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SHARING PROJECT UPDATES AND TIPS FOR GETTING THE MOST OUT OF THE SYSTEM AND ADDRESSING THE NEEDS OF DIVERSE CONSTITUENTS.

ISIS focus is a monthly newsletter to share project progress, useful advice, and more.

○ July | ○ 2006

ISIS focus

ISIS Self-Service Billing Has Successful Go-Live!

On June 5, 2006, the ISIS Self-Service Billing system went live. For most students, this was their first direct contact with the ISIS system.

Prior to go-live, the ISIS team conducted extensive research and made significant improvements to how information is presented and used by the Student Billing Self-Service users. Although future enhancements are expected, the initial go-live provided users with many additional features and benefits. The ISIS Self-Service system now features a number of online services, including secure credit card and eCheck (ACH) payments, and account summary functionality. The account summary includes the student's current balance, most recent charges, payments, financial aid disbursements, and any refunds that have been processed. The system also allows authorized

payers, such as students' parents and sponsors, to pay students' bills online and is available 24 hours a day, 7 days a week. Payments made through ISIS Self-Service are posted to the student's account and are visible immediately.

On June 15, 2006, the ISIS team successfully dispatched over 10,000 student bill notifications, welcoming students to their new home for online student accounts. In an effort to facilitate the payment handling process, the ISIS administrative application has also been extended to include credit card payment and refund capabilities, fundamentally eliminating the need to use a third-party system and ultimately double-entry.

As of June 26th 2006, the ISIS self-service system had collected over one million dollars in tuition

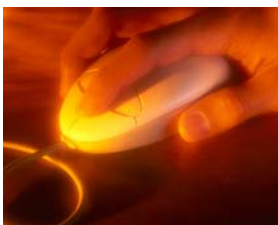
and fees through the online bill pay and is ready to service an even larger user population in July 2006.

The screenshot shows the ISIS Self-Service Billing system interface. The top navigation bar includes 'My Account', 'Account Summary', 'Online Bills', 'Authorized Checks', 'Credit Card Payment', and 'eCheck Payment'. The main content area displays 'My Account + Account Summary' with a warning message: 'Before you will find your account summary listing your transactions and current account balance. You can make online payments by electronic check or credit card (accepted by all divisions, except School of Arts and Sciences & Engineering). If you prefer to pay by paper check, please print out bill and mail it along with your check.' Below this, the 'Account Status' section shows 'Current Date: 06/29/2006' and 'Current Balance: \$ 0.00'. There are buttons for 'Pay by Paper Check', 'Pay by Credit Card', and 'Pay by eCheck'. The 'Current Activity' section shows a table of transactions for the billing period 06/11/2005 - 06/14/2005.

Transaction Date	Transaction ID	Description	Amount	Running Balance
06/04/2005	434400	SPSBE Web Credit Card Payment	\$527.00	\$ 0.00
06/16/2005	400795	SPSBE FE 05 Tuition Remission SponsorDep.	\$567.00	\$527.00
06/11/2005	402064	SPSBE FE 05 Tuition Remission SponsorDep.	\$448.00	\$1,542.00
06/11/2005	402224	ADD FALL BE 881.615	\$1,534.00	\$1,781.00

ISIS Self-Service Billing system went live 6/5/06.

Billing Updates [SBS]



The ISIS Self-Service Billing system went live on June 5, 2006 and has been processing payments and displaying students' account histories on a 24/7 basis.

The SBS Team members have reported acceptable responses from students, and will continue soliciting feedback from the students on ways to

improve the system. The SBS Functional Team and SIS are developing more reporting capabilities and communication tools to advertise the Self-Service website.

One current challenge is the billing notification process for Authorized Users (such as parents or sponsors) who are not classified as "Persons" in ISIS and therefore we can not use the robust communication engine in ISIS. We also continue to improve the capabilities for Student Accounts Offices staff to process electronic e-checks, credit

card payments, and credit card refunds for our students.

