COMPASS Town Hall Minutes- May 24th, 2018

Allison calls the town hall to order at 3:02PM.

Comments/questions from advisors are in red text.

All of these questions will be added to the COMPASS Issues and Suggestions Matrix at this link: <https://compass.ufl.edu/communications-amp-support/issues-and-suggestions-matrix/>

1. Agenda for the town hall
	1. Tips and Tricks, New Resources, New Screens
	2. Program Timeline
	3. Q&A
2. Tips and Tricks, New Resources, New Screens
	1. Shay Potts, COMPASS Training Manager
		1. Quick Tips embedded in Instruction Guides
			1. Enrollment Request Search
			2. Class Permissions
			3. Prerequisite Override for one or more students
			4. SIS search page
		2. New trainings in myUFL Basics Toolkit
			1. [Shortcuts, Hot Keys, Access Keys](file:///%5C%5Capfile.osg.ufl.edu%5Cap-aac%24%5CAAC%5CNicole%27s%20Nest%5CUAC%5CMinutes%5Ctraining.hr.ufl.edu%5Cinstructionguides%5Cmyuflbasics%5Caccess_keys.pdf)
			2. [Viewing Your Security Roles](http://training.hr.ufl.edu/instructionguides/myuflbasics/viewing_your_security_roles.pdf)
		3. Page Personalization
			1. You can use the Personalize Page on the top right of many pages in myUFL
			2. You can rearrange the tabbing order so the page will immediately jump to a certain section of the page
			3. You can also rearrange the order of the header columns to your preference.
			4. They are working to create page personalization guides which will be available in the next few days.
	2. Ben Markus, Communications Team
		1. Job Function/Security Role Matrix
			1. Lists the job topic, job function, training requirements, and security roles you need for that function.
		2. Can be found at this link: <https://compass.ufl.edu/communications-amp-support/supporting-materials/>
		3. If you have a need for a matrix, please let Ben know.
		4. Question: For new employees, when you are designating their security access/role, are these the names of the security roles you’d submit?
		5. Yes, you’d submit the names of these roles to your DSA.
	3. Toby Shorey, Academic Advising lead
		1. Multiple Course Directive Exception Screen
			1. Would allow you to put one course into multiple requirements on the degree audit on the same screen.
				1. Otherwise, you’d have to add the course directive to each requirement separately.
			2. It would also allow you to put in multiple courses into multiple requirements at the same time.
			3. This screen is still in development, and Toby will invite advisors to test out this new system.
			4. Question: will it work for certificates as well?
				1. Yes, you could make course directives for majors, minors, certificates on the same screen.
				2. It would be whatever programs you’d see when you run the degree audit.
			5. Question: Will you be able to see course titles, terms, etc. on this screen?
				1. Yes, the plan is to show those on this screen.
		2. Top 34 SCNS Transfer Courses By Enrollment That Are Used By Mainframe Audits (all colleges)
			1. Toby will need to identify the most popular courses, add them to the catalog, add them to the degree requirements, and then articulate/add equivalencies for these courses for students who take them moving forward.
		3. SASS/CS Finders Screen
			1. A screen for the mainframe system to show what exceptions are in the mainframe system, and what exceptions have been posted in the new system.
			2. By clicking on the UF ID, it would pop up into windows showing the mainframe degree audit as well as the new degree audit.
			3. You can then add a checkmark to that student to indicate that the exceptions have been done.
			4. Toby will check on the ETA of the rollout for this feature.
			5. Question: Concerns about course directives not carrying over into other degree audits, including the what-if degree audits.
				1. The challenge with using course substitutions instead of course directives is that it applies to everywhere for that student’s audit, meaning all advisors would have to agree to that substitution.
				2. There is no concept of a “dummy” course substitution (ex: GE-B) in the new system, so you could not apply a course substitution that way.

A course substitution has to be applied to a specific course in the UF Catalog.

Question: How do we apply substitutions in a global way?

The advising community can collectively decide if it is appropriate to use course substitutions instead of course directives.

There aren’t really global substitutions in the old degrees.

Advisors are saying that in the old system that they would want Gen Ed course substitutions to carry over when a student changes majors.

Other advisors are saying that they wouldn’t necessarily want substitutions to be made globally.

We can work together to improve global substitutions, but a course substitution must go to a specific course. It can’t generically go to GE-H.

Since we are adding the SCNS most common courses, could we add generic Gen Ed courses as well?

Toby isn’t sure if that would be appropriate.

Advisors want to make it clear that this is to make sure that the students are seeing accurate information, and is not just a concern of efficiency.

For a student that wants to shop majors, they will have to go see an advisor for every major just to see if their degree audit is accurate.

Yes, if the student is bringing in a lot of transfer coursework, they’d need to consult with advisors to discuss their remaining requirements.

