

COMMUNITY NEWSLETTER

July 2021 | Table of Contents

1 <i>Note from the Program Manager</i>	4 <i>Pennant Records Training Update</i>	7 <i>NGSS Release 1 Scope</i>
2 <i>NGSS Pennant Branding Transition</i>	5 <i>What's Next?</i>	
3 <i>CourseLeaf PATH Demonstration</i>	6 <i>Current Systems Freeze Period</i>	

Note from the Program Manager

Dear Penn Colleagues:

The Community Newsletter has been rebranded as part of a larger effort to improve the association of the NGSS project's efforts to build the Pennant suite of applications. For information on the branding transition, refer to page 2.

On June 11th, the project hosted its first CourseLeaf PATH System Demonstration, which was attended by over one hundred and sixty participants and received much praise from the audience. Another major accomplishment was the kick-off of the Business Advisory Group. The purpose of the group is to serve as a channel of information between the business leaders in the Schools and the NGSS project, while also ensuring alignment between academic and finance leadership of the Schools. Further, the XCAT Advisory Group has reconvened to continue its discussion on how the XCAT tool will operate as part of the Pennant suite of applications. In addition to our large advisory group efforts, the team continues to prepare the Pennant Records user community for the September 2021 go-live. We have finalized the Pennant Records training logistics and sessions details. For more information, see page 4.

There has been a recent update to the Current Systems Freeze Period. For more information, visit page 6. Behind the scenes, testing continues to progress. A major testing milestone was the successful completion of security-related testing and Pennant Aid user acceptance testing. The project team works diligently to complete the necessary testing activities as well as the deployment activities critical to the upcoming go-live.

Best,

Rosey Nissley



What are NGSS and Pennant?

The Next Generation Student Systems (NGSS) project is deploying Penn’s new student information system, referred to as the Pennant suite of applications.

Pennant Suite of Applications

What’s Happening?

Starting **September 13, 2021**, the functionality deployed by the NGSS project will be referred to the Pennant suite of applications: Pennant Accounts, Pennant Records, and Pennant Aid.

Pennant Accounts

- Student accounts and billing
- Live since 2015

Pennant Records

- Student records
- Release 1 Go-Live Sept. 2021

Pennant Aid

- Student financial aid
- Release 1 Go-Live Sept. 2021

For more information, visit the [NGSS website](#).

CourseLeaf PATH Registration Demonstration

On June 11th, the project hosted its first CourseLeaf PATH System Demonstration, showcasing registration functionality from the student perspective. This functionality will be available to students as part of the project's Release 2 go-live in March 2022. The audience included advisory group members, academic advising staff, and University leadership.

Specific content included course search, cart creation (mock schedules), advance registration, and add/drop/swap (course selection).

As part of the transition to the Pennant suite of applications, there will be changes in terminology. For specific examples of changes in language, refer to definitions on the right. Understanding how today's terms will exist in Pennant will help users navigate the new systems with ease.

Based on audience feedback, reactions were overwhelmingly supportive, with 90% of survey respondents reporting positive reactions. Participants remarked that the content presented from the students' lens has bolstered their confidence that the finished product will be effective.

Those who would like to review the meeting content may access the [slides](#), [recording](#), and [consolidated Q&A document](#).

Legend

	Penn InTouch Terminology
	Pennant Terminology

Changes in Terminology

Penn InTouch
Path@Penn
Student engagement layer which hosts student information, resources, and access points to external functionality, such as CourseLeaf PATH for registration.

Mock Schedule
Cart
Students can create multiple carts to experiment with various scheduling combinations.

Primary Request
Primary Cart
Cart that will be submitted for advance registration requests.

Alternate Request
Alternatives Cart
Cart that is linked to the Primary Cart and will be used for the Advance Registration request. If a course in the Primary Cart is not available, the system will use the alternate specified in the Alternatives Cart.

Course Selection
Add/Drop/Swap
Following Advance Registration, students can modify the system-created schedule during the specified ~2.5-week window in the beginning of the semester. Students can modify their schedule by adding, dropping, or swapping courses.

Pennant Records Training Update

Curriculum and Resources

- During each session of the first week, participants will receive an overview of the CourseLeaf Section Scheduler (CLSS) system and learn about modifications to Curriculum Manager (CM) as part of CM Retrofit.
- Other helpful tools will include Quick Reference Guides and a recorded training session for future reference.
- During the second week, there will be optional follow-up workshops where users can ask outstanding questions and receive additional guidance.

Logistics

- Sessions will have 25-30 participants each.
- End User training will take place on August 9th through 12th.
- The last 30 minutes of each session will include a hands-on experience in CLSS.
- For additional practice, users will have access to a CLSS training environment until August 20th at 5:00pm.

Monday	Tuesday	Wednesday	Thursday	Friday
August 9	August 10	August 11	August 12	August 13
Session 1 9:30 - 11:30	Session 3 9:30 - 11:30	Session 5 9:30 - 11:30	Session 7 9:30 - 11:30	
Session 2 1:30 - 3:30	Session 4 1:30 - 3:30	Session 6 1:30 - 3:30		
August 16	August 17	August 18	August 19	
	Workshop 1 11:00 - 1:00		Workshop 2 3:00 - 5:00	



Working Session



"Hands-On" Availability

What's Next?

FUTURE ISSUES

Monthly

In future Community Newsletters, the NGSS team will continue to update the community on Release 1 progress and additional Release 2 information. For more information on Release 2 scope, visit the [NGSS website](#).

