UR STUDENT SYSTEM

Community Forum

November 6, 2018

UNIVERSITY of ROCHESTER

Agenda

- Welcome & Introductions
- Project Overview & Status
- Demonstrations
- What is Changing?
- Project Update
- Ways to Engage with the Project Team
- Q&A

Last Updated: October, 2018

UR Student Project

Executive Steering Committee

EXECUTIVE SPONSORS

- **Robert Clark** — *Provost*
- **Holly Crawford** — *Chief Financial Officer*
- **David Lewis** — *Vice President for IT*
- **Stan Swete** — *Exec. Director of Technology, Workday*

PROJECT SPONSORS

- **John Hrusovsky** — *QA, JJH Consulting*
- **Brad Hoenshell** — *Program Director* Workday
- **Nancy Specht** — *University Registrar*
- **Julie Myers** — *Co-Deputy CIO*
- **Kathy Blackmon** — *University Bursar*
- **Elizabeth Milavec** — *University Controller*

Samantha Singhal
Co-Deputy CIO
(Project Director)

Kelly McMullen
Project Architect

Scott McEneany
Judy Van Atta
Brooke Bertolozzi (WD)
Darin Gordon (WD)

Babette Barnes
Conversions, Integrations, Reporting & Security

Conversions
Andrew Dinin (D)

Brenda Bixby (50%)
Aman Chawla (D)
Aruneraj Ganesan (D)
Gokul Gunasekaran
Sankalp Jain (D)
Rose Nguyen(WD)
Matthew Pirtle (WD)
Matt Siple
Pooja Upadhyay
Elton Wong (WD)
Paula Yandow-Reilly

Integrations
Kevin Hammon

Dusty Kodet (WD)
Emi Morales (WD)
Hector Perez
Justin Tran
Theresa Tran (WD)
Carlos Yoshimoto (WD)

Tenant & Security Management
Stephanie Parks
Simona Potocar (WD)
Jon Sanville (WD)

John Podvin
Associate Vice Provost for Institutional Research

Reporting
Marc Rumsey

Annie DeBruynkops (WD)
Sam Kwok (WD)
Mary Liess
Mark Pabilona (WD)

Student Data Warehouse
Reports to Julie Myers

Chris Adams (WD)
Project Administration & Engagement Management

Bernadene Barnes
Anita Brown (WD)
Ted Montemayor (D) - PM
Emilie Nunez (WD)

Cindy Fronterre
Training & Change Management

Melissa Carducci

Charlie DeSouza
System Configuration, Validation & Testing

Finance & Financial Aid
Scott Flaherty*
Karina Long (WD)

Nafisa Alam
Doug Dorval (WD/D)
Colleen Hartner (WD)
David Li (D)
Quan Quan (50%)
Edwin Roe (D)
Hali Skaggs

Records & Curriculum Mgt.
Julia Kraus*
Cindy Yeo (WD)

Brittney Davis (WD)
Michael Deegan(D)
Dave Garcia (50%)
Robert Jordan (WD/D)
Justin Krog
Janine McDuffie (WD)
Ethan Powell
Alek Rinholm (D)
Bill Satterfield (D)
Stefanie Shute (WD)
Elayne Stewart

Advising
Sean Hanna*
Pete Holly (WD)

Robin Baker (D)
Keith Costello (D)

KEY
WD = Workday **D** = Deloitte **BOLD** = Team Lead * = Subject Matter Expert
Orange indicates team members that receive their primary work direction from the WD Project Manager or WD Lead

Project Overview & Status

“Deciding what not to do is as important as deciding what to do.”

- Steve Jobs

Overview of Scope

Student Records & Curriculum Management

Course Catalog | Programs of Study | Registration | Instruction
Degree Audit | Transcripts | Reporting

Academic Advising

Cohorts | Advising | Academic plans

Student Finance

Charge Items | Charge Adjustment Schedules | Refunds | Payments and Payment Precedence | 1098-T | Financial Aid | Awards, Waivers & Grants

Vision

The University of Rochester envisions reliable, high-quality student information systems and processes that will:

- Be **flexible and extendable**, accommodating current priorities and requirements, with the ability to evolve with changing and as yet unforeseen academic and administrative realities, such as new forms of assessment and outcome tracking
- Provide **robust data capture and reporting capabilities, and verified, complete data** to allow the University and our schools to better understand and support progress toward strategic goals, and the progress of our students toward their academic goals
- Provide a **single, integrated source for core student data and services**, and easier, real-time integration with ancillary and third-party systems
- Create a **personalized system** that provides users with the information and services they need, when and where they need it
- Result in **configurable, reliable and automated processes** for students, faculty and staff to achieve better outcomes with less effort

