



On-line Application for Admission to Graduate Studies

University of Waterloo
Project with the
Ontario Universities' Application Centre

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Presenters

University of Waterloo

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Ontario Universities' Application Centre

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Project Overview

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University of Waterloo

Graduate Studies -Who we are

- Established in 1957
- Enrolment in Winter 2004 approximately 3,000
- Programs
 - Currently offering 62 master's programs, 34 doctoral programs & 1 graduate diploma program in 47 disciplines; plus 20 co-operative degree programs
- Applications in 2003-04 exceeded 6,000

UW Business Case - Proposal

- Purchase and implement software for an applicant self-service web application,
or,
contract external services to develop a self-service web application and data distribution process.
- Reviewed software products.
- Invited OUAC to develop a proposal/plan.

Business Case - Project

- **Reviewed goals with the Student Information Systems Project Management Committee and the Graduate Operations Committee:**
 - Establish a UW Working Group.
 - Implement a UW branded Graduate Studies application.
 - Implement a data distribution system from OUAC and UW upload process of application data to the UW Student Information System.
 - Implement an application acknowledgement, PDF application tracking form and reference forms for the applicant.
 - Provide applicant access to their on-line application for editing prior to submission.
 - Implement an OUAC facility to manage an electronic payment for application fees at the time of submission.
 - Implement reports to support academic admission decision-making.

Graduate Studies Working Group

- Working Group Representation
 - Graduate Studies Office (GSO)
 - All Faculties were represented including program administrators, Faculty members and students.
- User participation was essential to the success of the development and implementation -
 - Provided feedback to the GSO at each stage of development and implementation
 - Promoted the application from program websites (established links and customized information and instructions)
 - Participating in future cycles for new development and improvements of business processes

Graduate Studies Working Group continued

■ Activities

- Reviewed the current paper process and data.
- Documented program specific requirements, new data elements, web design for OUAC assessment.
- Tested new website, application data entry process.
- GSO participants worked with OUAC to test data distribution and, payment processing, edit reports, applicant acknowledgement process.
- GSO participants worked with UW Information Systems and Technology (IST) Project participants to develop and test upload processes, data mapping and search/match criteria to the UW Student Information System.

UW Implementation

- Training
 - Written procedures & hands-on training
- Changes to UW Business Processes
 - Tracking form (PDF form)
 - Communications with OUAC
 - Table updates
 - Annual review of future development requirements

UW - What we learned

- Do not under estimate the time required to facilitate user input, develop requirements, and testing!
- Experience with the data and program evaluation processes is required to develop effective reports.
- Reviewed inquiries from applicants – very few experienced difficulty with the process.
- We exceeded our expectations for successful use of the application.
 - More than 25% of applicants applied on-line.
(Note: Most applicants were referred to a PDF application or mailed a paper application prior to this implementation in December 2003.)

IST Development

- Overview
 - PeopleSoft (PS) Student Administrative System
 - Interface Application Data to PS Panels/Pages
 - Bolt-on Development
 - Tools used

PeopleSoft Student Admin

- Relational Database

- Modules

- CC – people data/ organization data/ 3 C's/ events
 - AD – prospects/ recruitment/ enrolment/ applicants
 - SR – academic records/ student careers/ courses/ academic requirements/ transfer credits/ government reporting
 - SF – customer accounts/ tuition & fees/ billing/ refunding/ payment plans
 - FA – budgets/ need analysis/ package & disburse aid/ OSAP
 - e-Apps – prospects/ applicants/ students/ instructors/ advisors/ v8

Interface OUAC data to PS Panels

- Move the data file from OUAC site
- Transfer file to PS server machine
- Develop a PS process to insert data into Oracle tables
- Create a development project plan
- Write functional specifications
 - Mapping fields
- Write technical specifications
 - Edits and validation
 - New objects
 - Search/Match

