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○ September | ○ 2006

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

ISIS

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

focus

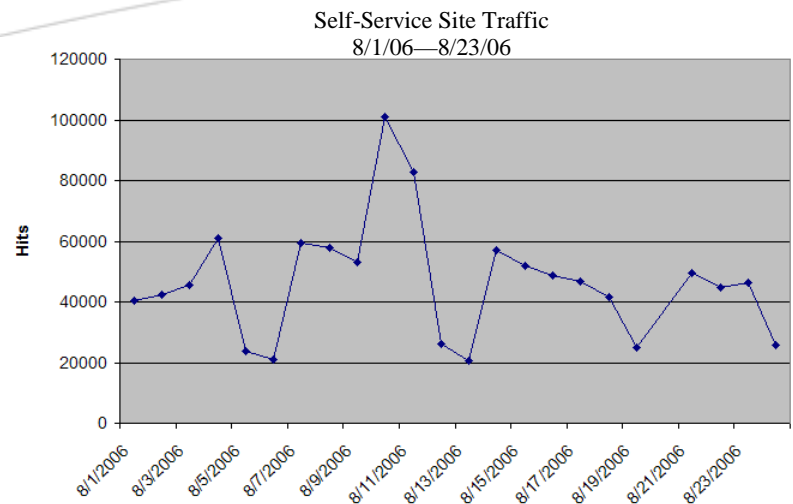
Self-Service Updates



Throughout the month of August, the Self-Service site has continued to get increasing web traffic, averaging about 46,000 hits a day and peaking at 101,035 hits on 8/10/2006, the same day August bills were printed. The performance of the web servers has been able to meet this demand easily.

The Self-Service development team has continued web site usability & accessibility improvements through this past month. Enhancements

have been made to the Self-Service online help system. The team is also in the process of gathering requirements and doing design and development for SSS.



Financial Aid Updates [SAS]

The fall portion of the 2006-2007 school year is upon us, and the financial aid offices at Hopkins have already delivered more than \$30 million dollars in financial aid to students using ISIS. We are also in the process of completing the University's Fiscal Operations Report and Application to Participate (FISAP) report for the Department of Education. This is the first year that the report was produced entirely from ISIS data, and early results show that the new report worked well.

The financial aid community will also spend a significant amount of time this fall planning the integration of our ISIS rules and reports with the SSS module of ISIS. Our current rules and reports reference the various legacy registration systems at Hopkins, and must be changed once SSS becomes the system of record.

SAS Tip of the Month

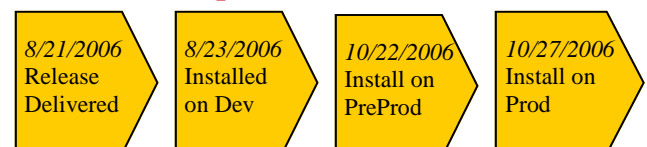
Want to prevent your non-disbursing SAS funds from showing up in the 'Disbursed' column of the SAS Student Aid screen? Ask your technical team to develop a "No Pay" fund disbursement eligibility rule to prevent awards associated with non-disbursing funds from qualifying for disbursement. Link this rule to all of your non-disbursing funds.

The next SAS Users' Group Meeting will be held on September 12th from 9am—11am. The dial in number is: 1-800-467-2166, pass code: 789978.

SunGard Releases 2.6.2

SunGard Higher Education released the Matrix Student Suite version 2.6.2 on Monday, August 21. This release is now installed in the development environment for testing and customization. The release will be installed in Production on October 27. Version 2.6.2 resolves a number of defects and provides several enhancements in each module. Please refer to the release notes (<http://know.isis.jhu.edu/x/KOI>) or contact your divisional representative with questions or concerns.

2.6.2 Implementation Timeline



Records and 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 events included:

- Began USIS data migration testing and SON data migration development
- Prioritized enhancement requests for upcoming development sprints with SunGard Higher Education
- Reviewed inventory of reporting requirements and determined appropriate tool to use for each
- Began design work for custom reports
- Continued tuition calculation design, configuration and development efforts

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: *

- 9/4 - SunGard Development Sprint Begins
- 9/7 - Full Team Meeting
- 9/7 - Data Migration Testing, Configuration and Rule Writing
- 9/11 - Workshop 5, EPP
- 9/12 - Workshop 11, Peabody
- 9/14 - Full Team Meeting
- 9/14 - Data Migration Testing, Configuration and Rule Writing
- 9/15 - Workshop 7, SAIS
- 9/21 - Full Team Meeting
- 9/21 - Data Migration Testing, Configuration and Rule Writing
- 9/25 - Workshop 6, EPP
- 9/25 - Workshop 8, SAIS
- 9/26 - Workshop 12, Peabody
- 9/28 - Full Team Meeting
- 9/28 - Data Migration Testing, Configuration and Rule Writing
- 9/30 - Configuration and Rule Writing Complete

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

Billing Updates [SBS]

The SBS Team and their Student Accounts Offices are preparing to welcome our new and returning students back to campus this month. We continue to advertise our new Self-Service access for students and their Authorized Payers, and are hearing that many questions can be answered by the visibility of current information. We'd love to head-off more of those "What's my account look like?" telephone calls and office visits!



We continue to progress in our efforts to clean up the duplicate person records, get our students zoned into their appropriate "home" divisions, and place appropriate Account Statuses into the newly created SBS accounts. The Fall term aid is flowing in from SAS, which means students' requests for refunds cannot be far behind, especially when they see the credit on their SBS accounts in Self-Service!

Good Luck to everyone during this Fall (and 1st Quarter) registration process!