Guiding Principles

- We will **adopt common practices** wherever possible to support a consistent experience; we will differ only where absolutely required
- We will **structure data** to improve our collective reporting and analytic capabilities
- We will **automate activity and processes** to enable staff to improve service for all our stakeholders
- We **value integrated systems and processes** over disparate systems and processes
- We will adapt administrative and academic practices as necessary to **implement an effective solution**

Cohort Basics

- Cohorts are specific groupings of student(s) defined in UR Student to accomplish:
  1. Advisor Assignment: To assign an advisor to his or her advisees
  2. Transactional Activity: A cohort may be required for a rule or policy transaction against a specific group *e.g., Senior class fee, engineering fees, etc*.
  3. Missing Attribute: In order to assign an attribute to a student or group of students for which there is no field in UR Student *e.g., Class Year/Standing*
- Cohort Types
- Methods for membership creation
  - Manual
  - Criteria Based

More information coming in Demo Day in Spring, 2019

Academic Plans

- Program of study templates
- Create Schedule / Save Schedule / Register from Plan
- Update Plan / Request Plan Approval From Advisor
  - By academic period
  - For entire plan
- Student and Advisor communicate through plan
  - Advisor can approve, add comments, and send feedback if the student needs to make changes before the plan can be approved

Demonstration

Questions & Answers

What Is Changing?

"The secret of change is to focus all of your energy not on fighting the old, but on building the new."

- Dan Millman

Systems Being Decommissioned

- Legacy Student Information System
- Legacy Student Data Warehouse*
- Shadow Student Information Systems
  - School of Nursing (Central 360)
  - Warner (WAIS)
  - Simon (Darden)
- Administrative access to Course Description Course Schedule (CDCS)
  - Will be populated from UR Student
- Nelnet (except for ECMS use)
- Student Access
- Advisor Access
- Instructor Access
- Alumni Access
- Degree Audit (uAchieve)

** Legacy student data warehouse being replaced with a new student data warehouse*

Active vs. Historical Students

Functionality Available for Active Students

- All transactional capabilities
- Transcripts
- Accessed via “Find Student”

Functionality Available for Historical Students

- No transactional capability without “rehydrating” the student
- Transcripts
- Accessed via “Find Historical Student” or “Find Global Student”

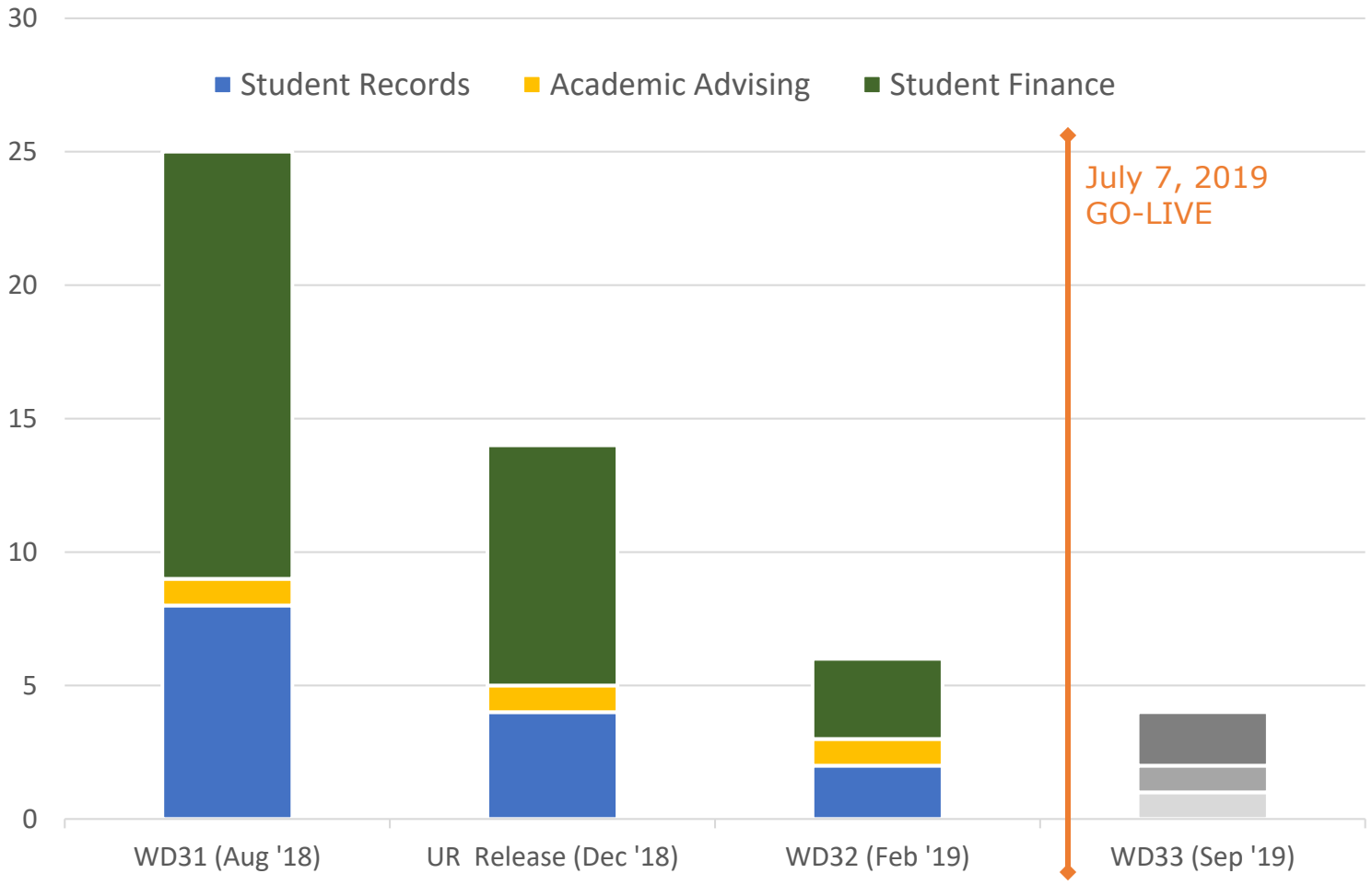
More information coming in UR Student Newsletter in Spring, 2019

