Campus Solutions Update & Roadmap

Alliance Down Under
8 November 2017

Gary Allen
Oracle Higher Education

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Agenda

- Oracle Announcements
- Campus Solutions 9.2 Overview
- CS 9.2 Upgrade Successes
- CS 9.2 New Delivered Enhancements
- PeopleTools 8.56
- CS 9.2 Roadmap
- CS 9.2 Resources
- Q&A

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New leadership team, new investment and new resources

- **Vivian Wong**
  Group Vice President for Higher Ed Development
- Responsible for Higher Education Student Systems development and strategy
- Previous experience in executive roles with Higher Education and Service technology companies
- Graduate of University of Technology, Sydney

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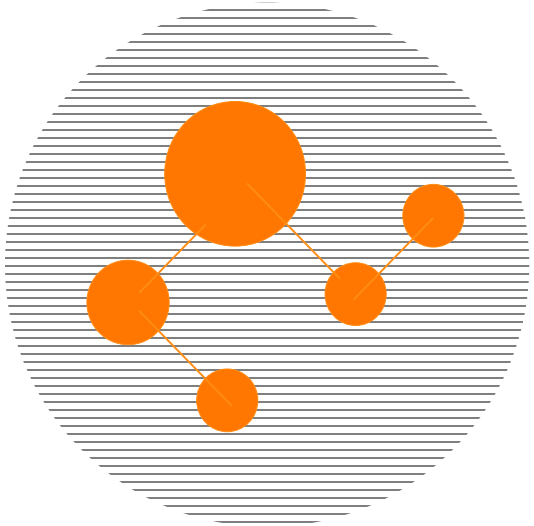
Oracle's Modern Student Strategy

Transforming the Student Experience to Help Every Student Succeed

Student First

Extensible Technology



Practical Path

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Oracle Campus Solutions 9.2 Lifetime Support Policy

Oracle continues to invest in customers who are on or moving to CS 9.2

- **There is no "end of life" date for Campus Solutions 9.2**
- Continuous delivery for PS 9.2 applications means that enhancements and updates are provided on the 9.2. codeline
- Premier Support dates are evaluated for update each year

Release	GA Date	Premier Support Ends	Extended Support Ends	Sustaining Support Ends
CRM 9.2	Jun 2013	Jun 2022	Not Available	Indefinite
CS 9.2	Dec 2015	Dec 2027	Not Available	Indefinite
ELM 9.2	Mar 2013	Dec 2027	Not Available	Indefinite
FMS/ESA/SCM 9.2	Mar 2013	Dec 2027	Not Available	Indefinite
HCM 9.2 [2]	Mar 2013	Dec 2027	Not Available	Indefinite
Portal Solutions 9.1	Oct 2009	Oct 2022	Not Available	Indefinite

Available at:
Oracle Lifetime Support Policy for Oracle Applications Guide
(http://www.oracle.com/us/support/library/lifetime-support-applications-069216.pdf)

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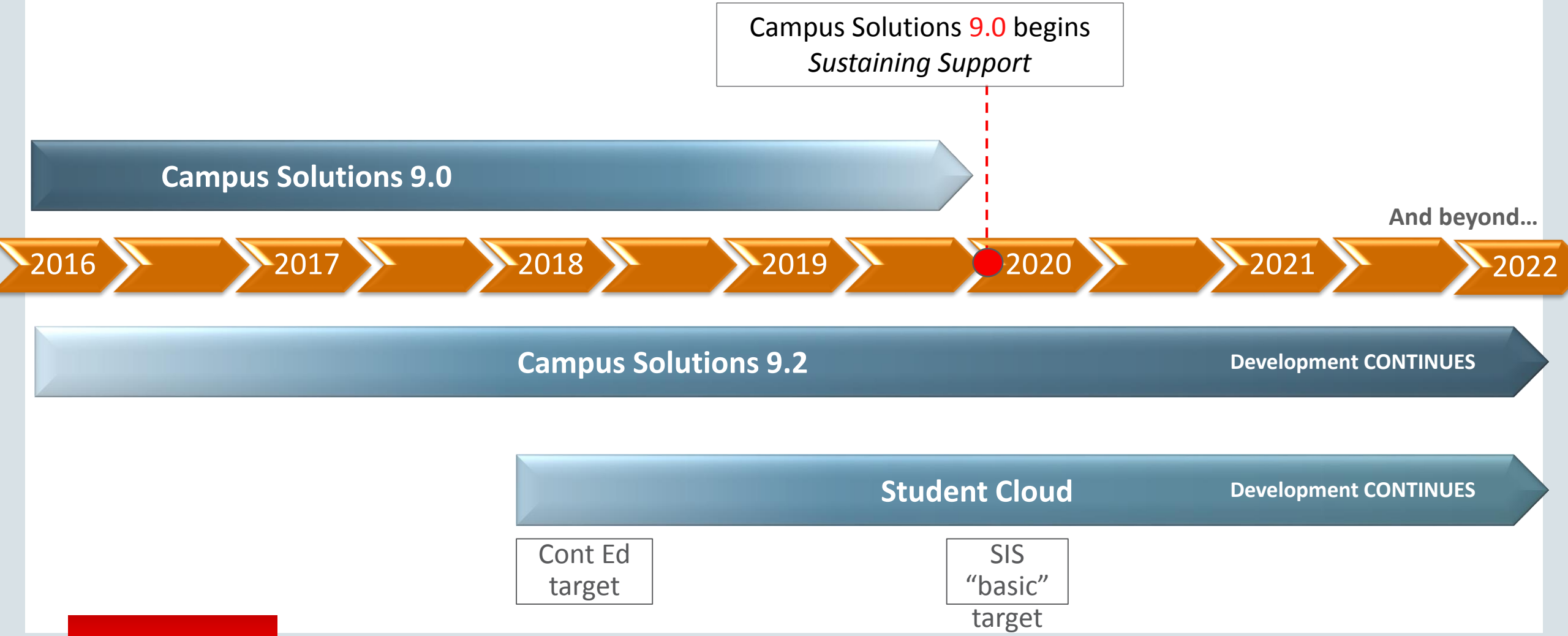
Oracle Student Products Timeline Summary

Options for your path forward



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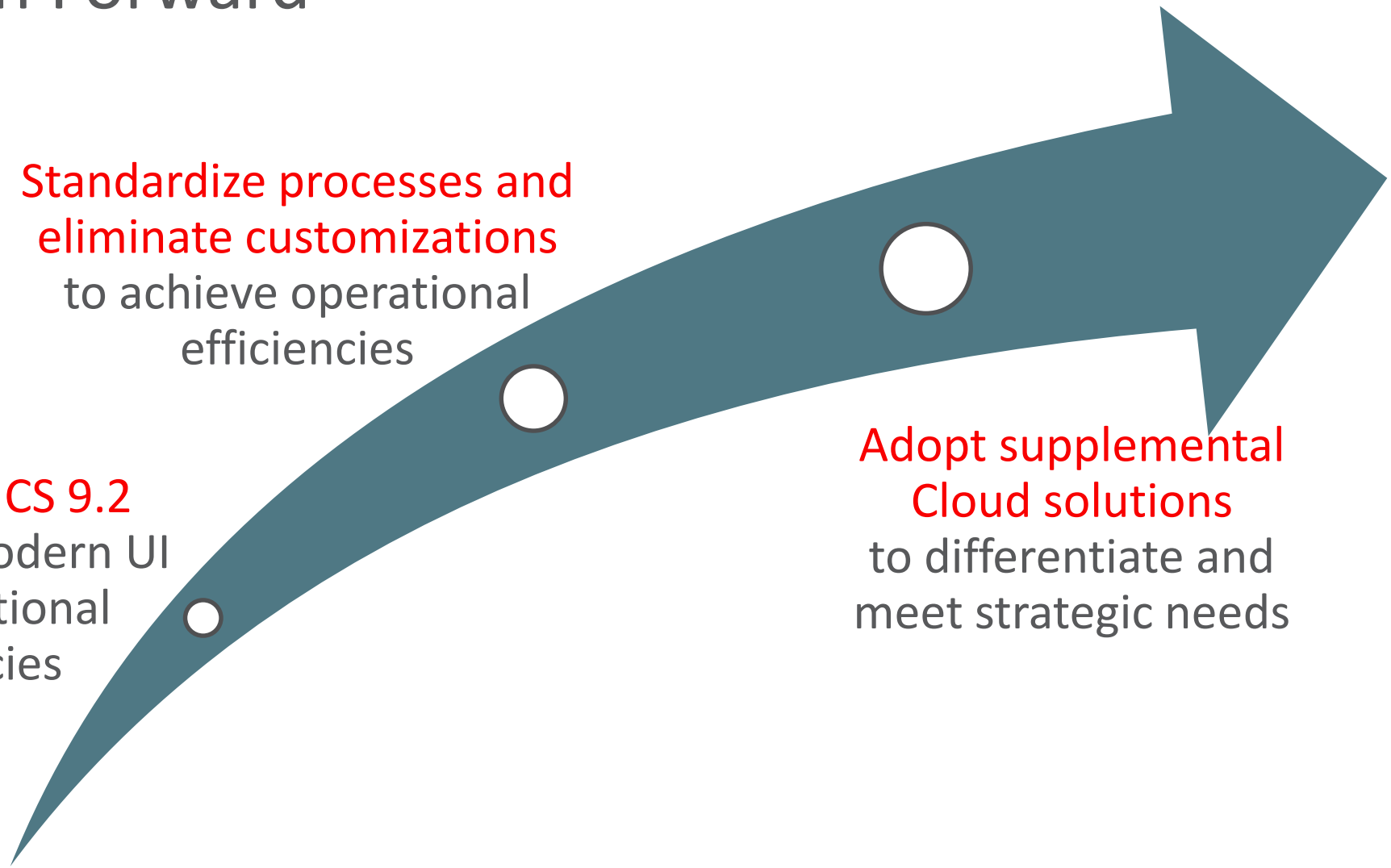
The Path Forward



Upgrade to CS 9.2
to achieve modern UI and operational efficiencies

Standardize processes and eliminate customizations
to achieve operational efficiencies