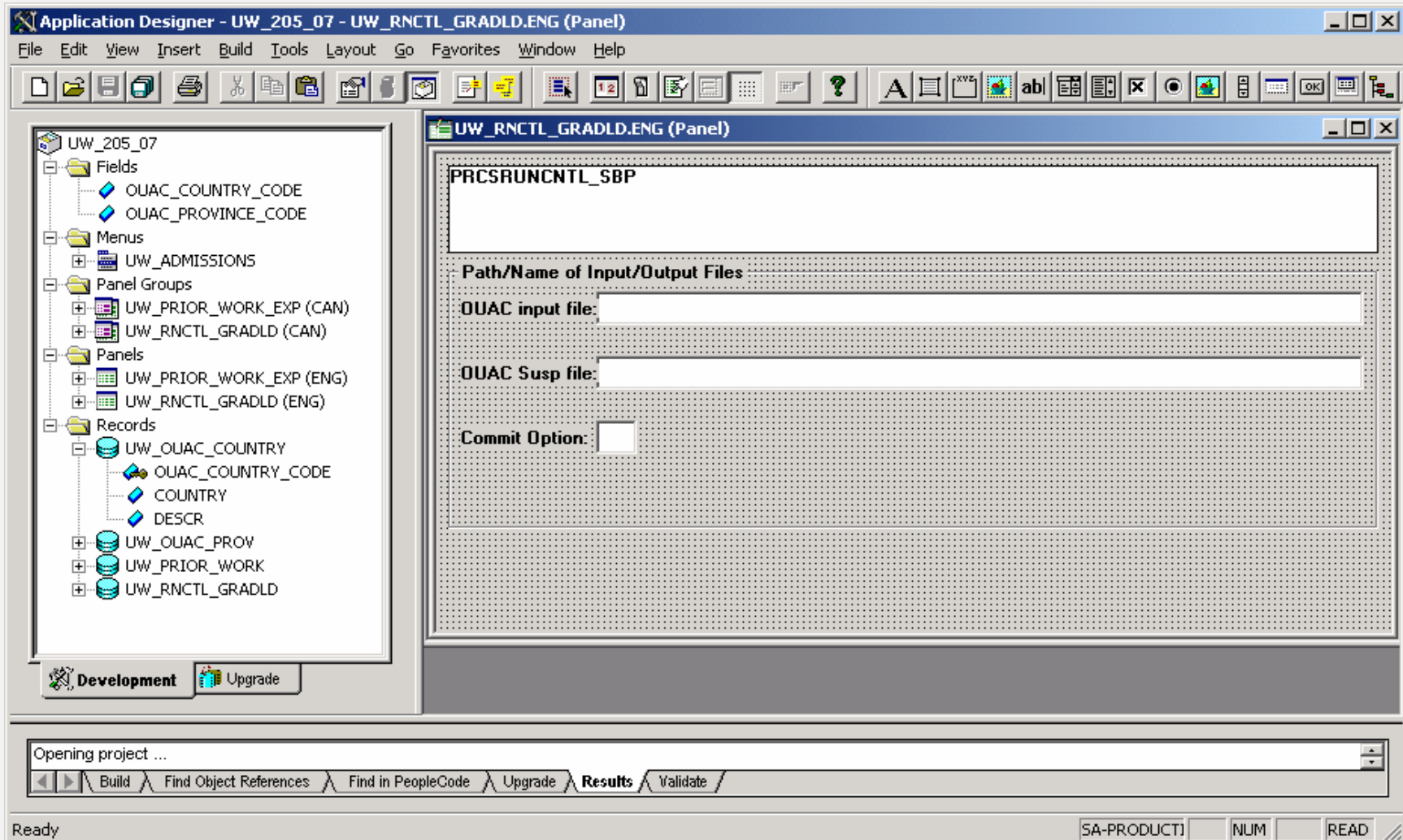
Bolt-on Development

- What is a bolt-on customization?
 - A distinct application “piece” designed to augment existing PS functionality while avoiding the need to change deliverables.
 - Allows us to customize to suit our business needs while avoiding lengthy, expensive fix and patch cycles.
 - Online Grad Web Apps dovetail into PS 3C functionality and use PS validation routines. Using SQR’s to handle the importing of data accomplished this.

Tools Used

- Calling SQR's from PeopleSoft
 - Menu item
 - Panel group (components in PS8)
 - Panel (Page in PS8)
 - Run Control
 - Process Definition
- These are defined using PS Application Designer

Application Designer



PS Panel

Process Applications - Use - Application Maintenance

File Edit View Go Favorites Use Inquire Process Help

Bio/Demo Data | Addresses | Application Program Data | Application Data | Application School/Region | Application Recruiters

ID: []

Academic Career: Graduate **Application Nbr:** 00131028
Prog Nbr: 0 **Career Nbr:** [0] [v]

Program Data

Eff Date: [02/03/2004] [1] **Admit Term:** [1045] [v] 2004 S Joint Program
Institution: University of Waterloo **Acad Load:** [Full-Time] [v] **Dual Prog:** [] [v]
Acad Prog: [GEN10] [v] PHD ENG **Campus:** [UW] [v] UW

Program Status

Status: Active **Program Action:** [MATR] [v] Matriculation
Action Dt: 02/03/2004 **Action Reason:** [AUTO] [v] Auto Assigned

Plan Data

Acad Plan: [CHED] [v] Chemical Engineering PHD G55

Sub-Plan Data

Sub-Plan: [POLYSCIEN] [v] Polymer Science & Engineering SPECIAL'N

[] SA-PRODUCT Application Program Data Update/Dis []

PS Panel

Process Applications - Use - Application Maintenance

File Edit View Go Favorites Use Inquire Process Help

Bio/Demo Data | Addresses | Application Program Data | **Application Data** | Application School/Region | Application Recruiters