Admissions Updates [SMS]

The SMS Users' group met on August 2 via videoconferencing with participants at the Mt. Washington and Washington DC campuses. This meeting represented the first step in changing the format and style of the SMS Users' Group meeting. In addition to discussing the challenges that divisions are facing, everyone is encouraged to share their solutions. To further facilitate this process, Nicole Westrick is establishing a page in Confluence where all future SMS Users' Group meeting agendas will be posted. All end users are encouraged to add content to agendas.

Upcoming SMS Go Live Dates - UPDATED -

SAIS-DC	SEPT 18 2006
Nursing	OCT 1 2006
SAIS-Bologna	DEC 1 2006

The next SMS Users' group meeting is scheduled for September 13th from 2 to 4 pm (location TBD, videoconference will be available). The primary topic of this meeting will be a demonstration of the 2.6.2.1 enhancements and creation of a testing plan for the release. You can access the draft agenda in Confluence at: <http://know.isis.jhu.edu/x/8Ew>.

Duplicate Task Force Group Formed

Since the launch of ISIS, a duplicate data issue was introduced. Duplicate person and student records are causing multiple issues for the Self-Service site and all the respective production modules: financial aid, billing, admission, and potentially records and registrations.



To resolve the issue, a “duplicate task force” was formed within SIS. The group will meet weekly to identify the source of duplicates, determine frequency of creation via each source, as well as identify possible solutions to prevent the creation of duplicate data.

All the relevant information and progress will be documented in Confluence at <http://know.isis.jhu.edu/x/WEU>.

Look for updates from the duplicate task force in future issues of the *ISIS Focus*.

Greetings from the ISIS DBA...

You may be wondering, who or what is a DBA? DBA stands for Database Administrator and as a member of the ISIS Technical Operations team, the DBA focuses on:



Sam Meiselman, DBA

- ISIS Rule and Code Review
- Database Design and Optimization
- SQL Server Upgrades
- Opportunities for DB Coding / Practice Standards

Did you Know?

ISIS, being a total management system for a student’s relationship with JHU, demands a large and complex database. For example, ISIS tracks prospects, applicants and other various types of people that total to a sum of over 750,000 people, more than the entire population of Baltimore!

In 1969, using the IBM 7090 computer in the basement of Garland Hall, it would have required almost four hundred 2,000-card boxes to process just the ISIS common person data (*not including* billing, addresses, registration data, etc). That’s enough cards to cover approximately 3 football fields!

Upcoming ISIS Training

Upcoming Training

There is only one ISIS related training course scheduled for the next 2 months... **ISIS: 110 - Departmental Graduate Aid (DGA)** (IS01.110.02) to be held at Eastern on 10/10/2006. To register for this course, call the Office of Training and Education at 443-997-6453 or visit them on the web @ <http://training.jhu.edu>.



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 complete.

- 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)

Departmental Training Available

The ISIS Training team is happy to provide training for your department. For more information, please contact Nicole Westrick at nmwestrick@jhu.edu.

Security Tip of the Month



Data on Paper is the Same as Data on the Screen



Sometimes it is necessary to print out copies of important or sensitive data. If you have sensitive printouts, do not leave them lying around where unauthorized, prying eyes can see them. Be sure to store the printouts in a secure location, and when you do not need them anymore, do not just throw them in the waste basket, **shred them!**

ISIS Tips and Tricks

Minimizing Duplicate Records

A fundamental concept of ISIS is that every individual has only one person record. **In order to ensure that you are not creating duplicate person records, keep in mind the following information when you are entering applicants.** When creating prospects, the steps are similar, but below we will focus on applicants.



From the "Applicant Duplicate Results" screen

When Entering Applicants...

Open Record – The Open Record button allows you to select any of the displayed records that are within your zone and open the existing SMS record for the applicant. Keep in mind that this will move you away from the Duplicate Check Results window.

Create New Student – The Create New Student button allows you to create an applicant record for the selected person. A new applicant record for the selected person record is created using the data that you have entered on the Applicant Fast Entry window. The person information stored in the common module is retained and a new applicant instance is created in the SMS module. Remember that in SMS "Student" and "Applicant" are used interchangeably.

- There may be times when an applicant applies to several programs, so use the Create New Student button to create multiple applicant instances, but retain one source person record.
- The Create New Student button will be disabled if it would attempt to generate two students with the same type/subtype and entry term attached to the same person.

Create New Person/Student – The Create New Person/Applicant allows you to create a new person record and a new applicant record for the individual. The person record and the applicant record will both include the data that you have entered on the Applicant Fast Entry window.

Create New Prospect/Applicant – You are confident that the error record and the selected duplicate record are the same individual and when you check the Applicant Summary window, no results are found.

When Reprocessing Records...

Similarly when you are reprocessing records through the Reprocessing window, you may encounter the following buttons that deal with preventing duplicate records:

Update Selected Record – Select the Update Selected Record when you are confident that the error record and the selected duplicate record are the same individual. When you click Update Selected Record, the selected duplicate record is updated with any information from the error record.

Create New Person – Select the Create New Person button when you are **certain** that none of the duplicate records displayed is a match for the selected error record. You should be absolutely certain of this before you click Create New Person. This creates both a new Person record and the corresponding Applicant record. Be especially careful with people whose name has changed.

Got ideas for the Tips & Tricks section?

Has your group found a creative way to use ISIS to improve your business process? Email isis@jhu.edu.

Looking for Past Issues of *ISIS Focus*?

You can find past issues of *ISIS Focus* on our website at:
<http://www.jhu.edu/isis/newsletter.htm>



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Special thanks to this month's ISIS Focus Contributors:

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