These slides represent the direction and intentions of the student administration team at the time the slides were presented. As the project evolves, some aspects may change. In particular, the screenshots contained in this presentation represent a default configuration. The configuration of screens at McMaster may vary.
Mosaic
Student Administration
Open House

April 4, 2013
Agenda

Refreshments and Registration
Welcome and Project Update
“I heard it through the grapevine”
Project Topics
Break
Project Topics II
Change and Training
Questions and “Don’t worry the ERP will fix that”
Prize Draw!
Team Mandate

To deliver a user-centric student administration system with integrated processes by leveraging our team’s unique insight and integrity to create a superb McMaster experience

-Student Administration Team
Project Status

What have we done so far?
- Finished Fit Gap workshops!

What are we doing now?
Detailed Fit
- Evaluating our business processes against PeopleSoft delivered functionality
- Developing ‘to be’ maps
- Consulting areas: Graduate Studies, Divinity, FHS, etc.
- Determining gaps and how to close them
  (Report, Interface, Conversion or Enhancement)
Revised Implementation Timelines

- Student administration systems are high priority
- Reflect the complexity and size of the student administration streams
- Several ways to configure system
  - gives us the time to choose the best option
- Implementation dates align better with business and student cycle
Timeline Overview

- **Student Administration**: Fit-Gap Stage
- **Finance**: December
- **Research Administration**: May
- **Human Resources**: Fit-Gap Stage, Design and Build, Go Live

*Finance includes budgeting*

- **2013**: Fit-Gap Stage
- **2014**: Design and Build, Go Live
- **2015**: Phase 1 October, Phase 2 December, Phase 3 March

Phase 1 May, Phase 2 September, Phase 3 January
Pop Quiz
Name one member of the Mosaic Executive Committee

or

Name one member of the Mosaic Steering Committee

(five prizes available)
# Executive Committee

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Wilkinson</td>
<td>Provost and Vice President, Academic</td>
</tr>
<tr>
<td>John Kelton</td>
<td>Dean and Vice President, Faculty of Health Sciences</td>
</tr>
<tr>
<td>Mo Elbestawi</td>
<td>Vice President, Research and International Affairs</td>
</tr>
<tr>
<td>Roger Couldrey</td>
<td>Vice President, Administration</td>
</tr>
<tr>
<td>Fred Hall</td>
<td>Chair, Mosaic Steering Committee</td>
</tr>
<tr>
<td>John Kearney</td>
<td>CIO, University Technology Services</td>
</tr>
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</table>
## Steering Committee

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
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</thead>
<tbody>
<tr>
<td>Fred Hall</td>
<td>Chair, Mosaic Steering Committee</td>
</tr>
<tr>
<td>Linda Elliott</td>
<td>Program Director, Mosaic</td>
</tr>
<tr>
<td>Deidre Henne</td>
<td>Assistant Vice President (Administration) &amp; CFO</td>
</tr>
<tr>
<td>John Kearney</td>
<td>CIO, University Technology Services</td>
</tr>
<tr>
<td>Debbie Martin</td>
<td>Assistant Vice President/Chief Administrative Officer (CAO), Faculty of Health Sciences</td>
</tr>
<tr>
<td>Barb McKenna</td>
<td>Director, Research Finance</td>
</tr>
<tr>
<td>Wanda McKenna</td>
<td>Director, Human Resources</td>
</tr>
<tr>
<td>Melissa Pool</td>
<td>University Registrar</td>
</tr>
<tr>
<td>Jacy Lee</td>
<td>Associate Vice President, Institutional Research and Analysis</td>
</tr>
</tbody>
</table>
“I Heard it through the Grapevine”
Student Administration Project Topics
Proposed McMaster Careers:
- Undergraduate, Graduate, Continuing Education, Medicine and Divinity

MacTalk | PeopleSpeak
---|---
Session | Term
Term | Session
Admin Group | Career
Program | Plan
Up | Down
Left | Right
Academic Structure

- Three term structure
  - There is functionality to enable courses to run over multiple terms
  - Registration and fee payment schedule will stay the same
  - Multi-term classes
Campus Community, Admissions, and Transfer Credit
Campus Community