ID:

Academic Career: Graduate **Application Nbr:** 00131028

Application Data

Application Center: GRAD GRAD **Admit Type:** NEW New

Application Date: 09/01/2004 **Academic Level:** Doctoral

Created On: 09/01/2004 **Notification Plan:** Regular

Prior Application **Application Method:** OUAC

Additional Information

Housing Interest:

Financial Aid Interest

File Information

Complete **Date:** 09/01/2004

External Application Nbr: 20045253110

Application Fee Information

Status: Pending **Fee Type:** Standard

SA-PRODUCT Application Data Update/Dis

Ontario Universities' Application Centre (OUAC): Who we are

- Established in 1972 by Ontario University presidents
- Centralized processing of university applications
- Initial focus on undergrad applications
- Expanded to include medicine, teacher education, law, rehabilitation sciences
- Engage in other services to assist university admission and registrar offices
(ie. surveys, collection of supplementary fees, electronic transcripts, etc)

OUAC: Why us?

- Credibility and reputation ... 30+ years in operation
- Know and understand university admission business
- Established method of data distribution
- Experience in web development
- Computer resources and infrastructure (hardware, help desk, payment processing, etc)
- Skilled and knowledgeable staff
- Not-for-profit status

OUAC: Project schedule

	Task	Assigned	Target Date
1	Prepare proposal	OUAC: Ron, Steve, Diane	2003-03-31
2	Response to proposal from Waterloo	UW: Lynn	2003-04-14
3	Waterloo to provide electronic tables, graphics, etc	UW: Lynn	2003-04-16 rev: 2003-05-30
4	Establish communication protocol and key resource people	OUAC/UW	2003-04-16
5	Feedback from Waterloo re: "Prior Institution" issues	UW: Lynn	2003-04-30
6	System specifications (draft) for distribution files	OUAC: Diane	2003-05-12 rev: 2003-06-06
7	Website prototype	OUAC: Steve	2003-05-16
8	Feedback from Waterloo re: prototype and system specifications	UW: Lynn	2003-05-30
9	Waterloo to provide PDF of submissions, referee forms, etc	UW: Lynn	2003-06-30
10	Provide preliminary file of distribution records (data entry)	OUAC: Diane	2003-08-01
11	Website prototype signoff by Waterloo	OUAC: Steve	2003-08-15
12	OUAC complete "Prior Institution" review	OUAC	2003-08-29
13	Internal OUAC test of website	OUAC	2003-09-16
14	Waterloo test of website	UW	2003-09-23
15	Feedback from Waterloo re: testing	UW: Lynn	2003-10-01
16	Test transfer program	OUAC: Trish	2003-10-07
17	Training for OUAC "help desk"	OUAC	2003-10-08
18	OUAC - fees interface	OUAC: Alena	2003-10-10
19	Inquiry program (OUAC/UW)	OUAC: Steve	2003-10-15
20	Test review program	OUAC	2003-10-15
21	Provide test distribution files to Waterloo	OUAC: Steve	2003-10-17 2003-10-21
22	Feedback from Waterloo re: distribution testing (signoff)	UW: Natalie/Walli/Lynn	2003-10-24
23	Waterloo signoff of website	UW: Lynn	2003-10-27
24	Waterloo website startup; web review goes live	OUAC: Steve	2003-11-03
25	Levy reports	OUAC: Alena	2004-03-05

OUAC: What we learned

- Identify appropriate checkpoints for signoffs and formalize this procedure
- Limit scope of project ... there's always Phase II
- Developed a “needs assessment” worksheet used as an initial step in defining similar online projects
- More accurate time estimates

OUAC: Development

- **Tools/Equipment used:**
 - Hardware – IBM iseries 400 (reliable, scalable, secure)
 - Software – IBM Websphere Commerce Suite v4.1
 - Leverage existing modules (yields shorter development time as well as lower cost to client)
- **Stages of Development:**
 - Specifications (based on deliverables from proposal)
 - Prototype (site layout)
 - Beta version (open to clients for feedback)
 - Testing (website and data distribution)
 - Implementation (production)
- **Make use of OUAC systems interface (already established with universities)**

OUAC: Implementation

- Fully Functioning Online Application
- Data Distribution – one per week (can be increased during peak processing periods)
- Fee collection and delinquent account follow-up by the OUAC
- Transfer payments (twice a year – April and September)
- Status reports (i.e. locked list, distribution list)
- Completed Application PDF documents (available from applicant or in electronic format from OUAC)
- Ongoing program/text updates (during production cycle)
- Technical Support (help desk) for applicants

Demonstration

Future Development

- Reports
- Discontinue paper applications
- More program specific options will be implemented
- Review requirements for a joint university program applications – unique branding, distribution, etc.

Questions & Answers

The UW Graduate Studies Application
location:

<http://compass.ouac.on.ca/uw/grad>