January 2012

PeopleSoft Campus Solutions 9.0 Additional Features January 2012

Pre-Release Notes



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Due to the nature of the product architecture, it may not be possible to safely include all features described in this document without risking significant destabilization of the code.

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Executive Summary

This document provides an overview of the new features planned for delivery in Oracle's PeopleSoft Campus Solutions (CS) 9.0 Additional Features January 2012. It is a preview intended to help you understand the new features, to assess their applicability to your institution, and to help you plan your IT projects and investments.

The planned features previewed in this document are:

- Research Enrollment Tracking Phase 1: Research Candidate Management & Thesis Processing
- Evaluation Management System (EMS) Phase 1
- Student Financials Third Party Contract Enhancements Phase 2
- Program Enrollment Phase 2: Program Planning and Enrollment
- Activity Management Phase 2: Organize and Manage

With every Additional Feature bundle, our goal is to help your organization leverage technology to its fullest and increase the efficiency and effectiveness of your operations. We plan to provide innovative and extensible functionality that will reduce the need for customization and maximize the return on your investment in Oracle Campus Solutions. Additional resources are planned to help your organization determine the impacts of implementing these new capabilities. We encourage you to visit My Oracle Support frequently to keep apprised of resources as they become available. While every attempt is made to accurately describe our intentions, the delivered additional features may not have every feature or capability mentioned in this document, and a specific feature may become part of a different application or have a different product name than those cited in this document.

Research Enrollment Tracking Phase 1: Candidate Management & Thesis Processing

The Research Enrollment Tracking feature is intended to provide a complete set of operations for administrators to manage their graduate research candidates. While many of our customers have managed research students using existing Campus Solutions features and functionality, we plan to deliver a central repository of the candidate's information with administrative components in which to monitor research candidate progress, track research topics, maintain supervisory assignments and provide a comprehensive management tool for supporting the "life cycle" of these unique students. In Additional Features January 2012, we plan to introduce the first installment of the new graduate research enrollment tracking feature. Targeted for delivery is research processing setup and the main administrative components for Candidate Management and Thesis Processing.

Anticipated features are expected to include:

- Setup components in which users can identify and define research eligible academic programs and plans, available research topics at the institution, and available research supervisors and the level of their participation.
- A Candidate Management data structure which provides the ability to define and track a research candidate's research topic, supervisors, thesis submission dates, and additional, school-defined requirements (i.e. intellectual property implications, human and animal testing clearances). This information can be entered during the admissions process, as well as after the candidate has matriculated. New administrator components to manage this information are targeted.
- A new Thesis Processing feature which will track the submission and evaluation of the candidate's thesis or dissertation. This new feature is expected to utilize the new Evaluation Management feature (see next section) to track the evaluation results from the individual thesis examiners.

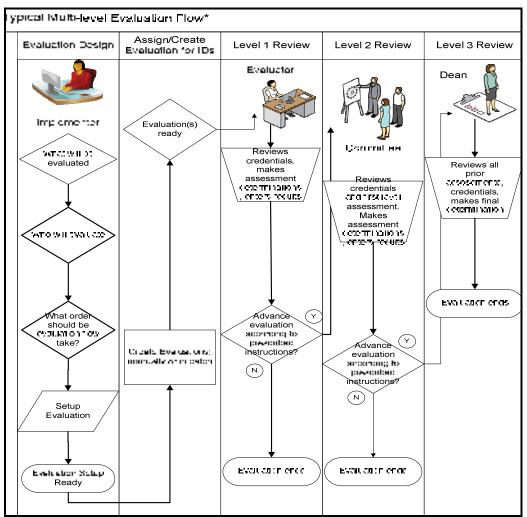
Beyond Additional Features January 2012: Planned Functionality for Research Enrollment Tracking

These features represent the initial phase of research management functionality. One of the benefits of the Continuous Delivery Model is that it allows Oracle Campus Solutions to deploy new functionality incrementally rather than delivering large units of new development at any one time. It is important to note that Oracle does not expect customers to be able to deploy the features planned for Research Enrollment Tracking Phase 1. However, by introducing new structures that provide a significant new range of functionality we anticipate that our customers will take the opportunity to evaluate new capabilities, review documentation, and begin their analysis for how they can leverage the feature, once fully delivered. Planned future functionality for Research Enrollment Tracking includes the ability

to calculate and monitor thesis submission dates and time remaining, scholarship application processing and awarding, and administering change requests related to leave of absence, research extensions, and load changes.