Adopt supplemental Cloud solutions
to differentiate and meet strategic needs

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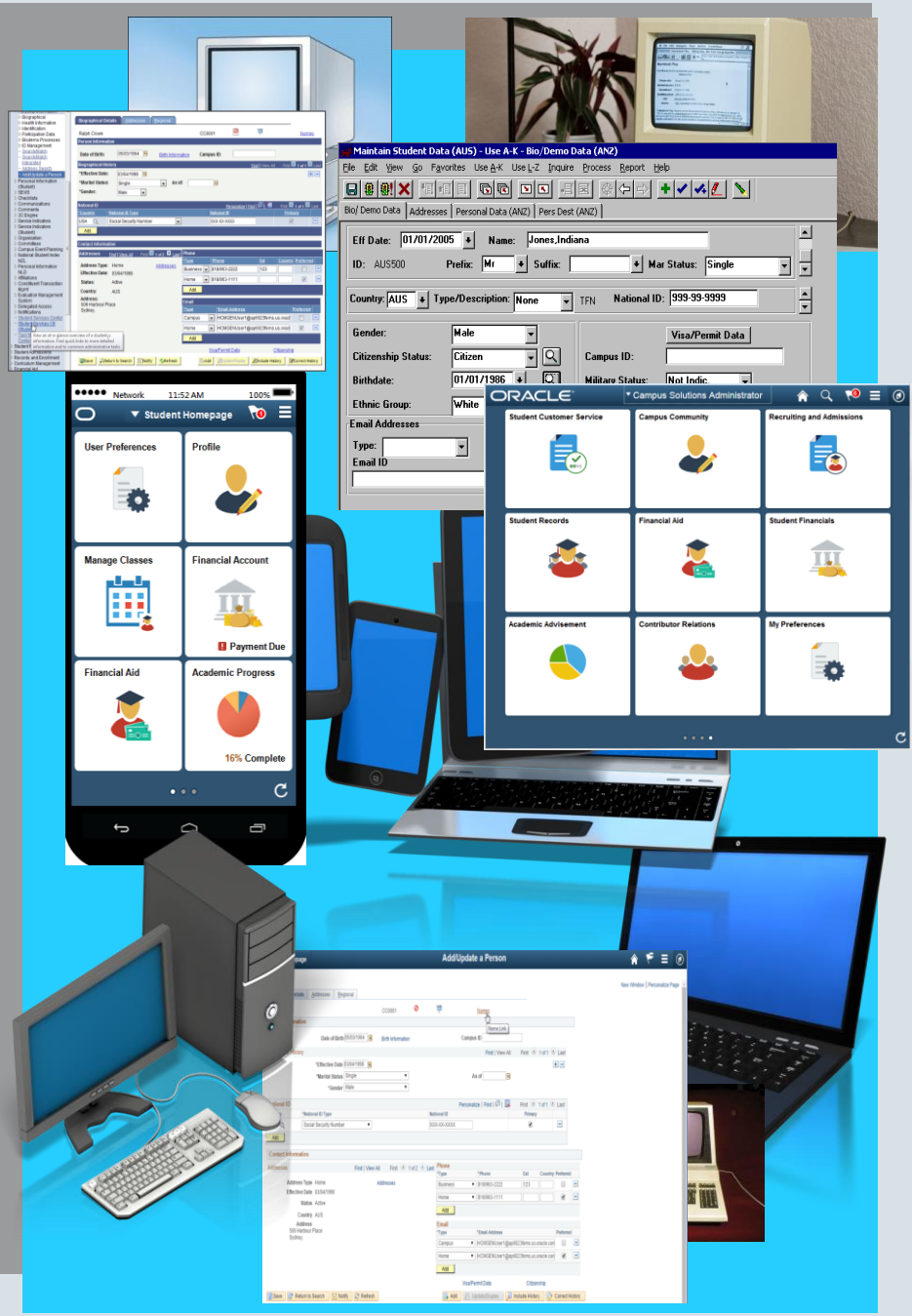
CAMPUS SOLUTIONS

Campus Solutions 9.2 Upgrade



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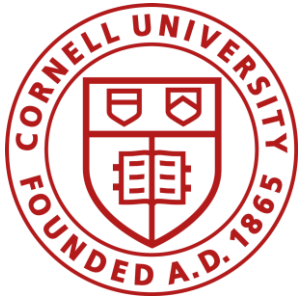
50+ Customers Live on CS 9.2



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CS 9.2 Upgrade Success

UNIVERSITY OF SOUTHERN QUEENSLAND

"The smoothest and easiest upgrade we have done so far."

Kristin Humphreys
Manager, Student Systems

- Over 27,000 students on three campuses
- Technical upgrade completed in 5.5 months
- Heavily customized environment
- "Functional" upgrade now under way to eliminate customizations and implement new features

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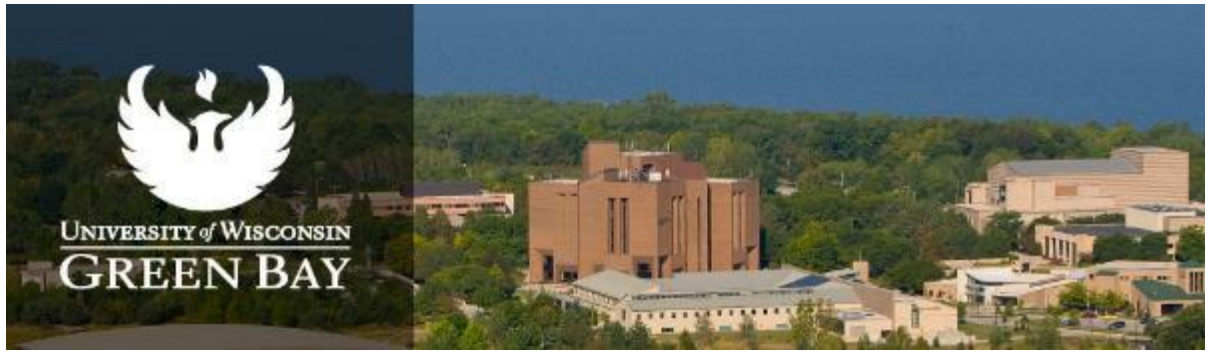
CS 9.2 Upgrade Success – UW Green Bay



- Lessons learned/recommendations
  - Create a separate testing area (get people out of their offices).
  - Make sure to have end-user support for testing and upgrade window.
  - Learn PUM – update process will be very different going forward.

- The upgrade took approx. 8 months
- 9 technical staff members and 12+ functional/testing staff (no consultants)
- Disruptions were managed by good communication with functional staff and choosing a good upgrade window
- CEMLI report showed less than 24% customized
- Testing took 3-4 months with 3 passes
- Went live with Fluid homepage for all staff and routed students and faculty to classic homepage.
- Going forward – campus User Group will meet to decide what fluid pages to roll out to students and faculty.

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CS 9.2 Upgrade Success – KCTCS

- Lessons learned/recommendations
  - The change management of project team members on fluid user interface took much longer than expected
  - “Bootcamp” for project team members on fluid user interface in the beginning phase or prior to the upgrade
  - Engage a full-time project manager and dedicated personnel for the duration of the upgrade.
  - More testing

- The upgrade started in October 2016 and completed on July 2, 2017; 16 colleges, 70 campuses live on CS 9.2
- Technical – 4, functional – 10, 1.5 technical consultant, partner lab
- Customization varies by functional areas. Converting classic pages to fluid pages was time consuming.
- Testing took 6 months
- Next steps:
  - Student access: Deploy additional delivered fluid user interfaces.
  - Administrative access: Create/deploy navigation collections

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Campus Solutions 9.2 Upgrade

Plan and Prepare: What you need to know

- Re-Certified CS 9.2 Upgrade Source Image 9.2.001 posted January, 2017
  - Requires minimum CS 9.0, Bundle #34, HCM Bundle #25 and PeopleTools 8.54 or higher before commencing their recertified upgrade.
  - Upgrading to CS 9.2 will take customers to the equivalent of CS 9.2 PUM Image 3 (~= CS 9.0 Bundle 43) and PeopleTools 8.55.10
- Using a certified upgrade ensures that your upgrade is predictable and successful
- Upgrade images are to be used for upgrade activity only!

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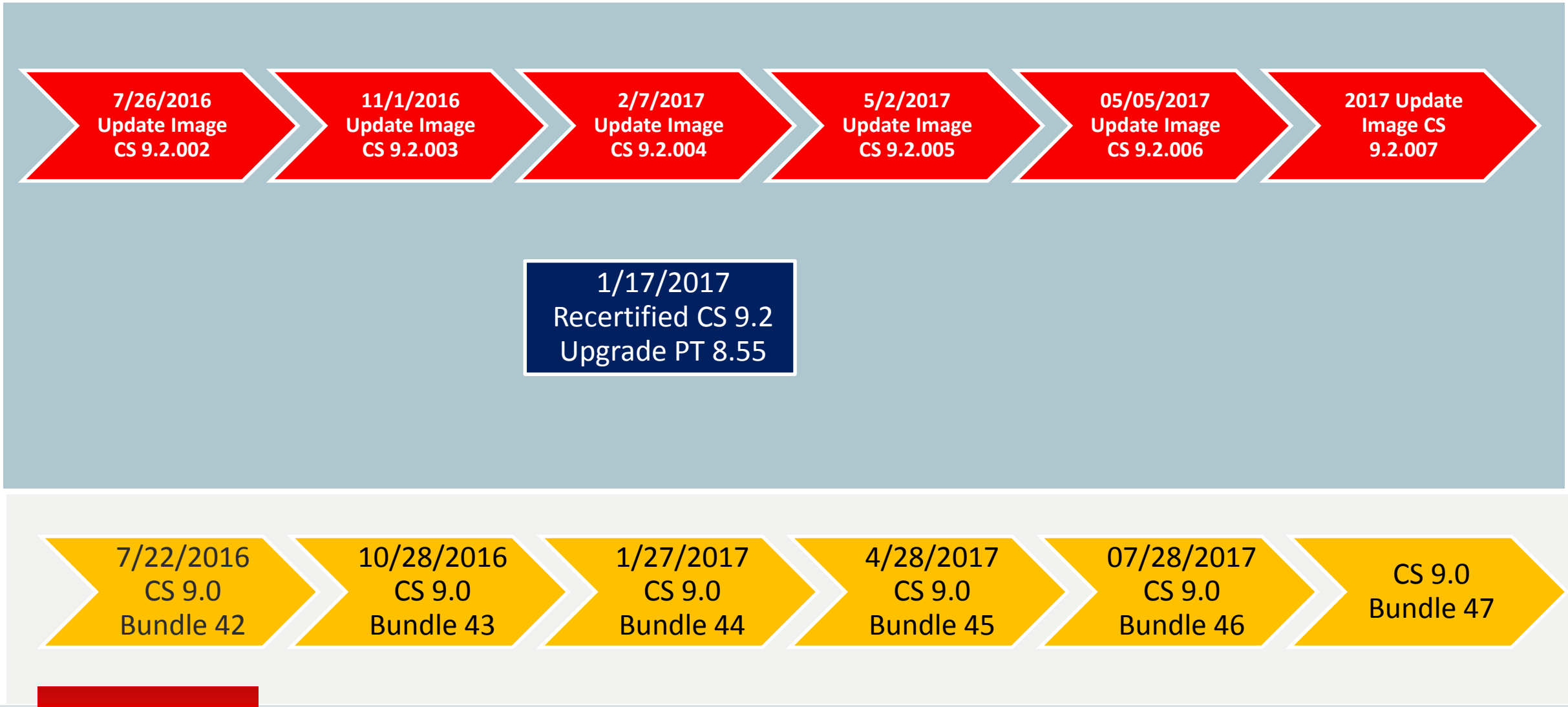
Campus Solutions Upgrade, PUM Images, Bundles