RELEASE 1 PENNANT RECORDS TRAINING BRIEFS

Summer 2021

The training briefs for CLSS and CM will continue throughout the summer to prepare users for training and go-live. See page 2 for more details.

RELEASE 1 TRAINING

Summer & Fall 2021

Release 1 Pennant Records training will take place during the **August 9-20** timeframe, focusing on CM Retrofit and CLSS:

- CLSS - Learn the section maintenance process, including creating and maintaining sections
- CM - Learn what functionality has been added, modified, and removed

Release 1 Pennant Aid training for end-users will take place in Fall 2021, focusing on Banner, enhanced ImageNow functionality, Pennant Reports, and more.

FALL ENGAGEMENT ACTIVITIES

Fall 2021

- **October 1** - CourseLeaf PATH System Demonstration for Advisors
- **October 29** - Information Session and Demonstration for Students
- **December 10** - Information Session for Advisors and Wider Audiences



Current Systems Freeze Period

Freeze Period Extension (New Programs and Adjustments to Existing Programs)

The current systems freeze period is being extended for the new programs or adjustments to existing programs with an effective date of Summer and Fall 2022.

Scope of Extension

The following types of changes will need to go through the Current Systems Freeze Period exceptions process:

Event Type	Examples				
Program Change	<ul style="list-style-type: none"> • Change to Program Title • New Major/Concentration • New Degree/Certificates • Requirements (if substantive changes) 				
Course Change	<ul style="list-style-type: none"> • New Subject Code • New Department Code 				
Cohort Change	<ul style="list-style-type: none"> • Changes impacting Budgeting (Fee Assessment) or Financial Aid 				
Special Programs Change	<ul style="list-style-type: none"> • New Code • Change or Removal of Code 				
Admissions Change	<ul style="list-style-type: none"> • New Code (effective for Fall 2022) • Change or Removal of Code (effective for Fall 2022) 				
<table border="1"> <thead> <tr> <th>Substantive Changes include:</th> <th>Non-Substantive Changes include:</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> • Major curricular overhaul (changes in requirement totals, structure, etc.) </td> <td> <ul style="list-style-type: none"> • Replacing deactivated courses • Inserting a course as an option for a requirement </td> </tr> </tbody> </table>		Substantive Changes include:	Non-Substantive Changes include:	<ul style="list-style-type: none"> • Major curricular overhaul (changes in requirement totals, structure, etc.) 	<ul style="list-style-type: none"> • Replacing deactivated courses • Inserting a course as an option for a requirement
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Exceptions Process

- Please communicate changes by submitting an exception request to Rob Nelson and Matt Sessa by emailing NGSS_FREEZE_CR@LISTS.UPENN.EDU.
- Rob Nelson and Matt Sessa will document the request and collaborate with appropriate University stakeholders to determine whether the need warrants an exception.

NGSS Systems - Release 1 Scope

What is Pennant?

The Next Generation Student Systems (NGSS) program is deploying Penn’s new student information system, referred to as the Pennant suite of applications. Pennant Accounts (student accounts and billing) has been live since 2015. Additional components of this suite include Pennant Records (student records and registration) and Pennant Aid (student financial aid), which will go-live in Fall 2021 (Release 1) and Spring 2022 (Release 2).

The NGSS program continues to design, build, and configure future-state systems supporting our [student records](#) and [financial aid](#) processes. The systems included in NGSS Release 1 will start to be used in Fall 2021 based on when academic or business processes launch (e.g. course and section maintenance, financial aid packaging).

Pennant Records - Release 1

Function	Current State	Future State
Curriculum (Course & Program) Management	<ul style="list-style-type: none"> Curriculum Manager (CM) with 3-digit course numbers 	<ul style="list-style-type: none"> Curriculum Manager (CM) with 4-digit course numbers
Section Maintenance	<ul style="list-style-type: none"> SRS Screens: 129-132 	<ul style="list-style-type: none"> CourseLeaf Section Scheduler (CLSS) Ellucian Banner
Final Exam Room Requests	<ul style="list-style-type: none"> Courses InTouch (CIT) Final Exam Application 	<ul style="list-style-type: none"> CourseLeaf Section Scheduler (CLSS)
Classroom Scheduling	<ul style="list-style-type: none"> SRS Screens: 130, 1C6 	<ul style="list-style-type: none"> CourseLeaf Section Scheduler (CLSS) Infosilem Timetabler Software
Post R1 Go-Live Training	<ul style="list-style-type: none"> SRS Screens: 1C6, 1C7, 1C8 	<ul style="list-style-type: none"> Infosilem Campus Scheduling

Pennant Aid - Release 1

Function	Current State	Future State
Financial Aid (FA) Processing - Non-Matriculated Applicants* Only <i>*New Applicants</i>	<ul style="list-style-type: none"> Student Aid Management (SAM) 	<ul style="list-style-type: none"> Ellucian Banner
FA Needs Analysis	<ul style="list-style-type: none"> Needs Analyzer 	<ul style="list-style-type: none"> Ellucian Banner
Imaging	<ul style="list-style-type: none"> ImageNow 	<ul style="list-style-type: none"> ImageNow with enhancements
Data Warehouse	<ul style="list-style-type: none"> FA Data Warehouse 	<ul style="list-style-type: none"> Operational Data Store (ODS) Data Warehouse with enhancements
Undergraduate FA Document Status and Award Notification	<ul style="list-style-type: none"> Slate 	<ul style="list-style-type: none"> Slate with enhancements