Evaluation Management System (EMS) Phase 1

Most institutions manage evaluation policies and processes that require criteria to be applied to candidates including those for admissions, scholarships, certifications, research dissertations, and variety of other similar activities. These significant processes frequently involve managing internal and external evaluators and committees, require the control and flow of materials and data used for adjudication, and frequently employ complex rules to be applied to candidates and their credentials.



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While evaluation practices have fundamental similarities, they vary sufficiently between and within institutions to require configurable structures for constructing, administering and executing evaluations activity. For example, while the illustration above might have only 3 "levels" of evaluation processing, there may be a need to have 2 or 5 levels of adjudication depending on the requirements and practices of different academic or administrative areas of the institution. The targeted EMS feature represents an innovative and comprehensive path to create a 'generic' evaluation solution which can be extended and applied to business needs in a number of functional departments within an institution.

Additional Features January 2012 is the initial delivery phase for EMS anticipated to provide setup and administrative structures and components. Using these planned structures a user can design an evaluation process in order to:

- Tie the evaluation to a set of functional area data in the system (ex. Graduate level thesis, doctoral dissertations, admissions, etc.)
- Identify *what* will be evaluated:
 - Define what is assessed in the evaluation, what ratings or measures are required, and assess the use of multiple rating schemes in the evaluation.
- Define *who* will evaluate the criterion in the rating schemes:
 - o Committees and/or an individual evaluator as reviewers
- Create multiple levels of review and process flow of the evaluation:
 - Multiple schemes can be included in the evaluation. These schemes can be linked to either committees or single evaluators for the review.
 - Priority can be specified to control the flow of the evaluation, indicating the order in which the schemes in the evaluation should act.
- Define specific values and function for recommendation and status fields which make sense for the end users of the evaluation business process
- Control desired behavior in the administrative component:
 - Ability to add or delete rating components from an evaluation
 - Designate which components are required
- Use Batch processing to:
 - Create evaluations
 - Update and maintain evaluations to:
 - Assign evaluators on an ad hoc basis

- Reassign or remove an evaluator
- Add or delete a component
- Delete evaluation records

Customers who are familiar with current evaluation functionality in Campus Solutions will recognize some similarities with the existing functionality. However, Campus Solutions EMS introduces all new objects, thus ensuring that the existing application functionality continues to work as it has in prior releases.

Beyond Additional Features January 2012: Planned Functionality for EMS

The Continuous Delivery Model allows Oracle Campus Solutions to deploy new functionality incrementally rather than delivering large units of new development at any one time. It is important to note that Oracle does not expect customers to be able to fully deploy the features planned for EMS Phase 1. However, by introducing new structures that provide a significant new range of functionality we anticipate our customers will take the opportunity to evaluate new capabilities, review documentation, and begin their analysis for how they can leverage the feature once fully delivered. With the initial foundation for EMS provided in January 2012, we plan to continue to deliver phased functionality that is anticipated to include:

- An Evaluation Center which will allow an evaluator to conduct and complete their evaluation review online and access content relevant to that review. It is anticipated that an evaluation administrator can access the Center for a high level view of the evaluations for which they have oversight and monitor the progress of those evaluations.
- Integration with a rules engine which can process and calculate data in the system and allow for automation of an evaluation.
- Work flow and Notifications integration.
- Continued enhancements to the initial foundation and structures delivered in January 2012

Planned Third Party Contract (TPC) Enhancements Phase 2

One of the top enhancement requests from the customers using Student Financials is in the area of Third Party Contracts (TPC) setup/maintenance and related Corporate Billing. Use of this functionality continues to expand, with different models of usage found in different countries. The variety and number of third party "sponsors" continues to grow too, from government agencies to private entities. In the October 2011 bundle, Campus Solutions

delivered new functionality to "roll" third party contracts in mass and "roll" specific students to the new third party contracts. In the January 2012 bundle, Campus Solutions is planning to deliver new functionality that will support the efficient maintenance of third party contracts. The planned functionality will:

- Provide the increased flexibility to group third party contracts for the purpose of capping the total contract amounts and/or student amounts.
- Provide a process to allow for node/item type exclusions on the third party contract setup.
- Provide additional student related and academic information in the Corporate Account.
- Provide the option of moving the student's due dates/billing dates to the Corporate account.

