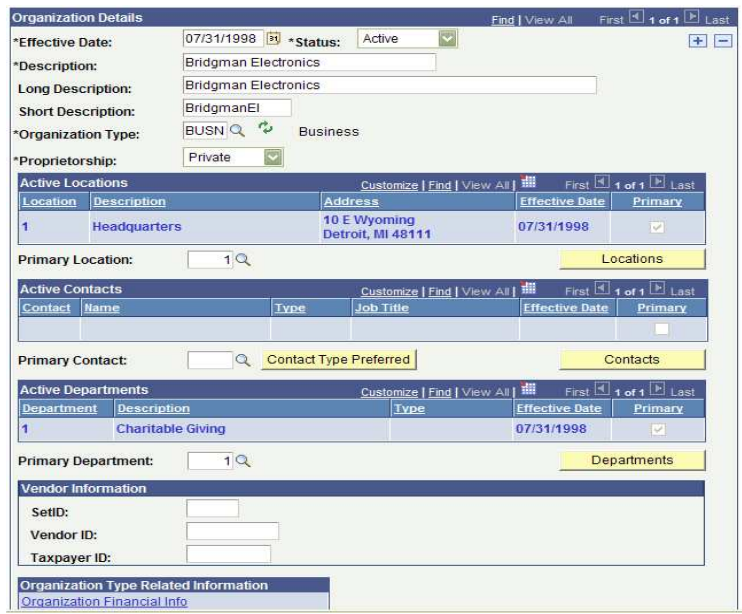
The External Organization component, while designed to support multiple modules in Campus Solutions such as Admissions or Student Financials, is used extensively by Contributor Relations customers. With the heavy use of this feature in the Advancement office, customers demanded improvements in the setup and maintenance of this data. Currently, adding and maintaining External Organizations is time-consuming and cumbersome. For example, correction mode is needed to complete the set up of an External Organization. In Release 9.0, customers are intended to be able to maintain a history of all changes to External Organizations, including changes to contacts, locations, and departments.

This feature is planned to be re-architected to streamline data entry and to add more flexibility around how External Organizations are used, especially in the realm of generating communications. Some of the intended changes include:

- Effective dating added to the External Organization Location, Contact, and Department components. Effective dating would allow the user to accommodate a history of changes to any of these elements. For example, if the contact in an organization changes over time, a user can see both the prior and current contacts.
- Enhancements to Contact Type, such as Preferred Contact, which will allow greater control over Communication selections. Previously, when a user wanted to communicate with a contact in an External Organization, s/he was only able to select one Primary Contact. This limit might cause the letter to go to an inappropriate person, potentially limiting the effectiveness of the communication. The planned new design offers more options to ensure communications reach the most appropriate person or persons. This planned new capability to select Contact Types is leveraged in the Communication Generation process in which the user can define one or multiple contacts to receive the communication. The new choices are planned to include: All Contacts, Custom List, Organization Preferred or Organization Primary. The value 'Custom List' allows the user to select any contact, regardless of contact type.

- Expanded choices in Communication Generation are also intended for Departments and Locations. The available options for Departments and Locations are: All Departments/Locations, Custom List or Organization Primary Location/Department.

- Contact Type Usage is intended to follow the design of Name and Address Type Usage. With Contact Type Usage, the user will be able to define and select the hierarchy of the contact type s/he wants such as President's office, Department head, etc. If the first contact usage type isn't present, the system looks for the second, third, and so on. To take advantage of this planned new feature in Contributor Relations, the Organization Recipient Usage field would be added to the Run Control for the new Communication Generation process.



Enhancements planned in the new release will give institutions greater flexibility in handling external organizations.

- External System Organization ID. As with prospect, donor, and alumni, many institutions use lists from external sources or associate their organization affiliations with a ratings scheme or some other identification. The External System Organization ID will help ensure the user can track the external system identifier, if any, within the existing External Organization data structure. For example, your development office may be communicating with a service that provides foundation information, such as support interests, and your users need to keep data about the foundations in sync with the external provider. The new External System Org ID provides the data needed to match records when the users need to communicate with the external system. Previous releases only allowed this capability for People, not Organizations.

Significant enhancements are planned that will make it much easier for your institution to track external, third party sources of data and identify organizations as well as persons.

