

GDS Phase 2 Advisory Committee Meeting

2/5/2008

1:30 PM

South Executive Conference Room - Teleconference

Meeting called by: Debi Jackson

Attendees: Cherie Hood, Debi Jackson, Bryan Dickason, Erik Thorson, Helen Montag, James Shumate, Lora Jo Bossio, Lorie Trapani, Leonard Gude, Nancy Solyn, Jeff Austin, John Bays, Wendy King, Rosemarie Nabity, Thea Pot-Van Atta, Rose Sgroi, Helen Montag, Helen Yang

Please bring: Requirements Document

Agenda

Introduction	Debi
Review Requirements	Debi - all
Identify Web Services Requirements	Debi - all
Open discussion / Summary	Team
Review action items	Debi

Additional Information

Next Meeting 19 February 2008

Review Requirements

The Advisory Committee met to review the draft Business Requirement # 3 and conclusion from CSAC staff and UC Davis staff discussing the changes for the Customized Roster. The group concluded that this request was not a web service but an enhancement to the existing customized rosters.

The group decided on the following requirements:

First of all, after explaining the mechanism of Roster data retrieving, it is better understood the 2-step searching for Roster data: pre-build a Roster Format (Query) first, then fetching data based on this format.

We all agreed the requirement is WebGrant Roster enhancement and will do the following to achieve that:

- 1 -- Remove the number of limit for Customized Roster. (Currently is up to 8)
- 2 -- Modify Customize Roster page to include the new items mentioned in Requirement #3.

The following item are being requested and need to be researched for feasibility:

- 3 -- Modify Customized Roster to include info for multiple terms (Currently is only available for 1 term).
- 4 -- All Customized Roster formats be loaded into Excel Spreadsheets.

Since later on we will be busy working on Real Time WebGrants (for payments and School Change) and Web Services, I will incorporate this requirement into it. Thea will collect more requests from Schools if needed.

Thea wrote up her notes from the meeting as well:

When Helen made it clear to UCD staff that she could not implement their first request regarding having a screen on WG that would filter/multiple filter various CG information and UCD understood what the obstacles were, it was decided that this would be the next best fix....

1. Allow unlimited customized reports
2. When requesting code information, only show the codes that the user is requesting. For example, when the user asks for all students to appear who have a, "PD" code, currently the report is also showing all the students who have a LOA, PS or other codes after all the PD codes are listed.
3. Exclude on hold status from paid filter
4. Ability to select more than one term on the customized roster
5. Carry SS# over to roster and create a clear button
6. Fix the download to allow download in excel format (Helen may have more information here)
7. Additional filter requests;
 - o Unpaid
 - o No need reported
 - o Awards on hold
 - o Adj reason codes
 - o Top 2% of Cal Grant B Entitlement awards

UCD staff did comment that Real time was not going to benefit them because it requires programming resources that they don't have and they assume most of the other schools will not be able to use this as a tool for the same reason. They further commented that they would prefer if we improved WG first because this would assist them now rather than Real time which may or may not assist them in the future.

UCD staff also requested the capability to see who entered data and the capability to enter summer payments.

High School Graduation Project Status:

The High School Project was split into two phases due to the required work for operations. The hold flag on payments of E2 awardees had to be in place in January. The hold flag would place a hold on the payment of a E2 student who has been awarded a grant until their high school graduation date is confirmed. The process of verifying a graduation date of a student is phase 2 of the project. This process is being coding now along with Phase 2 of the GDS real time project.

1. Bryan will gather the definitions of the reports (requirement #18) so they can be reviewed.
2. Bryan will interview Ophelia Barton at CSAC. Bryan will draft up her needs and it will be discussed at the 5 February Meeting.

The committee then reviewed the requirements for verify which are Web Grants enhancements and which are Web Services. Requirement 1 & 2 are Web Services and will be done. Requirement 3 & Requirement 9 need to be merged together and will be enhancements to WebGrants. Requirement 13,14 & 15 will be merged into Requirement 5. These Requirements will not have displays but will be reviewed and analyzed for a web service. The Requirements have been updated in the attached Requirements chart.

Debi will send out the instructions for logging on to CCC Confer for the demonstration.

Tasks:

Open Tasks Bryan will gather the definitions of the reports (requirement #18) so they can be reviewed.

Open Tasks: Bryan will interview Ophelia Barton at CSAC. Bryan will draft up her needs and it will be discussed at the 5 February Meeting.

Open Discussion

Tasks:

Next Meeting 19 February 2008

The Demo is scheduled for 19 February and Bryan Dickason will present the client for web services. Thank you.