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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 ◦ November ◦ 2007

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

focus

Help Us Help You!

JIRA is a critical component of how we can help you meet your business needs. Here are some guidelines which will help your JIRA issue move more smoothly through the ISIS Change Control process.

- ◆ **Before opening a JIRA**, review the problem with your ISIS divisional technical representative. The problem you are experiencing may be related to configuration or a rule and these items may require more specific details from your technical representative in the JIRA description—or it may be most appropriate for them to address it.
- ◆ **Always assign your issues to ISIS Prod Support** rather than to an individual. If that individual is out of the office, the issue risks being overlooked. The ISIS Prod Support queue is consistently monitored by SIS staff, and, as a result, your issue is prioritized and worked on in a timely manner.
- ◆ **Set realistic target dates.** We make every effort to prioritize and complete JIRA issues as quickly as possible, but your target dates help us prioritize the work in the queue. Keep in mind testing and user validation in Development through to Production is required to move your change through the instances.
- ◆ **Do not omit target dates.** Set the target date for the date you want the change to be in Production.
- ◆ **Use priorities appropriately.** Priorities do not necessarily translate into how fast an issue will be resolved. A production issue marked as **Emergency** will immediately notify SIS staff, either by pager or a cell phone text message.



- * **Emergency** - For production problems only when there is no workaround and critical processing cannot continue. An Emergency priority indicates that you are unable to perform work in ISIS that is critical to your business.
- * **High** - For problems where a major loss in functionality has occurred, but critical processing can still take place with a workaround. A high priority indicates that you are experiencing a loss in system functionality, but can still perform your business through a work-around.

- * **Medium** - For problems where a minor loss in functionality has occurred which causes a delay in moving forward with your everyday work.
- * **Low** - For problems that are cosmetic like misspelled words, or general questions that don't significantly affect moving forward with everyday work. A low priority indicates that your issue has minimal impact to your business.
- * **Unknown** – This is the default priority assigned to an issue. We encourage you to take the time to assign an appropriate priority to the issue and not use this default value.

- ◆ **Details, Details, and More Details! Provide as much detail as possible** when reporting an issue. The more detail you provide in the JIRA, the more quickly we can find the cause of the problem and you can get back to your daily operations. We recommend that you include this information:
 - * user name and role of individual experiencing the problem
 - * Environment (s) where the problem is experienced,
 - * detailed steps to reproduce the problem,
 - * screenshots, if possible,
 - * example records (by ISIS ID **not** SSN),
 - * are other users in your office experiencing the same behavior,
 - * can you reproduce the problem on another computer?
- ◆ **Never include a SSN** anywhere in JIRA - this includes attachments, screenshots, and comments. Paste your screenshot into "Paint" and remove the SSN everywhere it is displayed. Then you can paste this altered screenshot into the JIRA.
- ◆ **For a configuration JIRA**, please be sure to include the location of the workbook (VSS or Confluence) and any other details to get your configuration through to Production as quickly and accurately as possible.
- ◆ **For all promotion requests**, be sure to include the correct and complete path for the location of the SQL (VSS or Subversion).

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“Help Us Help You” article continued from page one . . .

- ◆ **Follow up with issues assigned to you on a timely basis.** For example, if a configuration is completed in WeeklyInstall, it should be reviewed and approved for the next instance, prior to the refresh of that instance, (in this case, each weekend). If the instance gets refreshed before the configuration is reviewed, that will result in having to re-do the configuration in that instance. This will cause your JIRA issue to be delayed and, possibly, go beyond your expected target date. Keep an eye on the ISIS Calendar <http://www.jhu.edu/isis/calendar> for information on when an instance will be refreshed.
- ◆ **Close resolved issues assigned to you promptly.** When SIS resolves a problem or completes a change we will assign the issue back to the original reporter for closure. If you are not the reporter of the JIRA, please assign it back to the original reporter for closure. This will ensure that all participants of the JIRA, including the originator, know that the issue is now resolved and can be closed.

JIRA Top 10 List

1. **Review the problem with your divisional technical representative**
2. **Assign your issue to ISIS ProdSupport**
3. **Set realistic target dates**
4. **Use the appropriate priority**
5. **Details – Include as many details as possible**
6. **Never include a government ID or social security number**
7. **Remember to include the location of the configuration workbook**
8. **Remember to include the complete path of the location of the SQL**
9. **Follow-up on issues assigned to you in a timely manner**
10. **Close resolved issues assigned to you promptly.**

SAS Tip for the Month

When you complete federal verification for individual student records, are you updating the 'Verification Status' field on the upper left corner of the Student ISIR/General tab? A value of V (Verified) is required by COD in order to fully substantiate Pell grant awards. The SAS team is currently investigating ways to automate this process, but manual intervention is currently required.