We have developed a notification broadcast that not only alerts students of their current activity, but also "reminds" all students who still owe tuition and fees of their outstanding debts. This will improve our ability to contact those former students who have left JHU with debt balances, before they may be placed with collection agencies. We have Jason Astrinsky and his team to thank for that added attraction!!



Records & Registration Updates [SSS]

Work continues on multiple initiatives to support Nursing as an SSS early adopter in March 2007 and broad use in Summer 2007. In the past month, some of the significant milestones include:

- Completed testing for 2.6.1.2, a minor release that fixes numerous defects which went to production June 20
- Facilitated business use-case scenario discussions with Nursing
- Completed design of the report model for student data and began a section/enrollment model. Both will utilize *SQL Server Reporting Services' Report Builder* to facilitate easy-to-use ad-hoc queries
- Met with faculty to gather feedback about ISIS Self-Service
- Interdivisional registration workgroup finalized workflow and credit conversion logic
- Began development of student data migration from USIS
- Staged Nursing configuration for final testing

A Look at SSS Upcoming Events



The SSS project team, comprised of registrars and their staff as well as dedicated project staff have numerous activities planned for this month: *

- 7/6 - Full Team Meeting
- 7/6 - Configuration and Rule Writing
- 7/7 - Workshop 6, SAIS
- 7/10 - Workshop 5, EPP
- 7/10 - Workshop 8, SPSBE
- 7/11 - Workshop 7, Peabody
- 7/12 - Workshop 5, AS/EN
- 7/13 - Full Team Meeting
- 7/13 - Configuration and Rule Writing
- 7/14 - Workshop 6, AAP
- 7/14 - Workshop 8, Nursing
- 7/17 - Workshop 7, SAIS
- 7/17 - Workshop 8, Public Health
- 7/20 - Full Team Meeting
- 7/20 - Configuration and Rule Writing
- 7/27 - Full Team Meeting
- 7/27 - Configuration and Rule Writing
- 7/31 - Workshop 6, EPP
- 7/31 - Workshop 9, Public Health

* Be sure to check the SSS Confluence space for specific locations and times as well as any schedule changes.

Admissions Updates [SMS]



Nicole Westrick

As of June 15, Nicole Westrick, the ISIS Training Coordinator, has agreed to serve as the SMS Functional Lead and will lead the SMS User's group and serve as the central contact for all admissions users across the university. Her responsibilities as the SMS Functional Lead include:

- 1) Convening and leading the SMS user group meetings;
- 2) Providing functional leadership in the ISIS production support/change control model, screening divisional requests and working with the users to prioritize those requests for SIS and/or the vendor;
- 3) Providing a leadership role in the functional testing of new releases and builds, ensuring that each school's issues are addressed; and
- 4) Working with the vendor to present recommendations to assist with their formulation of a long range strategy for the product.

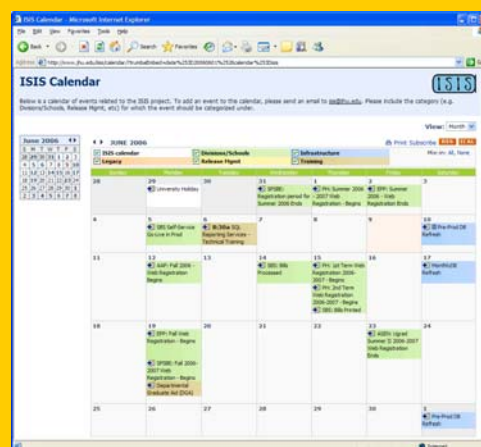
Throughout July, Nicole will be meeting with SMS functional users in every division. The next SMS Users' Group meeting is scheduled for Tuesday, August 2nd. The agenda (with time and place) will be distributed in early July.

Upcoming SMS Go Live Dates

SAIS-DC	AUG 2006
Nursing	OCT 2006
SAIS-Bologna	DEC 2006

Check out the ISIS Calendar www.jhu.edu/isis/calendar

Get a snapshot of events that affect ISIS — database refreshes, scheduled server maintenance, training classes, school registration dates, etc.