Question: Is there anything that can be done on a security level so we can do course substitutions on Gen Eds. but not on major requirements.

No. It’s not a security issue, it’s the way audits in the new system function, and it would not allow for this.

Question: Is there any way to make the Gen Ed static?

If an equivalency is done for that course (example: if PSY dept determines a course is PSY 2012), then it will be equated to PSY 2012 in the degree audits.

There were issues how course substitutions were done in the old system.

* + - * 1. Question: Are we going to communicate to students about the changes to the degree audit?

Concerns about frustrated students, false advertising regarding what requirements are actually remaining.

There are definitely differences between the two audits and we’ll have to work with students to make these adjustments.

* + - * 1. Question: When the new degree audit is looking for the hours required for the degree, it is excluding certain courses that it should not.

To calculate the total hours earned, the audit first looks for the credits used in the degree audit, and then adds in the credits not used in the degree audit.

The federal forms will fill out ask for the total number of hours. Can we have a line on the degree audit added to show how many total hours the student has earned?

Toby will look into whether or not that would be possible to add.

It will be very confusing to students to look at the degree audits and see the hours earned, which aren’t an accurate reflection of how many hours have been earned.

Toby will look into how to add a Total Hours Earned line to the degree audits.

* + - 1. Dr. Aagard suggests bringing these concerns back to the COMPASS Advisory Group to brainstorm about these concerns.
1. Timeline
	1. Dave Gruber, Associate CIO and Senior Director, Enterprise Systems and Project Management Organization
		1. COMPASS Timeline can be found at this link: <https://compass.ufl.edu/timeline/>
		2. The new repeat course policy has been delayed until Spring 2019.
			1. You’ll now see that on the timeline for October 2018 in preparation for Spring registration.
		3. July 9th- the current plan to implement the Campus Solutions degree audit into the One.UF degree audits that students view.
			1. There are discussions about other options for when to show these new degree audits.
		4. August 20th- Grades, Transcripts, Aid Disbursement, and Graduation will be released.
			1. We would be fully in Campus Solutions at that point.
			2. The mainframe will be Read-Only from that point forward.
		5. Question: Where is transfer admissions processing on the timeline?
			1. There will be some “sneak-peeks” into that system that are planned for June.
			2. It is being built as we speak.
			3. That is part of the CRM, not Campus Solutions based, so it is not part of the COMPASS timeline provided.
			4. Fall 2018 admissions are in the old system.
		6. Question: What is the timeline for the transfer equivalency process to be fully implemented?
			1. They are working on it to see how to find common ground between all of the departments.
			2. The hope is that in the long-run this will ease the burden on advisors to avoid having to make substitutions, particularly for lower-division Gen Ed courses.
		7. Question: Will we be able to admit students for Fall after August 20th?
			1. That date will be fine-tuned and we’ll make sure not to turn it off while processes are ongoing.
		8. Question: For Degree Certification, it will still be important to have the old system in place.
			1. August 20th is a target date but we’ll make sure not to turn off the old system if it is still being used.
			2. We do need to unplug the mainframe somewhere around that date to avoid having to extend the mainframe maintenance contracts for an additional year.
		9. Question: Fall transfers have not been able to register in the new system since their transcripts are not available.
			1. Dr. Aagard asked Rick Bryant, Director of Admissions, to take that question back to his staff.
		10. Question: What are the timelines for grad student implementations?
			1. They have been working closely with the Graduate School, and there are plans to move the SIS functionality into Campus Solutions.
		11. Question: how do the timelines function for programs that do not work on the traditional Fall timeline?
			1. They will follow up to make sure how it will work for programs that do not operate on the traditional Fall timeline.
		12. Question: Is there going to be functionality in the new system for advisors to run their own data reports?
			1. They are trying to see what they can run in the new Kognos environment, and the plan is to build those modules into Kognos.
			2. Question: How can we access the data we need once the mainframe becomes read-only?
			3. They have been identifying areas of the used reports/functions and building it in to the new system.
			4. Question: Can we see the list of reports that are being created?
				1. Fran will be happy to share the list that she has but it will only have the job names on them.
				2. They’ll also have in-person workshops.
		13. Question: Can we search by student groups in Campus Solutions?
			1. They can look into adding it.
		14. Question: Service indicators in different systems aren’t communicating to one another, and this creates a huge issue for Preview. Specifically for the health insurance holds.
			1. There is a synchronization process between the old and new system every 5 minutes.
		15. Question: The UF Online Links hold has not been created in the new system.
			1. They were unaware of that hold until recently and it is in the works to be added into Campus Solutions.
		16. Question: For programs whose tuition is tied to their program code/student groups, how does it work, specifically when a student has multiple student groups?
			1. There are special program codes on the classes, and that is what is used for tuition billing, not the student group.
			2. They brought over any special program codes that students were in at the time that data was brought into Campus Solutions.
