



UNC  
INFORMATION  
TECHNOLOGY SERVICES

# **ERP Implementation Update: Board of Trustees, Academic Affairs Committee**

November 19, 2008



# ERP Implementation

## “Enterprise Resource Planning”

What does the “ERP” buzzword imply?

- Process integration - integrated infrastructure that supports end-to-end activity for key administrative processes
  - Provides clarity around processes
  - Facilitates training and knowledge transfer
  - Best-practice-based business processes
  
- Standards-based architecture and toolkit
  - Reduces range of skills required to support system
  - Reduces number of staff required for support and maintenance
  - Allows flexibility in reallocating resources across specific functional areas



# Why are we doing this?

- Fragile, aging, and inflexible architecture
  - Outdated mainframe technology
  - Legacy systems increasingly prone to errors
  - Changes lead to unpredictable ripple effects
  - Risky and excessively laborious to modify applications
  - Difficult to find people who have skills needed to address legacy mainframe backend systems as well as web front-end interfaces
  - For Student: current mainframe vendor product no longer supported
- Technical difficulties impede new functionality
  - Inadequate reporting capabilities
  - Inability to address core functionality in certain areas such as admissions
- Problematic system architecture
  - Data housed in many different systems difficult to integrate
  - Redundant/duplicated data cause data integrity issues
  - Current mainframe data base architecture no longer supported



# Project Vision

- Support all those who work and learn at UNC-Chapel Hill with an administrative system able to handle our level of complexity
- Improve the experience of Carolina students with state-of-the-art software
- Provide improved resources—including secure, centralized, and standardized data sources as well as powerful reporting tools
- Establish a common, sustainable platform based on current technology
- Support staff success by providing effective, user-friendly training and ongoing support
- Establish a governance structure for administrative systems that ensures policy, process management, and system changes are addressed equitably and efficiently from a University-wide perspective
- Encourage University-wide collaboration by supporting the development of standardized processes



# Beyond the software

The process supports institutional transformation beginning with:

- An end-to-end review of student processes
- Clarification and renewed look at policies and practices
- Establishment of an active project governance structure that prepares the way for ongoing governance
- Broad campus engagement in defining the new system and associated processes
- Establishment of a common, sustainable platform that provides the basis for future development