- New Setup Table so the user can identify if an external system ID is for people, organizations, or both. To ease the upgrade, we plan to migrate the old values from the Translate Table into this new table.
- Customizable navigation. Because the External Organization structure is used by several business offices on campus and is business process-specific, the planned enhanced navigation will support multiple users' needs. For example, as part of completely defining an External Organization, Contributor Relations users may need to add information about Foundations while data that is required by users in the Admissions and Student Financial offices can still be supported. The user will be able to add navigation to the External Organization component so s/he can move efficiently to the other pages needed to complete the set up. We plan to add new controls in the External Organization Type field to drive the new navigation. This planned enhancement streamlines the component so the user sees only what is pertinent to the generic Organization and can then navigate to the specific information desired. Further, since this navigation is defined by the institution, users have the ability to link whichever additional pages they may want to complete as part of defining an External Organization. When the user clicks on the navigation links at on the External Organization component, it is intended that they will be transferred to that new page, be able to make their updates, click Save, and then be returned to the original External Organization page.
- Planned support for multiple North American Industry Classification System (NAICS) codes for each organization (the system that replaced the Standard Industry Codes in North America) while preserving the single SIC field in current releases. We will deliver the current NAICS values as sample data but do not plan to update this list going forward.
- New External Organization Regional Page, modeled after the Person Regional Page. This new page includes the NAICS (mentioned in prior paragraph), information specific to The Netherlands, and information to support OUAC for Ontario, Canada.

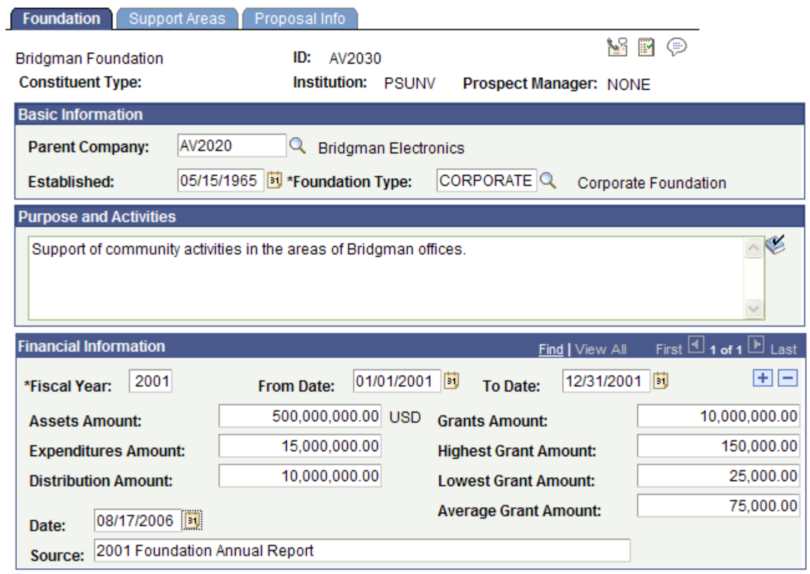
Usability Improvements

There are a number of places throughout Contributor Relations where customers have requested a different flow or additional data fields to better support their business processes. Some of these planned enhancements include:

- Header portion of all Contributor Relations pages made consistent throughout, with the FERPA hyperlink and Prospect Manager information available where appropriate. If the prospect manager has an email address on record, the Prospect Manager hyperlink opens the email client so s/he can communicate immediately to the person designated as the Prospect Manager in the context of the transaction being reviewed.

Many usability enhancements are planned for Contributor Relations to greatly improve the user experience and better support the way your development organization manages its business processes.

- Foundation data entry fields are planned that give users the ability to view and search for foundations meeting specific funding requirements. This enhancement is based on customer input about the challenges they have maintaining foundation information such as the name of the funding entity. We also plan to add a new component to track foundation areas of interest, proposal timing, and so on. Also planned is a supporting online inquiry page that would allow the user to find foundations that support a particular kind of project, within a specified time frame, to make it easier to identify prospect foundations.



Usability enhancements will make it easier to view, search, and track foundations

- Spouse Rings are planned for the Bio-Demo pages in the Campus Community pages accessed from within the Contributor Relations menus. Adding the icon for Spouse Rings ensures a more complete view of spouse relationships throughout the Campus Community pages, along with the enhanced ability to keep the data about spouses in sync. For example, if you are changing an address for someone, you can click on the Spouse Rings icon to link to that person's spouse and update that address as well.

- Link between Involvement Codes, Types, and Categories. The Involvement module was designed to inform staff about the affiliations, interests, activities, honors, and awards of an individual. This planned enhancement will help ensure that Involvement Code values are appropriately linked to Categories and Types, thereby improving data integrity.

- Associate the Involvement Code to at least one Type and at least one Category to ensure the correct data is being entered. This planned connection will make it much easier for users to select the appropriate value for the type of involvement they are tracking. For example, Survey Results will not intermingle with Scholarship types.

Usability enhancements planned for this release will improve efficiencies in the administration of contact data for more effective prospect management.