Records & Registration Updates [SSS]

Processing in ISIS for the fall semester -- the first full semester for most divisions using SSS -- continues to progress well. Issues are being worked through and new issues are arising with much less frequency. As the pace of new issues slows down, attention turns to the tasks remaining from the implementation such as graduation changes, additional batch jobs, usability improvements and many others. At the same time, registration for spring is already underway at some divisions and will open shortly for others. This is another significant milestone as it will be the first time that all divisions working in SSS use ISIS for a full semester's enrollment.



The schedule of SSS team meetings, agendas and minutes for November can be found at <https://know.isis.jhu.edu/x/8w8>.

Financial Aid Updates [SAS]

This month, the long awaited SAS 2.6.2.4 release will be applied to production. You will recall that this release delivers several important enhancements to the SAS administrative interface; greatly simplifying the manner in which staff can revise awards and disbursement records. The most significant changes are visible on the new Update Aid Details screen, now called Update Aid Disbursements. Users will be able to:

- ◆ View changes to Type/Subtype, Aid, Disbursements, ISIR Imports, Student Status, SAP and Loans via the new History link
- ◆ Accept, decline, hold or cancel all awards on the SAS Student Aid screen in one action by selecting multiple awards using the CTRL or SHIFT keys and the new buttons on the SAS Student Aid screen
- ◆ See loan fees and net disbursement amounts automatically recalculated upon editing individual Direct Loan disbursement records
- ◆ Make updates to the COD status and sequence numbers associated with Direct Loan disbursements

Users will also notice that the award amount and sum of all scheduled disbursements are always synchronized. The new screens are very intuitive, taking much of the guess work out of the award revision process. Some retraining may be required, and the new screens will be discussed in greater detail during the November 13th SAS User Group Meeting.

Last month, the Direct PLUS Loan Work Group submitted a proposal to University leadership, requesting permission to offer Direct PLUS loans exclusively to new borrowers, while giving current borrowers the choice to continue with their current Federal Family Education Loans (FFEL) lender. We anticipate a decision on this issue by the end of November.



The next SAS Users Group Meeting is scheduled for **Tuesday, November 13, 2007 from 9:00—11:00 a.m.** Dial 1-800-467-2166 and enter a participant code of 789978 to access the call.

Self-Service Updates

The Self-Service team continues their hard work on implementation of bug fixes and enhancements. A few significant Self-Service enhancements to be on the lookout for in the future include the following:



- ◆ **Unofficial Student Transcripts** - This feature will allow students to view and print out their unofficial transcripts through the Self-Service application, resulting in significant time savings for both the students and the registrar's offices. The advisors will also be able to view their advisees' unofficial transcripts.
- ◆ **Printable Class Schedules** - The Self-Service team is working on providing students with the ability to print out their class schedules for reference on the go.
- ◆ **Advisor Access to Class Schedules** - Advisors will soon have access to their advisees class schedules to assist them in the decision making process.
- ◆ **Excel Grade Upload** - The faculty will soon have the ability to fill in student grades in the downloaded Excel grade roster and subsequently upload the grade roster to report the student grades in ISIS.
- ◆ **Integrated Web Chat Pilot** - The Self-Service team will be exploring the viability of browser-based instant messaging as a means for ISIS to provide direct technical support to the self-service users (students, faculty, advisors, and authorized payers). This pilot is a partnership between SIS and the Homewood Financial Aid Office to support their early decision applicants.



Reminder To Close All Browser Windows

The team would like to use this opportunity to stress the importance of closing all browser windows in order to be fully logged out of the Self-Service application. A defect in the single sign-on software package

that is currently being used by ISIS is preventing the Self-Service application from logging a user out of the system. The resolution of this problem in the single sign-on software is currently in the works, but in the meantime we would like to stress how important it is to close all browser windows in order to log out of the system. Previously, the logout link in the top right corner of the self-service screens would take the user to a page indicating that he/she must close all browser windows in order to log out. It appears that in some public locations the students would click the link and walk away, resulting in their records being exposed to the next student who attempted to use the system. Until the problem is fully resolved in the single sign-on software, please be sure to close all browser windows in order to prevent others from accessing your records.