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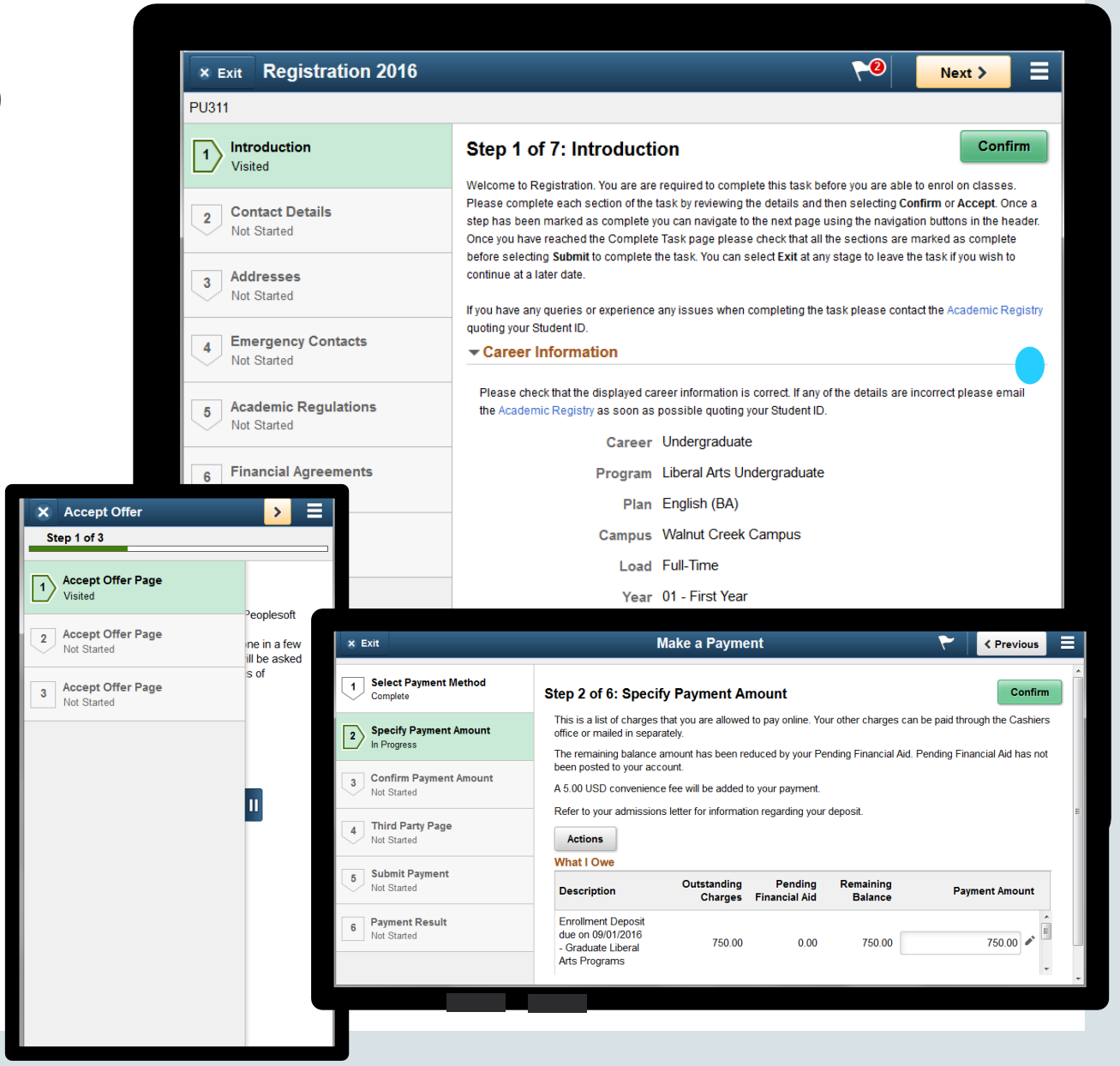
Activity Guides

- Abundant uses cases for step-by-step sequences for students and applicants
- CS Activity Guides are used in:
  - Admissions applications by applicants
  - Student Financials: Make a Payment
  - Enrolling in classes, swapping classes, dropping classes
  - Campus Community Tasks
- 8 delivered templates accessible in a delivered Task Mgt WorkCenter
- CS Advisory Groups asking for more!



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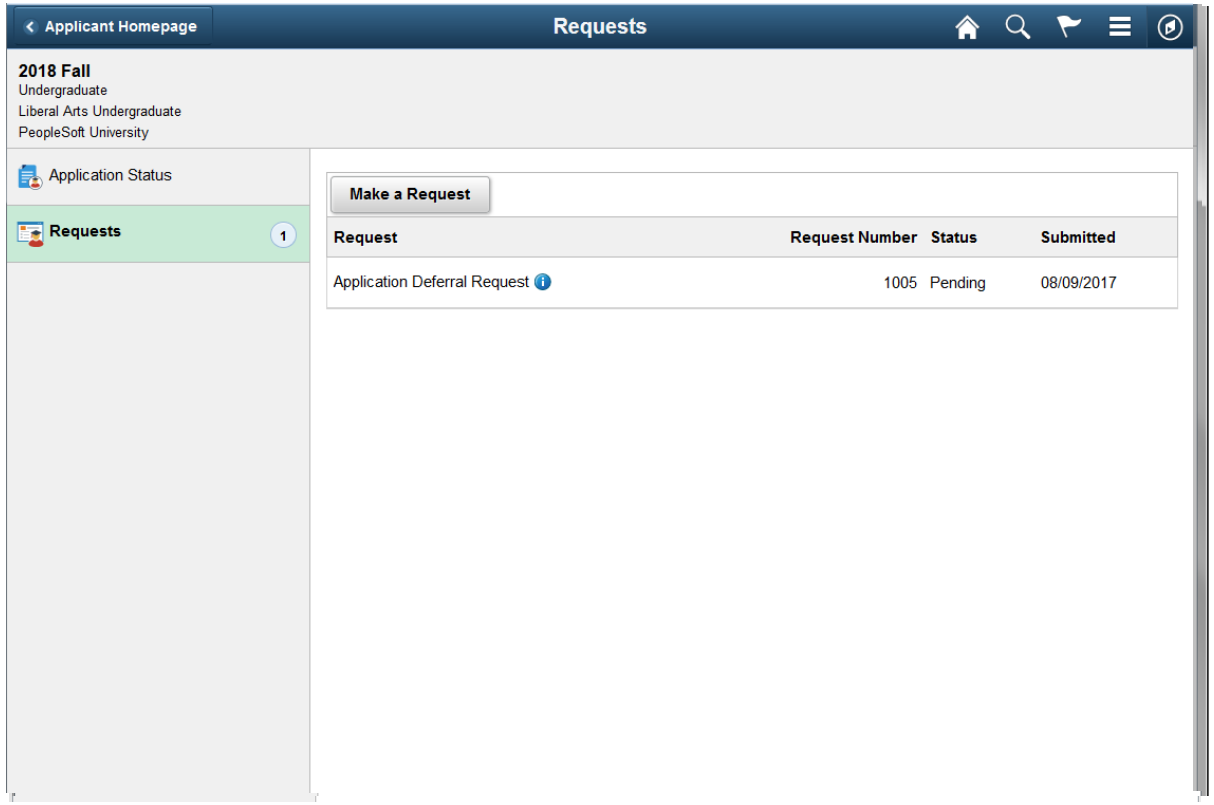
Campus Solutions and Approvals

- Applications now includes a Requests menu item
- Requests can be deployed to applicants as necessary
- In this use case an admitted applicant selects to defer to a future admission term
- Pending status for request appears



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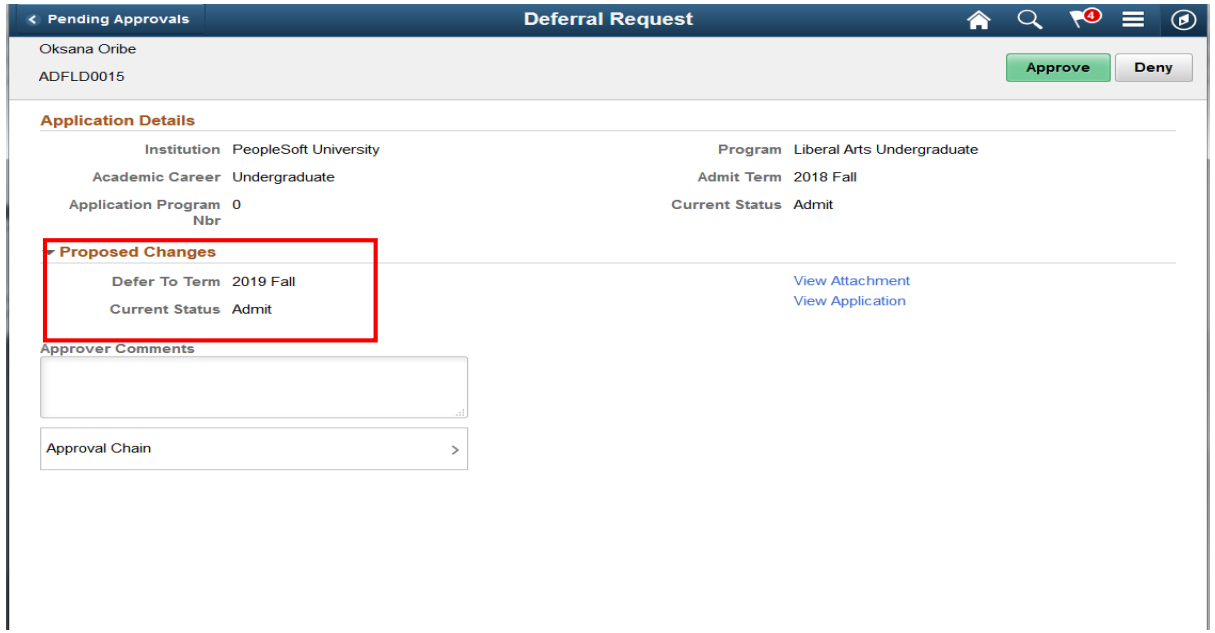
Campus Solutions and Fluid Approvals

Fluid Approvals, Page Composer



For Administrators

- Delivered a page for each request type
- Of course customers will want to update
- Delivered objects for Page Composer
- Drag and Drop changes are immediate!

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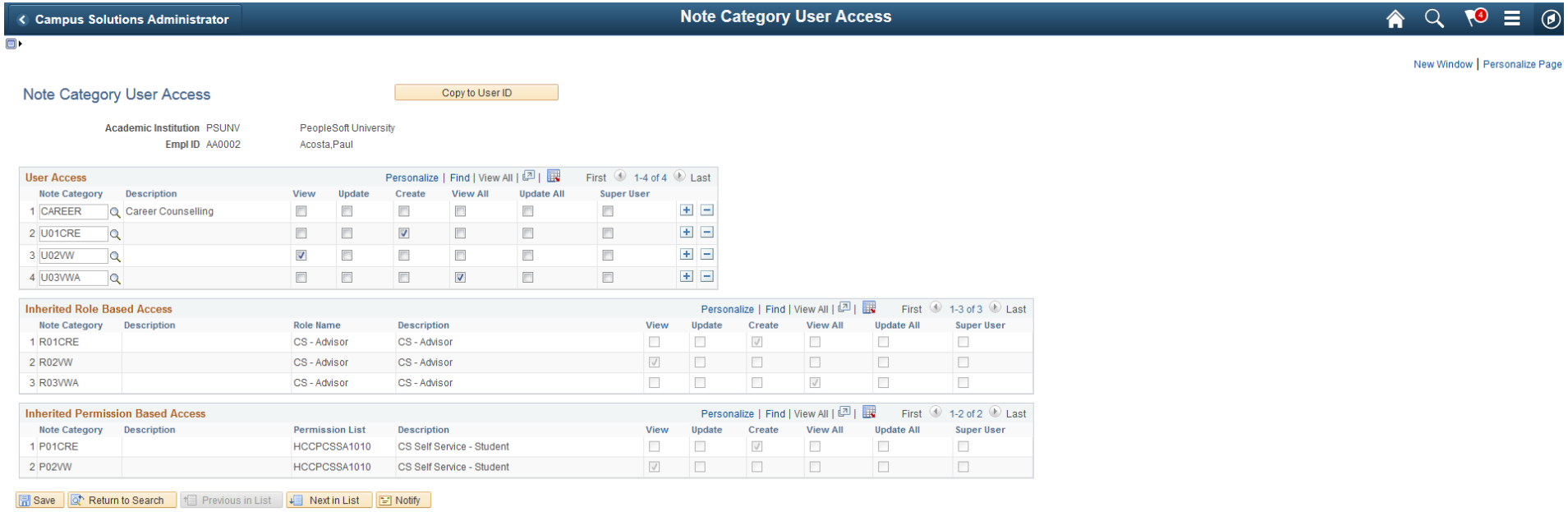
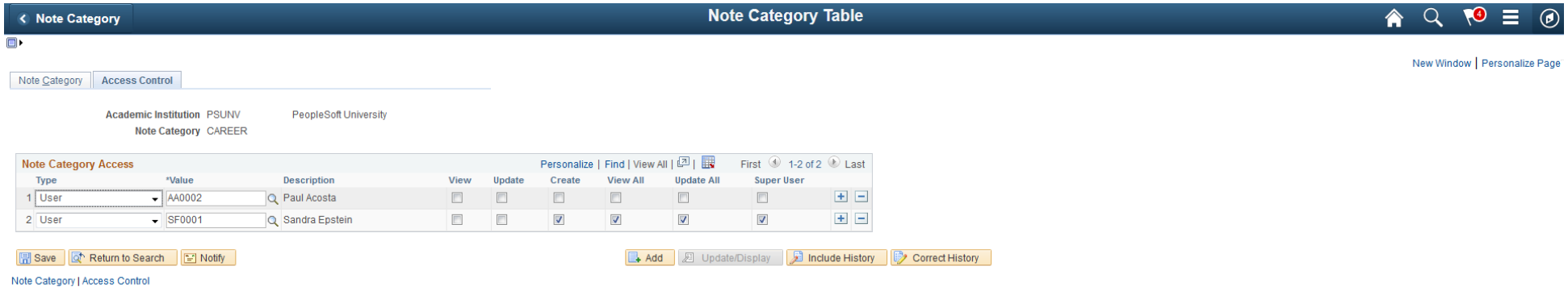
Managing AA Notes Access: By User and by Note Category





