

Campus Planning Portfolio: Using the PeopleSoft Portal to Develop a Planning Website for Middle States Accreditation

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ABSTRACT

The College of New Jersey has just finished the development of a planning portfolio website using the PeopleSoft portal. This site will allow administrators on campus to submit planning documents and strategies that form the data necessary for Middle States Accreditation.

Using the PeopleSoft Enterprise Portal, users can submit documents to various work groups and label them with the appropriate elements and standards consistent with Middle States policy. This site will act as an evolving process that will allow accreditation to become a more active or living process throughout the year while avoiding the scramble that happens every few years. The Middle States Commission on Higher Education has also expressed interest in this new process.

The site was developed using the PeopleSoft Enterprise Portal 8.8. Although the Enterprise Portal can be cumbersome at times, it provided a variety of features that allowed us to accomplish the tasks desired.

Categories and Subject Descriptors

H.2.8 Database Applications

General Terms

Management, Design, Reliability, Experimentation,

Keywords

Planning Portfolio, Portal, PeopleSoft Enterprise Portal 8.8, Accreditation

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SIGUCCS'04, October 10–13, 2004, Baltimore, Maryland, USA.
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1. INTRODUCTION

The College of New Jersey (TCNJ) has recently launched a Planning Portfolio system within the PeopleSoft Enterprise Portal. The portal was purchased from PeopleSoft in early 2003. TCNJ is using a phased approach to developing the PeopleSoft portal, allowing for a different approach to implementation and campus wide release.

In 2002 the Commission on Institutions of Higher Education of the Middle States Association of Colleges and Secondary Schools instituted a change in their accreditation process asking for schools to use a continuous self-study model. This model invokes the idea of a living process in which campus wide planning standards and documents are being continually updated and shared within the campus community for review, reference and policy.

The Middle States Commission on Higher Education (MSCHE) has issued a set of standards and elements for schools to follow and label their planning documents. Each aspect of the campus planning process is expected to meet one or more of these standards and multiple elements within that standard.

TCNJ has decided to develop the portal to handle the dynamic living planning process on campus.

Middle States Standards

Institutional Context

Standard 1: Mission, Goals, and Objectives

Standard 2: Planning, Resource Allocation, and Institutional Renewal

Standard 3: Institutional Resources

Standard 4: Leadership and Governance

Standard 5: Administration

Standard 6: Integrity

Standard 7: Institutional Assessment

Educational Effectiveness

Standard 8: Student Admissions

Standard 9: Student Support Services

Standard 10: Faculty

Standard 11: Educational Offerings

Standard 12: General Education

Standard 13: Related Educational Activities

Standard 14: Assessment of Student Learning

2. PORTAL SPECIFICS

In 2002 TCNJ decided to follow the path of many schools to purchase a portal. It was agreed that a portal would help us consolidate campus wide information into one place while delivering user based applications and information to specific groups. The portal can act as a conduit for students to access all student based information. The same is true for faculty and staff.

TCNJ is using the PeopleSoft Enterprise Portal version 8.8. We are currently using PeopleSoft HR version 8.3 and Finance version 7.52. We plan to implement PeopleSoft Student Admin version 8.4 in the coming year. The standardization of the TCNJ ERP on the PeopleSoft development platform was a key factor in the decision to purchase the PeopleSoft portal.

Access to the portal is role based. Security administrators grant privileges to users via roles based on their user type (student, faculty, staff, or guest). Security can also be inherited from other PeopleSoft enterprise systems. The portal allows us to use our LDAP user directory to allow users to maintain their current usernames and passwords for the new system. It can be developed to allow single sign-on for other PeopleSoft applications and third party applications.

3. PLANNING PORTFOLIO PORTAL SITE

We did not see the rush in implementing the portal immediately for the entire campus. When it was purchased we were in the midst of implementing our new human resource system and on the verge of an upgrade to the financial system. The implementation timeline for the portal wasn't driven by our ERP plans. These projects accounted for the majority of our development resources, limiting the possibility of a single phase enterprise wide rollout.

The need for a living planning process was brought to the attention of the department of Information Technology via the Provost. This appeared to be the perfect opportunity to use the portal, allowing for a small scale implementation that would let the portal development team to become more familiar with the product.

The PeopleSoft Enterprise Portal provides workgroup functionality which allows a set of users to submit, publish and edit documents while keeping a historical view of those documents as they are modified. The portal is role based allowing a hierarchy of access to users.