Admissions Updates [SMS]

The October SMS Users Group meeting covered a variety of topics. Highlights included:



- ◆ **MBA Capstone Students** - Abe Mauer and Eric Brown, students at the Carey Business School, attended the SMS user group meeting. They are working on an MBA Capstone project to develop a strategic plan for Student Information Systems, with a focus on the use of distributed computing technologies in support of teaching and learning. A number of questions were discussed. These students may be contacting SMS team members for additional information.
- ◆ **Delete Prospects and Applicant Records** - A review of the testing activities and next steps related to the ability to delete prospect and applicant records. It appears that users will be able to delete prospect and applicant records, but they will not be able to delete the underlying person record. Additional testing is required. David Paolino is working on some customizations to improve the delete confirmation message and the record selection process. More details and discussion will happen at the November SMS Users Group meeting.
- ◆ **2.6.2.1.x Security Release** - It is essential that every division perform impact testing in both development and pre-production before the release is migrated to Production on Thursday, November 1st. Every division should go through all of the regular tasks that they perform in ISIS and validate that all customizations are working with the new release. It is often more difficult to correct a problem after it goes to production, especially when it could be prevented by thorough testing.
- ◆ **JIRAs** - Many open JIRAs were discussed at the meeting. Complete notes and action items are available in the meeting minutes.



SMS Users Group Meeting Reminder

The next SMS Users Group is scheduled for **Tuesday, November 13 from 2 p.m. – 4 p.m. at Mt. Washington B-133A**. You can add items to the agenda in Confluence at: <https://know.isis.jhu.edu/x/JMo>. To review the minutes from the September meeting visit Confluence at <https://know.isis.jhu.edu/x/Iso>.

Nicole Westrick is working on scheduling the 2008 User Group meetings. These should be available prior to our November meeting in Confluence at: <https://know.isis.jhu.edu/x/8Ew>.



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

Meet the ISIS Staff...Kelly Heese

I started working at JHU in the fall of 2005. Prior to that I spent my time in Philadelphia... going to school at Drexel University (BS Information Systems) and then spending 2 years working at the University of Pennsylvania. There I was the School of Engineering's "web girl" -



redesigning and maintaining the school's web site as well as assisting faculty and staff with all their web related needs. A job change for my husband brought us to the Baltimore area -- and within a month's time-- I had gotten married, went on a wonderful honeymoon, moved to Baltimore, and started a new job with Student Information Systems. Talk about a busy month!

Since being at JHU, I've been lucky to work in many different areas of the department and with ISIS. This has allowed me to work with just about everyone in my department and many folks in the divisional offices. I've spent time administering and supporting our department's time tracking system, JIRA, and Confluence. For the last year or so, I've spent most of my time with the Self-Service team - helping with site design and development efforts as well as testing for the SSS go live.

The greatest challenge I find with ISIS is the depth of the system and how all the pieces interact. Working with the Self-Service site really brings all these aspects together – so there is always something new to learn and understand.

I have a passion for web usability and am always striving for things to be as easy and intuitive as possible on the web.

Outside of work I like to stay active – hiking, biking, running, etc. My favorite vacation getaway is the beach...particularly Florida's Gulf Coast and the Outer Banks in North Carolina. Something you may not know about me is that I completed a triathlon while in college (when I was actually in shape). There's no better feeling than pushing yourself physically like that and accomplishing the goal. I also love animals and worked part time in Philadelphia as a dog walker/pet sitter. That allowed me to do many of the things I love...bike around the city, spend time with animals, and walk!

Lately I've been busy with the birth of our first son, Christopher Patrick. He was born last month on October 7th, weighing 7 pounds and measuring 20 inches long. My husband and I are treasuring every moment – from the funny faces and smiles he makes when he's sleeping to simply gazing into his eyes when he's awake and content.

...I've been lucky to work in many different areas of the department and with ISIS.

Billing Updates [SBS]

The SBS Team continues to monitor the Tuition Calculation process which is based on various statuses in SSS, and we will refine the procedures as we all become more familiar with the integration of the systems. Constant contact with our divisional Registrar's Offices is vital during this time of learning and of changing business operations.

The team met with two of the Capstone Project members to discuss SBS and the role of IT in our business practices. We anticipate some follow-up by them, and look forward to continuing to work with them. We are being given roles and permission to do our own uploading of large files into SBS directly, such as health fees and library fines. SRS reporting was demonstrated to us at our last meeting, and we will be testing the ad hoc reporting capabilities this access gives us as we move away from Crystal Reports.

