



Bowling Green State University

Campus Solutions
Final Scope Document

Version 3.0 – Final Scope Development

March 24, 2008

Presented by:

Leslie A. Wilbourn, Project Manager

Bill Gerwin, Project Director

Christopher Cox, Project Director

Table of Contents

Campus Solutions Scope 5

Introduction 7

Preliminary Scope Summary – December 10, 2007 7

Final Scope Summary 7

Conversion Scope Summary 8

Interface Scope Summary 9

Reporting Scope Summary 10

Customization Scope Summary 11

 Acceptable Customizations 11

 Unacceptable Customizations 11

Business Process Scope Detail 12

 Academic Structure – Foundation Tables 12

 Campus Community – Bio/Demo Data 12

 Admissions – Office of Admissions (Prospects and Undergraduate Applications) 13

 Student Records – Office of Registration and Records 14

 Financial Aid – Office of Student Financial Aid 15

 Student Financials – Bursar’s Office 15

 Graduate College 15

 Residence Life 16

 Continuing Education 16

Assumptions 17

Data Conversions, Interfaces, and Reports Categories 18

 Category 1 – Mandated 18

 Category 2 – Critical 18

 Category 3 – Important 19

 Category 4 – Nice-to-Have (Non-Essential) 19

 Category Q – PS/Query 19

 Category V – Vendor 20

 Category 0 – No Longer Needed 20

Conversion Scope Detail 21

 Academic Structure – Foundation Tables 21

 Campus Community – Bio/Demo Data 21

 Admissions – Prospects and Undergraduate Applications 21

Student Records..... 21

Financial Aid 21

Student Financials..... 21

Graduate College..... 22

Residence Life 22

Interface Scope Detail 23

 Academic Structure – Foundation Tables..... 23

 Campus Community – Bio/Demo Data..... 23

 Admissions – Prospects and Undergraduate Applications 23

 Student Records..... 23

 Financial Aid 23

 Student Financials..... 23

 Graduate College..... 24

 Residence Life 24

Reporting Scope Detail..... 25

 Academic Structure – Foundation Tables..... 25

 Campus Community – Bio/Demo Data..... 25

 Admissions – Prospects and Undergraduate Applications 25

 Student Records..... 25

 Financial Aid 25

 Student Financials..... 25

 Graduate College..... 26

 Residence Life 26

Testing Scope 27

Functional/Unit Testing 27

System/Integration Testing..... 27

User Acceptance Testing 27

Performance/Stress Testing 27

Data Conversion Testing 27

Training Scope 28

Change Management Scope 28

Deliverables..... 28

Hardware/Software Requirement 28

Conclusion 29

Tab - Scope Appendixes

Appendix A: Conversions, Interfaces, and Reports Categories 30

Appendix B: Business Process Inventory 32

Appendix C: BG@100 Organization Structure 42

Appendix D: *In Scope* and *Out of Scope* Reference 43

Appendix E: BG@100 Timeline 45

Appendix Fa: Fit/Gap/Potential Resolution Inventory Admissions 49

Appendix Fsr: Fit/Gap/Potential Resolution Inventory Student Records 51

Appendix Ffa: Fit/Gap/Potential Resolution Inventory Financial Aid 54

Appendix Fsf: Fit/Gap/Potential Resolution Inventory Student Financials 57

Appendix Fga: Fit/Gap/Potential Resolution Inventory Graduate Admissions..... 59

Appendix Fr: Fit/Gap/Potential Resolution Inventory Residence Life 60

Tab - Amendments

Appendix Z: Amendments..... 61

*' This document was printed for the Strategic Need Meeting held on March 19, 2008.

Campus Solutions Scope

This document presents a final scope for a baseline delivery of the BG@100 Campus Solutions System. This final scope document includes and is supported by the conversion scope, interface scope, reporting scope, testing scope, training scope, portal self-service scope, and change management scope details.

The preliminary scope document defined areas to be addressed by the BG@100 project team (identified as *In Scope*) during the initial modeling schedule (December 2007, January 2008, and February 2008) as well as areas that will *NOT* be included (identified as *Out of Scope*) in the project during those three months. The initial modeling schedule has been completed, and this document has been finalized based upon those findings.

The final scope document attempts to address all areas that have been defined as *In Scope* as well as all areas that have been defined as *Out of Scope* for the PeopleSoft Campus Solutions Systems Summer 2009 go-live. In the event that not all areas were addressed, an Amendments Section has been provided for updates:

- Academic Structure – Fully Implementing
- Campus Community – Partially Implementing
- Recruiting (Undergraduate) – Partially Implementing Maintaining UAS¹
- Recruiting (Graduate) – Fully Implementing
- Admissions (Undergraduate) – Partially Implementing Maintaining UAS
- Admissions (Graduate) – Fully Implementing
- Student Records – Fully Implementing
- Academic Advisement (Degree Audit) – Not Implementing Maintaining DARwin²
- Continuing Education – Partially Implementing
- Gradebook – Not Implementing Maintaining Blackboard³
- Financial Aid – Fully Implementing
- Student Financials – Fully Implementing
- Contributor Relations – Not Implementing
- Involvement – Not Implementing
- Learner Services – Not Implementing
- Learning Management – Not Implementing Maintaining Blackboard
- Outreach – Not Implementing
- Personal Portfolio – Not Implementing
- Residence Life – Fully Implementing RMS⁴
- PASS – Not Implementing Maintaining fsaAtlas⁵

¹ UAS – Undergraduate Admissions System developed by BGSU

² DARwin - Degree Audit Reporting System (DARS) (Non-University System) utilized for degree audit.

³ BB - Blackboard

⁴ RMS – Residential Management Systems is the contracted provider of Housing Management software

The final scope document only identifies the scope of work determined by the BG@100 project team. It does not identify if the amount of work can be developed and thoroughly tested prior to the established go-lives for Summer 2009:

<u>Module</u>	<u>Go-Live Period</u>
Academic Structure	July 2008
Campus Community	September 2008
Admissions Module	September 2008 through February 2009
Student Records Module	August 2008 through June 2009
Financial Aid Module	October 2008 through September 2010
Student Financials Module	January 2009 through June 2009
Residence Life RMS	January 2009

The final scope document will be identified on a detailed project plan and timeline and provided to the Executive Steering Committee on or before April 14, 2008.

⁵ fsaATLAS is the ISEVIS reporting application for international student/scholar offices.

Introduction

The Campus Solutions preliminary scope described the development work that was expected to be performed by the BG@100 project team during the PeopleSoft Campus Solutions implementation to replace or enhance the legacy system.

The fit gap process for the PeopleSoft Campus Solutions System was completed and provided an opportunity for the project team to review the existing legacy system and the PeopleSoft Campus Solutions System. Based upon the results of the fit gap process, the BG@100 project team was able to present a Campus Solutions Preliminary Scope Document for review and approval by the Executive Steering Committee on December 10, 2007.

The modeling process for the PeopleSoft Campus Solutions System began on November 27, 2007. It was anticipated that the initial modeling review would be completed by February 2008. Based upon the results of the modeling process, this finalized scope document has been developed for review and approval.

Preliminary Scope Summary – December 10, 2007

At the time of the development of the preliminary scope documentation and based upon the results of the fit gap process, the BG@100 project team was recommending limited development work be approved until a finalized scope document was officially presented for approval to the Executive Steering Committee on March 24, 2008. It was the BG@100 project management team's intention to establish a preliminary scope based upon the initial results of the fit gap notes and session evaluations. It was also the BG@100 project management team's intention to utilize the initial modeling sessions to complete a final Campus Solution scope document. The results of the initial modeling sessions have finalized the scope for the implementation of the PeopleSoft Campus Solutions System by the BG@100 project team.

Final Scope Summary

The BG@100 project team has identified and is recommending extensive development work in order to implement the PeopleSoft Campus Solutions System. The development work consists of conversions, interfaces, reports, and modifications to the delivered (vanilla) PeopleSoft Campus Solutions System. The BG@100 project team has officially established Summer 2009 as the go-live term and year with a phased-in or rolling calendar implementation schedule. It is the BG@100 project management team's intention to present within this final scope document and within the final supporting scope documents the extensive development and implementation work that will need to be completed by the BG@100 project team and supported by the Executive Steering Committee.

Any development work presented after the final scope document has been approved, should be considered as Post Go-Live. This development work should be re-evaluated at an appropriate time based upon post production support and when upgrades to v9.0 are being reviewed and evaluated. Continued amendments to the final scope will increase the risk that the originally approved development work will not be sufficiently developed and tested prior to the established go-live of Summer 2009.

Conversion Scope Summary

Based upon the results of the fit gap and initial modeling process, the BG@100 project team is recommending the following conversion categories be considered as *In Scope* for the initial implementation and will be presented to the Executive Steering Committee as Information Items:

- Conversion Category 1 – Mandated
- Conversion Category 2 – Critical
- Conversion Category 3 – Important

Based upon the results of the fit gap and initial modeling process, the BG@100 project team is recommending the following conversion categories be considered as *Out of Scope* for the initial implementation. It is recommended that the following conversions identified with these categories be reevaluated during Post Production analysis:

- Conversion Category 4 – Non-Essential Nice To Have
- Conversion Category 0 – No Longer Needed
- Conversions Identified After the Approval of the Campus Solutions Scope

Additional references to the conversion categories and the specific conversions can be found in the following documentation:

- Final Campus Solutions Scope – Data Conversions Categories – Page 18
- Final Campus Solutions Scope – Final Conversion Detail – Page 21
- Final Conversion Scope

It is *Out of Scope* to assume that all data found within the various databases utilized by Bowling Green State University will be converted into the new PeopleSoft Campus Solutions System. It is imperative that only data that is deemed necessary and valid be converted into the new system to support business processes. The PeopleSoft Campus Solutions is the official production system and it is not intended to be the official data warehouse for the University.

Interface Scope Summary

Based upon the results of the fit gap process, the BG@100 project team is recommending the following be considered as *In Scope* for the initial implementation and will be presented to the Executive Steering Committee as Information Items:

- Interface Category 1 – Mandated
- Interface Category 2 – Critical
- Interface Category 3 – Important
- Interface Category Q – PS/Query
- Interface Category V – Vendor (Support Only)

Based upon the results of the fit gap and initial modeling process, the BG@100 project team is recommending the following interface categories be considered as *Out of Scope* for the initial implementation. It is recommended that the following interfaces identified with these categories be reevaluated during Post Production analysis:

- Interface Category 4 – Non-Essential Nice To Have
- Interface Category 0 – No Longer Needed
- Interfaces Identified After the Approval of the Campus Solutions Scope

Additional references to the interface categories and the specific interfaces can be found in the following documentation:

- Final Campus Solutions Scope – Data Interface Categories – Page 18
- Final Campus Solutions Scope – Final Interface Detail – Page 23
- Final Interface Scope

It is *Out of Scope* to assume that any and all requests to move or interface data from the official Bowling Green State University system will be provided. It is imperative that only data that is deemed necessary and pertinent be interfaced to external systems, regardless, if those external systems are maintained by Bowling Green State University employees. The PeopleSoft Campus Solutions is the official production system and should be maintained in compliance with all FERPA, HIPPA, and identity security policies and procedures. This includes all data that is shared with external systems.