Contract Groups

For sponsor contracts that span a period of time not related to a specific term, we plan to provide functionality to allow many third party contracts to be associated to one Contract Group. The Contract Group will set a contract cap amount and a student cap amount. The tracking of contract amounts will be compared to the Contract Group capped amount to verify the cap amount has not been exceeded. In addition, the similar tracking will be done at individual student amounts.

Third Party Group Student	Lifetime Cap Override
Business Unit:	PSUNV
Third Party Contract Group:	GRAD_ASSISTANCE_201112
External Org ID:	2000113 Alumni Hall Association
*Description:	Grad Assistance 2011-2012
Lifetime Group Cap:	4,000.00 USD 🗹 Enforce Lifetime Group Cap
Lifetime Student Cap:	2,000.00 USD
Save Return to Search	↑ Previous in List ↓ Next in List ► Notify ► Add Update/Display
Third Party Group Student Lifeti	me Cap Override

There may be times when specific students within a contract group may have an amount that should be less than the Lifetime Student Cap. The Student Lifetime Cap Override allows the administrator to identify the EmplID and the Lifetime Student Cap override amount.

Third Party Group Stu	ident Lifetime Cap Override	L
Business Unit:	PSUNV Exte	ernal Org ID: 2000113
Third Party Contract Gro	OUP: GRAD_ASSISTANCE_	201112
Lifetime Student Cap:	2,000	.00 USD
Students with Override	Customize Find	First 🚺 1 of 1 💟 Last
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Save Return to Se	arch + Previous in List +	Next in List Notify
Third Party Group Student	Lifetime Cap Override	

We plan on providing 2 inquiry pages to allow viewing of the Contract Group Information.

• The Third Party Group Summary page provides an inquiry view of all the contracts that have linked to the Contract Group.

Business Unit:	PSUNV						
Third Party Contract Group:	GRAD_ASSIST	FANCE_201112	Grad Assistance 2011-201	2			
External Org ID:	mal Org ID: 2000113		Alumni Hall Association	🕅 Enfo	🔽 Enforce Lifetime Group Cap		
Lifetime Cap:	4,000.00	Group Charges:	3,400.00	Remaining:	600.00		
Group Contracts			Custor	<u>mize Find </u> 🛄	First 🚺 1-3 of 3 🚺 Last		
Contract Number	Description		Contract Max	Contract Charges	<u>Remaining</u>		
GA_FALL2011	Grad Assistar	nce Fall2011	2,000.00	1,650.00	350.0		
GA_SPRING2012	Grad Assistar	nce Spring2012	1,000.00	0.00	1,000.0		
GA SPRNG2012	Grad Assistar	nce sp 2012	2,000.00	1,750.00	250.0		

• The Student Contract Group Summary page provides an inquiry view at the student level. The total frame will either display the Lifetime Student Cap or if a student is associated to a Lifetime Student Override. In addition, a link is provided on each contract that the student is associated to. Clicking the link will take the administrator to the Assign page.

Numerica Unit:	PBUNK					
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Node/Item Type Exclusion Process

In order to continue streamlining the Contract Setup and Maintenance, we are planning to provide the flexibility to allow for changes in "eligible charges". The planned process will contain 2 steps:

Step 1: A new component in the TPC setup is planned to identify the exclusions of tree nodes and/or item types.

Third Party	Chang	e Request			
Business Unit:	PSUNV				
Contract Number:	GA_FALL	2011	Grad Assista	ance Fall2011	
*Status:	Open	•	Tree Name:	ITEM_SECUR	RITY
Request DateTime:	11/16/20	11 4:12:25PM	By:	PS	
Updated:	11/16/20	11 4:12:51PM	By:	PS	
Active Third Party	lodes			Find View All	First 🚺 1 of 1 🚺 Last
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*Item Type		Description	ni, sin si		
1 100000000	01 Q	Medical School Tuition			+ -

Step 2: Run the Process Node Change Request. This proposed new process will determine if the specified third party contract has picked up the excluded item types/nodes from the student's account. If the excluded item types/nodes have been previously linked to the

contract, the process will remove the excluded items from the corporate account and move the items back to the student's account.