- Effective Dating rules which will allow multiple rows to exist so users will be able to see a history of the changes to that Unit, such as a Description, over time.
- Streamline data entry and combine activities onto a single page. For example, the definition of staff and volunteers will include the Role setup to more efficiently manage and maintain information about staff and volunteers. By combining two components into one, the users will be able to immediately indicate the roles a staff person or volunteer may take, such as Prospect Manager.
- More intuitive navigation, especially in the self-service pages. To improve the intuitiveness of the Outreach pages used by Prospect Managers, we intend to apply a consistent set of buttons that appear at the end of each task managed through Outreach. This should help the user choose the step he or she might want to complete next for a prospect. He or she can also use the Go To dropdown options to complete a task for another constituent in the user's My Prospects. (More planned enhancements to the Prospect Manager functionality are detailed in the next section.)

Prospect Management

Several enhancements have been planned for easier, more flexible management of an institutions' prospective donors. These planned improvements include:

- Allowing Contact Reports to be entered prior to the completion of an Action. On every Action, there is a tab for Contact Reports so the user can track the results of the Action. Prior to Release 9.0, the users could only enter a Contact Report when the Action is complete. The planned new design allows the Contact Report to be open while the Action is in progress, enabling the user to build the contact report as he or she goes through the Action.
- Standardize Action summaries and filters to include Contact and Action Types. It is intended that users be able to filter and sort by contact and action types, such as all phone calls together or 'asks' together. This is planned to be standard throughout the Prospect Management feature where Actions are used which will improve the consistency of the overall feature.
- The Resource Assignment Inquiry pages are planned to be extended to sort alphabetically, as well as by Person or External Organization ID so that People and Organizations will not be intermingled alphabetically in the list.
- Redesign the Ratings functionality to improve data integrity. We plan to enable identification of where a Rating indicator or Rating Category originated, such as Marts and Lundy. We also plan to provide the means to link specific Rating Indicators, such as income range, to related Categories, such as giving potential, or Types, such as peer or staff, which will ensure a tighter connection with, and clarity of, the data.

Greatly enhanced search capabilities, along with security controls, are planned.

Searches

The Search/Match capabilities for the entire Campus Solutions applications were enhanced in Release 8.9. In the continuing evolution of leveraging this powerful search capability, the specific Contributor Relations search was planned to be eliminated and all parts of the application expected to use the Campus Solutions Search/Match. Contributor Relations fields were planned to be incorporated into the overall Search/Match process.

In Release 9.0, the user can expect to have the power of Search/Match with ability to search on Class Year and other Contributor Relations-specific fields. More importantly, the user is intended to be able to create Contributor Relations-specific Search/Match result sets. You will be able to define the result sets specific to roles or to individuals. This flexibility allows the various Departments or Units to see the results exactly as they need to.

All the new Contributor Relations-specific search fields are planned to be included in the standard Search/Match functionality to allow saved-search criteria and results sets to be customized to your business processes with access controlled by security role if necessary.

Another planned enhancement to External Organization Search/Match result sets is to include Carry ID functionality similar to that currently available when searching for a person, and all search records are planned to be standardized throughout Contributor Relations so a user can search by an expanded, consistent set of search fields.

Academic Summary

In keeping with the theme of providing better access to the wealth of information stored in Contributor Relations, we plan to provide a single page to display all degree information in a grid structure that can be sorted based on the user's preferences. The data will continue to be stored on multiple tables such as external, legacy, and student administration. However, this planned new record supporting the Summary Page will also prove useful for reporting. Users will no longer have to query against three tables since the data is now planned to be available in one view, with both the descriptions and codes for each degree.

Academic Information Customize | Find | First 1-6 of 6 Last

	Institution Name	Year	Degree	Major1	Major2	Minor1	Minor2
1	PeopleSoft University	2003	Master of Business Admin	Political Economy		Business Administration	
2	PeopleSoft University	1998	Bachelor of Engineering	Electrical Engineering		Environmental Design	
3	PeopleSoft University	2001	Bachelor of Arts	Classics-BA	Sociology	Music Minor	English Minor
4	PeopleSoft University	2001	Bachelor of Arts	Philosophy (BA)			
5	Lewis-Clark State College	1996	Associate of Arts				
6	Great Lakes University	1999	Associate of Applied Science	Physics	Genetics	French	Sociology

Degree information will be summarized and displayed in a single view, even if the degree data comes from multiple sources.