Reporting Scope Summary

Based upon the results of the fit gap process, the BG@100 project team is recommending the following be considered as *In Scope* for the initial implementation. Category 1 and Category 2 will be presented to the Executive Steering Committee as Information Items. Category Q will be developed by the BG@100 project team (Functional Team Lead and Back-Office Staff) during the unit testing and implementation period. Category 3 will need to be presented to the Executive Steering Committee as action items for approval:

- Reporting Category 1 – Mandated
- Reporting Category 2 – Critical
- Reporting Category 3 – Important (ESC Approved)
- Reporting Category Q – PS/Query
- Reporting Category V – Vendor (Support Only)

Based upon the results of the fit gap and initial modeling process, the BG@100 project team is recommending the following reporting categories be considered as *Out of Scope* for the initial implementation. It is recommended that the following reports identified with these categories be reevaluated during Post Production analysis:

- Reporting Category 4 – Non-Essential Nice To Have
- Reporting Category 0 – No Longer Needed
- Reports Identified After the Approval of the Campus Solutions Scope

Additional references to the reporting categories and the specific reports can be found in the following documentation:

- Final Campus Solutions Scope – Data Reporting Categories – Page 18
- Final Campus Solutions Scope – Final Reporting Detail – Page 26
- Final Reporting Scope

It is *Out of Scope* to assume that any and all report requests will be developed by the BG@100 project team prior to or subsequent to the Summer 2009 go-live dates. It is imperative that only reports that are deemed necessary and pertinent be completed and thoroughly tested during the implementation. The PeopleSoft Campus Solutions is the official production system and should be maintained in compliance with all FERPA, HIPPA, and identity security policies and procedures. This includes all data that is shared with external systems.

Customization Scope Summary

Based upon the previously defined change control process, a customization has been defined as any add, change, or deletion to a PeopleSoft delivered component. A component may take the form of any of the following:

- Online Pages (a.k.a. screen or panel viewable via web application)

- Database Tables

- Interfaces

- Reports

- Workflow

Any change to the software that would need to be repeated during an upgrade

The last item on the above list is a catch all caveat. Customizations are a concern if they are required to be performed again in order to upgrade the PeopleSoft Campus Solutions System.

Acceptable Customizations

The BG@100 project team is encouraged to only recommend acceptable customizations to the Executive Steering Committee after a thorough review and evaluation of the delivered PeopleSoft Campus Solution capabilities. This includes evaluating potential business process changes and potential policy changes. The following is a list of acceptable reasons for submitting customizations for review and approval only all other options have been exhausted:

- Maintain compliance where required by law;

- Maintain compliance with local, state, and federal government agencies;

- Maintain compliance with university specific agencies;

- Maintain compliance with outside vendors;

- Maintain existing interfaces with other packaged software currently being used at the university; and

- Maintenance of translate tables.

Unacceptable Customizations

There are certain subjective customizations that should be avoided by the BG@100 project team. The following is a list of unacceptable customizations that should not be presented to the Executive Steering Committee:

- Aesthetics – this would include such things as changing the labels on fields, changing the order of fields, deleting unused fields, and change in appearance that can not be done outside the delivered system functionalities;

- Using any delivered field for anything other than what it was designed for;

- Adding approved changes to a delivered online page; and

- Adding approved changes to a delivered application database table.

Business Process Scope Detail

Academic Structure – Foundation Tables

The BG@100 project team has established the academic structure in the PeopleSoft Campus Solutions System as a key precursor to all other functionality. Understanding how the institution structures campuses, academic programs, academic departments, and subject areas is essential to the success of the PeopleSoft Campus Solutions System implementation.

Based upon the critical nature and the overall dependencies of the Academic Structure, the BG@100 project team will need to consider the established Academic Structure – Foundation Tables methodology as final. Any and all changes to the established Academic Structure – Foundation Tables methodology will be considered as *Out of Scope*.

Academic Structure – Foundation Table Methodology is defined as follows:

- Institution (1) = BGSUN
- Academic Career (2) = UGRD and GRAD
- Academic Groups (12) = Equivalent to College
- Undergraduate Academic Programs (11) = Equivalent to College
- Graduate Academic Programs (7) = Equivalent to Degrees and Non-Degrees (PhD, MS)
- Academic Plans = Equivalent to SIS Majors, Minors, Fields of Study, Specializations, and Preparations (Pre-Majors), and Guest Designations
- Academic Sub-Plans = Equivalent to Specializations

Campus Community – Bio/Demo Data

PeopleSoft Campus Solutions utilizes Campus Community to create the records for the individuals and organizations that comprise BGSU community. After a record is created, BGSU will use Campus Community to continue to update, maintain, and track information about the individuals and external organizations associated with BGSU.

Based upon the critical nature of the PeopleSoft Campus Solutions database sharing both HRMS and CSS bio demographical data, the Master Data Management Committee was established and charged with the task of defining the Campus Community structure and data entry standards. The determinations made by the Master Data Management Committee (MDMC) are considered as *In Scope* as long as it does not conflict with previously defined scope. When a conflict occurs, the Conversion, Interface, and/or Reporting Scope supersedes the Campus Community Scope.

Elements of Campus Community – Bio/Demo Data that have been deemed *In Scope* is defined as follows:

- ID Management
- Name
- Address
- Telephone
- eMail Address
- National ID (Defaults)

- Ethnicity
- Citizenship
- Visa
- Residency Status
- Emergency Contacts
- Driver's License
- Relations with Institutions
- Relationships (Parents)
- FERPA
- Comments
- Checklists
- Communications
- Participation – Committee
- Extracurricular Activities
- Languages
- Religion
- Academic Interest
- Service Indicators
- Search/Match
- Self-Service
- Disability
- External Organizations

Elements of Campus Community – Bio/Demo Data that have been deemed as *Out of Scope* is defined as follows:

- Health
- Immunizations
- Address Cleansing Software
- Event Planning
- PASS (SEVIS)

Admissions – Office of Admissions (Prospects and Undergraduate Applications)

The PeopleSoft Campus Solutions Recruiting and Admissions modules will allow BGSU to plan, manage, and track admissions and recruitment activities. The PeopleSoft Campus Solutions System is designed to interface with third-party vendors to provide on-line application features based upon the recruitment and application needs of BGSU. Currently, the Undergraduate Admissions has developed a web-based self-service and administrative system known as Undergraduate Admissions System (UAS). A partial list of Undergraduate Admissions business processes and the system functionality within the UAS and the PeopleSoft Campus Solutions System has been included in Appendix B.

The decision was made on February 20, 2008, to continue the utilization of the current Undergraduate Admissions System (UAS) in conjunction with the PeopleSoft Campus Solutions System (PS CSS). This means BGSU will continue to use the UAS system interfacing data collected to the PS CSS and interfaces from PS CSS to UAS. Based upon

this decision, the BG@100 project team will primarily focus on interfacing the data collected from UAS into the PS CSS for maintenance and reporting purposes. Even though there will be two systems, the PeopleSoft Campus Solutions System is considered the official system of record for BGSU.

It is *In Scope* for the BG@100 project team to establish an interface from UAS to the PeopleSoft Campus Solutions System and an interface from the PeopleSoft Campus Solutions System to UAS. It is also *In Scope* for the BG@100 project team to establish comprehensive and integrated business processes in order to accurately maintain applicant data.

It is *Out of Scope* for the BG@100 project team to duplicate the collection of prospect and applicant data in the PeopleSoft Campus Solutions System.

Post go live activities established by the BG@100 project team include comparative analysis of PeopleSoft and UAS functionality in order to reach a permanent solution. This involves additional modeling of functions such as event management, self service, and solutions provided in future upgrades of the PeopleSoft Campus Solutions System.

Student Records – Office of Registration and Records

The PeopleSoft Campus Solutions Student Records module will allow BGSU to enter, track, and process BGSU academic information.

The PeopleSoft Campus Solutions Academic Advisement (Degree Audit) module could allow BGSU to track the requirements and policies that a student must satisfy in order to graduate. As a student progresses towards graduation, the Academic Advisement audit engine analyzes all courses, restrictions, pre-conditions, or conditions completed (both successfully and unsuccessfully) by the student. The application determines what requirements are still outstanding. Using data specified on PeopleSoft Campus Solutions Student Records pages and requirements entered on Academic Advisement pages, this application automatically tracks a student's degree progress. Academic Advisement is separated into two parts: how to enter requirements into the system using the appropriate pages and how to analyze student data against the requirements in order to report degree progress. Currently, the Office of Registration and Records utilizes the DARwin system to complete this system requirement for BGSU. The DARwin system provides progress toward degree completion in a student's declared major while applying the state of Ohio Transfer requirements. By considering BGSU work, transfer courses and courses in progress, DARwin provides timely information on progress toward meeting degree requirements.

A partial list of the Office of Registration and Records business processes and the system functionality within the PeopleSoft Campus Solutions System and the DARwin system has been included in Appendix B.

It is *In Scope* for the BG@100 project team to establish comprehensive and integrated business processes in order to accurately process a student's academic record. The PeopleSoft Campus Solutions System will be the official system of record for BGSU.

The decision was made on February 20, 2008, to continue the utilization of the current DARwin system. It is *In Scope* for the BG@100 project team to establish comprehensive and integrated business processes in order to accurately process all academic advising records in the DARwin system. The DARwin system will be the official system of record for BGSU.

It is *Out of Scope* for the BG@100 project team to establish comprehensive and integrated business processes utilizing the Gradebook module. The current Blackboard system will

continue to be a viable option for the processing of final grades with PeopleSoft Campus Solutions System being the official system of record for the BGSU official grades posted.

Financial Aid – Office of Student Financial Aid

The PeopleSoft Campus Solutions Financial Aid module supports local management and awarding of federal aid, state aid, institutional aid, departmental aid, and scholarship funds.

A partial list of the Financial Aid business processes and the system functionality within the PeopleSoft Campus Solutions System has been included in Appendix B.