Process Nod	e Change Request				
Run Control ID: san	dy	Ē	<u>Report Manager</u>	Process Monitor	Run
Parameters					
*Business Unit: *Contract Number: Request DateTime: Created By:	PSUNV Q GA_FALL2011 11/16/2011 4:12:25PM PS	a	PeopleSoft Univ Grad Assistanc	and a second	

Enhancements to the Corporate Account

To provide additional student information on the Corporate account we plan on providing a cross reference to the student's related charges and academic information. We also anticipate providing the ability to move the student's due dates/billing dates to the Corporate account. This functionality is particularly relevant to our global markets.

Beyond Additional Features January 2012: Planned Additions to Third Party Contracts

As noted in the *PeopleSoft Campus Solutions 9.0 Statement of Direction 2011, May 2011* we are planning for several additions to TPC in coming bundles. In order to provide the mandatory information based on sponsor requirements, we are planning to provide additional flexibility in producing the invoice or an electronic file:

• Enhancements to the XML Corporate Billing file to include the student's academic information.

In responding to the institution's business requirements in Applying Corporate Payments, we are planning on the following capability:

• Enhance Group Post process to retrieve outstanding External Org ID charges by various criteria

In responding to the institution's business needs in viewing Corporate transactions, we are planning on providing the ability to:

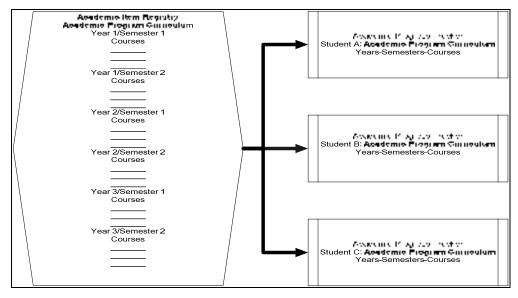
• Inquire/search against the corporate account transactions using various criteria

• Display Contract Number and Contract EmplID for a payment

Program Enrollment Phase 2: Program Planning and Enrollment

Program Enrollment describes an educational model where a student must generally complete a strictly defined set of courses towards the completion of their academic objective in a specified sequence; each of which are often structured in a series of levels or stages, where one stage must be successfully completed before a student can progress and enroll in the next set of courses. We intend to provide a flexible structure that can enable institutions to apply this framework to various program requirements to organize curricula and control enrollment. We introduced our initial offerings for this major ongoing effort in Additional Features July 2011 in which we concentrated on delivering the core setup that will support Program Enrollment functionality in later releases. In Additional Features January 2012 we plan to introduce student data structures to support this flexible enrollment model: the Academic Progress Tracker (APT). The primary goal of this phase is to provide a structure that can support the various business processes that center on the management of student program data, from initial curriculum assignment, enrollment, and progression through academic requirements through to program completion.

With this objective in mind, the APT user interface planned for this iteration is dedicated to using the program data built in the Academic Item Registry (AIR; introduced in July, 2011) and applying the results of that setup to a student. At this early stage this basic UI will allow users to assign, evaluate and manage the program curriculum they designed in AIR at the student level.



The planned APT is intended to:

- Store the Academic Items (or program requirements/components) that a student accumulates as they progress through a program of study
- Maintain the structure of a student's program requirements (as defined in AIR) so that results can be calculated at user defined levels and progress can be tracked
- Provide a user defined structure of results and statistics (total credits, grade points, etc.) that is not subject to the constraints imposed by the current term based structure, with it's strictly defined set of fields

It is expected that administrative users will use the APT component to apply, manage and simulate various processes that will allow them to:

- Create an APT Instance and assign it to a student: An APT instance is the program curriculum or course of study that is assigned to a student. If a student is pursuing multiple degree programs, there could be an instance for each.
- Ability to 'seed' the APT with user defined levels of the program including Year of Program and Academic Year/Term tracking: if the program structure is configured appropriately, Year of Program and Academic Year/Term values can be tracked and assigned to program items as they are accumulated in the APT
- Add program content Academic Item Registry items to a student's APT instance in such a way that it represents the structure of the student's program – without regard to the term based constructs of the core system.
- Add multiple attempts against a particular program requirement: Each academic item stored in APT can have multiple attempts associated with it, allowing courses or other program components to be retaken without changing the structure of the program

Most importantly, the APT is expected to provide an administrative view of the entire Academic Registry based program tree attached to the program instance that is assigned to a student. The example below illustrates the unique design of the APT component that offers administrative users the ability to review and manage items including adding items from outside of the student's program of study. Item delete is also supported and users can also substitute a prescribed program item for another item.