Reporting

- A new student data warehouse will go live with UR Student
  - Data warehouse reporting tools will still be Cognos and Tableau
- Most operational reports will come from UR Student
  - Ex: Course roster, advising lists, registration holds
- Strategic and external reports will come from the data warehouse
  - Ex: Federal, state and ranking submissions; retention modeling
- There will be bumps in the road with reporting
  - Ex: Old report = 397 students; new report = 396; huh?
- We are prioritizing reports that are:
  - Critical for go-live (July 7)
  - Critical for Fall census (September 27, 2019)
  - Critical by end of term (December, 2019)

Project Update

Product Maturity / UR Blockers

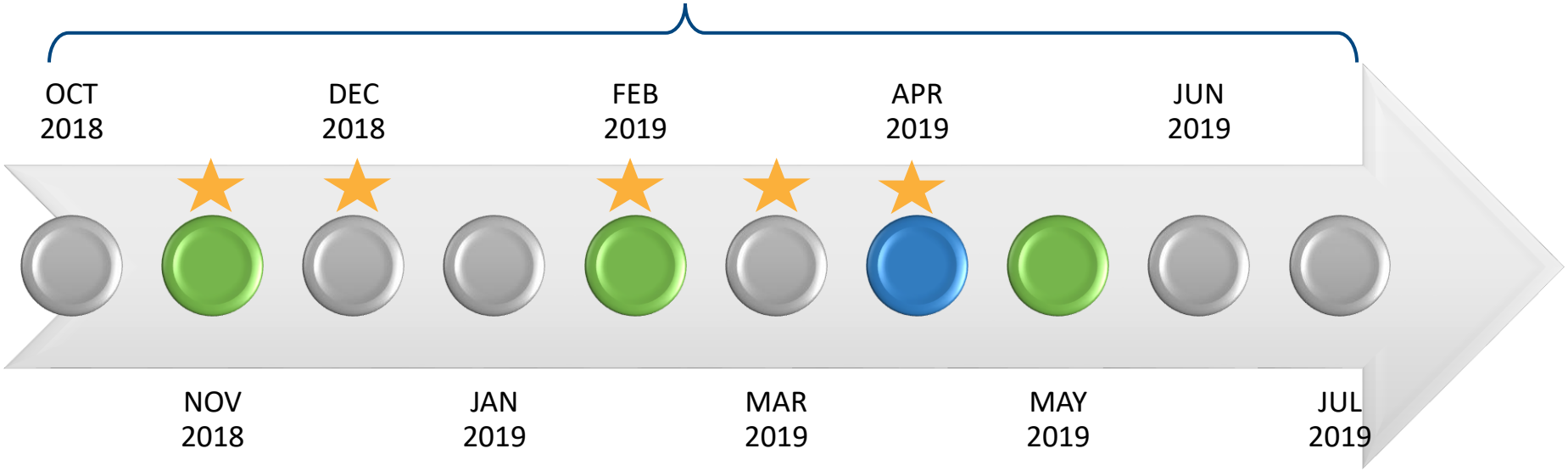


Where We Are…

10/15/18
Kickoff
E2E
Testing
2/4/19
WD32
Preview
May '19
Go/No-go
Decision
9/7/19
WD33
12/31/18
WD's
special UR
release
Feb / Mar
Kickoff
DIL
Testing
7/7/19
Phase I
Target
Go-Live