It is *In Scope* for the BG@100 project team to establish comprehensive and integrated business processes in order to accurately process federal, institutional, and state financial aid. The PeopleSoft Campus Solutions System will be the official system of record for BGSU.

Student Financials – Bursar's Office

The PeopleSoft Campus Solutions Student Financials module is a tool for higher education institutions to manage student receivables, billing, collections, and cashiering. Using Student Financials, both staff and students can quickly find and use the financial information they need to make critical decisions. Student Financials receives information from virtually all areas of PeopleSoft Enterprise Campus Solutions.

A partial list of the Student Financials business processes and the system functionality within the PeopleSoft Campus Solutions System has been included in Appendix B.

It is *In Scope* for the BG@100 project team to establish comprehensive and integrated business processes in order to accurately manage and calculate student receivable information for BGSU. It is *Out of Scope* for the BG@100 project team to establish a comprehensive business process in order to manage and calculate non-student receivable information. The PeopleSoft Financials Management System (PS FMS) Accounts Receivable module will be the official system of record and the PeopleSoft Campus Solutions System will be the official system of record for student accounts at BGSU.

Graduate College

The Graduate College manages four major areas: Admissions Processes, Enrollment Services, Graduation Processes, and Payroll (Stipend Database for Assistantships).

It is *In Scope* for the BG@100 project team to establish comprehensive and integrated business processes in order to accurately manage graduate student applications, graduate student enrollment services, and graduate student graduation processes. The PeopleSoft Campus Solutions System will be the official system of record for BGSU.

It is *Out of Scope* for the BG@100 project team to establish a business process for payroll stipends within the PeopleSoft Campus Solutions System. The PeopleSoft Human Resource Management System (PS HRMS) will be the official system of record for BGSU.

Residence Life

Pending the results of the RMS Fit/Gap and Training sessions.

Continuing Education

Currently, Continuing Education non-credit course processing is *Out of Scope* and credit course processing is considered as *In Scope* for the BG@100 implementation of the PeopleSoft Campus Solutions System. PeopleWare is the official system of record for non-credit courses at BGSU.

Assumptions

The BG@100 project team has completed the fit gap and the initial modeling sessions and has documented an enormous amount of fits and gaps by conducting a comparative analysis of the legacy system business processes to the new PeopleSoft Campus Solutions System.

Fit-Gap Modeling List	<i>Total Number of Fit/Gap Sessions</i>	<i>Total Number of Fits</i>	<i>Total Number of Fits with Enhancement</i>	<i>Total Number of Fits with Constraints</i>	<i>Total Number of Current Gaps</i>	<i>Total Number of Gap Resolutions</i>
	<i>Total Number of Modeling Sessions</i>	<i>Gaps Resolved as Fits</i>				
Campus Community	2	0	0	0	7	6
	0	5				
Academic Structure (Foundation Tables)	3	1	0	0	1	1
	15	3				
Admissions (Undergraduate)	22	143	0	0	34	34
	32	12				
Student Records	39	236	0	9	214	206
	30	239				
Financial Aid	28	161	85	0	42	42
	59	2				
Student Financials	26	51	0	0	43	43
	50	2				
Graduate College	5	40	0	0	12	12
	4	4				
Residence Life ⁶	Current	ND	ND	ND	ND	ND
Totals	125	632	85	9	353	344
	190	267				

⁶ Residence Life recently completed the fit gap process, the results will be provided in an RMS Amendment.

There is a continued risk that as the BG@100 project team continues the final stages of modeling and begins the official testing process that the above information specifically the defined gaps and gap resolutions will change. Identifying these changes is imperative to the project, however, it also places the project at risk of meeting the established implementation timeline.

During the fit gap and modeling process for the new PeopleSoft Campus Solutions System more than fourteen hundred (1,406 documented) fits and or gaps were identified and documented. A total of one hundred and twenty-five (125) fit gap sessions were completed along with two months of modeling.

As a result of the fit gap and modeling sessions almost one thousand (993) fits were identified with three hundred and fifty-three (353) gaps being identified. At this time, there are only nine (9) gaps pending resolution.

Data Conversions, Interfaces, and Reports Categories

BG@100 project team has developed the following categories in order to accurately identify the legacy system data conversions, interfaces, and reports included in this scope document. A breakdown by module for each category has been included as Appendix A. It is anticipated that the BG@100 project team will continue to define PeopleSoft Campus Solutions System data conversions, interfaces, and reports utilizing the following categories:

Category 1 – Mandated

Category 1 - Mandated has been assigned to all mandated data conversion, interfaces, or reports needed for maintaining any compliance: required by law; with government agencies; with university specific agencies; with university policies; and with outside vendors.

Category 1 – Mandated data conversions, interfaces, or reports will be submitted to the Executive Steering Committee as information items and will be considered as *In Scope*.⁷

Category 2 – Critical

Category 2 – Critical has been assigned to all mission critical data conversions, interfaces, or reports which the back offices must have before the go-live dates; otherwise, the related office will not be able to perform the essential business process function(s).

Category 2 – Critical data conversions, interfaces, or reports will be submitted to the Executive Steering Committee as information items and will be considered as *In Scope*.⁸

⁷ Category 1 – Mandated data conversions have been included in the Conversion Scope Document as Appendix C1.

Category 1 – Mandated interfaces have been included in the Interface Scope Document as Appendix I1.

Category 1 – Mandated reports have been included in the Report Scope Document as Appendix R1.

⁸ Category 2 – Critical data conversions have been included in the Conversion Scope Document as Appendix C2.

Category 2 – Critical reports have been included in the Report Scope Document as Appendix R2.

Category 3 – Important

Category 3 - Important has been assigned to all important data conversions, interfaces, or reports needed for the operation of business process function(s) but may not be needed before the go-live dates.

Category 3 – Important data conversions and interfaces will be submitted to the Executive Steering Committee as information items and will be considered as *In Scope*. It is necessary for the Executive Steering Committee to approve the action item before the development begins. Important reports will need to be submitted to the Executive Steering Committee by the BG@100 project team for consideration. Category 3 reports are considered *Out of Scope* until such time that the action item is reviewed and approved by the Executive Steering Committee. Development of the approved Category 3 items will be based upon the BG@100 Campus Solutions project timeline and the resources available.⁹

Category 4 – Nice-to-Have (Non-Essential)

Category 4 – Non-Essential has been assigned to all nice to have (non-essential) data conversions, interfaces, or reports. All legacy data conversions, interfaces, or reports classified as a Category 4 – Non-Essential will *NOT* be included in the BG@100 Campus Solutions System implementation. Category 4 – Non-Essential conversions, interfaces, or reports are considered as *Out of Scope* unless approved as an action item by the Executive Steering Committee items and will be based upon the BG@100 Campus Solutions project timeline and the resources available.¹⁰

Category Q – PS/Query

Category Q has been assigned to all interfaces and reports that could be potentially generated from PS/Query manager by the functional users.¹¹ During the modeling and testing phases of the PeopleSoft Campus Solutions implementation, if it is determined that the report is too complex to be built using the PS/Query manager, the interface or report will need to be re-categorized into either Category 1, Category 2, Category 3, or Category 4.

Category 2 – Critical interfaces have been included in the Interface Scope Document as Appendix I2.

⁹ Category 3 – Important data conversions have been included in the Conversion Scope Document as Appendix C3.

Category 3 – Important reports have been included in the Report Scope Document as Appendix R3.

Category 3 – Important interfaces have been included in the Interface Scope Document as Appendix I3.

¹⁰ Category 4 – Non-Essential data conversions have been included in the Conversion Scope Document as Appendix C4.

Category 4 – Non-Essential interfaces have been included in the Interface Scope Document as Appendix I4.

Category 4 – Non-Essential reports have been included in the Report Scope Document as Appendix R4.

¹¹ Category Q – PS/Query data conversions have been included in the Conversion Scope Document as Appendix C5.

Category Q – PS/Query interfaces have been included in the Interface Scope Document as Appendix I5.

Category Q – PS/Query reports have been included in the Report Scope Document as Appendix R5.

The BG@100 project teams are encouraged to develop all Category Q – PS/Query interfaces and reports during the modeling and testing phases of the PeopleSoft Campus Solutions System. All Category Q – PS/Query interfaces or reports will *NOT* be submitted to the Executive Steering Committee as information items or as action items for approval. It is necessary for the BG@100 project team to use BG@100 standardized naming conventions and document the satisfactory completion of the interface or report in order for the developed Category Q – PS/Query interfaces or reports to be accurately maintained during the implementation and go-live.

The BG@100 project team realizes that Focus interfaces and reports are used prevalently among the current SIS user base. It is the intent of the BG@100 project team to provide adequate training in the utilization of the PS/Query reporting tool along with the Crystal and/or XML Publisher tools to the Focus experts and the back-office employee user base.

Category Q interfaces and reports are considered as *In Scope*.

Category V – Vendor

Category V has been assigned to all interfaces and reports that will be developed and/or maintained by a third-party vendor. During the modeling and testing phases of the PeopleSoft Campus Solutions implementation, if it is determined that the interface or report is *NOT* going to be delivered by the third-party vendor, the interface will need to be re-categorized into either Category 1, Category 2, Category 3, Category 4, or Category Q.¹² The estimated hours of development has not been identified even though there will be some development hours required by the BG@100 project team in order to assist the vendor with the functional specifications and testing.

Category V interfaces and reports developed by the third-party vendor with only limited amount of assistance by the BG@100 project team is considered as *In Scope*.

Category 0 – No Longer Needed

Category 0 has been assigned to all conversion, interfaces, and reports that will *NOT* be necessary to develop due to non-utilization or due to the PeopleSoft Campus Solutions delivered functionality. While these processes will *NOT* require time for interface or report development, it is important to note that the PeopleSoft Campus Solutions integration points will need to be thoroughly tested. The BG@100 project team is also anticipating that other processes originally identified as interfaces will most likely be replaced by the new identity management system installation.

All Category 0 conversions, interfaces, and reports are being evaluated during the modeling process.

All Category 0 manual conversions that have been identified are considered as *In Scope*.

¹² Category V – vendor interfaces have been identified and have been included in the Interface Scope Document as Appendix IV.
Category V – vendor reports have been identified and have been included in the Report Scope Document as Appendix RV.

Conversion Scope Detail

During the fit/gap and modeling sessions, there were fifty-four (54) conversions extracts identified and fifty-four (54) conversions imports have been identified. The one-hundred and eight (108) conversions are considered *In Scope*.