Send your updates and posts for the calendar to:
isis@jhu.edu

ISIS Tips and Tricks

What are Profile Values?

Got ideas for the Tips & Tricks section? Have you found a creative way to use ISIS to improve your business process? Email isis@jhu.edu.

Profile values allow you to set default values for specific fields on many ISIS windows. By setting profile values, you will no longer have to select values for these fields each time you open a window.

To Define Profile Values



1. Within any window, click the **Profile** button in the ISIS toolbar. The User Profiles – Web Page Dialog appears. Note: By default the Profile values for the current window are displayed.
2. In the **User Value** field for the profile you wish to set, use the list of values (LOV) to select your default value.
3. Click **Save** to save your profile values.
4. Click **Close** to close the **User Profiles – Web Page Dialog** and return to the window.

Clear this checkbox, select an Application, and click Find to display the profile values for the selected Application.

You can restore the system defaults by clicking **Restore Defaults**.

Profile	App.	Installation Value	Role Value	User Value
Letter Extraction Application	CMN			
Letter Extraction Recipient	CMN			

Description: Default application shown in the letter extraction screen.

NOTE: The defaults will take effect the next time you enter the window. You can restore the default profile values by clicking the Restore Defaults on the User Profiles – Web Page Dialog.

User Profiles – Web Page Dialog (Extract Letters)

Important SSS Profiles to make your job easier

Profile Name	Profile Description	Window
ENROLLMENT		
SSS_STUDENT_ENROLLMENT_DEFAULT_ENROLLMENTS	Default Enrollment Type to filter enrollments	Student Enrollments
SSS_STUDENTENROLLMENT_DEFAULT_ACADEMIC_PERIOD	Default Academic Period to filter enrollments	Student Enrollments
SSS_STUDENTENROLLMENT_DEFAULT_STATUS	Default Enrollment Status to filter enrollments	Student Enrollments
SSS_DEFAULT_ENROLL_STATUS	Default Enrollment Status	Course Registration
SSS_DEFAULT_INDEPENDENT_ENROLL_STATUS	Default Enrollment Status for Independent Study	Course Registration
SSS_StudentLookupDefaultStartAcademicPeriod	Default Start Academic Period for Student Lookup	
PROGRAM OF STUDY		
SSS_StudentPOS_DegreeStatusDefault	Default status for a Degree on the Student Program of Study screen	Program of Study
SSS_StudentPOS_MajorStatusDefault	Default status for a Major on the Student Program of Study screen	Program of Study
SSS_StudentPOS_MinorStatusDefault	Default status for a Minor on the Student Program of Study screen	Program of Study
SSS_StudentPOS_POSStatusDefault	Default POS status on the Student Program of Study screen	Program of Study



Financial Aid Updates [SAS]

Earlier this month, SunGard Higher Education delivered the first in a series of four planned HERA (Higher Education Reauthorization) releases. This software upgrade was successfully applied to production, and supports changes that were made to the Federal Needs Analysis formula.

'Tis the season for reporting, and with the 2005-2006 school year winding down, the aid community will begin to produce many year-end reports. This year, (for the first time!) all of the underlying data will come from the ISIS system. Some reports, such as the Fiscal Operations Report and Application to Participate (FISAP), will be produced centrally. This is an area where we hope to reap the benefits of the naming conventions and code standards established during our regular implementation.

The IDOC (Institutional Documentation Service) team is meeting weekly to implement an imaging service for the financial aid offices. We are finalizing the design, scope and time-line for this ISIS add-on service.

Finally, on Friday, June 23rd the School of Nursing went live with online financial aid Self-Service in ISIS. Congratulations to everyone involved in this effort!



What's New in ISIS Reporting?



In the coming months, report developers for ISIS will have the choice of designing and developing reports in Crystal Reports or SQL Server Reporting Services (SSRS).