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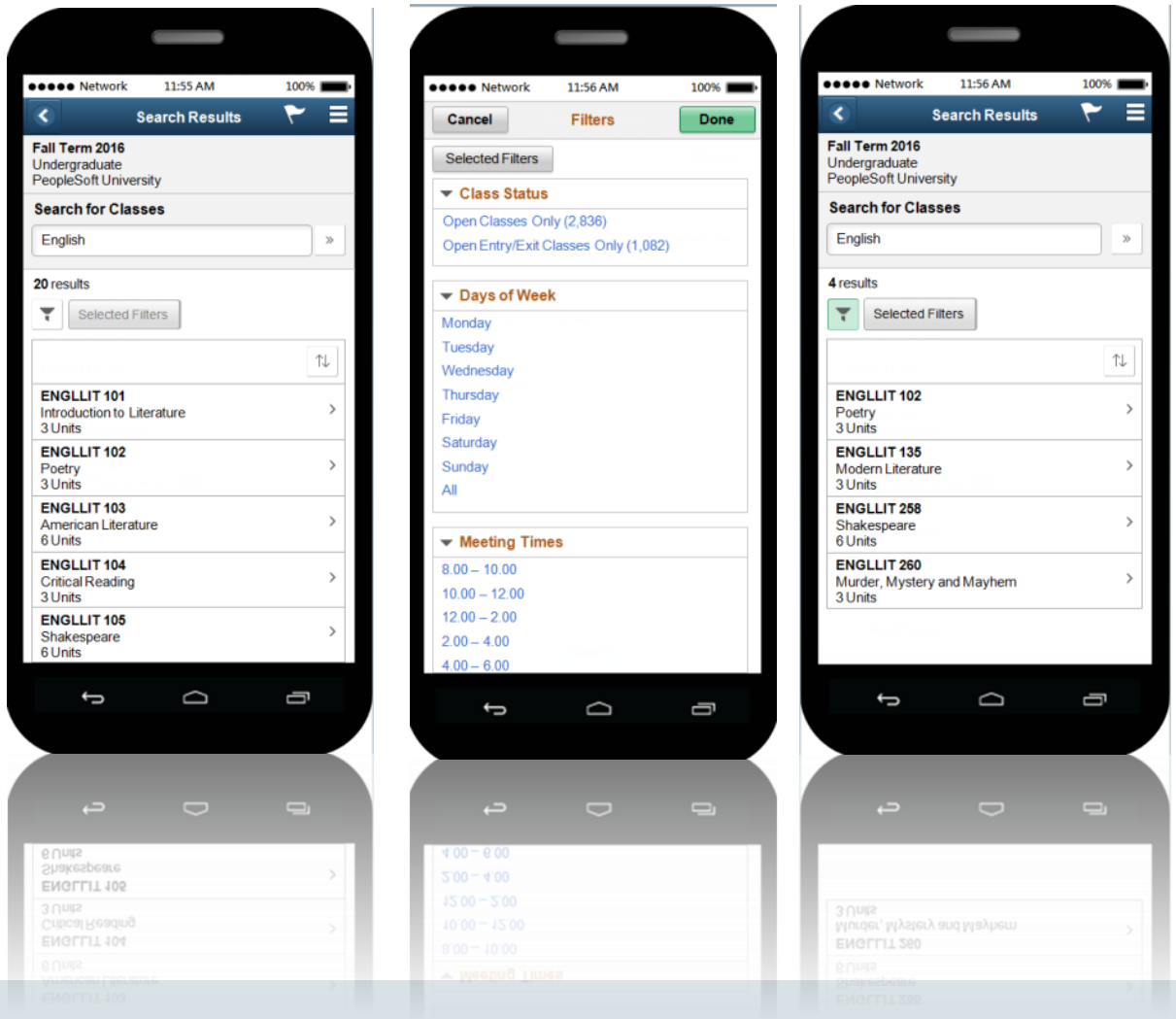
Campus Solutions 9.2 and the PeopleSoft Search Framework/Elasticsearch

- Campus Solutions 9.2 will be utilizing the PSFT Search Framework to perform Class Search, Browse Catalog
  - Setup Pages and Management Utilities Delivered
- Campus Solutions 9.2 utilizes the Elasticsearch engine for Class Search, Browse Catalog
  - Requires PeopleTools 8.55.12
- PeoplesSoft Search Framework powered by Elasticsearch provides:
  - Modern UI
  - Near real-time searches: Supported by index search and live search against the db
  - Keyword search, Search by Subject and by Instructor
  - Wild card searches
  - Search Results filtered using facets



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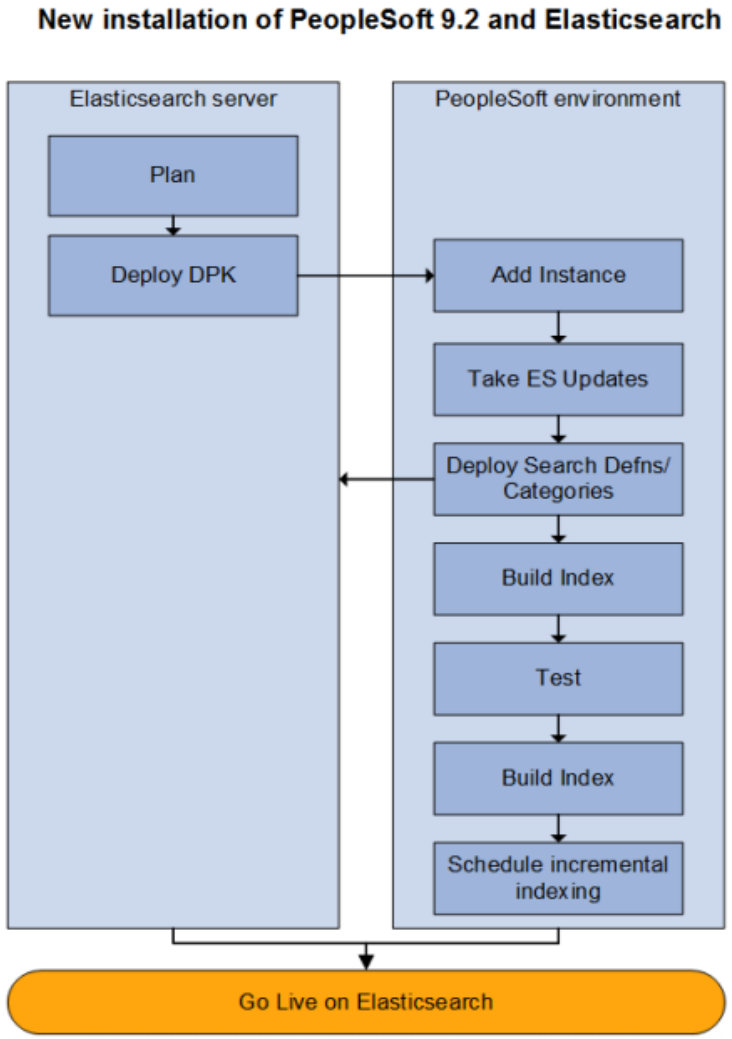
Elasticsearch and Campus Solutions 9.2



- Elasticsearch is an open-source search engine used for the PeopleSoft Search Framework for PeopleSoft 9.2 applications.
- Elasticsearch is provided as a deployment package (DPK) that delivers the required Elasticsearch software version, as well as Java-based plug-ins needed for integration with PeopleSoft environments.
- In Campus Solutions, Elasticsearch is used in class search for Fluid, which provides better performance in indexing and results retrieval.
- Note: To use class search in Fluid user interface, make sure you use **PeopleTools 8.55.12** or later.

For information on how to deploy and configure Elasticsearch to support class search in Fluid, see PeopleTools 8.55.11 or Higher Elasticsearch Home Page on My Oracle Support (Doc ID 2205540.2).

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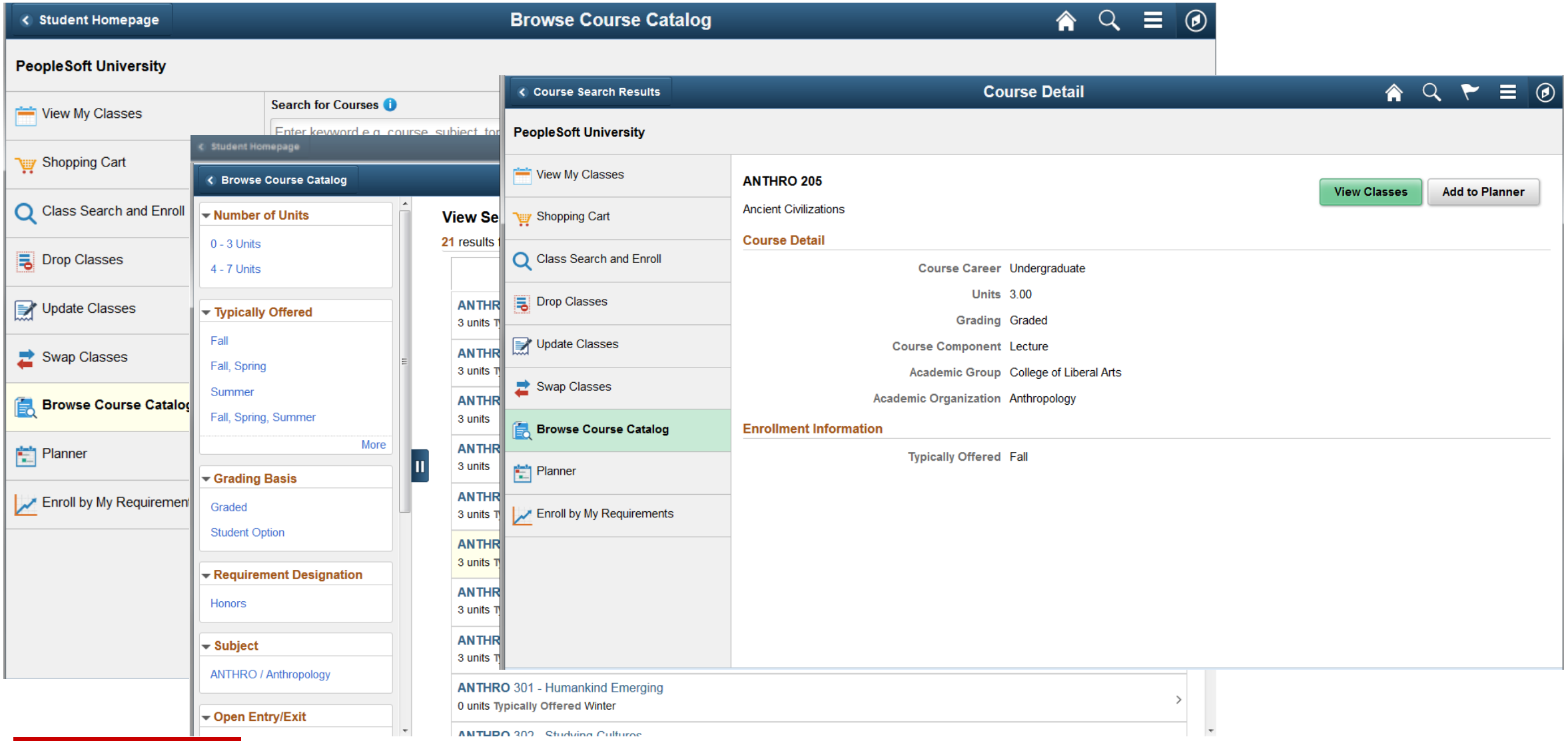
Elasticsearch: Browse Catalog