Academic Structure – Foundation Tables

During the fit/gap and modeling sessions, all Academic Structure conversion categories were confirmed and evaluated. There are eight (8) critical conversions that are considered as *In Scope*. The BG@100 project team is encouraged to evaluate the most appropriate method of converting the Academic Structure into the system to ensure data integrity. For a detailed list of the Academic Structure conversions, refer to Appendix C2.

Campus Community – Bio/Demo Data

During the fit/gap and modeling sessions, all Campus Community conversion categories were confirmed and evaluated. There are twenty-nine (29) critical conversions that are considered as *In Scope*. For a detailed list of the Campus Community conversions, refer to Appendix C2 and Appendix C3.

The BG@100 project team is responsible for thoroughly evaluating the Campus Community data being converted into the system. It is imperative that the Campus Community modeling business process analysis include a thorough review of the legacy data standards.

Admissions – Prospects and Undergraduate Applications

During the fit/gap and modeling sessions, all Undergraduate Admissions and Undergraduate Prospect conversion categories were confirmed and evaluated. There are four (4) critical conversions that are considered as *In Scope*. For a detailed list of the Admissions (Undergraduate) conversions, refer to Appendix C2.

Student Records

During the fit/gap and modeling sessions, all registration and records conversion categories were confirmed and evaluated. There are thirty (30) mandated, critical, and important conversions that are considered as *In Scope*. For a detailed list of the Student Records conversions, refer to Appendix C1, Appendix C2, and Appendix C3.

Financial Aid

During the fit/gap and modeling sessions, all Financial Aid conversion categories were confirmed and evaluated. There are eleven (11) mandated and critical conversions that are considered as *In Scope*. For a detailed list of the Student Financial Aid conversions, refer to Appendix C1 and Appendix C2.

Student Financials

During the fit/gap and modeling sessions, all Student Financials conversion categories were confirmed and evaluated. There are fourteen (14) mandated and critical conversions that

are considered as *In Scope*. For a detailed list of the Student Financials conversions, refer to Appendix C1 and Appendix C2.

Graduate College

During the fit/gap and modeling sessions, all graduate prospect, graduate applicant, and graduate student conversion categories were confirmed and evaluated. There are eight (8) mandated and critical conversions that are considered as *In Scope*. For a detailed list of the Graduate College conversions, refer to Appendix C2 and Appendix C3.

Residence Life

The Residential Management System (RMS) is current reviewing and evaluating the potential RMS conversion requests.

Interface Scope Detail

Academic Structure – Foundation Tables

During the fit/gap and modeling sessions, all Academic Structure interface categories were confirmed and evaluated. There is currently Not a request for Academic Structure interfaces. For a detailed list of the Academic Structure interfaces, refer to Appendix I1, Appendix I2, Appendix I3, Appendix I4, Appendix IQ, and Appendix IV.

Campus Community – Bio/Demo Data

During the fit/gap and modeling sessions, all Campus Community interface categories were confirmed and evaluated. There are seven (7) critical and important interfaces that are considered as *In Scope*. For a detailed list of the Campus Community interfaces, refer to Appendix I2 and Appendix I3.

The BG@100 project team is responsible for thoroughly evaluating the Campus Community data being interfaced into external systems.

Admissions – Prospects and Undergraduate Applications

During the fit/gap and modeling sessions, all Undergraduate Admissions and Undergraduate Prospect interface categories were confirmed and evaluated. There are nineteen (19) critical, important, and query interfaces that are considered as *In Scope*. For a detailed list of the Admissions (Undergraduate) interfaces, refer to Appendix I2, Appendix I3 and Appendix IQ.

Student Records

During the fit/gap and modeling sessions, all Registration and Records interface categories were confirmed and evaluated. There are thirty (30) mandatory, critical, important, query, and vendor interfaces that are considered as *In Scope*. There are five (5) nice-to-have non-essential interfaces that are considered as *Out of Scope* until such time that they are reviewed and approved by the Executive Steering Committee. For a detailed list of the Records and Registration interfaces, refer to Appendix I1, Appendix I2, Appendix I3, Appendix I4, Appendix IQ, and Appendix IV.

Financial Aid

During the fit/gap and modeling sessions, all Financial Aid interface categories were confirmed and evaluated. There are six (6) mandatory, critical, important, and query interfaces that are considered as *In Scope*. There is one (1) nice-to-have non-essential interface that is considered as *Out of Scope* until such time that it is reviewed and approved by the Executive Steering Committee. For a detailed list of the Student Financial Aid interfaces, refer to Appendix I1, Appendix I2, Appendix I3, Appendix I4, and Appendix IQ.

Student Financials

During the fit/gap and modeling sessions, all Student Financials interface categories were confirmed and evaluated. There are thirty-eight (38) critical, important, query, and vendor

interfaces that are considered as *In Scope*. There is one (1) nice-to-have non-essential interface that is considered as *Out of Scope* until such time that it is reviewed and approved by the Executive Steering Committee. For a detailed list of the Student Financials interfaces, refer to Appendix I2, Appendix I3, Appendix I4, Appendix IQ, and Appendix IV.

Graduate College

During the fit/gap and modeling sessions, all Graduate Prospects, Graduate Applicants, and Graduate Student interface categories were confirmed and evaluated. There are five (5) critical and query interfaces that are considered as *In Scope*. For a detailed list of the Admissions (Undergraduate) interfaces, refer to Appendix I2 and Appendix IQ.

Residence Life

At this time, there are *NO* Category 1, Category 2, Category 3, or Category 4 Residence Life Interfaces being recommended. However, the BG@100 project team is encouraged to utilize the initial modeling process to finalize and conclude all fit gap documentation and interface mapping documents. The interface mapping documents should include a field-by-field mapping matrix.

All Category Q interfaces are approved for development during the modeling sessions.

Reporting Scope Detail

Academic Structure – Foundation Tables

During the fit/gap and modeling sessions, all Academic Structure report categories were confirmed and evaluated. There are no Academic Structure reports being recommended.

Campus Community – Bio/Demo Data

During the fit/gap and modeling sessions, all Campus Community report categories were confirmed and evaluated. There are no Campus Community reports being recommended.

Admissions – Prospects and Undergraduate Applications

During the fit/gap and modeling sessions, all Undergraduate Admissions and Undergraduate Prospect report categories were confirmed and evaluated. There are sixteen (16) mandated and critical reports that are considered as *In Scope*. For a detailed list of the Admissions (Undergraduate) reports, refer to Appendix R1 and Appendix R2.

Student Records

During the fit/gap and modeling sessions, all Registration and Records report categories were confirmed and evaluated. There are fifty-four (54) mandatory, critical, and query reports that are considered as *In Scope*. There are twenty-six (26) important and nice-to-have non-essential reports that are considered as *Out of Scope* until such time that they are reviewed and approved by the Executive Steering Committee. For a detailed list of the Records and Registration reports, refer to Appendix R1, Appendix R2, Appendix R3, Appendix R4, and Appendix RQ.

Financial Aid

During the fit/gap and modeling sessions, all Financial Aid report categories were confirmed and evaluated. There are eighteen (18) mandatory, critical, and query reports that are considered as *In Scope*. There are twelve (12) important and nice-to-have non-essential reports that are considered as *Out of Scope* until such time that they are reviewed and approved by the Executive Steering Committee. For a detailed list of the Student Financial Aid reports, refer to Appendix R1, Appendix R2, Appendix R3, Appendix R4, and Appendix RQ.

Student Financials

During the fit/gap and modeling sessions, all Student Financials report categories were confirmed and evaluated. There are seventy-three (73) mandatory, critical, and query reports that are considered as *In Scope*. For a detailed list of the Student Financials reports, refer to Appendix R1, Appendix R2, and Appendix RQ.

Graduate College

During the fit/gap and modeling sessions, all Graduate College report categories were confirmed and evaluated. There are four (4) mandatory and critical reports that are considered as *In Scope*. For a detailed list of the Graduate College reports, refer to Appendix R1 and Appendix R2.

All Category Q reports are approved for development during the modeling sessions.

Residence Life

At this time there are *NO* Category 1, Category 2, Category 3, or Category 4 Residence Life reports being recommended.

All Category Q reports are approved for development during the modeling sessions.

Testing Scope

Functional/Unit Testing

The purpose of the Functional/Unit Test is to validate that the software is operational. Primary considerations include the new software developed for the project and validation that vendor updates and fixes are correctly applied. The development team executes Functional/Unit testing as they develop new processes.

System/Integration Testing

System/Integration testing is the opportunity to combine BGSU's functional business processes with PeopleSoft's technical processing environment. The testing will be completed in most part by the functional and technical leads for the system modules.

System/Integration testing focuses on making sure that BGSU's system setup works and that the processes across each module function in an integrated way.

User Acceptance Testing

User Acceptance testing refers to the process of functional users fully testing all scenarios and possibilities that they would encounter to ensure that they can perform their jobs using the PeopleSoft Campus Solutions System. The testing team(s) will include members of the back office staff in addition to members of the project team.

Performance/Stress Testing

Performance/Stress testing will be conducted following the User Acceptance testing phase. This testing will attempt to simulate significant user load on the PeopleSoft Campus Solutions System as well as executing functions that will put large loads on the system due to the amount of data being processed.

Data Conversion Testing

Data Conversion validation will focus on testing, verifying and validating data converted from the various legacy systems into PeopleSoft Campus Solutions System. Conversion testing will occur within subsets of Unit, System/Integration and User Acceptance testing. Initial validation of converted data will occur during testing, which will be performed by the conversion team in the conversion database (CSSCNV) instance. Additional validation of converted data will occur as we complete each round of System/Integration and User Acceptance testing.

Training Scope

Training for PeopleSoft Campus Solutions System will provide users with the knowledge, skills, and support they need to become proficient in using the new system. In addition, training will facilitate users in making a successful and smooth transition from the old legacy systems to the PeopleSoft Student Administration. We will offer training to 100% of expected users prior to Go-Live. Training will be provided before, during, and after the implementation of each module: Academic Structure, Campus Community, Admissions, Student Records, Student Financials, Financial Aid, and Self-Service.

Change Management Scope

The CSS BG@100 Change Management Team will design, develop, and manage delivery of initiatives/priorities beginning with the planning phase of the project and continue through the implementation of the PeopleSoft Campus Solutions System. Providing initiatives/priorities throughout the life of a project – especially one that spans several years – is necessary to sustain participation and ownership in impacted audiences.

Deliverables

- ESC Action Item Request
 - ESC Information Item Request
 - Project Plan(s)
 - ESC Status Report
 - Modeling Documentation (Basis for Training and Business Procedure Manual)
-

Hardware/Software Requirement

- PeopleSoft Campus Solutions System v8.9
- Back-Office Staff
- BG@100 Project Team
- Strategic Needs Committee
- Change Management Committee

Conclusion

“The BG@100 project, named in recognition of the vision for the university’s centennial milestone, is committed to providing efficient, effective and high quality information and service to students, faculty and staff. To meet our changing needs, BGSU is implementing PeopleSoft to advance the technology that supports and serves the learning community.”