With the latest release of the product, SSRS has become an additional integrated reporting option. Several divisional techs attended a four-day class on SSRS and expressed interest in utilizing SSRS for reporting in future deployments. Crystal Reports will remain available to developers of all modules for some time. End users may notice subtle differences in report viewer appearance; however, the report viewers have the same basic functionality.

Additionally, SSRS offers end users the **Report Builder**, a new ad-hoc reporting tool that enables them to create their own reports and explore

data. The Report Builder application is deployed from your browser. The user interface derives its ease of use from other Microsoft products such as Excel or PowerPoint. Reports are based upon pre-built models that diminish the need for knowledge of database design by providing meaningful business names for fields and tables, defining relationships between data entities, and grouping data elements logically.

Users begin by selecting a model and layout of a report and then drag-and-drop report items from the report model to the design area. Users can set constraints to filter the data and sort the data. New fields and calculations can be created from the model. Users can preview and print their reports and export data to Excel and other formats.

For more information on Report Builder or SSRS, please contact your divisional tech resource or Paul Coffelt from SIS.

Upcoming ISIS Training

Course Title	Course ID	Date	Location
Departmental Graduate Aid (DGA)	IS01.110.02.20	08/02/06	Eastern B104
Admissions Training	IS03.130.01.08	08/07/06	Eastern B104
Astra Manager Overview	AS01.100.400.03	08/14/06	Eastern B104
Astra Event Scheduling	AS01.001.200.05	08/15/06	Eastern B104
Astra Reporting	AS01.100.300.03	08/15/06	Eastern B104
Astra Schedule	AS02.001.100.06	08/16/06	Eastern B104
Creating and Maintaining Courses	IS02.300.10.09	08/21/06	Eastern B104

E-Learning Courses

There are also several **E-Learning courses** available for anyone to take at any time. Each of these courses take about an hour to go through.

ISIS: 100 - Navigating in ISIS (ID: ISIS.100.01)

ISIS: 110 - Departmental Graduate Aid (DGA) (ID: ISIS.110.01)

ISIS: 120 - Financial Aid Inquiry (ID: ISIS.120.01)

ISIS: 130 - Student Billing Inquiry (ID: ISIS.130.01)

To Register

To register for any of these courses, call the Office of Training and Education at 443-997-6453 or visit them on the web @ <http://training.jhu.edu>.



Appropriate Uses of Social Security Numbers

The Concerns

Awareness over the dangers of identity theft are widely reported in the media and from law enforcement agencies. For instance, you may recall, the report of the Department of Veterans Affairs analyst's laptop that was stolen in a May 3 burglary from his home in Aspen Hill, Maryland.



That laptop, which was taken home without authorization, contained the Social Security Numbers of 26.5 million veterans, among other sensitive personal data. There is currently a class-action lawsuit brought in this case which seeks \$1,000 in damages to *each person* affected by the data theft, totaling up to **\$26.5 billion**.

A recent article on CNET News, *University server in hackers' hands for a year*, highlighted data theft by hackers at Ohio State University on several campus servers, which held over 137,000 social security numbers. CNET writer Greg Sandoval interviewed Avivah Litan, security analyst with research firm Gartner. Litan estimated that *a third of all data leaks are at universities*. Litan stated that "... information bandits are preying on the nation's colleges for three reasons. First, the school's possess Social Security Numbers and other information useful in committing identity theft. Secondly, she says universities don't take security serious enough. Lastly, universities are at a disadvantage because they must keep information free flowing. Part of their mission is to share knowledge. While the Internet has simplified that task, it has also presented greater risks."

The Associated Press has also reported numerous cases of data security breaches at universities in the recent years.

- A department chairwoman from the University of South Carolina accidentally attached a database file to a mass email she sent out about summer classes. The database file contained students' Social Security Numbers.
- Montclair State University in New Jersey warned about 9,000 students in October that they had accidentally posted their names and Social Security Numbers on the Internet for four months.
- In March 2005, a laptop was stolen from the University of California-Berkley that contained the SSNs of about 100,000 alumni, graduate students, and past applicants.