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в	- Year 1 - Semester 1	Study Period		I.	010101015
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	and ECON 3: Microconomic Frinciples	Course	Mandatory	I.	010101013
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	and ECON 1004E: Economic Methods I	Course	Mandatory	I.	010101014
	: 1- and CON 112 Int Political conciny	Conse	Handabuy		100000005
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	Contraction (SOC MIL Wint Process)	Contree	Liednes		1001000001
Β	or Economics Year 1 Option List B	Course List	Electives		010101015
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	or ECON 1014: Economics of Social Problems)	Course	Electives	I.	010101013
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Beyond Additional Features January 2012: Planned Functionality for Program Enrollment

One of the benefits of the Continuous Delivery Model is that it allows Oracle Campus Solutions to deploy new functionality incrementally rather than delivering large units of new development at any one time. The Continuous Delivery model also allows us to respond to customer feedback and guidance on an ongoing basis in order to apply useful insights and suggestions into our development efforts. It is important to note that Oracle does not expect customers to be able to deploy the features planned for Program Enrollment Phase 2. However, by introducing new structures that provide significant new range of functionality we anticipate our customers will take the opportunity to evaluate new capabilities, review documentation, and begin their analysis for how they can leverage the feature, once fully delivered.

With the described data model expected to be in place with Additional Features January 2012, subsequent delivery phases are planned to encompass the delivery of a more sophisticated administrative UI as well as self-service versions for students, faculty and advisors. Future phases will also include the delivery of the processes that institutions will use to interact with the student data structure: updates and changes to APT data, rules based

result calculation, rules based progression, honors and awards. The Academic Progress Tracker component planned for Additional Features January 2012 will eventually be used only by very high level power users.

Activity Management Phase 2: Organize and Manage

"Marks and Exams" describes a comprehensive design for calculating results within a course structure. Institutions require granular grading structures and calculation functionality to evaluate a variety of student assignments, attendance and course level examinations. In Additional Features July 2011, Campus Solutions delivered an extensive framework to support marks and exams in a new feature entitled, 'Activity Management'. We introduced the Activity Registry which represents the foundation for managing marks and exams in Campus Solutions. The registry connects to course catalog entries and allows users to define a course calculation structure in a hierarchical design (content tree) where detailed grading rules can be defined. The next step is to carry that structure to the schedule level and allow administrative users to manage and organize class content. In January 2012, we plan to focus on Manage and Organize features which include:

- <u>Activity Generator</u>: the mechanism to assign Activity IDs to coursework content and associate an activity registry to class sections.
- <u>Coursework Activity Manager</u>: administrative access into class activities.
- <u>Activity Definition Update</u>: an update of the activity definition to support the Activity Manager.
- <u>Activity Registry Update</u>: an update of the activity registry to support updates in the Activity Manager.
- <u>Update to Additional Features, July 2011</u>: the Result Scheme Table has been enhanced to be re- delivered as the Result Scale.

Each of these planned features is designed for "power" users, implementers and managers with comprehensive knowledge of academic content and a sophisticated understanding of the CS Course Catalog and Class Schedule. These administrators will be able to use the planned Activity Generator to:

- Associate a course activity registry content tree with its scheduled sections in a given term.
- Determine how to organize the sections into views (course roots) in which administrators/faculty can manage coursework
- Define the number of required exam sittings for a course

• Generate Activity IDs for course roots and the course root's associated coursework (components, exam, assessment items, and attendance)

One of the major benefits of Activity Management is that it will allow the management of coursework at the course level rather than at the section level as is currently required in core Campus Solutions. While Activity Management remains dependent on the class schedule, the Activity Generator is expected to provide a way for administrative users to fuse class sections into a course "root" to provide a single view of coursework with all its associated structure (components, exams and other assessable learning content). Changes to a course root will apply to all sections of that course. In the Activity Manager, the granular grading rules that were defined at the course level in the Activity Registry are associated with the course roots which were established in the Activity Generator. We anticipate that administrative users will have the ability to edit the grading rules as needed and, if applicable, have the changes associated to all sections of a course root. For example, one course root created especially for honors sections may have different grading requirements than nonhonors sections. A user could make a change once at the course root level and apply that change to all honors sections that are associated with that course root.