All BG@100 project team members are encouraged to embrace this opportunity to develop new and improved business processes, implement integrated business processes, minimize the dependencies of customizations, and utilize PeopleSoft best practices in order to embrace the BG@100 project mission.

Appendix A: Conversions, Interfaces, and Reports Categories

The table below identifies by category the number of conversions, interfaces, and reports as determined by the BG@100 project team during fit gap. The categories and areas highlighted in green have been recommended as *In Scope*.

Category Breakdown	<i>Category 1 Mandated</i>	<i>Category 2 Critical</i>	<i>Category 3 Important</i>	<i>Category 4 Nice-to-Have (Non-Essential)</i>	<i>Category 0 No Longer Needed</i>	<i>Category Q PS/Query</i>	<i>Category V Vendor</i>
Conversions (Export and Import)							
Academic Structure – Foundation Tables	0	12	0	0	0	—	—
Campus Community – Bio/Demo Data	0	23	2	4	4	—	—
Admissions	0	8	0	2	2	—	—
Student Records	23	14	0	1	1	—	—
Financial Aid	7	6	0	0	0	—	—
Student Financials	0	16	0	0	0	—	—
Graduate College	0	4	0	0	0	—	—
Residence Life	—	—	—	—	0	—	—
Totals	30	83	2	7	7	0	0
Interfaces							
Academic Structure – Foundation Tables	0	0	0	0	0	0	0
Campus Community – Bio/Demo Data	0	4	3	0	18	0	0
Admissions	0	9	2	0	10	8	0
Student Records	1	13	4	5	28	3	9
Financial Aid	2	1	1	1	0	2	0
Student Financials	0	9	3	1	2	0	25
Graduate College	0	2	0	0	2	3	0
Residence Life	—	—	—	0	4	3	1
Alumni	0	0	0	0	0	0	1

Category Breakdown	<i>Category 1 Mandated</i>	<i>Category 2 Critical</i>	<i>Category 3 Important</i>	<i>Category 4 Nice-to-Have (Non-Essential)</i>	<i>Category 0 No Longer Needed</i>	<i>Category Q PS/Query</i>	<i>Category V Vendor</i>
Totals	3	38	13	7	64	19	36
Reports							
Academic Structure – Foundation Tables	0	0	0	0	0	0	—
Campus Community – Bio/Demo Data	0	0	0	0	0	0	—
Admissions	1	15	0	0	0	0	—
Student Records	17	12	20	6	22	25	—
Financial Aid	3	4	6	6	35	11	—
Student Financials	1	18	0	0	144	54	—
Graduate College	1	3	0	0	3	0	—
Residence Life	—	—	—	—	—	—	—
Totals	23	52	26	12	204	90	0
Development Totals	65	177	41	28	275	111	36

Residence Life has not completed the fit gap process. This information will be provided once the fit gap process has been completed. This has been symbolized by “—”.

Appendix B: Business Process Inventory

The table below identifies the current legacy Systems that were evaluated during the fit gap process, the PeopleSoft Campus Solutions Module that will be evaluated during the modeling process, and the Proposed System of Record for BGSU by each primary business processes divided by BGSU department.

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
Office of Admissions (Undergraduate)			
Undergraduate Admissions Staff			
Paper Admissions Application Entry	UAS	Student Admissions Application Entry	PS CSS
Paper Prospect Recruitment Form	UAS	Student Recruiting Maintain Prospects	PS CSS
Management of the Application	SIS	Student Admissions Application Maintenance	PS CSS
Management and Awarding of New Student Scholarships	UAS/SIS	Awarding	PS CSS
Recruitment Management	UAS/SIS	Student Recruiting Maintain Prospects	PS CSS
Campus Visits and Event Management (real-time tickers/counters)	UAS	Events 3C's	PS CSS
Reporting and Communication Management	UAS/SIS	3C's Reporting Solution	PS CSS
Academic Departments			
Advising Appointment Scheduling	UAS	Events	PS CSS
On-Line Reporting	UAS	Reporting Solution	PS CSS
Audition and Portfolio Evaluation	UAS	General Materials Applicant Materials	PS CSS
OREG Profile Support	UAS	Student Records	PS CSS
Administrative Offices			
On-Line Reporting	UAS	Reporting Solution	PS CSS
Communication Distribution	UAS	3C's	PS CSS

¹³ PS CSS – PeopleSoft Campus Solutions System

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
Course Advising Support for OREG	UAS	Student Records	PS CSS
Professors			
Class Visit Management	UAS	Events	PS CSS
Targeted Recruitment	UAS	Reporting Solution 3C's	PS CSS
High School Counselors			
Viewing Status of current Applications and Documents Required	UAS	Checklist Summary Application Maintenance Summary	PS CSS
View Class Schedules of PSEOP Students	UAS	Student Records Reporting Solutions	PS CSS
Prospects and Applicants			
On-Line Application for Admissions	UAS	Student Admissions Application Entry	PS CSS
On-Line Scholarship Applications	UAS	Student Admissions Create Prospects	PS CSS
Information Requests	UAS	3C's Student Recruiting Maintain Prospects	PS CSS
Access University Information Personalized Web Page	UAS	Not Delivered	UAS
Schedule Admissions Counselor Meetings	UAS	Events	PS CSS
Register Self and Guests for Events	UAS	Events	PS CSS
Schedule Class Visits	UAS	Events	PS CSS
Complete and Submit Application Materials for Academic Departments	UAS	General Materials Applicant Materials	PS CSS
Office of Registration and Records (Registrar's Office)			
Registration			
Course Catalog	SIS	Curriculum Management Course Catalog	PS CSS

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
Schedule of Classes	SIS	Curriculum Management Schedule of Classes	PS CSS
Term Copy	SIS	Curriculum Management Roll Curriculum Data Forward	PS CSS
Enrollment Requirements	SIS	Curriculum Management Enrollment Requirement	PS CSS
Combined Sections	SIS	Curriculum Management	PS CSS
Dynamic Dates	–	Curriculum Management	PS CSS
Facility and Event Information	R25	Curriculum Management	R25
Class Roster	SIS	Curriculum Management	PS CSS
Attendance Roster	–	Curriculum Management	PS CSS
Personal Data Maintenance	SIS	Campus Community	PS CSS
Student Status and Program/Plan	SIS	Records and Enrollment Career and Program Information	PS CSS
Registration	SIS	Records and Enrollment Enroll Students	PS CSS
Student Term Information	SIS	Records and Enrollment Student Term Information	PS CSS
Enrollment Summaries	SIS	Records and Enrollment Enrollment Summaries	PS CSS
Enrollment Reporting	SIS/M2 Tables	Records and Enrollment Enrollment Reporting	PS CSS
Enrollment Verifications	SIS	Records and Enrollment Enrollment Verifications	PS CSS
OREG Reservation System		Evaluation Being Conducted	Evaluation Being Conducted
Waitlist	SIS	Records and Enrollment Term Processing	PS CSS
Firelands Processing	SIS	Records and Enrollment	PS CSS
Records			
Transfer Credit	DARwin/SIS	Records and Enrollment Transfer Credit Evaluation	DARwin

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
Transcripts	SIS	Records and Enrollment Transcripts	PS CSS
Mid-Term Grading	DB2/SIS	Curriculum Management Grading	Evaluation Being Conducted
Grading	SIS	Curriculum Management Grading	PS CSS
Academic Advising	DARwin/SIS	Academic Advisement	DARwin
Graduation	SIS	Records and Enrollment Graduation	PS CSS
Student Self-Service	SIS	Student Center Self-Service	PS CSS
Advisor Self-Service	SIS	Advisor Self-Service	PS CSS
Instructor Self-Service	SIS	Faculty Center Self-Service	PS CSS
Instructor/Advisor Information	SIS	Curriculum Management Instructor/Advisor Information	PS CSS
Facilities and HEI Reporting	CICS	Evaluation Being Conducted	Evaluation Being Conducted
Athletics/NCAA Compliance	SIS	Campus Community Student Groups	PS CSS
Consortium/Study Agreements	SIS	Program/Plan Enrollment Request	PS CSS
Enrollment Types	SIS	Schedule of Classes Enrollment Request	PS CSS
Non-Credit Enrollment	Peopleware/Aceware	Records and Enrollment Enroll Students	Peopleware/Aceware
Teacher Licensure	SIS	Academic Structure	PS CSS
PSEOP Processing	SIS	Academic Structure	PS CSS
Disability Services	SIS	Student Groups Accommodations	PS CSS
SSS and OMAI	SIS	Student Groups	PS CSS
Office of Student Financial Aid			
New Aid Year	SAM	Set Up SACR	PS CSS
DB Matches/SSN/NSLDS/etc.	SAM	Application Processing	PS CSS

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
ISIR Loads	SAM	File Management	PS CSS
Cost of Attendance	SAM	Budgets	PS CSS
Bio Loads for No FAFSA Aid Recipients	SAM	Personal Information (Students) Manage Financial Aid Years	PS CSS
Financial Aid Award Codes and Criteria	SAM	Awards	PS CSS
Awarding Aid	SAM	Award Processing	PS CSS
Anticipated Aid (Deferments)	SAM	Financial Aid Item Types	PS CSS
ACG	SAM	ACG/SMART Grants	PS CSS
SMART	SAM	ACG/SMART Grants	PS CSS
SEOG	SAM	Award Processing	PS CSS
Pell	SAM	Pell Grants	PS CSS
Processing Direct Loans	SAM	Loans	PS CSS
Nursing Loans	SAM	Loans	PS CSS
Perkins Loans	SAM	Loans	PS CSS
Schell Loans – Main and Firelands	SAM	Loans	PS CSS
Entrance Interviews	SAM	Packaging Status Summary	PS CSS
Exit Interviews	SAM	Packaging Status Summary	PS CSS
Electronic Data Exchange – COD	SAM	File Management	PS CSS
Alternative Loans	SAM	Loans	PS CSS
IMA	SAM	NSLDS	PS CSS
OIG	SAM	Award Processing	PS CSS
OCOG	SAM	Award Processing	PS CSS
Ohio Academic Scholarship	SAM	Award Processing	PS CSS
3 RD Party Awards	SAM	Award Processing	PS CSS