There are numerous news reports, magazine articles, and websites designed to educate people about what they can do to protect themselves from identity theft. At the top of every list on how to minimize the risk of identity theft is the need to protect your Social Security Number (SSN).

It is of no surprise then that concerns have been raised over the last few years about inappropriate uses of students' Social Security Numbers by faculty and administrative staff here at JHU. For many years the use of

SSNs as a personal identifier has been commonplace in most organizations. Student SSNs can not be completely eliminated since they are, for instance, required for some state and federal government reporting purposes. However, in the wake of increasing reports of personal identity fraud and theft it has become increasingly clear that indiscriminate use of the SSN can occur in the absence of proper business practices and that we must take action to reduce our use of it as much as possible. In May of 2003, the Provost issued a letter to all members of the JHU community to set the stage for SSN changes to come; for more information, please see:

<http://www.jhu.edu/~gazette/2003/05may03/05social.html>.

As a university that deals with enormous amounts of data, much of which contains sensitive information, JHU must take every precaution to be vigilant and proactive in safeguarding our students' data.

What you can do

- Please refrain from including SSNs in emails, letters, and JIRA issues. When a student needs to be uniquely identified, please **use the ISISID or HopkinsID as an alternative identifier**. See page 6 for more details on both IDs.
- When working with screenshots in JIRA, emails, etc., remember to **remove any SSNs that may be on your screenshots**. (See detailed instructions in Confluence — <http://know.isis.jhu.edu/x/9yo>)
- Dispose properly of any sensitive information that has been printed out by **using a paper shredder** when you are finished with the hard-copy.
- Avoid saving any documents that may contain sensitive information locally – this includes in **emails, laptops, desktops, CDs, and flash USB drives**. These items are easily stolen or lost so please take extra precautions to keep them free of all sensitive information. Take time to go back through your locally stored emails and files and delete files that contain SSNs. If you feel you must store sensitive information on a mobile device, please make sure that the directory or file is encrypted and password-protected. Talk with your IT administrator about possible encryption tools and options that will work best for you. (See Encryption Tips: <http://www.it.jhu.edu/infosec/tips/encryptguide.html>)
- If you use a laptop...make sure you **keep it properly locked with a security cable** at your desk at all times. If you take your laptop home, do not leave it visible in your car—that is an invitation for someone to break in. Keep it in your trunk instead. If thieves can't see a laptop, they can't steal a laptop.
- If you need to step away from your desk, remember to **lock your computer** to prevent unauthorized access to university systems. You can lock your computer by using [CTRL + ALT + DEL] and select "Lock Workstation" or [WINDOWS KEY + L].
- When possible, **do not request SSN's electronically on web sites or through email**.



Appropriate Uses of Social Security Numbers (continued)

Alternatives to the SSN in ISIS

Before we can go into which identifiers you can use as an alternative to the SSN, it is helpful to take a step back and go in to the explanation of the different IDs used in ISIS and their purposes.

HopkinsID— Beginning in 2004, the Johns Hopkins Enterprise Directory (JHED) began generating six-character alphanumeric identifiers for all JHU faculty, staff, students, and alumni. This is known as the HopkinsID (e.g. FGB3E1).

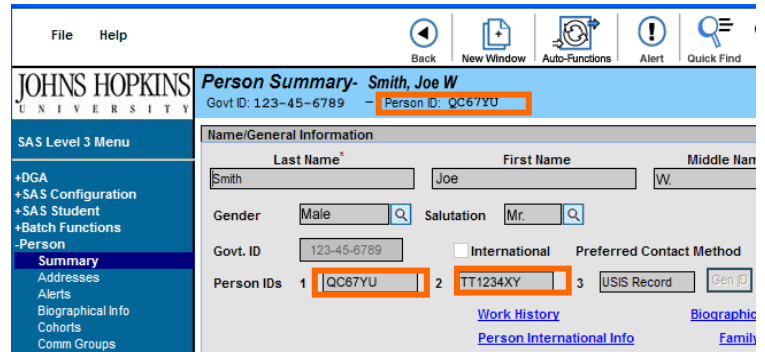
ISIS ID— The ISIS ID is an eight-character alphanumeric identifier assigned to all ISIS users; faculty, staff, students, alumni, and prospective students (e.g. TC1234BX).