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New Feature:
Configurable Biographic Details

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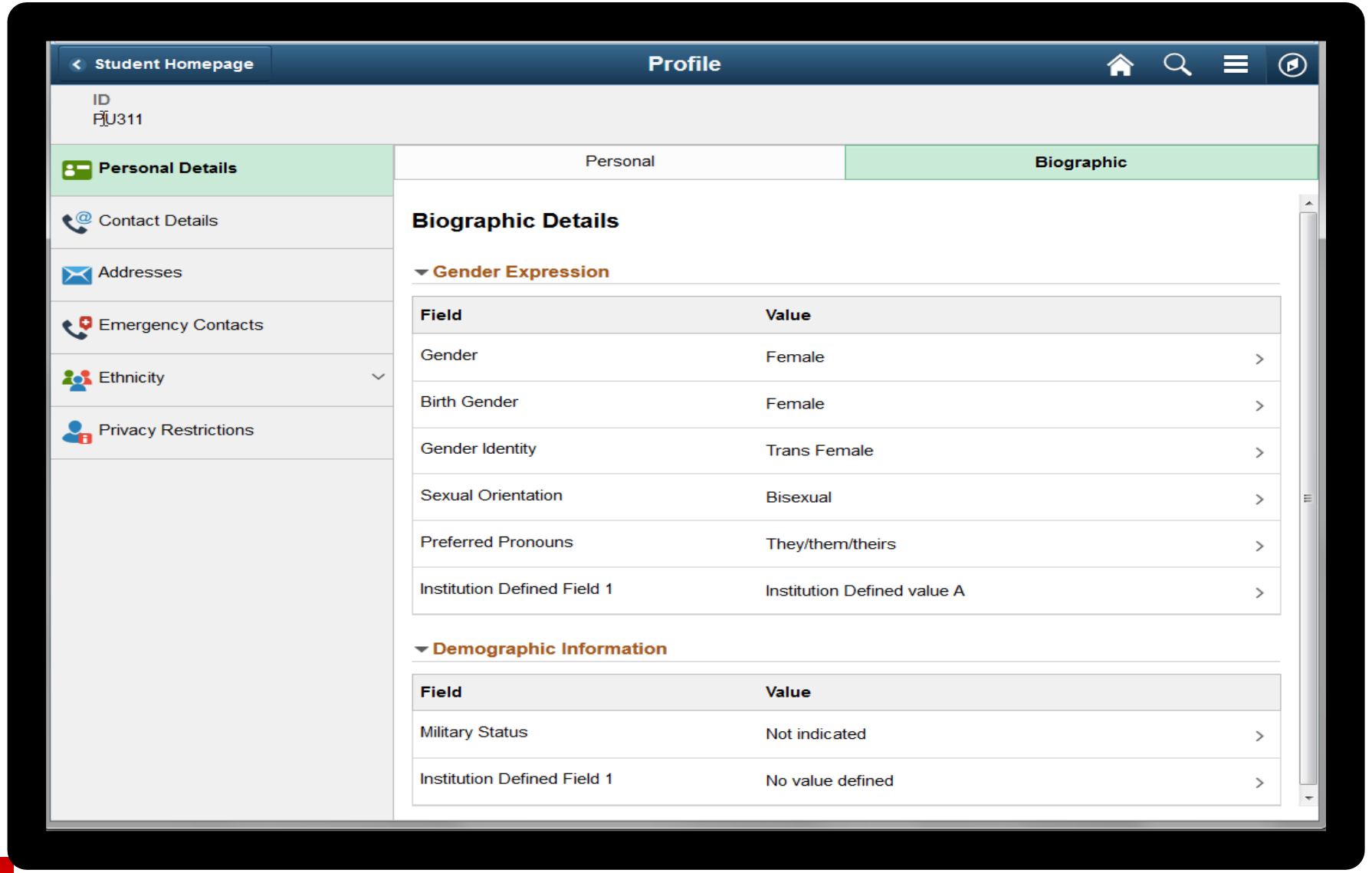
Configurable Biographic Details



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Configurable Biographic Details – Overview

New Biographic Record

- New SCC_PERS_BIOG record for Gender and Gender Expression related fields
- Also includes 9 generic attribute fields
- Effective dated
- CAF-enabled for any further fields that may be required in back-office

New Pages

- New configurable back-office “Personal” page in Add/Update a Person
- Separate security via Permission lists
- New configurable “Biographic Details” Fluid self-service page
- Also allows some existing fields to be deployed that are not supported in classic self-service (*Marital Status, Military Status, Religious Preference)*
- By default new pages are “turned off” and not displayed until configuration is added

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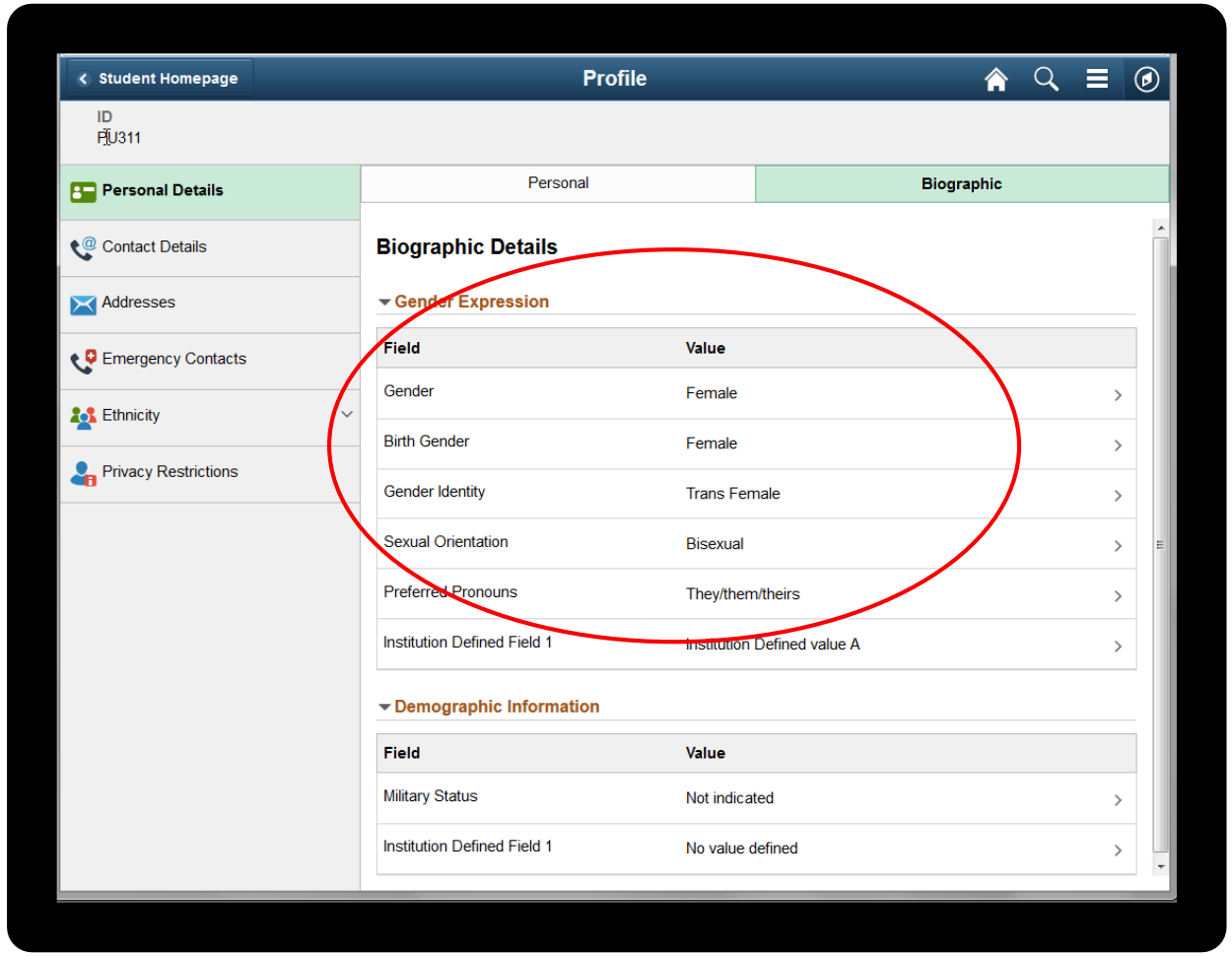
Configurable Biographic Details

Supporting Gender Identity controls



- Biographic Tab allow you configure fields, field labels, field values for Self Service
  - Gender Identity
  - Sexual Orientation
  - Preferred Pronouns and more…
- Configurable sections to organize data as you wish
- Explanatory information text can be configured and deployed for each data field