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
External Scholarships	SAM	Award Processing	PS CSS
Graduate/Departmental/ Continuing Education Fee Waivers	SAM	Award Processing	PS CSS
Alumni Legacy Supplemental	SAM	Award Processing	PS CSS
Athletics	SAM	Award Processing	PS CSS
Falcon Soars	SAM	Award Processing	PS CSS
Orange and Brown	SAM	Award Processing	PS CSS
Tuition Certainty	SAM	Award Processing	PS CSS
University Tuition Scholarship	SAM	Award Processing	PS CSS
Enrollment Verification	SIS/SAM	Communications	PS CSS
Census Date	SIS/SAM	Set Up SACR	PS CSS
Late/Add Exceptions	SIS/SAM	Award Processing	PS CSS
Not Coming	SIS/SAM	Self-Service	PS CSS
R2T4	SIS/SAM	Return Title IV	PS CSS
Summer Processing	SAM	Award Processing	PS CSS
Special Enrollment - AYA	SAM	Award Processing	PS CSS
Special Enrollment - COOP	SAM	Award Processing	PS CSS
Special Enrollment - NSE	SAM	Award Processing	PS CSS
Special Enrollment - FIT	SAM	Award Processing	PS CSS
Special Enrollment - Guest	SAM	Award Processing	PS CSS
Special Enrollment - Teacher Certificate	SAM	Award Processing	PS CSS
Special Enrollment - Consortiums	SAM	Award Processing	PS CSS
FISAP	SAM	Fund Management	PS CSS
FERPA for FA	SAM	3C's	PS CSS
Short Term Loans - Main	SAM/SIS	Award Processing	PS CSS
Checklists	SAM	Campus Community	PS CSS

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
Comments	SAM	Campus Community	PS CSS
Communications	SAM	Campus Community	PS CSS
BGSU Special Applications and On-Line Programs	SAM Manual FA Office	Not Delivered	PS CSS Manual FA Office BGSU FA Web Pages
Security	SAM	Secure Student Administration	PS CSS
FA Term	SAM	Financial Aid Term	PS CSS
Disbursements	SAM	Disbursement	PS CSS
FWSP	SAM	Awards	PS CSS
SSS	SAM	Awards	PS CSS
Endowed Scholarships/Development	SAM	Awards	PS CSS
Satisfactory Academic Progress (SAP)	SAM/SIS	Satisfactory Academic Progress	PS CSS
SFA Foundation Scholarships - Firelands	SAM	Award Processing	PS CSS
Short Term Loans - Firelands	SAM/SIS	Award Processing	PS CSS
HEI Processes	SAM	Not Delivered BGSU Customization	PS CSS
Office of the Bursar			
Tuition Calculation	SIS	Tuition and Fees	PS CSS
Withdrawal	SIS	Tuition and Fees	PS CSS
Cancellation	SIS	Tuition and Fees	PS CSS
Add/Drop	SIS	Tuition and Fees	PS CSS
Waivers	SIS	Tuition and Fees	PS CSS
Cashiering	SIS	Cashiering	PS CSS
Admission Deposits	SIS	Administrative Fees	PS CSS
Billing	SIS	Billing	PS CSS
Refunding	SIS	Refunding	PS CSS
Aging/Credit History	SIS	Collections	PS CSS

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
Collections	SIS	Collections	PS CSS
Write Offs	SIS	Collections	PS CSS
Financial Aid – Awards	SIS	FA Charges and Pay	PS CSS
Financial Aid – Outside Scholarship	SIS	FA Charges and Pay	PS CSS
3 rd Party Contract	SIS	Payment Plans 3 rd Party Contracts	PS CSS
IPP	SIS	Payment Plans 3 rd Party Contracts	PS CSS
STEP	SIS	Payment Plans 3 rd Party Contracts	PS CSS
Employer Reimbursement	SIS	Payment Plans 3 rd Party Contracts	PS CSS
Anticipated Aid	SIS	Financial Aid	PS CSS
Alternative Loan	SIS	Financial Aid	PS CSS
Other Deferments	SIS	Financial Aid	PS CSS
Charges (Meal Plan, Parking, Library, Bookstore, etc.)	SIS	Charges and Payments	PS CSS
Payments – Alternative Loans	SIS	Charges and Payments	PS CSS
Payments – Sallie Mae	Sallie Mae	Charges and Payments	PS CSS
Group Post	SIS	Charges and Payments	PS CSS
Student Post	SIS	Charges and Payments	PS CSS
NSF Checks	SIS	Charges and Payments	PS CSS
ECSI	SIS	Pending	PS CSS
Service Charges	SIS	Charges and Payments	PS CSS
Late Fees	SIS	Charges and Payments	PS CSS
Finance Charges	SIS	Charges and Payments	PS CSS
Photo ID	SIS	Charges and Payments	PS CSS
BG1 Card	BG1	Charges and Payments	PS CSS
FERPA	SIS	Campus Community Service Indicator	PS CSS

<i>Business Process List</i>	<i>Current System "Legacy"</i>	<i>PS CSS¹³ Module "Currently Evaluating"</i>	<i>Proposed System of Record</i>
Financial Responsibility Agreements	SIS	Student Records Service Indicator	PS CSS
1098T	SIS	1098T	PS CSS
1098E	SIS	1098T	PS CSS
GL Interface	SIS	GL Interface	PS CSS
Service Indicators	SIS	Campus Community Service Indicator	PS CSS
Comments	SIS	Campus Community	PS CSS
Communications	SIS	Campus Community	PS CSS
Self Service	SIS	Self-Service	PS CSS
Graduate College (Graduate Admissions)			
Prospects (Request for Information)	Graduate College Web Servers	Student Recruiting Maintain Prospects	PS CSS
On-Line Application	CollegeNet	Not Delivered BGSU Customization	PS CSS
Application Maintenance	SIS	Student Admissions Application Maintenance	PS CSS
Stipends	FMPPro ¹⁴ PS HCM	Payment Plans 3 rd Party Contracts PS HCM	FMPPro PS HCM
Graduate College Fee Waivers	FMPPro	Payment Plans Equation Engine 3 rd Party Contracts PS	PS CSS
Graduation Processing	FMPPro	Records and Enrollment Career and Program Information Query Extracts	PS CSS
Residence Life			
	BGSU Local Housing Application	To Be Determined (RMS Fit Gap)	To Be Determined (RMS Fit Gap)

The table above identifies each of the business processes initially evaluated during the fit gap process. The current legacy system was identified during the fit gap process. During the initial

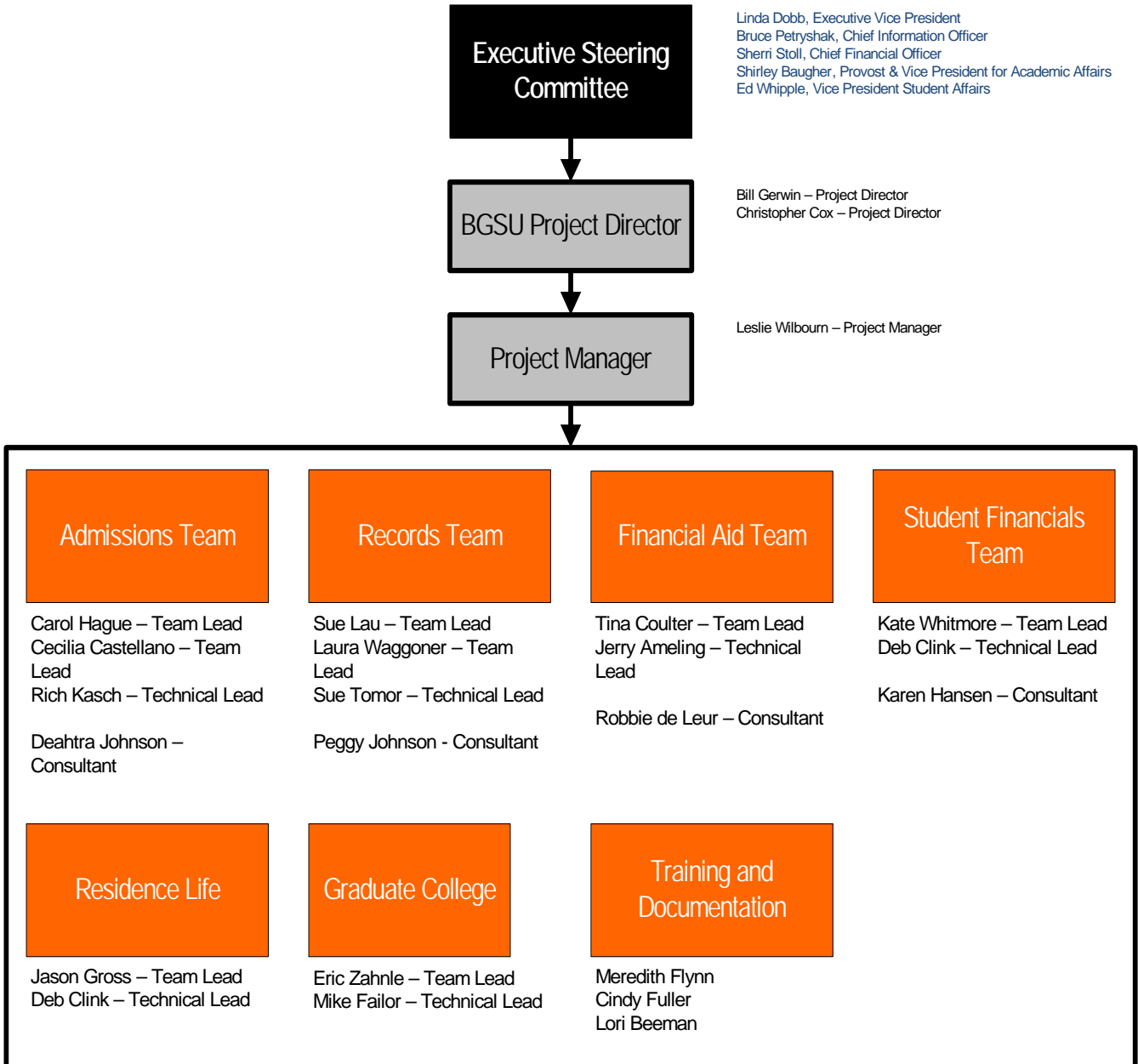
¹⁴ FMPPro – FileMaker Professional

modeling process, the PeopleSoft Campus Solutions System will be reviewed and evaluated. The PeopleSoft Campus Solutions System module has been identified in the table above in the "PS CSS Module" column. This column will be updated during the modeling process.

It is the intent of the BG@100 project team to focus on the PeopleSoft Campus Solutions System as the system of record for BGSU. This has been identified in the table above in the "Proposed System of Record" column.