- Personal Data, Checklists, Communications, Comments, Service Indicators
- Communications for Applicants and Staff
  - What? When? Why?
<table>
<thead>
<tr>
<th>Admissions</th>
<th></th>
<th></th>
<th></th>
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<tbody>
<tr>
<td>Request Information</td>
<td>Apply for Admission</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact Information</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Permanent Address</td>
<td>None</td>
<td>Mailing Address</td>
<td>None</td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Other Personal...</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary Phone</td>
<td>None</td>
<td>Contact: Email</td>
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<table>
<thead>
<tr>
<th>Admissions</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>My Applications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PeopleSoft University</td>
<td>Fine Arts Undergraduates</td>
<td>2014 Fall</td>
<td></td>
</tr>
</tbody>
</table>
Admissions/Self Service: One Stop - Applicant

- Ability to maintain biographical information.
- Ability for applicants to view items that staff have identified as required for their application – ‘live/status’ information.
- Ability to submit Supplementary Application.
- Ability for applicants to view admission (and any transfer credit)/refusals (deny) decisions.
- Ability for non-OUAC applicants to accept an offer; provide a link for OUAC applicants to accept an offer.
Admissions

- Opportunity to scan documents and electronically transfer admission files to the Faculties. Save a tree!
- McMaster On-line Application for admission (non-OUAC)
  - replace manual entry of paper forms, web-forms and other stand-alone methods of applying. (Save another tree!)
- Graduate Studies: Replace SynApps
  - application data directly to PeopleSoft
### Course Credits

<table>
<thead>
<tr>
<th>Model Nbr</th>
<th>Institution</th>
<th>Credit Source Type</th>
<th>Source Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PeopleSoft University</td>
<td></td>
<td>University of Glasgow</td>
</tr>
<tr>
<td>Career</td>
<td>Undergraduate</td>
<td></td>
<td></td>
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<tr>
<td>Program</td>
<td>Fine Arts Undergraduate</td>
<td></td>
<td></td>
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<tr>
<td>Plan</td>
<td>Music BA</td>
<td></td>
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</tr>
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</table>

<table>
<thead>
<tr>
<th>Term</th>
<th>Incoming Course</th>
<th>Units Taken</th>
<th>Grade Input</th>
<th>Status</th>
<th>Equivalent Course</th>
<th>Units</th>
<th>Grade</th>
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</thead>
<tbody>
<tr>
<td>2014 Fall</td>
<td>MUSIC 10001</td>
<td>3.00</td>
<td>A</td>
<td>Posted</td>
<td>MUSIC 160</td>
<td>3.00</td>
<td>T</td>
</tr>
</tbody>
</table>

### Test Credits

No test credits found.

### Other Credits

No other credits found.
Student Records

- Student Self Registration
  - Students will be given a specific enrolment appointment date and time
  - Students will be able to register and immediately receive their class schedule
  - Students will be able to browse academic requirements and course catalog, and will be able to add courses to planner or shopping cart via these tools
  - Pre/Co/Anti requisites are visible when enrolling in self-service
  - Pre-planning and validation can make the actual registration process a few clicks and they are finished.
Student Registration - Student View

Dwayne Jones

Shopping Cart

Add Classes to Shopping Cart

Use the Shopping Cart to temporarily save classes until it is time to enroll for this term. Click Validate to have the system check for possible conflicts prior to enrolling.

2013 Fall | Undergraduate | PeopleSoft University

Add to Cart:

Enter Class Nbr

Find Classes

Class Search

My Requirements

My Planner

2013 Fall Shopping Cart

<table>
<thead>
<tr>
<th>Select</th>
<th>Class</th>
<th>Days/Times</th>
<th>Room</th>
<th>Instructor</th>
<th>Units</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ART 112-1</td>
<td>MoWeFr 10:00 - 10:50</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>HISTORY 101-1</td>
<td>Tu 18:30 - 21:00</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
<td></td>
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</table>

for selected: delete validate enroll

My 2013 Fall Class Schedule

Enrolled

Dropped

Wait Listed

<table>
<thead>
<tr>
<th>Class</th>
<th>Description</th>
<th>Days/Times</th>
<th>Room</th>
<th>Instructor</th>
<th>Units</th>
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</thead>
<tbody>
<tr>
<td>ENGLIT 110-SR1 [1692]</td>
<td>Critical Reading of Lit (Lecture)</td>
<td>TBA</td>
<td>TBA</td>
<td>Staff</td>
<td>3.00</td>
</tr>
<tr>
<td>MATH 107-1 [1184]</td>
<td>Precalculus (Lecture)</td>
<td>TuTh 09:00 - 10:20</td>
<td>TBA</td>
<td>Staff</td>
<td>2.00</td>
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</tbody>
</table>
BREAK
Pop Quiz
Name a member of the Student Advisory Committee