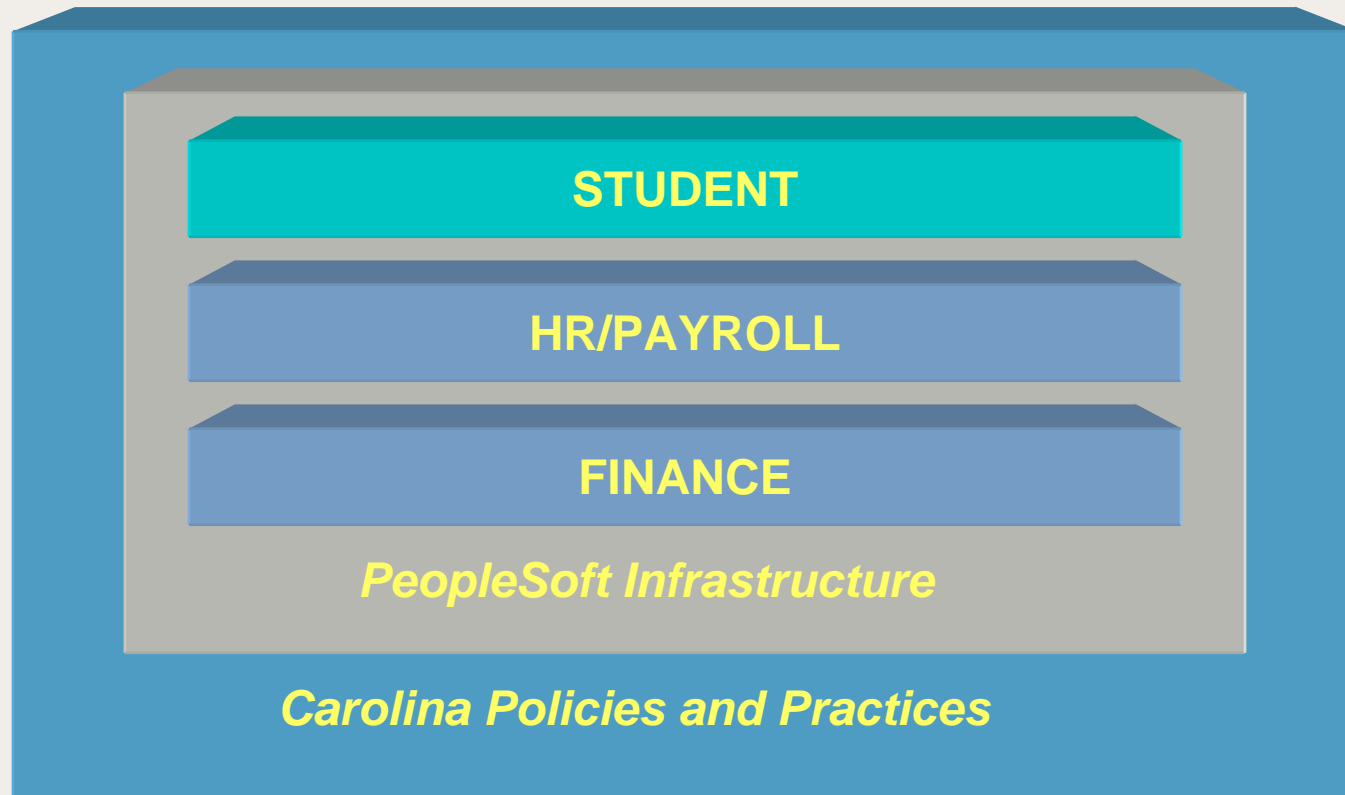


# Benefits for Our Students

- Improved student service through process consolidation/clarification
  - Admissions
  - Transcript Issuance
  - Residency determination
- Improved service capability through data consolidation and access
  - Academic records - all centralized
  - Reduced number of supplemental systems with difficult and inconsistent integration
- Improved student experience
  - Easy-to-use self-service capability that maximizes the “Carolina experience” through tools students need to:
    - ◆ Manage their academic careers
    - ◆ Monitor their “to do’s”
    - ◆ Maintain their personal information
    - ◆ Modern “shopping cart” design similar to commercial web sites



# Project Scope





# Project Structure/Governance

Project Sponsors: Bernadette Gray-Little,  
Larry Conrad, Dick Mann

Stakeholders Committee:  
Chaired by Roger Patterson

Information Technology  
Services

ERP Project Team: Led by  
Stephanie Szakal

Integrator:  
Deloitte, Inc.