It is also the intent of the BG@100 project team to add in an additional column as a result of the modeling process with the proposed data management system; example: PS CSS, DARwin, R25, etc. This will identify the system or systems being implemented in conjunction with the PeopleSoft Campus Solutions System.

Appendix C: BG@100 Organization Structure



Appendix D: *In Scope* and *Out of Scope* Reference

The table below identifies project activities that are considered as *In Scope* and *Out of Scope*. The “*Status*” column identifies the activity currently being conducted by the BG@100 project team.

	<i>In Scope</i>	<i>Out of Scope</i>	<i>Status</i>
Conversion Development			
Category 1 – Mandated	Yes	No	Evaluating
Category 2 – Critical	Yes	No	Developing Evaluating Testing
Category 3 – Important	Yes	No	Evaluating
Category 4 – Nice-to-Have (Non-Essential)	No	Yes	Evaluating
Category Q – PS/Query	Not Applicable	Not Applicable	Not Applicable
Category V – Vendor	Not Applicable	Not Applicable	Not Applicable
Category 0 – No Longer Needed	No	Yes	Confirming
Interface Development			
Category 1 – Mandated	Yes	No	Developing Evaluating
Category 2 – Critical	Yes	No	Developing Evaluating
Category 3 – Important	Yes	No	Evaluating
Category 4 – Nice-to-Have (Non-Essential)	No	Yes	Evaluating
Category Q – PS/Query	Yes	No	Development
Category V – Vendor	Yes	No	Development Notification
Category 0 – No Longer Needed	No	Yes	Confirming
Reporting Development			
Category 1 – Mandated	Yes	No	Developing Evaluating

	<i>In Scope</i>	<i>Out of Scope</i>	<i>Status</i>
Category 2 – Critical	Yes	No	Developing Evaluating
Category 3 – Important	No Must be approved by ESC	Yes, unless approved by ESC	Evaluating
Category 4 – Nice-to-Have (Non-Essential)	No	Yes	Evaluating
Category Q – PS/Query	Yes	No	Developing
Category V – Vendor	Yes	No	Developing Notification
Category 0 – No Longer Needed	No	Yes	Confirming
Business Process Reengineering			
Academic Structure	Yes Fully Implementing	No	Testing
Campus Community	Yes Fully Implementing	Events	Testing
Admissions (Undergraduate)	Yes Partially Implementing	To be Determined	Analysis
Student Records	Yes	To be Determined	Analysis
Financial Aid	Yes	To be Determined	Analysis
Student Financials	Yes	To be Determined	Analysis
Graduate College	Yes	To be Determined	Analysis
Residence Life	Yes	To be Determined	Analysis
Firelands	Yes	To be Determined	Analysis
Continuing Education	Yes	To be Determined	Analysis

Appendix E: BG@100 Timeline

The following table identifies the critical go-live dates determined by the BG@100 project team in conjunction with the Summer 2009 phased in go-live strategy.

	<i>Term/Session</i>	<i>Projected Go-Live</i>	
Academic Structure	July 2008		
Foundation Tables	All	July 2008	
Campus Community	September 2008		
Bio/Demo Data	Approved Conversion	September 2008	
3C's		September 2008	
Service Indicators		September 2008	
Self-Service		August 2008	Still Determining
Admissions Module	September 2008 – February 2009		
Prospects		September 2008	
Undergraduate Applications	Summer 2009 Fall 2009	September 2008	
Graduate Applications	Summer 2009 Fall 2009	September 2008	
Test Scores	Approved Conversion	September 2008	
BGNet Accounts	Summer 2009 Fall 2009	September 2008	
Scholarship Letters (New Freshman)	Fall 2009	September 2008	
Matriculation (Graduate)	Summer 2009	February 2009	
Matriculation (Undergraduate)	Summer 2009	February 2009	
Student Records Module	October 2008 – June 2010		
Applications for Graduation	Summer 2009	February 2009	
R25		December 2008	
Course Catalog	Summer 2009 Fall 2009 2009 – 2010	August 2008	

	<i>Term/Session</i>	<i>Projected Go-Live</i>	
Transfer Credit Rules	Summer 2009 Fall 2009	December 2008	
Class Schedule	Summer 2009 Fall 2009	October 2008 January 2009	
Student Groups		February 2009	
Prerequisite Classes	Summer 2009 Fall 2009	October 2008	
Degree Audit	Summer 2009 Fall 2009	March 2009	
Term Activation	Summer 2009 Fall 2009	January 2009	
Enrollment	Summer 2009 Fall 2009	February 2009 March 2009	
HEI Reporting	Summer 2009 Fall 2009	May 2009	
Grading	Summer 2009	June 2009	
Degree Audit	Fall 2009	June 2009	
Transcripts		June 2009	
OREG	Fall 2010	June 2010	
Graduation		August 2009	
Enrollment Verifications		August 2009	
Financial Aid Module	October 2008 – August 2009		
New Year Aid 09-10 (Table Setup)	Summer 2009 Header	October 2008	
Aid Year Activation 09-10	Summer 2009 Header	January 2009	
Admissions Scholarship Interface	Summer 2009 Header	January 2009	
ISIR Load 09-10	Summer 2009 Header	January 2009	
Self-Service	2009 – 2010	January 2009	

	<i>Term/Session</i>	<i>Projected Go-Live</i>	
QA Selection	Summer 2009 Header	January 2009	
Build COA	2009 – 2010	February 2009	
Rollover Aid	2009 – 2010	February 2009	
Load OCOG Estimates	2009 – 2010	February 2009	
FA Term Build	2009 – 2010	February 2009	
Assign Budgets	2009 – 2010	February 2009	
Verification Process	2009 – 2010	February 2009	
ISIR Corrections	2009 – 2010	February 2009 ¹⁵	
Auto Packaging	2009 – 2010	March 2009	
Initial Award Letters	2009 – 2010	March 2009	
Award Authorization	Summer 2009 Fall 2009	April 2009 June 2009	
Certify Alternative Loans	Summer 2009	April 2009	
Summer Award Disbursement	Summer 2009	May 2009	
R2T4	Summer 2009	May 2009	
Work Study Processing	Summer 2009 Fall 2009	July 2009	
Exit Interview	Summer 2009	July 2009	
FA Enrollment Verifications	Summer 2009	August 2009	
Satisfactory Academic Progress	2009 - 2010	May 2010	
FISAP Report	2009 - 2010	September 2010	
Student Financial Module	January 2009 – June 2009		
Self-Service	Fall 2009	January 2009	
Financial Responsibility Agreement	Fall 2009	January 2009	
Service Indicators	Fall 2009	January 2009	

¹⁵ Dependant on the Regulations Release II

	<i>Term/Session</i>	<i>Projected Go-Live</i>	
GL Interface	Summer 2009	February 2009	
FMS Accounts Payable	Fall 2009	February 2009	
Cashiering	Summer 2009	February 2009	
Web Payment Processing		February 2009	
Group/Student Post		February 2009	
Third-Party Contracts	Fall 2009	March 2009	
W/D and Cancellation Processing	Fall 2009	March 2009	
Tuition Calculation	Summer 2009 Fall 2009	April 2009 May 2009	
Billing	Summer 2009	April 2009	
Refunds	Summer 2009	April 2009	
Return of Title IV	Summer 2009	May 2009	
Late Fee Processing	Summer 2009	May 2009	
Aging/Credit History	Summer 2009	May 2009	
SF Fiscal Year End	2008 – 2009	June 2009	
RMS	January 2009 – March 2009		
Residence Life	Fall 2009 Summer 2009	January 2009 March 2009	

Appendix Fa: Fit/Gap/Potential Resolution Inventory Admissions

The table below represents the results of the Office of Admissions - Undergraduate fit gap and initial modeling process. The information found within this table is subject to change based upon further analysis during the final stages of modeling and the official testing process. The intent of this information is to identify the potential development work being requested.

Office of Admissions (Undergraduate)
Undergraduate Admissions Staff

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
Undergraduate Main Campus Recruiting Process	3 Fit	7 Gaps	UAS Approved by ESC BGSU Business Process Change BGSU Customization Self-Service
Freshman Application Process	36 Fits	8 Gaps	UAS Approved by ESC BGSU Customization Interface Reports New Fields Automation of Communications
Transfer Application Process	20 Fits	5 Gaps	UAS Approved by ESC BGSU Business Process Change BGSU Customization Field Modification
International Applications Guest Applications PSEOP	12 Fits	1 Gap	BGSU Customization
Undergraduate Application Evaluation (Post Load/Pre-Evaluation) Process	12 Fits	0 Gaps	None
Undergraduate Application Evaluation Process	11 Fits	1 Gap	BGSU Customization UAS Interface
Undergraduate Application Maintenance Process	1 Fit	1 Gap	BGSU Customization Inquiry Page
Test Score Loads	7 Fits	0 Gaps	None
Test Score Process	5 Fits	4 Gaps	BGSU Business Process Change BGSU Customization Load Automation/Calculation
Comments, Communication, and Checklist (3C's)	0 Fits	3 Gaps	BGSU Customization Application Engine

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
External Education Process	0 Fits	1 Gap	BGSU Customization New Field
Undergraduate Scholarship Process	1 Fit	1 Gap	BGSU Customization UAS Interface
Call Center	0 Fits	1 Gap	BGSU Customization UAS Interface
BGNet Account Temporary ID Cards	0 Fits	1 Gap	BGSU Customization UAS Interface
Firelands			
BGSU Firelands Application Process	19 Fits	1 Gap	BGSU Customization UAS Interface
BGSU Firelands Application Evaluation Process	10 Fits	2 Gaps	BGSU Customization DARwin Interface Modify SQC Code
BGSU Firelands Prospect and Recruiting Process	4 Fits	0 Gaps	None
Academic Departments			
College of Music and School of Art Special Admissions	4 Fits	1 Gap	BGSU Customization Automation

Appendix Fsr: Fit/Gap/Potential Resolution Inventory Student Records

The table below represents the results of the Office of Registrations and Records fit gap and initial modeling process. The information found within this table is subject to change based upon further analysis during the final stages of modeling and the official testing process. The intent of this information is to identify the potential development work being requested.