Workgroup Functionality

-Workgroup Roles

Expert/Publisher

Author

Viewer

-Department Folders/Categories

Principles

Programs and Practices

Probing Questions/Data

Reflection/Recommendations

-Workgroup Hierarchy

This allows for top level workgroups to have subgroups under them.

- Document/Article Attachment

This allows for experts and authors to submit/attach documents, articles or URLs which can be labeled with metadata and stored in different folders or locations.

Each major department on campus was given a workgroup in which different users take on the roles of expert/publisher, author and viewer within that department. The director of the department would have expert access giving final approval to publish documents in their workgroup. Other members of the department may have author roles which would allow them to submit and edit documents.

All users are setup with the viewer role enabling them to have access to all of the published planning data within the other planning workgroups. Other higher end users are given an expert role which allows them to administer several workgroups. The workgroups themselves can contain a hierarchy of other workgroups allowing for major departments to contain sub-departments. The publisher/expert role for the major department would have their access trickle down the hierarchy so they could review and supervise their other areas. The Provost's office has administrator access to all of the planning workgroups allowing them to manage the entire site.

Each department has four categories in which to place their articles and documents: Principles, Programs and Practices, Probing Questions/Data, Reflection/Recommendations. These four areas provide for a structure to the planning process. Each document can then be labeled with the standards and elements, provided by MSCHE, in which they meet. When submitting a document or article the portal allows you to add different types of metadata, including a description of the item, valid dates, and other comments.

Document Functionality:

1. Description/Comments

This allows for authors/experts to supply a descriptor (metadata) to the document.

2. Check in/ Check out functionality

Documents can be checked out for editing or review. No one else can view or modify the document while it is checked in. Administrators can force the check in of a document.

3. Standards/Elements/Year

These are the Standards and Elements supplied by MSCHE. Users are given a dropdown box to choose from. Each document can be labeled with several standards and several elements for each standard. Documents must also be labeled with the appropriate year for the accreditation/planning process.

4. Location (which folder/group to save in)

5. Versioning

The portal keeps track of the different versions of a document as it is edited for modified. This provides an historical perspective of a document which will allow for a critical review of the planning process throughout its life cycle.

6. Publish

Documents are not made available for viewing until they are published. They can be published to the workgroup and also to a

portal news section. Only the expert roles will have rights to publish.

7. Notification

As articles are published, submitted or checked in/out, notifications can be sent via email to the appropriate users.

All of this functionality comes delivered with the portal except for the Standard and Elements labeling. This was a modification made by our professional staff with the help of PeopleSoft consulting.

The portal allows for a centralized location to store all of the planning documents, standards, and processes in a much more accessible and flexible architecture than a standard file server or network. The key to bringing the planning process together is the planning administrator's ability to review all of the information submitted and see how it is categorized regarding the MSCHE standards and elements.

A search tool has been developed in the portal to allow administrators to view the list of MSCHE standards and how many documents have been categorized with that standard and the elements within that standard. This allows administrators to review which standards for that given year need attention. Notifications can then be sent via the portal to specific users to submit or modify planning documents to meet the appropriate standards/elements.

A news group within the portal has also been activated allowing administrators to post important information on the planning portfolio page within the portal. All users are brought to this page after logging in.

Administrators also have the ability to flag important documents. Important documents show up on a separate page allowing for easy access to the higher level planning process.

4. MSCHE ACCREDITATION REVIEW

Guest access has been setup within the portal which will allow for MSCHE to review our planning process at any given time. They will be given the search tool and access to the page which displays documents labeled as important.

MSCHE has expressed great interest in this form of a living planning cycle. TCNJ will be undergoing the next MSCHE audit in 2005. In the past auditors have had to sit for days on end leafing through and organizing massive amounts of documents for accreditation. This centralized approach to accreditation will allow for easy, concise access to the important planning documents and fast review of the entire planning process.

5. CONCLUSION

TCNJ has completed the technical aspects of the planning site. Testing has been completed and the system has moved into production. The planning administrators are now learning the system and populating the workgroups with current planning documents. They plan to distribute access to the system as necessary. The next year will be used to assess the functionality of the business process and make modifications as necessary. The idea of a living planning process is a high goal to achieve but we believe it to be reachable.

Currently the planning site is the only aspect in which the portal is being used. Work is now being done to implement other enterprise systems into the portal starting with Human Resources and moving onto Financials.

6. REFERENCES

The College of New Jersey
<http://www.tcnj.edu>

Middle States Commission on Higher Education
<http://www.msache.org>