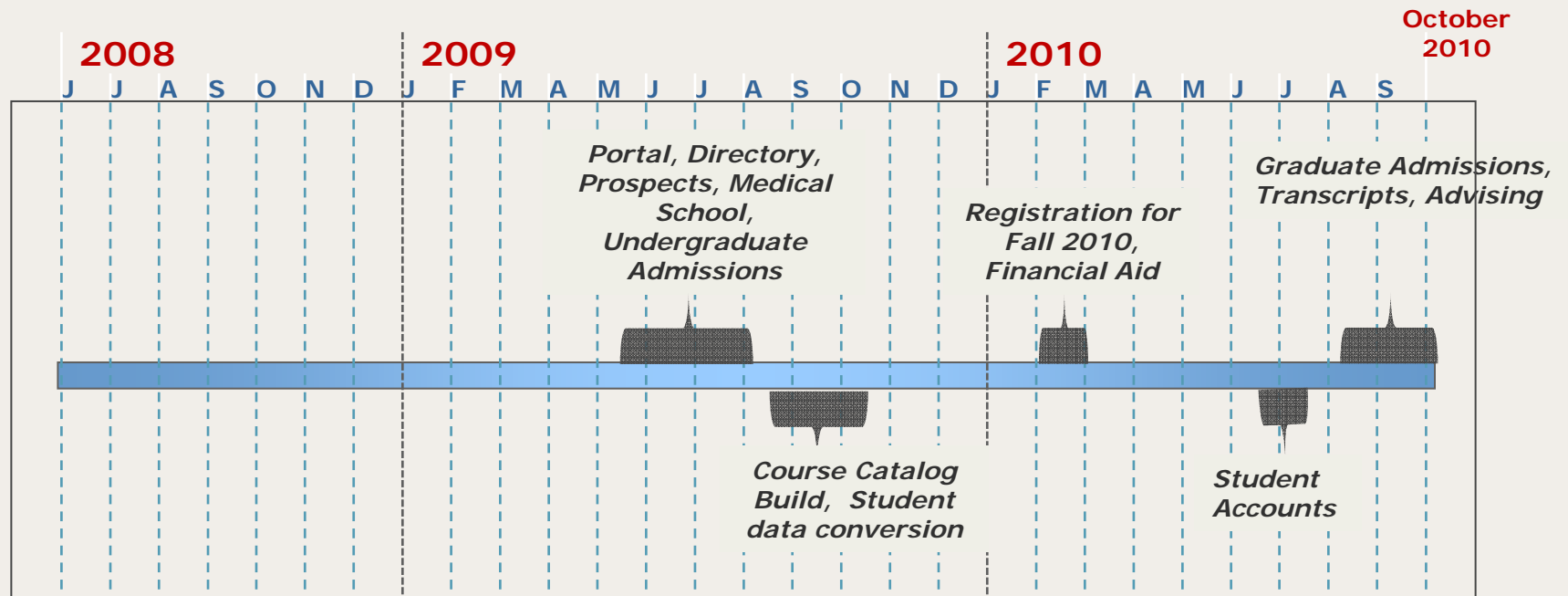


# Student Components

- The base PeopleSoft functionality
  - “Campus Community” -holds faculty, staff, and affiliates, as well as students
  - Admissions - single solution for Undergrad, Graduate and Professional schools
  - Student Records
  - Financial Aid
  - Student Accounts
- “Companion Projects” - additional efforts launched in support of the base system
  - Portal - will provide consistent, branded access to campus services
  - Document Management - will allow electronic store, capture, routing and management of documents
  - Data Warehouse - will provide improved analytical reporting capabilities