(five prizes)
### Committee Members

<table>
<thead>
<tr>
<th>Committee Members</th>
<th>Joanne Smith</th>
<th>Susan Birnie</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrea Thyret-Kidd</td>
<td>Ruth Toth</td>
<td>Wendy Finemore</td>
</tr>
<tr>
<td>Lynn Giordano</td>
<td>Maria White</td>
<td>Lisa Boniface</td>
</tr>
<tr>
<td>Rebecca Hamilton</td>
<td>Cathy Oudshoorn</td>
<td>Nina Thomas</td>
</tr>
<tr>
<td>Sophia Holness</td>
<td>Huaifa Saeed</td>
<td>Elizabeth Seymour</td>
</tr>
<tr>
<td>Paula Johnson</td>
<td>Greg Rombough</td>
<td>Anne Cholewka</td>
</tr>
<tr>
<td>Pat Kalnins</td>
<td>Jane Lewis</td>
<td>Gord de Pass</td>
</tr>
<tr>
<td>Marzena Kielar</td>
<td>Sonya Martin</td>
<td></td>
</tr>
</tbody>
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**Student Advisory Committee**

---

McMaster University

Mosaic
Student Centre

- Increased Functionality in the Student Centre
  - Electronic transcript requests and enrolment letters
  - Students can view unofficial transcripts through self-service
  - Grade Reports for entire academic career
  - Student Account and Financial Aid Views
  - Admissions information
  - Students will be able to run their own “what-if” advising reports
# Student Centre – Staff View

**Dwayne Jones**

**ID:** SFEK00006

### Academics

- **My Class Schedule**
  - Shopping Cart
  - My Planner
- **other academic...**

**2013 Fall Schedule**

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Date/Time</th>
<th>Room</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENGLIT 110-SR1</td>
<td>LEC (1962)</td>
<td>TBA</td>
<td></td>
</tr>
<tr>
<td>MATH 107-1</td>
<td>LEC (1184)</td>
<td>TuTh 09:00 - 10:20</td>
<td>TBA</td>
</tr>
</tbody>
</table>

### Finances

- **My Account**
  - Account Inquiry
- **Financial Aid**
  - View Financial Aid

**Account Summary**

- You owe 8,775.34.
  - Due Now: 8,775.34
  - Future Due: 0.00
- You have a past due balance of 8,775.34.

Currency used is Canadian Dollar.

### Personal Information

- **Demographic Data**
  - Emergency Contact

**Contact Information**

- **Permanent Address**
  - 975 Syson Road
  - Burlington ON L7L 5S3
- **Mailing Address**
  - 437 Elizabeth Street
  - Burlington ON L2R 2L8
- **Primary Phone**
  - 925.642.9392
- **Campus Email**
  - dwayne@momaster.ca

### Admissions

- **Apply for Admission**

**My Applications**

- PeopleSoft University
  - Graduate Liberal Arts Programs
- 2014 Fall

### Search Engines

- CNN
- BBC
- NBC
- Yahoo
- Google

### Other Links

- Amazon
- McMaster
Student Records: Administrative Staff

- Student Service Centre provides consolidated view of student information and view of student self-service
  - You see what the student sees!
- 3C’s Communication Engine is comprehensive tool to support select student populations for custom communications
- Integrated data and new reporting tools will better support reporting and analysis
- No More SENTENCES
  - replaced by specific PeopleSoft functionality
Student Records: Administrative Staff