Gift Entry Extensions

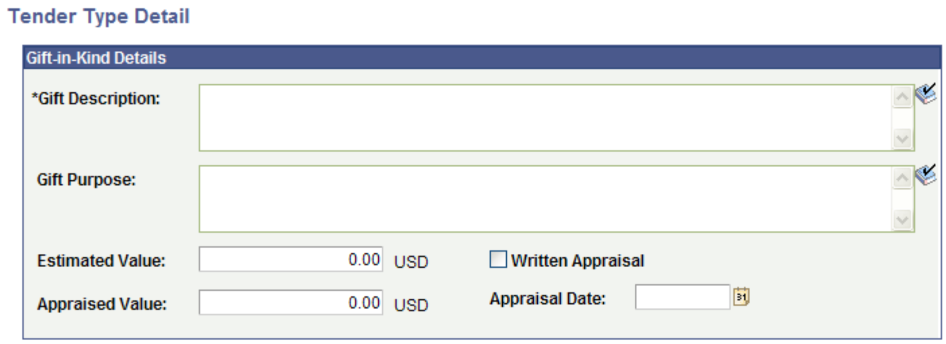
Users will appreciate the flexibility of the planned enhancements to entering gifts into the system to ensure comprehensive and accurate information on gifts and pledges.

Planned enhancements to the Gift Entry process include:

- Recognition and Donor IDs with a date of death or deceased service indicator will be flagged as DECEASED when selected in gift/pledge/membership entry. With this flag, the user will be aware that they are adding a transaction to a deceased person. This flag will help ensure accurate data entered into the correct record because the user will need to verify that they should be entering the gift in the deceased record.
- Enhanced flexibility in determining when gifts should be included in or excluded from the General Ledger Interface. This planned capability will allow tracking of gifts other than standard monetary tender, such as gifts-in-kind, that need not be reported to the General Ledger (GL). In Release 9.0, it is intended that non-monetary gifts can be flagged to be excluded from GL Interface processing. This planned enhancement follows the design of the existing controls in Pledge entry, where the Pledge Flag controls when pledges need to feed to the GL. The Pledge Flag defaults to 'off', ensuring that the user has to turn it on in order to send pledges to the GL. In the new enhancement for Gift entry, the system is set up to default the new flag 'on', assuming the user is going to send the Gift to GL. However, if the institution's business processes determines the default is not appropriate, it can be overridden.
- On the Gift Entry pages, the new Search hyperlink links to the enhanced Search/Match feature (see description above). Users will now have the power of Search/Match for Gift, Pledge, and Membership Entry. Since the Carry ID functionality has also been planned, users will be able to copy the Carry ID for a person or an Organization, saving time.
- In Gift and Pledge processing, we have planned to expand the reach of selection for the Tribute Notify ID value. Users will be able to select any person in the HCM database (any Employee ID in Campus Solutions or HRMS). This enhancement should help ensure the institution has complete data about gifts and pledges.

Tender Detail Extensions

Planned enhancements to Contributor Relations Release 9.0 will provide customers with options so they will no longer need to use the Comments section to record details about gifts-in-kind and securities. We plan to add new values and detail pages to Tender-type to support gifts-in-kind and securities. A specific data-entry page for gifts-in-kind is also planned that will include the ability to track details related to the gift-in-kind, such as whether or not an appraisal was performed. Also, a data-entry page for gifts of securities, such as stocks and bonds, is expected to be added and will include fields specific to tracking the value of the transferred securities. We also plan to add fields for the Description and security information, including CUSIP number.



Searchable data fields are available in which to enter details and comments about gifts.

For tender details that are not pertinent to data that is transferred to the GL during posting, a new, editable tender-details page is planned to allow editing of these details outside of a session.

Matching Gift Extensions

Our current functionality for Matching Gift is robust. With Release 9.0, we have planned to expedite ease-of-entry to create a more comprehensive solution. Matching gift entry is planned to allow for the following:

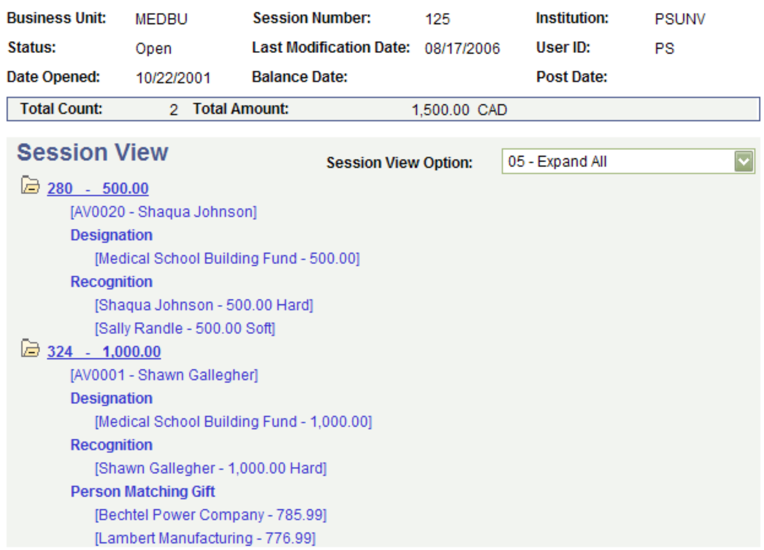
- Create a matching gift at the point that the unexpected match is received and enter it for the matching organization. Institutions frequently have to deal with receiving an unexpected matched gift from an organization for a donor they didn't have in the match program or for whom they had not created the relationship. The planned enhanced functionality means the user will be able to associate the donor with the organization and create the matched gift record while processing the Matching Gift information.
- Check all gifts during a session, create all expected matching gifts just prior to balancing the session, and create entries at the individual gift level. This new functionality will act as an added safety net to help prevent the loss of potential matching gifts so your development organization can maximize the outcome of each gift campaign, especially when matching is involved. Currently, the matching process is only applied at the Gift level, not the session level. So if the user misses the step of clicking the button to kick off the process, they will miss the match. The Maintain Sessions page will now have a Session matching gift button. At end of the session, the user will click the matching gift button and the program will review all person records s/he has not evaluated and checks for matching gift opportunities.

Sessions Extensions

Planned session entry enhancements include:

- Deposit Number field (bank identifying information) to align a particular session with a particular bank deposit for auditing purposes.
- Tree structure to view Session Details to permit a cascading, hierarchical view of the details of all gifts in the session by various criteria, including designations, recognitions, tributes, and matching gifts. From the Tree view,

users will be able to drill down on each gift to make any changes or additions you need and then return to the Tree. This tree structure could also be printed as a report using the browser Print command.



A tree structure makes it easier to make and track multiple gifts by various criteria.

Population Selection

Customers need the ability to identify groups of individuals or organizations for a variety of purposes. In Campus Solutions 9.0, Oracle intends to provide a powerful, easy-to-use tool that will allow groups to be dynamically created. Contributor Relations users will have the ability to continue to use the existing Build/Merge audience process, along with the new Population Selection utility. (Please see more detailed information about Population Selection in the Campus Community Section of this document.)

Population Selection is expected to include a configurable selection tool framework that allows the user to create a group of Employee IDs, Organizations, or any set of data you choose, using:

- PS Query
- Equation Engine
- External file load (e.g. MS Excel spreadsheet)

A number of Contributor Relations batch processes are intended to be reconfigured to use this new tool. These include:

- Audiences
- Initiatives
- Membership Organizations
- 3C Engine

- Communication assignment
- Service Indicator assignment and removal

Oracle's powerful XML Publisher tool is expected to give institutions much greater flexibility in the way they create and deliver communications to individuals and organizations.

Communication

The primary planned enhancement within the area of Comments, Checklists, and Communications (3Cs) for Contributor Relations users is the expected addition of a new Communication Generation process. This process is not intended to replace the existing Letter Generation process or the communication structures, but instead is planned to provide much greater power and flexibility for creating communications because it is intended to be delivered as an applications engine program that is constructed using the XML Publisher tool.

Oracle XML Publisher is a new java based product available within the technology stack of PeopleTools 8.47. Utilizing a set of familiar desktop tools such as Adobe Acrobat and Microsoft Word, users can create and maintain their own report formats based on development-delivered XML data extracts. XML Publisher will then convert these documents to the XSL-FO format. Users can also obtain third-party provided PDF forms, such as government tax forms, and merge XML data generated from any PeopleSoft application to fill in the forms with the required data.

In addition to a new Communication Generation engine, other planned 3C enhancements include:

- Communication preference selection such as email or letter
- Enhanced external organization contact usages allowing, for example, a choice of Primary, Preferred, or Custom List
- Improved usability of Person Communication Management and Organization Communication Management pages
- Use of Population Selection tool to mass assign communications for Organizations or individuals

For more detailed information about Communications, please see the Campus Community Section of this document.

CONCLUSION

Today's education environment calls for institution management to go well beyond the basics. With highly diverse and changing student population compositions, institutions must focus on attracting, nurturing, and retaining the best students, faculty, alumni and staff. At the same time, increased scrutiny, accountability, performance metrics, and cost controls to guide operations mean that technology investments must be strategic and provide demonstrable ROI—or value—to the institution.

The PeopleSoft Campus Solutions 9.0 is intended to meet customer needs, industry best practices, analysts' recommendations, and Oracle's own commitment to and leadership in the education industry.

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