			3. They will work on a crosswalk about student groups in both systems.
		17. Question: To find courses that are double-counting for combined degrees, it takes 7 clicks in the old system, and 14 clicks in the new system. It is frustrating, not user friendly, and hard to understand why the change to the new system is being made.
			1. They apologize for the frustrations experienced, and they understand that this is just the beginning and they’ll continue to make improvements along the way.
			2. The old system has many limitations that prevent the university from doing its business.
			3. Most R1 universities in the country are using Campus Solutions.
			4. Follow-up: We need this to be functional and user-friendly, and right now it is a disaster. It is awful to work with, confusing, not-intuitive, not attractive, and doesn’t work well. It is difficult to cope with this new system.
		18. Question: Leadership means they are people to help us work through difficulties. We really needed someone to come to each college and ask what each college needed, and that needed to happen two years ago instead of being rolled out during advanced registration. Particularly for programs that are off-book, no one has checked to see what is needed.
			1. Many trips have been made to colleges to collect questions and input. There has been a lot of engagement with campus to collect information before coding this system.
			2. Follow-up: For off-book programs, they are essentially being told that they have to comply with the UF calendar.
				1. This is not the message. They looked at the calendar to find commonalities between the different calendars and make suggestions.
				2. There are 220 different calendars for one term, so they are trying to find commonalities and combine them.
				3. The hope is the find a calendar that the program can work within.
		19. Question: We are well aware that feedback was sought, but now the system doesn’t have the functionality that we requested. The real dilemma is the July 5th degree audit release- there isn’t the time to input the exceptions by that date. It is unreasonable and irresponsible to keep to that timeline for this summer. Advisors’ credibility will be undetermined if the new degree audits go live on that date and they aren’t accurate, and it isn’t feasible to have them be accurate by that date.
			1. The new systems that Toby is implementing will make this more feasible.
			2. There are discussions about moving the new audit implementation back into August.
			3. They are also looking at ways to prioritize the implementation, starting with students who are graduating in Fall.
			4. Follow-up: The concern is that delaying until August is still a huge program as far as updating the new degree audits, and there isn’t any free time to update these exceptions in the new audits. We’d like dedicated COMPASS team members to make these exceptions since advisors do not have the time.
				1. There will be additional difficulty if we delay implementing the new system for another year.
				2. We are not going to keep the old system for another year- it is going to be retired this year.
				3. The timeline dates are still target dates and there are discussions ongoing about potential delays or providing the colleges with additional help.
		20. Question: Who is deciding which issues to fix first and what fixes are being prioritized?
			1. The OUR COMPASS Questions email team have been seeing what questions are coming in and triaging them as they come.
				1. That makes up what questions are added to the Issues and Suggestions Matrix.
			2. Toby has also announced several more open labs.
				1. The degree audit will still be on the mainframe as of August 20th but it won’t include Fall information.
		21. Question: There’s more than just the programming of the audit, but there are issues with how tracking is programmed in the audit is well. Somehow we have to have the time to review the audits and fix the tracking issues because all students, including freshman, will get holds based on these tracking audits in Fall. Students will make financial aid decisions based on these audits. It is a big deal to make sure these tracking audits are right.
			1. We all have to come together to invest and gain confidence in these new degree audits.
			2. We have to begin the process of transitioning to the new audits.
			3. Follow-up: It’s not technically feasible to have the confidence in these new audits in Fall. The changes we have to make to these new degree audits are substantial. We are concerned about any misinformation going out to students. We’d like to ask for:
				1. Also, can advisors see the student system, so we can see what classes are open and closed to students? It takes much longer to change the course for one student in the new system than it did in the old system. Departments are also writing to advisors to ask if there are seats available in a course.

It is on the list to be able to show advisors what students see as far as seat availability, although some of the counts are going to be tricky. This is a customization and it is on the list.

* + - * 1. Every extra five minutes spent on this is five minutes we can’t spend on degree audits. We also would like a summary screen that lists their name, UF ID, classification, GPA, major, student group, etc.

The Lobby Management system could be leveraged to include that functionality.

Some of these solutions may not be appropriate to include in Campus Solutions.

More changes are coming and we need your expertise.

If there are ways for the COMPASS team to help, please let them know.

* + 1. For the releases coming in August and October, we won’t know what the issues will be in Campus Solutions since the information won’t be updated in the mainframe, even if it’s read only, and we can’t trust the new system to be accurate. Without knowing if the information is accurate, we can’t effectively do our jobs, and the new system hasn’t proven to be accurate.
		2. Allison polls the advisors present to ask if they would be open to participating in another COMPASS Town Hall this summer, and all advisors present agree to participating in another town hall.