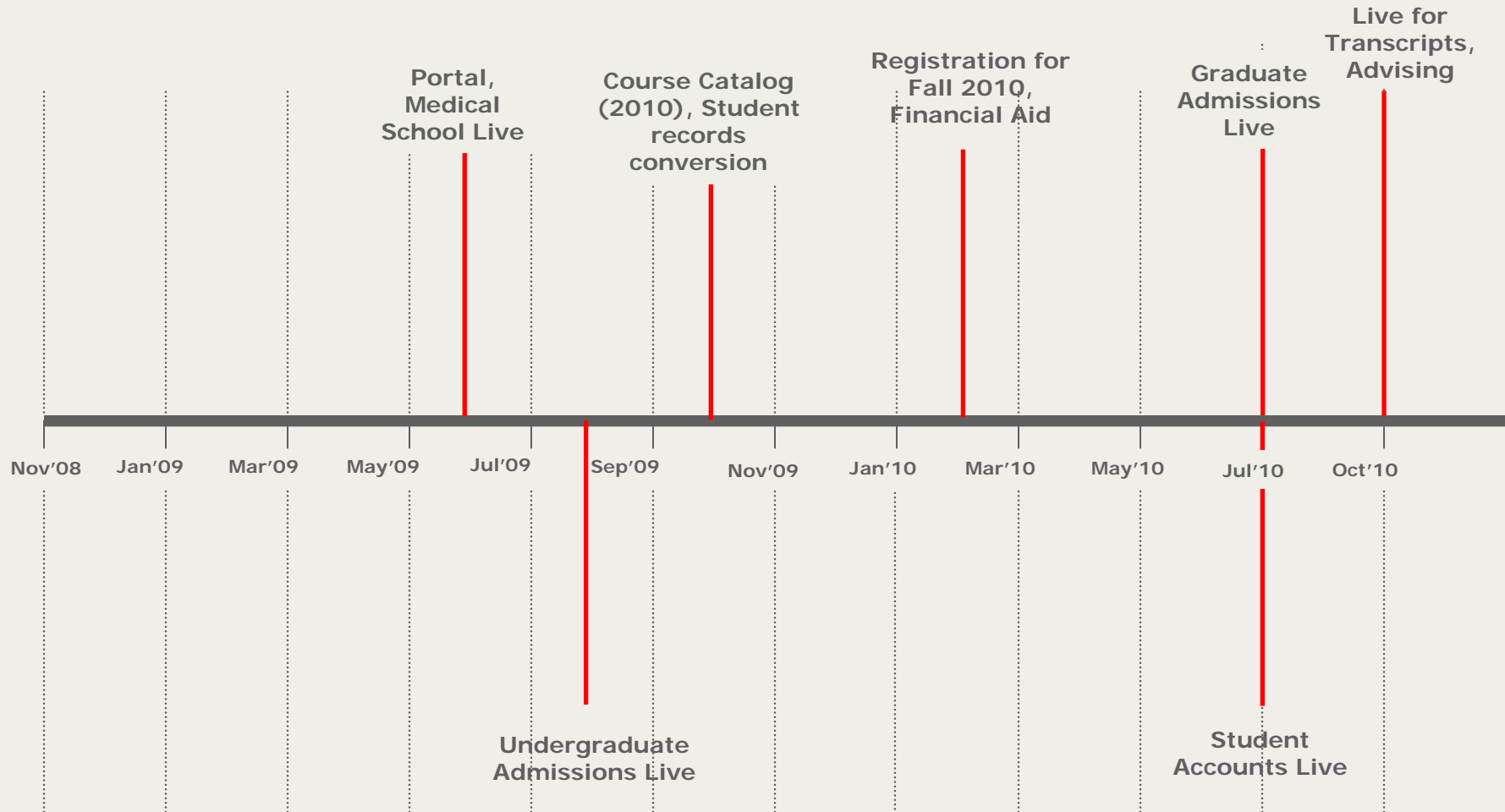


## Following the Student Lifecycle





# ERP Timeline





# Brief Project Update

## What have we accomplished:

- Documented and analyzed existing processes
- Developed needed processes with input from the University's functional offices
- Identified requirements the base software does not address
- Created a Project Charter that defines scope and approach (approved by the Sponsors in February 2008)
- Completed detailed design and configuration planning sessions



# Brief Project Update

What are we doing now:

- System configuration is occurring
- Final design and development of system interfaces and modifications are underway
- Conversions of student records are underway
- Team is now testing admissions portion of the system



# DEMO

## PeopleSoft Campus Solutions

### Student Self-Service



## Self Service > Student Center

**Craig's Student Center**

**Academics**

[Search](#)  
[Plan](#)  
[Enroll](#)  
[My Academics](#)

**You are not enrolled in classes.**

[SEARCH FOR CLASSES](#)

**Holds**  
No Holds.

**To Do List**  
No To Do's.

**Enrollment Dates**  
[Open Enrollment Dates](#)

**Advisor**  
**Program Advisor**  
None Assigned

**Finances**

**My Account**  
[Account Inquiry](#)

**Financial Aid**  
[View Financial Aid](#)  
[Accept/Decline Awards](#)  
[Report Other Financial Aid](#)

**We are unable to display your account at this time. To access this information, contact the Bursar's office to complete your account profile.**

**Personal Information**

[Demographic Data](#)  
[Emergency Contact](#)  
[Names](#)  
[User Preferences](#)

**Contact Information**

<a href="#">Home Address</a>	<a href="#">Mailing Address</a>
None	None
<a href="#">Home Phone</a>	<a href="#">UNC E-Mail Address</a>
None	None

**Admissions**

[Request Information](#)  
[Apply for Admission](#)  
[Accept/Decline](#)

**You do not have any pending applications at this time.**

**Student Central**

If any of the above addresses are incorrect please click [Go](#)

**RECORDS AND REGISTRATION SERVICES**

[Go](#) **Course Evaluation System**

[Go](#) **Data Verification Update**

[Go](#) **Register For Classes**  
PIN:  Undergraduate/Graduate 2009 Spring Semester

[Go](#) **Academic Eligibility**

[Go](#) **Registration Information** Undergraduate/Graduate 2009 Spring Semester

**You Do Not Have Any Stops**

Course Availability (Subject is required):  
[Go](#) Subject:  (and/or) Course Number:  (and/or) Section:

Term: 2009 SPRING SEMESTER

[Go](#) **Student Personal Information**  
Undergraduate/Graduate

[Go](#) **Grade Summary:** UNDERGRADUATE

[Go](#) **Grades** (includes semester/cumulative statistics)  
Undergraduate/Graduate 2008 Spring Semester

[Go](#) **Schedule:**  
Undergraduate/Graduate 2009 Spring Semester

[Go](#) **Weekly Planner**  
Undergraduate/Graduate 2009 Spring Semester

[Go](#) **Semester Enrollment Information**  
Undergraduate/Graduate 2009 Spring Semester