- Effective dating throughout the system provides better management and historical information.
- One process for Faculty/department to provide information for both academic calendar and class scheduling.
- Replacing the DCU with PeopleSoft functionality.
- Reserve capacities, block enrolment and wait-listing will provide new tools for managing class enrolment.
- Ability to assign instructors to all classes.
- Class roster with email functionality.
More PeopleSpeak

- Academic Advisement = Degree Audit

- When a student changes program the advisement processes will automatically reflect the new requirements for the student

- There is specific functionality that enables faculty advisors to customize student-specific advisement requirements without setting up a new requirement
Student Records: Instructors

- Faculty centre for instructors provides online access to key faculty resources
  - Instructor schedule
  - Exam schedule, including accommodated exams
  - Class roster with email functionality

- Faculty information is updated real-time
## Class Roster

### ART 113 - 1 (1318)

**History of World Art (Lecture)**

<table>
<thead>
<tr>
<th>Days and Times</th>
<th>Room</th>
<th>Instructor</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mo 3:00PM-5:30PM</td>
<td>TBA</td>
<td>Ana Beck, Aurelia Edmundson, Betty Locherty</td>
<td>2013/08/30 - 2013/12/12</td>
</tr>
</tbody>
</table>

**Enrollment Status** Enrolled

**Enrollment Capacity** 4  Enrolled 4

Select display option:  
- Link to Photos
- Include photos in list

### Enrolled Students

<table>
<thead>
<tr>
<th>Photo ID</th>
<th>Name</th>
<th>Grade Basis</th>
<th>Units</th>
<th>Program and Plan</th>
<th>Level</th>
<th>Status Note</th>
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<tbody>
<tr>
<td>SR0417</td>
<td>Heck, Heather</td>
<td>Graded</td>
<td>3.00</td>
<td>Fine Arts Undergraduate - Music Performance (BFA)</td>
<td>Freshman</td>
<td></td>
</tr>
<tr>
<td>SR0416</td>
<td>Isaac, Aaron</td>
<td>Graded</td>
<td>0.00</td>
<td>Fine Arts Undergraduate - Music Performance (BFA)</td>
<td>Freshman</td>
<td>Withdrawn</td>
</tr>
<tr>
<td>SR0431</td>
<td>Nolan, Edward</td>
<td>Graded</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - Undeclared Undergraduate</td>
<td>Freshman</td>
<td></td>
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<tr>
<td>SR0432</td>
<td>Norfleet, Marian</td>
<td>Graded</td>
<td>3.00</td>
<td>Liberal Arts Undergraduate - Undeclared Undergraduate</td>
<td>Freshman</td>
<td></td>
</tr>
</tbody>
</table>
### View My Weekly Schedule

#### Week of 2013/9/2 - 2013/9/8

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday Sep 2</th>
<th>Tuesday Sep 3</th>
<th>Wednesday Sep 4</th>
<th>Thursday Sep 5</th>
<th>Friday Sep 6</th>
<th>Saturday Sep 7</th>
<th>Sunday Sep 8</th>
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<tbody>
<tr>
<td>8:00AM</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>9:00AM</td>
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<tr>
<td>10:00AM</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>11:00AM</td>
<td>ENGLIT 120 - 1 Lecture 11:00AM - 11:50AM</td>
<td>ENGLIT 120 - 1 Lecture 11:00AM - 11:50AM</td>
<td>ENGLIT 120 - 1 Lecture 11:00AM - 11:50AM</td>
<td></td>
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<tr>
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<td>1:00PM</td>
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<td></td>
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<tr>
<td>2:00PM</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>3:00PM</td>
<td>ART 113 - 1 Lecture 3:00PM - 5:30PM</td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<td>4:00PM</td>
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<tr>
<td>5:00PM</td>
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<tr>
<td>6:00PM</td>
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</table>
Student Financials

- Student Cashiering is a separate module from Finance Cashiering.
- Self Service has delivered ability to accept on-line payment for non-sanctioned fees and the possibility of accepting credit cards.
- Direct deposit option for refunds is another delivered function that could be considered.
- Tuition fees will be assessed in real time, this includes waivers such as P/R Deductions and Staff Assistance.
Financial Aid

A McMaster solution for all areas providing aid to students:

- Office of Student Financial Aid & Scholarships
- CCE
- Divinity College
- MBA Programs, DeGroote School of Business
- The School of Graduate Studies
- The School of Medicine
- Faculties and Departments….
Financial Aid