Once the course root structure is defined, the planned Activity Generator assigns Activity IDs to all coursework and it is at this level that administrative and faculty users will manage that coursework.

Beyond Additional Features January 2012: Planned Additions to Activity Management

Using our Continuous Delivery model allows us to build upon and deliver Activity Management over several bundles. This approach allows us to recognize and address changes in original design. For example, in January 2012 we plan to introduce the Result Scale which replaces the previously delivered Result Scheme (July 2011) and offers a much more configurable setting to define how marks, grades and outcomes are defined. The Continuous Delivery model also allows us to respond to customer feedback and guidance on an ongoing basis in order to apply useful insights and suggestions into our development efforts. It is important to note that Oracle does not expect customers to be able to deploy the features planned for Activity Management Phase 2. However, by introducing new structures that provide a significant new range of functionality we anticipate our customers will take the opportunity to evaluate new capabilities, review documentation, and begin their analysis for how they can leverage the feature, once fully delivered Anticipated future functionality includes examination management features - exam periods, exam scheduling and staffing, exam and reassessment enrollment; activity roster generation; a user interface for faculty to manage coursework activities and assign activity results; blind grading, and a rules based result calculation process to compute overall course results.

Anticipated Documentation for Additional Features January 2012

In order to gain a thorough understanding of the important new functionality targeted for Additional Features January 2012, extensive documentation is planned. This documentation will take on two forms. Detailed papers outlining key features and benefits are planned for Program Enrollment, Marks and Exams, Research Enrollment Tracking, and Evaluation Management System. Where appropriate, CS 9.0 Bundle #24 PeopleBooks documentation will include content on Program Enrollment, Marks and Exams, Research Enrollment Tracking, and Evaluation Management System. Planned enhancements to Third Party Contracts are anticipated to be updated in PeopleBooks associated with the bundle. These planned references represent our commitment to keep you informed and prepared to take full advantage of the features that are available through our Continuous Delivery Model. Customers should visit My Oracle Support PeopleSoft Enterprise Campus Solutions 9.0 Documentation Home Page (Doc ID 751540.1) for access when Additional Features January 2012 is made available.

Planned Campus Solutions 9.0 Bundle #24 Functional Documentation for Additional Features January 2012:

PEME Benefits Document.pdf containing:

- An Overview of Program Enrollment and Marks and Exams Key Benefits to the Institution
 - o Phase 1 Program Definition and Activity Management
 - Phase 2 Student Program and Coursework Organization and Management

Research Tracking Benefits Document.pdf containing:

- An Overview of Research Tracking Key Benefits to the Institution
 - Phase 1 Research Candidate Management and Thesis Processing
- An Overview of Evaluation Management System Key Benefits to the Institution
 - Phase 1 Evaluation Management System Creating the Infrastructure

When available, please visit CS 9.0 Bundle #24 Functional Documentation and Additional Features January 2012 to access the PeopleBooks updates for the following packages:

- For Program Enrollment refer to: <u>PEME Program Enrollment Documentation.pdf</u>
- For Marks and Exams refer to: <u>PEME Marks and Exams Documentation.pdf</u>
- For Research Enrollment Tracking refer to: <u>Research Tracking and Thesis</u> <u>Management.pdf</u>

- For Evaluation Management System refer to: <u>Evaluation Management System.pdf</u>
- For Third Party Contracts refer to: CS Bundle 24 Student Financials 9.0.pdf

Also available:

• PeopleSoft Campus Solutions 9.0 Statement of Direction FY 2011 (Doc ID 1171540.1)

Conclusion

The introduction of the extensive phased functionality in Additional Features January 2012 illustrates Oracle's commitment to advancing innovative functional models for Campus Solutions to serve a world-wide customer base. We can do this by employing a Continuous Delivery Model which provides the ability to take advantage of new and important technology and innovative design on ongoing and sustained basis. The PeopleSoft Campus Solutions 9.0 Additional Features January 2012 is intended to meet customer needs, extend value, and provide leadership for the global higher education community. We encourage all business areas to evaluate the content of this Additional Features bundle for applicability to their business processes.



Campus Solutions 9.0 May 2011

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