[Go](#) **Are You A Degree Candidate?**

[Go](#) **Awarded Degree(s)**

[Go](#) **Graduation Requirements Advising System**

[Go](#) **Update Your Privacy Flags**

**CASHIER SERVICES**

[Go](#) **Billing Statement:**  
Type: Detail Report: Activity since Last Billing Statement

[Go](#) **Pay Your Bill**

[Go](#) **How are you receiving your financial aid refund check?**

**SCHOLARSHIPS AND STUDENT AID SERVICES**

[Go](#) **Financial Aid Information**

[Go](#) **Click the GO button to view the FAQs about Financial Aid Errors**

[Go](#) **Visit the Office of Scholarships and Student Aid website if you need instructions on finding your financial aid on Student Central**

**HOUSING SERVICES**

Housing Recontracting is Not Currently Available

**UNC STUDENT STORES**

[Go](#) **Order Microsoft Package**

[Go](#) **Order CCI Laptop**



- Self Service > Student Center > Academics > Plan > My Planner

Craig Turmroal go to ...

Search Plan Enroll My Academics

my planner shopping cart course history

### My Planner

Add courses to Planner using: [BROWSE COURSE CATALOG](#) [PLAN BY MY REQUIREMENTS](#)

Delete all courses in Planner: [DELETE ALL](#)

**Unassigned Courses**

Select	Course	Description	Units	Delete
<input type="checkbox"/>	AFAM 258	<a href="#">CIVIL RIGHTS</a>	3.00	
<input type="checkbox"/>	AMST 334	<a href="#">DEFINING AMERICA</a>	3.00	

Move selected courses to Term ▼ [move](#)

**2009 Spring**

Select	Course	Description	Units	Delete
<input type="checkbox"/>	AMST 53	<a href="#">FYS FAM &amp; SOCIAL CHANGE</a>	3.00	
<input type="checkbox"/>	AMST 231	<a href="#">EASTERN NATIVE AMERICANS</a>	3.00	

Move selected courses to Term ▼ [move](#)



# Shopping Cart

- Self Service > Student Center > Academics > Plan > Shopping Cart

### Shopping Cart

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#### 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.

**2009 Spring | Undergraduate | UNC Chapel Hill**

Open     Closed     Wait List

**Add to Cart:**

Enter Class Nbr

**Find Classes**

Class Search  
 My Requirements  
 My Planner

#### 2009 Spring Shopping Cart

Your enrollment shopping cart is empty.



# Add Courses to Shopping Cart Using My Planner

- Self Service > Student Center > Academics > Plan > Shopping Cart

**Shopping Cart** 1 2 3

**Search from My Planner**

2009 Spring | Undergraduate | UNC Chapel Hill

[Return to Add Classes to Shopping Cart](#)

▼ 2009 Spring

Course	Description	Units	Term Status	Select
AMST 53	<a href="#">FYS FAM &amp; SOCIAL CHANGE</a>	3.00	Classes available this term.	<a href="#">select</a>
AMST 231	<a href="#">EASTERN NATIVE AMERICANS</a>	3.00	Not offered in 2009 Spring.	

Use 'select' to view course information and schedule

▼ Unassigned Courses

Course	Description	Units	Term Status
AFAM 258	<a href="#">CIVIL RIGHTS</a>	3.00	Not offered in 2009 Spring.
AMST 334	<a href="#">DEFINING AMERICA</a>	3.00	Not offered in 2009 Spring.

[Return to Add Classes to Shopping Cart](#)



# Add Courses Using My Planner

- Self Service > Student Center > Academics > Plan > Shopping Cart

**2009 Spring Course Schedule**

**My Class Schedule**  
You are not registered for classes in this term.

**Shopping Cart**  
Your shopping cart is empty.

● Open    ■ Closed    ▲ Wait List

**AMST 53 sections for 2009 Spring**

Section	Session	Status			
<a href="#">1-LEC (1043)</a>	1	●	<b>select</b>		
Days	Start	End	Room	Instructor	Dates
MoWe	11:00AM	12:00PM	TBA	Staff	01/12/2009 - 04/28/2009

View All    1 of 1    Last

[Return to Search from My Planner](#)