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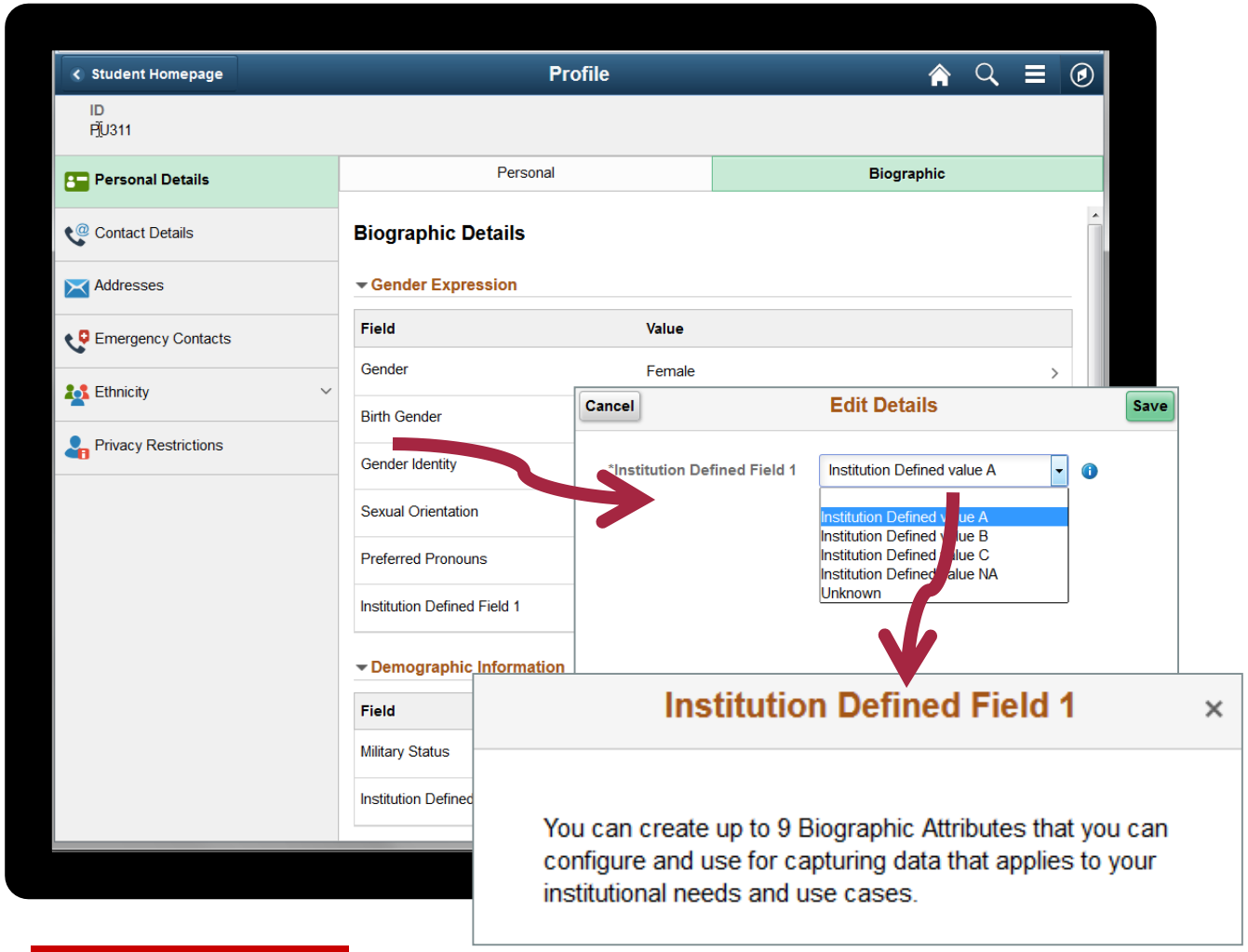
Configurable Biographic Details

New Pages and Fields



- Institution defined translate values easily deployed
- New Biographic Details record allows up to 9 Institution Defined fields in 12 sections
- Sequence of appearance is configurable
- Explanatory information Help text configured in text catalog and can include hyperlinks and formatted content

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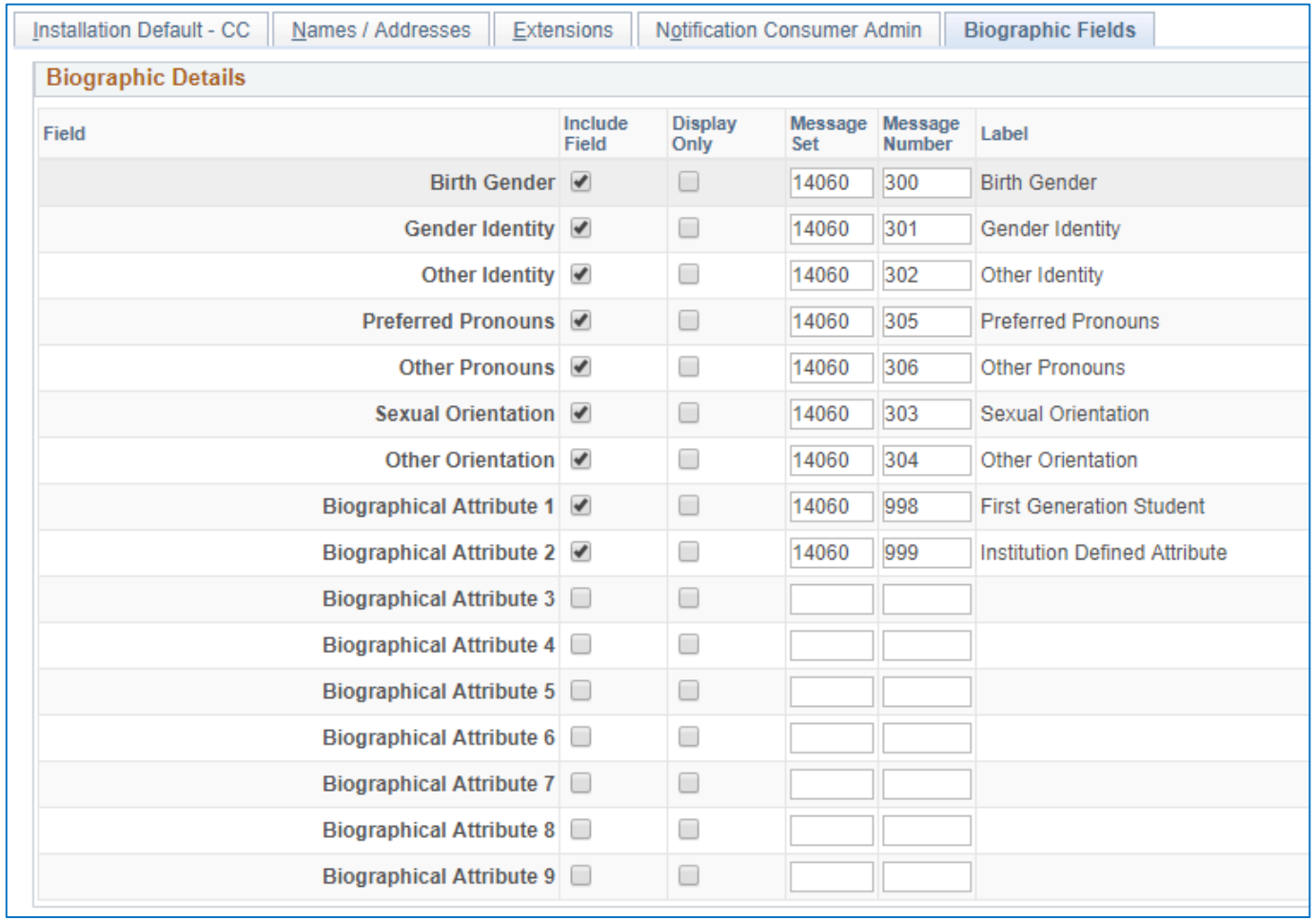
Campus Community Installation

Biographic Fields



Field	Include Field	Display Only	Message Set	Message Number	Label
Birth Gender	✔		14060	300	Birth Gender
Gender Identity	✔		14060	301	Gender Identity
Other Identity	✔		14060	302	Other Identity
Preferred Pronouns	✔		14060	305	Preferred Pronouns
Other Pronouns	✔		14060	306	Other Pronouns
Sexual Orientation	✔		14060	303	Sexual Orientation
Other Orientation	✔		14060	304	Other Orientation
Biographical Attribute 1	✔		14060	998	First Generation Student
Biographical Attribute 2	✔		14060	999	Institution Defined Attribute
Biographical Attribute 3					
Biographical Attribute 4					
Biographical Attribute 5					
Biographical Attribute 6					
Biographical Attribute 7					
Biographical Attribute 8					
Biographical Attribute 9					

- Display Only option can be selected to make a particular field read-only even for user with update access to the page.
- All fields labels are configurable using message catalog entries.
- Help text is defined using Text Catalog to allow RTF, URL's etc.

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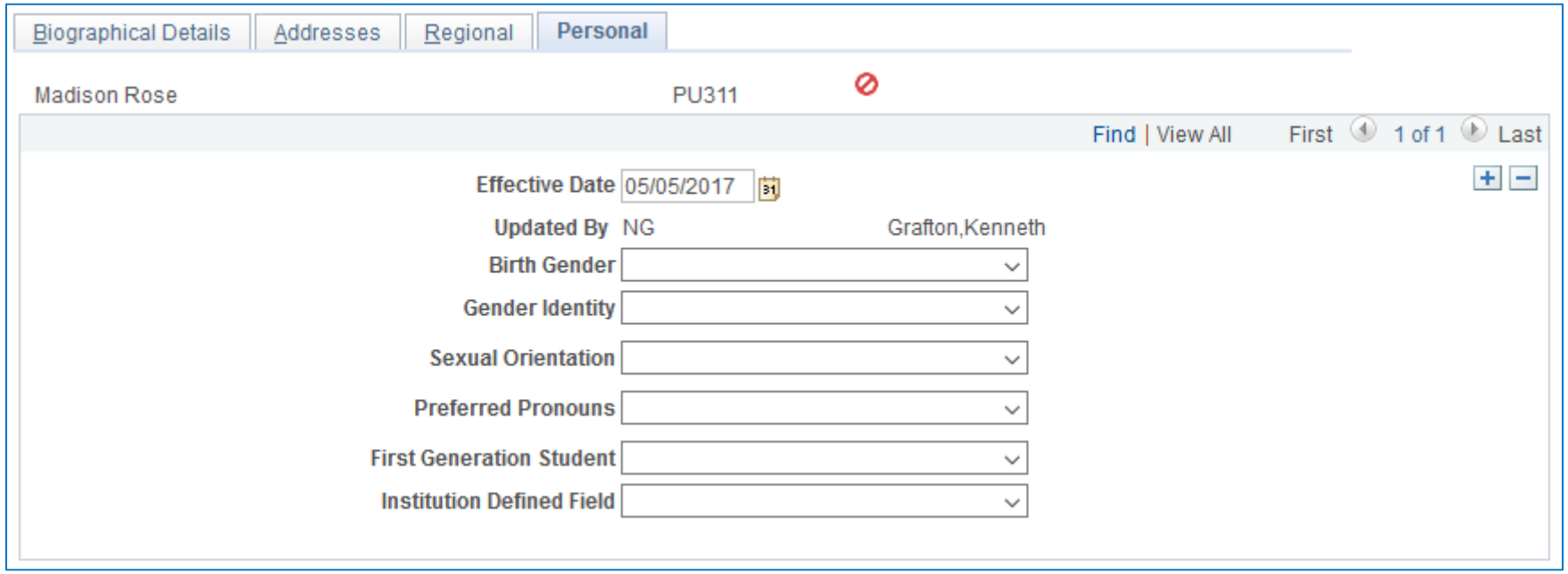
Add/Update a Person

New Personal Page



- Delivered “turned off”, configuration to select which fields to include
- Separate page secured via permission list
- Effective Date - to track changes
- Updated By – to indicate who updated, i.e. admin or student

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Configurable Biographic Details – Summary

Delivered

- Data collection via self-service
- Allow batch import of new Biographic fields via Constituent Transaction Management (CTM)

Planned Features and Enhancements

- Adding Personal page to Add Application, Application Maintenance, Create/Update Prospects
- Adding new Biographic fields to existing FERPA/Privacy records

- Enabling Profile pages (including Biographic Details) for Activity Guides
- Awaiting Working Group feedback on further requirements

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PeopleTools 8.56

Now Available!