The SBS areas of the latest security patch are undergoing testing by team members, to determine if any normal operations are affected. David Paolino will send us information about our PINE responses and additional information he needs to enhance the SBS portion of the system. Our November SBS Team meeting will concentrate on this important project. Team meeting notes are visible and can be updated in Confluence in the ISIS Billing space, linking to SBS Meetings and Minutes by date.

 The next SBS Users Group Meeting is scheduled for **Tuesday, November 27, 2007 from 9:30 a.m.—12:00 noon at Mt. Washington, A-15.**



Business Solutions Manager Position Has Been Posted

Student Information Systems has recently posted a newly created "Business Solutions Manager" position, a key functional leadership role to promote the use and integration of student information systems across the university and providing post-implementation leadership and direction to the ISIS functional user groups. For more information, or to apply, please visit the link below

Business Solution Manager (ISIS); Req #31588

Role = ATP, Level = 4, Range = PF

https://hrmt.jhu.edu/jhujobs/job_view.cfm?view_req_id=31588.

Security Tip of the Month

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 you need to run an errand on your way home. If thieves can't see a laptop, they can't steal a laptop. Do not leave your laptop in your car for long periods of time, i.e. overnight — heat and cold are not good for it!

ISIS Data Entry For International Students

In order to increase the accuracy of data entry for international student information, there have been several processes implemented in ISIS to automatically set certain fields. These include:

CONDITION	AUTOMATIC UPDATE
If the Citizenship Status is Non US Citizen (regardless of whether the student is a legal permanent resident)	Then the International checkbox is selected.
If the Citizenship Status is Non US Citizen and the Visa Type is not LPR	Then the Non-Resident Alien checkbox is selected and the Race Code value in self-service displays as Not-Applicable
If the Citizenship Status is Non US Citizen and the Visa Type is LPR	Then the Permanent US Resident checkbox is selected.

Entering an International Student (including US Permanent Residents)

To enter international student information, you must visit two windows: **Biographical Details** and **International Info**

STEP 1: Citizenship and Country of Citizenship information:

- From the menu select **Summary** → **Biographical Info** link → **Citizenship Details** region.
- In the **Citizenship Status** drop-down, select **Non US Citizen**.
- In the **Country of Citizenship (if not US)** drop-down, select the student's country of citizenship.
- Save your work.
- NOTE: The **International** checkbox is automatically selected by the automated processes.

STEP 2: Applicant International Information/Visa information:

- From the Applicant Biographical Details window, select the Applicant International Info link → Visa information region
 - Click on the **ADD** button
 - In the **Type** field, select the student's Visa Type.
 - In the **Status** field, select **Active**.
 - Click the **POST** button
 - Save** your work.
- NOTE: Do not use the **Back** button to review that the Citizenship Status and Permanent US Resident flags are set correctly! From the menu, select Applicant Summary → Applicant Biographical link → Citizenship Details region.

ISIS Tips & Tricks

Use the Section Calendar to Manage Class Meeting Dates!

After you have entered days of the week and time information on the Times/Faculty window, the Section Calendar window allows you to view every meeting for a section. You can use this window to maintain those sections which do not meet on a regular schedule. You can also use this window to remove holidays.

From the SSS menu, select **Section** → **Maintain** → **Calendar**

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.

All of us in Student Information Systems would like to wish you and your family a happy and healthy Thanksgiving Holiday!

Upcoming ISIS Training

Course Title	Time	Location	Date(s) Offered *
Astra Event Scheduling and Reporting AS01.100.500	1pm-4pm	Eastern B104	11/15/2007
Astra Schedule (2 day) AS02.001.100	9am-4pm	Eastern B104	11/7/— 11/8/2007
SSS Registration and Records Overview IS01.402.07	9am– 12pm	Eastern B104	11/6/2007

* Dates offered with seats available as of this publication date.

Departmental Training Available

For more information, please contact Nicole Westrick at mmwestrick@jhu.edu.

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

Web-Based Training

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
 ISIS: 110 - Departmental Graduate Aid
 ISIS: 120 - Financial Aid Inquiry
 ISIS: 130 - Student Billing Inquiry

What do YOU think of this newsletter?
 Your comments, and suggestions are always welcome at isis@jhu.edu.



Looking for Past Issues of *ISIS Focus*?

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



ISIS FOCUS CONTRIBUTORS

Special thanks to this month's ISIS Focus Contributors:

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