Use 'select' to add the course to the shopping cart



# Add Courses Using My Planner

- Self Service > Student Center > Academics > Plan > Shopping Cart

**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.

2009 Spring | Undergraduate | UNC Chapel Hill

Open  Closed  Wait List

**Add to Cart:**  
Enter Class Nbr  
   
Find Classes  
 Class Search  
 My Requirements  
 My Planner

Select	Class	Days/Times	Room	Instructor	Units	Status
<input checked="" type="checkbox"/>	<a href="#">AMST 53-1</a> (1043)	MoWe 11:00AM - 12:00PM	TBA	Staff	3.00	<input checked="" type="radio"/>

for selected:



# Add Courses Using My Planner

- Self Service > Student Center > Academics > Plan > Shopping Cart

Craig Turmroal go to ...

**Shopping Cart** 1 2 3

**3. View results**

View the following status report for enrollment confirmations and errors:

2009 Spring | Undergraduate | UNC Chapel Hill

✓ Success: enrolled ✗ Error: unable to add class

Class	Message	Status
AMST 53	Success: This class has been added to your schedule.	✓

[MY CLASS SCHEDULE](#) [ADD ANOTHER CLASS](#)



# Drop A Class Using Self Service Enrollment

- Self Service > Student Center > Academics > Enroll > Drop

**Drop Classes** 1 2 3

**1. Select classes to drop**

Select the classes to drop and click Drop Selected Classes.

2009 Spring | Undergraduate | UNC Chapel Hill

Enrolled  Dropped  Wait Listed

Select	Class	Description	Days/Times	Room	Instructor	Units	Status
<input checked="" type="checkbox"/>	<a href="#">AFAM 258-1 (1045)</a>	CIVIL RIGHTS (Lecture)	TuTh 2:00PM - 3:00PM	TBA	Staff	3.00	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">AMST 53-1 (1043)</a>	FYS FAM & SOCIAL CHANGE (Lecture)	MoWe 11:00AM - 12:00PM	TBA	Staff	3.00	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">AMST 231-1 (1044)</a>	EASTERN NATIVE AMERICANS (Lecture)	MoWeFr 9:00AM - 10:00AM	TBA	Staff	3.00	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">AMST 334-1 (1046)</a>	DEFINING AMERICA (Lecture)	TuFr 3:00PM - 4:00PM	TBA	Staff	3.00	<input checked="" type="checkbox"/>

**DROP SELECTED CLASSES**



# Drop A Class Using Self Service Enrollment

- Self Service > Student Center > Academics > Enroll > Drop

**Drop Classes** 1 2 3

### 3. View results

View the results of your enrollment request. Click [Fix Errors](#) to make changes to your request.

2009 Spring | Undergraduate | UNC Chapel Hill

✓ Success: dropped      ✗ Error: unable to drop class

Class	Message	Status
AFAM 258	<b>Success:</b> This class has been removed from your schedule.	✓

[MY CLASS SCHEDULE](#)



# Swap A Class Using Self Service Enrollment

- Self Service > Student Center > Academics > Enroll > Swap

**Swap a Class** 1 2 3

**1. Select a class to swap**

Select the class you wish to swap then select the class you wish to replace it with.

2009 Spring | Undergraduate | UNC Chapel Hill

**Swap This Class**

Select from your schedule

**With This Class**

Search for Class

----- OR -----

Enter Class Nbr

[▶ My 2009 Spring Class Schedule](#)



# Swap A Class Using Self Service Enrollment

- Self Service > Student Center > Academics > Enroll > Swap

**Swap a Class** 1 2 3

### 3. View results

View the results of your swap request. Click Fix Errors to try and correct the problems listed below or change your swap choices.

2009 Spring | Undergraduate | UNC Chapel Hill

✓ Success: Classes were swapped    ✗ Error: Unable to swap class

Class	Message	Status
Swap AMST 231 with HIST 54	Success: This class has been replaced.	✓

[MY CLASS SCHEDULE](#)



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enrollment shopping cart ▶

other academic... ▾ ▶▶

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<a href="#">Home Phone</a> None	<a href="#">UNC E-Mail Address</a> None

other personal... ▾ ▶▶

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**You do not have any pending applications at this time.**

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[Open Enrollment Dates](#)

**Advisor**  
**Program Advisor**  
None Assigned



# Questions