Office of Registration and Records (Registrar's Office)
Registration

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
Academic Policies	14 Fits	5 Gaps	BGSU Business Process Change BGSU Customization Interface DARwin Approved by ESC
Academic Structure	5 Fits	0 Gaps	None
Course Catalog	4 Fits	4 Gaps 3 Pending Gaps	BGSU Business Process Change BGSU Business Policy Change BGSU Customization
Schedule of Classes	12 Fits	2 Gaps 1 Pending	BGSU Policy Change BGSU Customization Interfaces
Dynamic Dates	3 Fits	0 Gap	None
Personal Data Maintenance	11 Fits	0 Gap	None
Registration	16 Fits	2 Gaps	BGSU Business Process Change BGSU Customization Modification
OREG Reservation System	18 Fits	0 Gaps	None
Waitlist	6 Fits	0 Gaps	None
Firelands Processing	5 Fits	1 Gap	None

Records

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
Transfer Credit	38 Fits	15 Gaps	DARwin Approved by ESC
Transcripts	0 Fit	4 Gaps	BGSU Customization Cobol Change Field Change Interface
Mid-Term Grading	3 Fits	4 Gaps	BGSU Business Process Change BGSU Customization Reports Modification
Grading	22 Fits	7 Gaps	BGSU Business Process Change BGSU Customization Reports Modification
Academic Advising (Degree Audit)	11 Fits	20 Gaps	DARwin Approved by ESC
Graduation	12 Fits	13 Gaps	BGSU Customization Interface Report Pending
Student Self-Service	22 Fits	6 Gaps	DARwin Approved by ESC BGSU Customization Display Changes Search Change Interface
Advisor Self-Service	18 Fits	9 Gap	DARwin Approved by ESC BGSU Business Process Change
Instructor Self-Service	16 Fits	4 Gaps	BGSU Customization Interface Report Pending
Facilities and HEI Reporting	4 Fits	2 Gaps	BGSU Third-Party Software R25 or Customization BGSU Customization Reports
Athletics/NCAA Compliance	5 Fits	0 Gap	None
Consortium/Study Agreements	3 Fits	1 Gap	BGSU Business Process Change BGSU Customization Report
Enrollment Types	6 Fits	0 Gap	None
PSEOP Processing	7 Fits	1 Gap	BGSU Customization Field Change

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
SF and SR Integrated Processing	6 Fits	1 Gap	Pending
Disability Services/ SSS/OMAI/PSEOP	24 Fits	0 Gaps	None
eMail Records	0 Fits	1 Gap	Pending
Student Status and Program/Plan	16 Fits	3 Gaps	BGSU Customization
Teacher Licensure	7 Fits	0 Gaps	None
Integrated Sessions	5 Fits	2 Gaps	BGSU Business Process Change BGSU Customization
Miscellaneous Items	9 Fits	2 Gaps	BGSU Business Process Change BGSU Customization
Interfaces	0 Fits	32 Gaps	BGSU Customization
Reports	0 Fits	95 Gaps	BGSU Customization

Appendix Ffa: Fit/Gap/Potential Resolution Inventory Financial Aid

The table below represents the results of the Student Financial Aid fit gap and initial modeling process. The information found within this table is subject to change based upon further analysis during the final stages of modeling and the official testing process. The intent of this information is to identify the potential development work being requested.

Office of Student Financial Aid

The following table represents the identified Fits (Legacy system and PeopleSoft system align), Fit Enhancement (PeopleSoft system provides additional features than current Legacy system), and Gaps (PeopleSoft system does not deliver current functionality utilized in the Legacy system regardless if the Legacy system was customized in order to provide the current functionality) during the Fit/Gap and initial Modeling sessions.

Potential Gap Resolutions were initially identified into categorizes for standardization. Based upon the review of the information provided by the Student Financial Aid Team, the base utilization is being recommended with necessary interface and report development. There is also the request to enhance the delivered system with automated programming in order to automate business processes.

PeopleSoft does not deliver state reporting nor state aid processing, therefore, in order for PeopleSoft to be utilized fully, a bolt-on solution is being recommended.

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
New Aid Year	6 Fits 2 Fits Enhancements	2 Gaps	BGSU Customization Interface Requests BGSU Bolt-On
Needs Analysis and Verification	19 Fits 9 Fits Enhancements	2 Gaps	BGSU Customization Automation Programming
Financial Aid Award Codes and Criteria	11 Fits 5 Fits Enhancements	1 Gap	BGSU Customization Self-Service
Awarding Aid	12 Fits 6 Fit Enhancements	3 Gaps	BGSU Customization Program Current Customization Automation Programming BGSU Business Process Change BGSU Policy Change
Anticipated Aid (Deferments)	10 Fits 4 Fit Enhancements	None	None
Federal Programs – Grants and Federal Work Study	12 Fits 2 Fit Enhancements	1 Gap	BGSU Business Process Change BGSU Customization Automation Programming

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
Processing Direct Loans	9 Fits 2 Fit Enhancements	2 Gaps	BGSU Business Process Change BGSU Customization Interface
Processing Loans (Perkins, NUR, SCHELL, Entrance Interviews, Exit Counseling)	1 Fit Enhancements	None	None
Electronic Data Exchange – COD	8 Fits	1 Gap	BGSU Customization Automation Programming
Electronic Data Exchange – NSLDS, HEI, Alternative Loans	6 Fits 5 Fit Enhancements	4 Gaps	BGSU Customization Automation Programming BGSU Bolt On
Processing State Aid	8 Fits 4 Fit Enhancements	3 Gaps	BGSU Customization Reports Large Bolt On Programming BGSU Business Process Change
Fee Waivers, Outside Scholarships, and third Party Contracts	2 Fits 3 Fit Enhancements	3 Gaps	Business Process Change BGSU Customization Automation Programming
Awarding Institution Aid	12 Fits 4 Fit Enhancements	4 Gaps	BGSU Business Process Change BGSU Customization Interface Reports Automation Programming BGSU Bolt-On
Enrollment Reviews and Audits	7 Fits 6 Fit Enhancements	2 Gaps	BGSU Business Process Change BGSU Customization New Field
Processing Aid for Special Enrollment	5 Fits 3 Fit Enhancements	None	None
Fiscal Accountability – Disbursements, Cash Drawdowns, and FISAP	1 Fit 6 Fit Enhancements	None	None
FERPA, Holds, FA Self-Service, and STL Processing	2 Fits	3 Gaps	BGSU Business Process Change BGSU Customization Self-Service
3C's – Comments, Communications, Checklists	7 Fits	2 Gaps	BGSU Business Process Change BGSU Customization Self-Service Automation Programming
BGSU Special Applications and On-Line Programs	1 Fit 1 Fit Enhancements	2 Gaps	BGSU Business Process Change BGSU Customization Interface

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
Security	2 Fits 3 Fit Enhancements	3 Gaps	BGSU Business Process Change BGSU Customization Page Change – Data Entry
FA Term	1 Fit Enhancement	None	None
Disbursements	2 Fit Enhancements	1 Gap	BGSU Customization Report
FWSP	2 Fits	None	None
SSS	2 Fit Enhancements	None	None
Endowed Scholarships/Development	4 Fit Enhancements	None	None
Satisfactory Academic Progress	3 Fits 2 Fit Enhancements	1 Gap	BGSU Customization New Field
Consortium/Study Agreements (Internal Session)	4 Fits 1 Fit Enhancement	None	None
Firelands	6 Fits 4 Fit Enhancements	1 Gap	BGSU Customization Interface
Totals	161 Fits 85 Fit Enhancements	42 Gaps	19 BGSU Business Process Changes 28 BGSU Customization 4 BGSU Bolt-On Customizations 1 BGSU Policy Change 1 Undetermined

Appendix Fsf: Fit/Gap/Potential Resolution Inventory Student Financials

The table below represents the results of the Bursar’s Office fit gap and initial modeling process. The information found within this table is subject to change based upon further analysis during the final stages of modeling and the official testing process. The intent of this information is to identify the potential development work being requested.

Office of the Bursar

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
Admissions Deposits	2 Fits	0 Gap	None
Student and Agency Billing (Third Party Invoices)	2 Fits	8 Gaps	BGSU Business Process Change BGSU Customization Interface Self-Service
BG1 Card and Photo ID	0 Fit	0 Gap	None
Call Center and Counseling	1 Fit	0 Gap	None
Cashiering	10 Fits	4 Gaps	BGSU Business Process Change BGSU Customization Interface
Collections	4 Fits	2 Gaps	BGSU Business Process Change BGSU Customization Interface
Bankruptcies and Write-Offs	2 Fits	0 Gap	None
Current and Non-Current Bankruptcies	0 Fit	1 Gap	BGSU Business Process Change
Deferrals and Payment Plans	6 Fits	3 Gaps	BGSU Business Process Change BGSU Customization
Financial Aid, Perkins Loans, and Alternative Loans	3 Fits	3 Gaps	BGSU Customization Interface Reports
General Ledger (Touch Points)	4 Fits	4 Gaps	BGSU Business Process Change BGSU Customization Report
Graduate Fee Waivers and Payroll Deductions	0 Fit	0 Gap	None
Refunding	1 Fits	4 Gaps	BGSU Business Process Change BGSU Customization Interface Report

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
Room and Board	0 Fit	2 Gaps	Pending RMS Fit/Gap and Modeling
Self-Service – Web Payment Methods	1 Fit	3 Gaps	BGSU Business Process Change BGSU Customization
Service Indicators	1 Fit	5 Gaps	BGSU Business Process Change BGSU Customization Financial Responsibility Agreement Approved by ESC
Sponsored Scholarship	0 Fits	0 Gap	None
Student Health Insurance and Miscellaneous Fees	1 Fit	3 Gaps	BGSU Customization Interface
Student Special Situations (Withdrawal)	4 Fits	0 Gap	None
Transaction Code (Item Types)	2 Fits	0 Gap	None
Tuition and General Fee Charges Tuition Calculation	4 Fits	0 Gap	None
Waivers	3 Fits	1 Gap	Business Process Change

Appendix Fga: Fit/Gap/Potential Resolution Inventory Graduate Admissions

The table below represents the results of the Graduate College fit gap and initial modeling process. The information found within this table is subject to change based upon further analysis during the final stages of modeling and the official testing process. The intent of this information is to identify the potential development work being requested.

Graduate College (Graduate Admissions)

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>
Graduate College On-Line Application	26 Fits	5 Gaps	BGSU Business Process Change BGSU Customization
Application Evaluation	4 Fits	0 Gaps	None
Application Processing	9 Fits	2 Gaps	BGSU Business Process Change BGSU Customization
Graduate College Fee Waivers			
Graduation Processing	4 Fits	3 Gaps	BGSU Business Process Change BGSU Customization

Appendix Fr: Fit/Gap/Potential Resolution Inventory Residence Life

This information is pending the results of the RMS fit/gap and modeling processes.

Residence Life

<i>Business Process List</i>	<i>Fit</i>	<i>Gap</i>	<i>Potential Gap Resolutions</i>

Appendix Z: Amendments

This section has been reserved for Amendments to the final scope document.