- Solutions for University and Government Student Aid
- Full Integration within Campus Solutions
- Interfaces for HR/Payroll and Trust Funds
Financial Aid: New Student Experience

- “Smart” Online Applications for University Aid
  - Pre-screening Capabilities
  - Standardized Templates
  - Standardized Process Flows

- Checklists
  - Identify Action Required by Student
  - Cleared Once Requirement Complete
Financial Aid continued

- See the “Whole” Picture
  - PS Student centre Includes Financial Aid
  - Track Aid Status from Application to Decision to Payment
  - Payment Clearly Identified on Student Account
  
  …“University Achievement Award” vs “Scholarship”
Financial Aid: Process Improvements

- **Determining Aid**
  - Online Applications (more!)
  - Mathematical to Committee Selection (we’re covered!)

- **Aid Payments**
  - Transactions…not Journal Entries!

- **Work Program Employer Processes**
  - Work program job requisitions through HR Recruitment
  - SFAS approvals via HR work queue
  - HR generated Term End Labour/Distribution Reports
  - …no more Employer Reports!
People, Change and Training
People Principles

- We will communicate information about the Mosaic project to increase your understanding of it.
- We will invite and consider your input and tell you what we’ve done with it.
- We will provide learning opportunities for you to build the skills and knowledge necessary to prepare for, implement and sustain this change.
- We will recognize your efforts and accomplishments.
People Principles continued

- We will foster increased collaboration and understanding of how our work impacts others.
- We will help leaders of the organization to embrace, lead and enable change.
- We will encourage greater innovation and flexibility in order to create value-added services.
Training

- Provide the right training to the right people at the right time so that McMaster’s staff and faculty are able to use the new system when they need to.
- Training will be designed to meet the needs of user groups.
- Schedules will be released in advance to ensure that end users are aware of training opportunities.
- Multiple training methods (class, web, etc.)
Communication & Engagement

Regular updates to TMG and Daily News

Bulletins outlining details on process changes

Open House

Readiness survey

Training

Legend

Fit/Gap Planning
Common Design
Design
Build
Deliver
Operate
Questions

a.k.a.

“Don’t Worry, the ERP will fix that…”

www.mcmaster.ca/mosaic
mosaic@mcmaster.ca
Mosaic Student Project Team Contacts

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sonya Martin</td>
<td><a href="mailto:martin@mcmaster.ca">martin@mcmaster.ca</a></td>
</tr>
<tr>
<td>Olivia Demerling</td>
<td><a href="mailto:demerl@mcmaster.ca">demerl@mcmaster.ca</a></td>
</tr>
<tr>
<td>Jackie Nielson</td>
<td><a href="mailto:nielsen@mcmaster.ca">nielsen@mcmaster.ca</a></td>
</tr>
<tr>
<td>Bernadette Belan</td>
<td><a href="mailto:belanb@mcmaster.ca">belanb@mcmaster.ca</a></td>
</tr>
<tr>
<td>Mat Lampriere</td>
<td><a href="mailto:lemprim@mcmaster.ca">lemprim@mcmaster.ca</a></td>
</tr>
<tr>
<td>Nevine Chawra</td>
<td><a href="mailto:chawran@mcmaster.ca">chawran@mcmaster.ca</a></td>
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<tr>
<td>Gord de Pass</td>
<td><a href="mailto:depass@mcmaster.ca">depass@mcmaster.ca</a></td>
</tr>
<tr>
<td>Julie Birch</td>
<td><a href="mailto:birchj@mcmaster.ca">birchj@mcmaster.ca</a></td>
</tr>
<tr>
<td>Tracie Long</td>
<td><a href="mailto:traciel@mcmaster.ca">traciel@mcmaster.ca</a></td>
</tr>
<tr>
<td>Theresa Cooke</td>
<td><a href="mailto:cooketm@mcmaster.ca">cooketm@mcmaster.ca</a></td>
</tr>
<tr>
<td>Mark Russom</td>
<td><a href="mailto:russom@mcmaster.ca">russom@mcmaster.ca</a></td>
</tr>
</tbody>
</table>