Person ID1, Person ID2— In ISIS, there are two fields called Person ID1 and Person ID2. Person ID1 will contain *either* the ISIS ID or the HopkinsID, depending on the status of the user (student/staff/etc. vs. prospects/applicants). Person ID2 will *always* contain the ISIS ID.

Why do we have so many identifiers? In ISIS, the HopkinsID is not assigned to prospective students — only to those who eventually matriculate. Since Financial Aid and Admissions offices routinely correspond with prospective students, the ISIS ID has been developed to help safeguard this population against the inadvertent disclosure of their Social Security Numbers. The value of the ISIS ID will be initially stored in both the *Person ID1* and *Person ID2* fields in ISIS. If a prospective student eventually enrolls at JHU, the value stored in *Person ID1* (which is originally their ISIS ID) will be replaced with their new HopkinsID. The ISIS ID will always be accessible in the *Person ID2* field. See the table below for explanations on the different labels used on ISIS screens and what the values are.

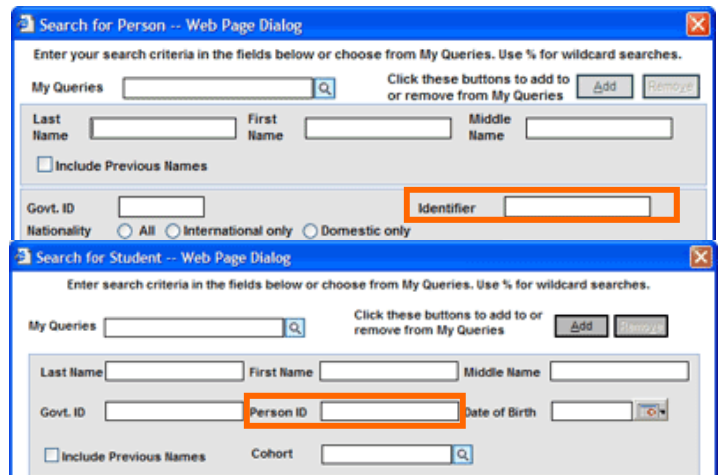
Labels Used on ISIS Screens			
	Govt ID	Person ID* or Identifier* or Person ID1	Person ID2
Value (If a student, faculty, staff, or alumni)	SSN	HopkinsID	ISIS ID
Value (If a prospective student)	SSN or JHU Temp SSN (e.g. 899-XX-XXXX)	ISIS ID	ISIS ID
Searchable?	YES	YES	NO

* Note: The labels "Person ID" and "Identifier" use the value contained in Person ID1. Person ID, Person ID1, and Identifier all contain the same value; the labels are just different.



On the Person Summary screen, the Person ID 1 field is shown next to the Govt ID in the top blue bar.

In the gray area, the Person ID1, Person ID2, and Person ID3 fields are shown. In this example, the Person ID1 field contains the user's HopkinsID (6 char.). The Person ID2 field contains the user's ISIS ID (8 char.). The Person ID 3 field is a reserved field for system administrators.



Look for the "Person ID" or "Identifier" labels on Search screens. They search the same value (Person ID1). Enter the student's HopkinsID, or if they are a prospective student, enter their ISIS ID.

Remember... Where appropriate, especially in external communications, ISIS administrative users should use the ISIS ID or HopkinsID in place of SSNs on letters, reports, etc.

There is an official university policy in development that will outline more specific guidelines on SSN usage. Your cooperation in this effort to increase our awareness and reduce our reliance on student SSNs is very much appreciated and important.

ISIS FOCUS CONTRIBUTORS

Special thanks to this month's ISIS Focus Contributors:

- | | |
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| Jason Astrinsky | Steve Hellen |
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| Kelly Heese | |