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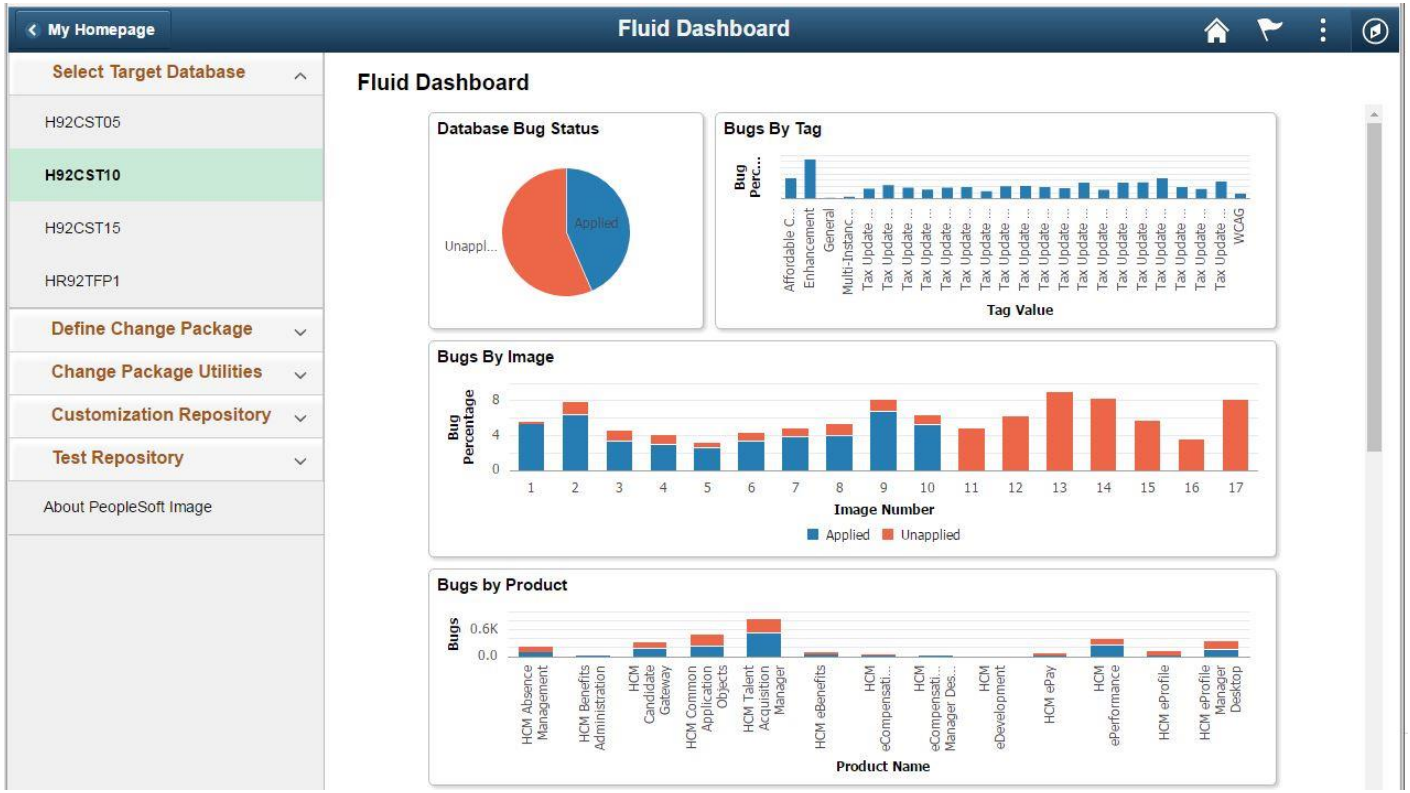
PUM Analytics

- Dashboard
  - Looks similar but the information is different
  - Show an element of scope within the analytics
  - Drive the user interface from the analytic



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PeopleSoft Test Framework

- Query Based Testing
  - Perform a query, save the results, and drive the test using data from the query
  - The most requested feature for PTF
  - Optimized for developers
  - Lets testers create single tests that execute many times and are easily portable across different environments
- Testing with Charts
  - Create PTF tests that interact with charts
  - Capture values and compare results

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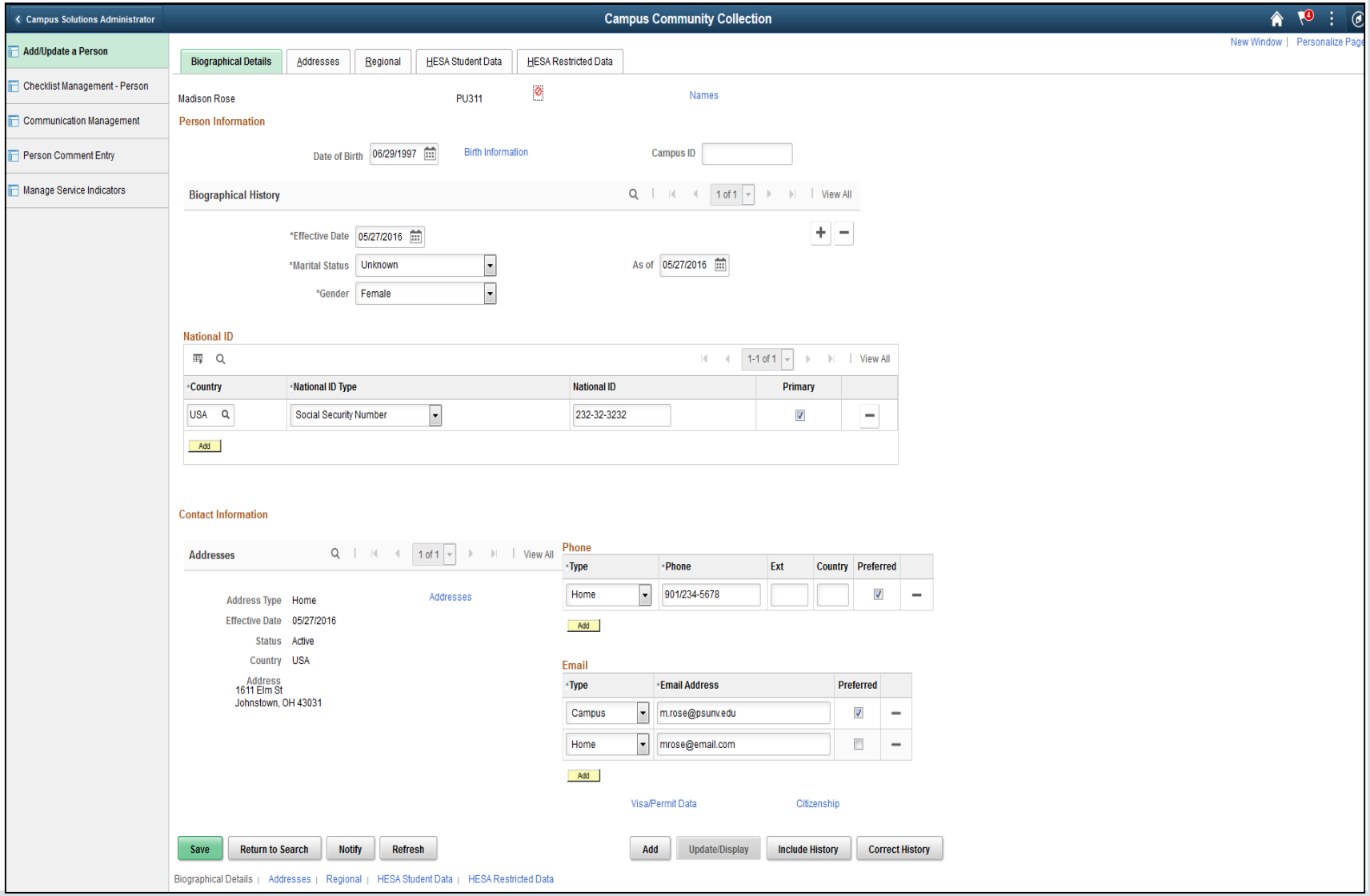
“Classic Plus” and Campus Solutions 9.2 – *Future*

- New style sheet in PT 8.56
- Designed to allow classic pages to mimic look /feel of Fluid
- Minimize visual differences
- Provide unified user interface
- Global “switch” to enable Classic Plus
- Switch at component level to convert component



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Looking Forward

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Campus Solutions Roadmap: Ensuring Value

Planned Features Subject to Change

Campus Solutions 9.2 Technology Uptake

- Selective Adoption
- PeopleSoft Productivity Tools
  - Activity Guides
  - Pivot Grids
  - Forms, Approvals and Page Composer
  - Workcenters, Dashboards
- Fluid UI Homepages, Tiles, Navigation Collections, etc.
- Advanced Search Technology: PS Search Framework – Elasticsearch

Campus Solutions 9.2 Functional Excellence

- Continued Redesign - Transactions for Students, Applicants
- Complete the End to End Enrollment redesign
- Functional Enhancements, Program Enrollment, Activity Management, Advisement
- Business Continuity Enhancements: Accessibility, Campus Mobile Support, Common Attribute Enablement
- Ongoing regulatory support

Campus Solutions 9.2 Advancing to the Future

- Continued Redesign – All Operational Areas Transactions for Students, Applicants
- Enhanced Administrative Centers
- Integration to Oracle Higher Education Cloud Solutions
- CS and Oracle Public Cloud, PS Cloud Manager
- PT 8.56, 8.57 features adoption
- Functional enhancements – customer guidance

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Campus Solutions 9.2: Current Release and Roadmap

Not Comprehensive Subject to Change

Current Release Delivered In 2017

Admissions
- Application Management Fluid Approvals and Page Composer
- Enhanced Accept/Decline Admissions Offers options

Advising
- Real-time Advising Report Generation Enhancements
- Advising Notes Access Control

Campus Community
- Preferred Name for Faculty Centers, Milestones
- Activity Guides: View Student Agreements
- Self Service Fluid To Do List: Addition of Variable Data
- Activity Guides; Biographic data enablement
- Constituent Transaction Management (CTM) Enhancements to accommodate delivered Biographic Profile and Gender ID data

Financial Aid
- Fluid Shopping Sheet
- Large Form Factor Financial Aid Summary

Student Financials
- Student Waivers CAF enabled

Student Records
- Browse Catalog using Elasticsearch
- Fluid Unofficial Transcript Request

Global Regulatory Updates 2016-2017
US FA Regulatory Updates 2016-2017

Next

Admissions
- Update Program Action process enhancements
- Recommender/Referee Support

Advising
- Advisor Report Generation for Multiple Advisees
- Advising Notes: Fluid Self Service

Campus Community
- Common Attribute Framework (CAF) enablement: Residency
- Common Attribute Framework (CAF) enablement;:Organization Tables: Contacts, Locations, Departments.
- Preferred Name Display updates: Activity Management Workcenter
- Continued Accessibility Enhancements

Financial Aid
- Award Sequencing Enhancement
- Allow the Pop Update using data from Pop Select query

Student Financials
- Official Transcript Ordering and Payment

Student Records
- Fluid – Request for Official Transcripts
- Fluid – Request for Enrollment Verification

Global Regulatory Updates 2017-2018
US FA Regulatory Updates 2017-2018

Future

Admissions
- Administrative Applicants Services Center

Advising
- Updated design for Advisor Center
- Managing Advisor Assignments with Population Selection
- Enhance Fluid Academic Progress Summary to Calculate by Course Count or Units

Campus Community
- Enhanced Data Privacy Controls
- CS Data Integration to Marketing Cloud

Contributor Relations
- Enhanced Organization Profiles

Financial Aid
- Exit Counseling Enhancements
- Loan Type Inactivation

Student Financials
- Upgrade SF Worklists to AWE
- Collections Workcenter

Student Records
- Program Enrollment Program Transfer
- Import/export XML formatted data
- Enrollment Prevention: Exceeding Facility Capacity
- Grade Roster Update: Last Date of Attendance Date

Cross Product Business Continuity
- Continued Common Attribute Framework (CAF) enablement: Instructor -Advisor Table.
- PeopleTools 8.56 Classic Plus; Priority Components
- Priority targeted Fluid self service pages
- Continued Accessibility Enhancements

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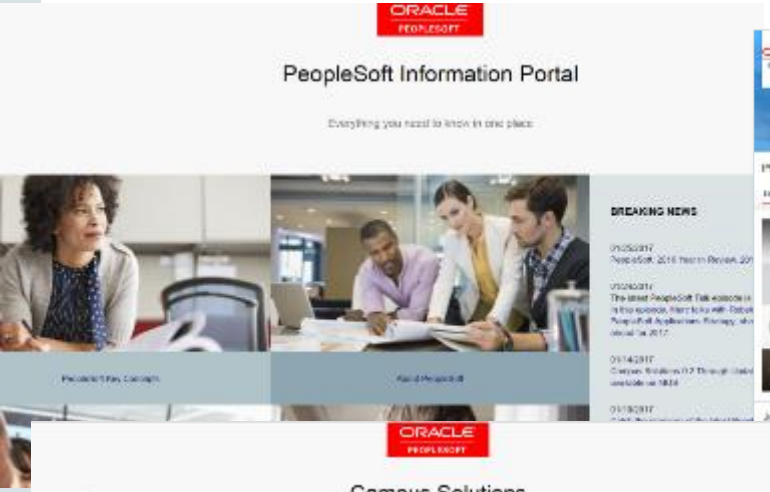
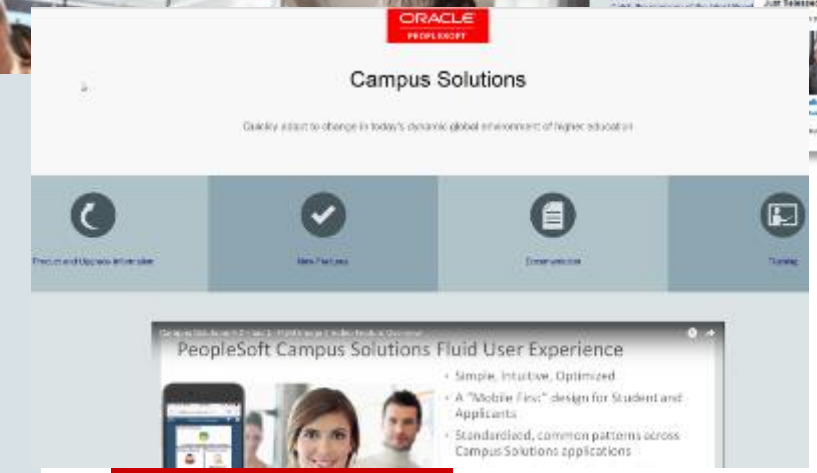
Get Connected and Stay Informed

Key PeopleSoft Information Sources

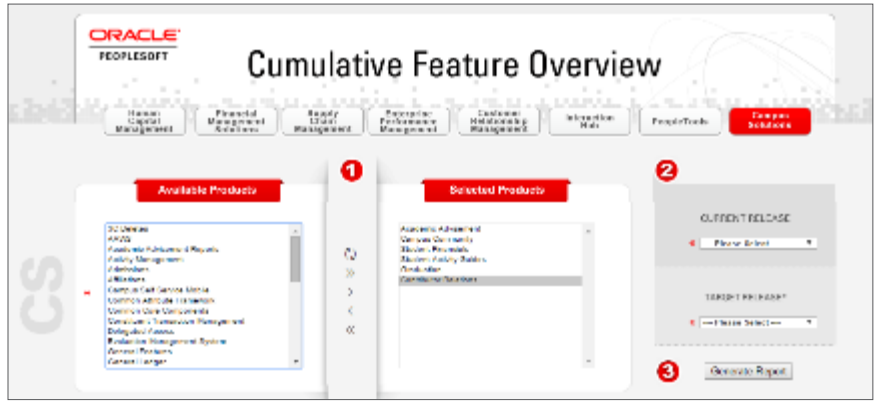
PeopleSoft Campus Solutions Information Portal



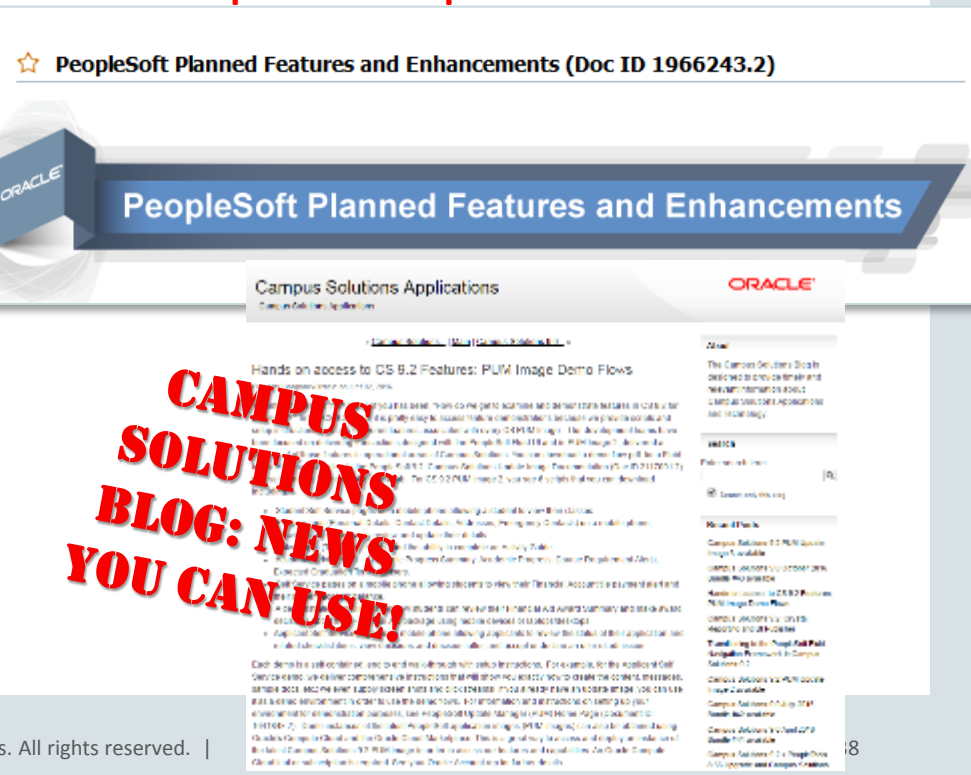


PeopleSoft Campus Solutions Video Feature Overviews and PeopleSoft Talks

PeopleSoft Campus Solutions CFO Tool



PeopleSoft Campus Solutions PFE



CAMPUS SOLUTIONS BLOG: NEWS YOU CAN USE!

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CS 9.2 Resources

Where to learn more about CS 9.2 features

- Campus Solutions 9.2 Doc Homepage (Doc ID 2013381.1)
- PeopleSoft Planned Features and Enhancements (Doc ID 1966243.2) Campus Solutions tab (The “new” Statement of Direction-CS 9.2 targeted features and enhancements)
- PeopleSoft Information Portal
- Campus Solutions Applications Blog
- PeopleSoft Video Feature Overviews
- Oracle Higher Education You Tube Channel – Campus Solutions
- PeopleSoft Update Manager (PUM) Home Page (Doc ID 1641843.2)
- PeopleSoft 9.2: Campus Solutions Update Image Documentation (Doc ID 2117001.2)
- Cumulative Feature Overview (Doc ID 1675137.1)
- PeopleSoft Campus Solutions (CS) 9.2 Update Image Overviews (Doc ID 2116071.1)
- PeopleSoft Campus Solutions Upgrade Home Page (Doc ID 2078564.2)
- PeopleTools 8.55.11 or Higher Elasticsearch Home Page (Doc ID 2205540.2)

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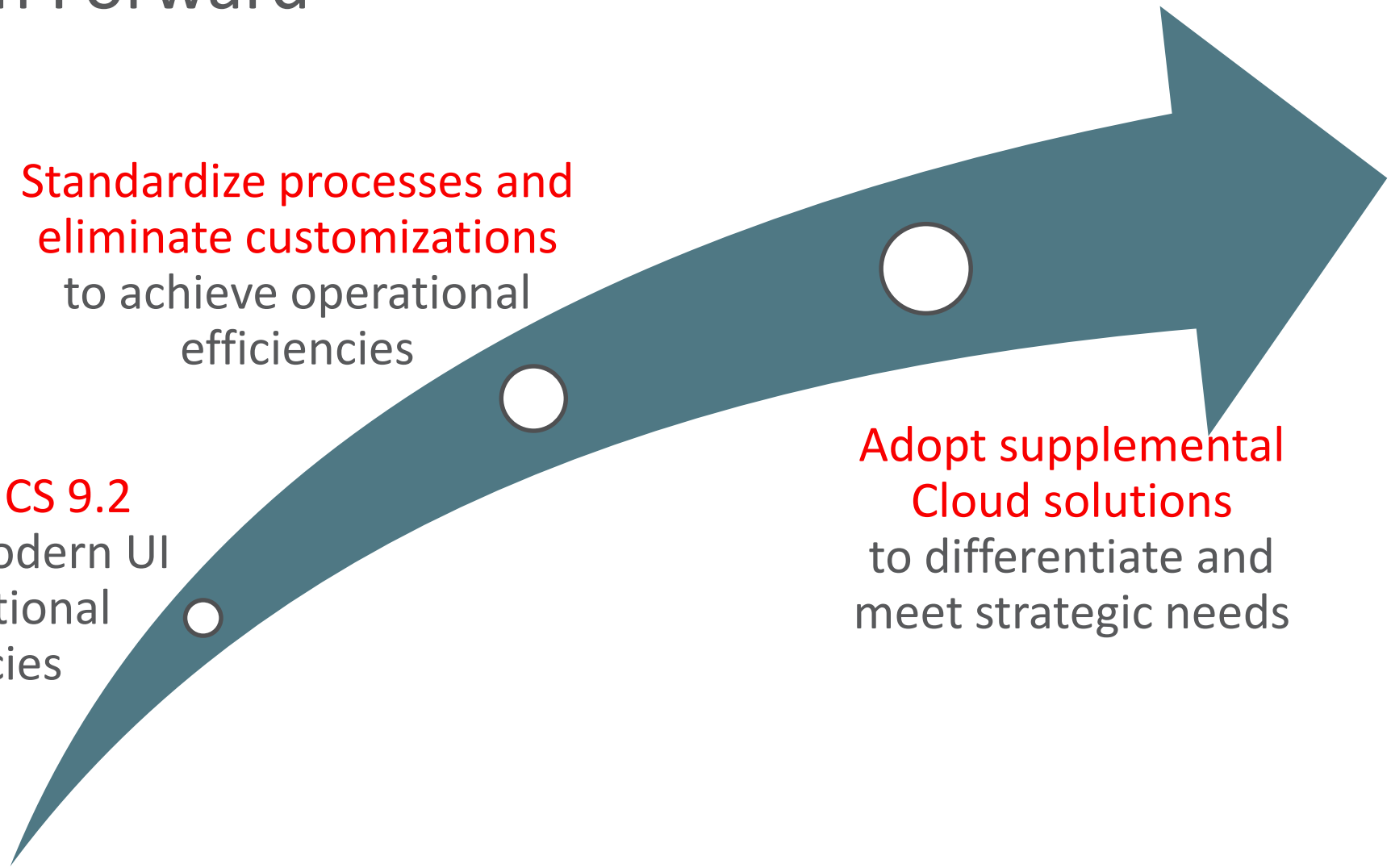
The Path Forward



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