Ways to Engage with the Project Team

Special Interest Groups | Newsletters | Website
http://www.rochester.edu/urstudent/



LEGEND:
- Demo Day
- Community Forum
- Hands-on Workshops

Early Communications to Parents & Students

Training

Questions & Answers

UNIVERSITY of ROCHESTER

UR Student

Records and Registration

Program of Study

- Majors and Minors in ISIS become “programs of study” in UR Student
- We’ll hear a lot about “program of study type”; these include:
  - Major
  - Intended major
  - Program focus
  - Minor
  - Cluster
  - Primary Instrument
  - Certificate
- Program focus is new: Some English, Biology, Warner and Nursing majors will be grouped into single majors with a program focus

Come to November 14, 2018 Demo Day to learn more

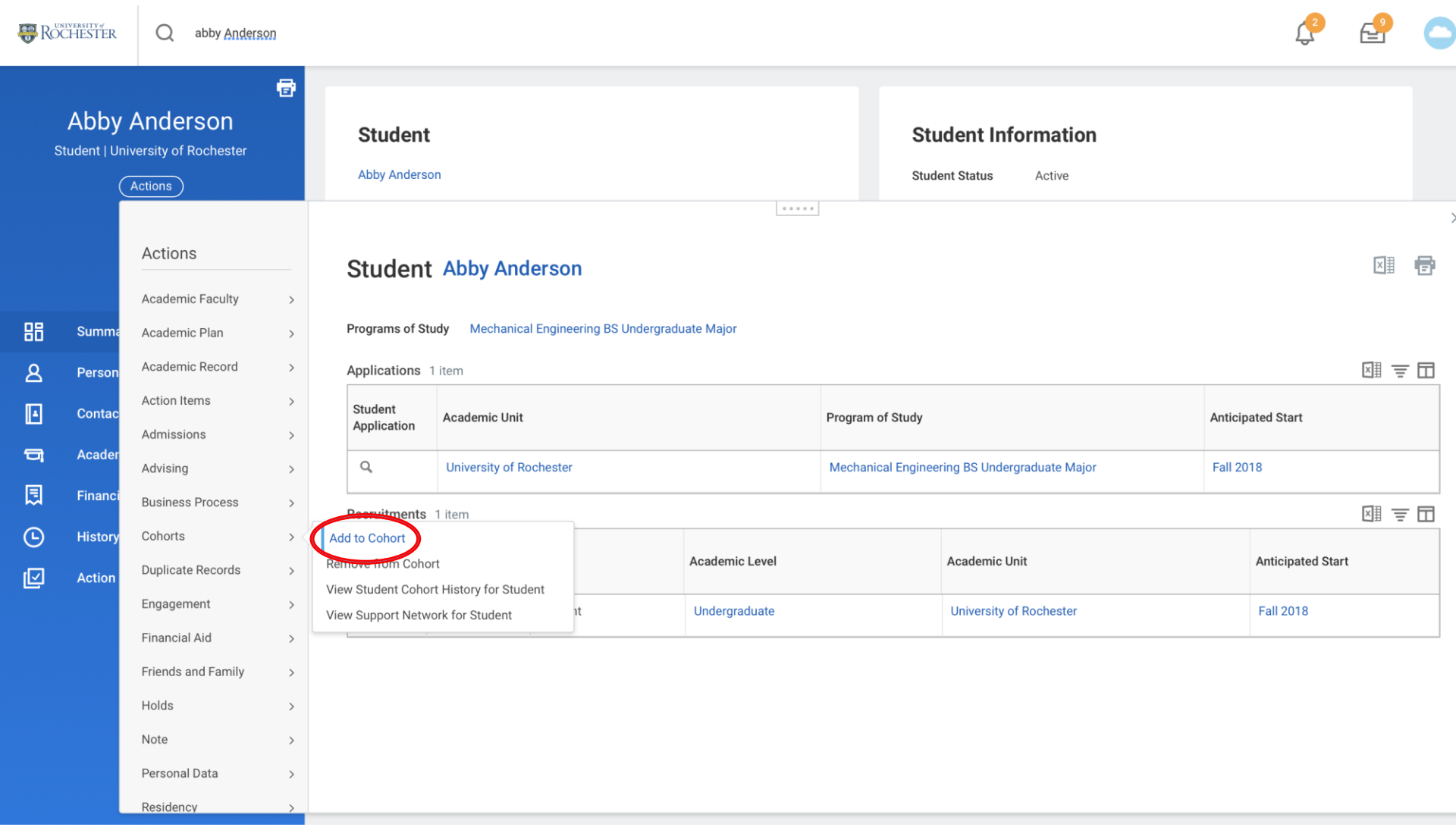
Courses

- NEW Course components
  - Subject and Number
  - Course ID *e.g., CSC 240-01*
  - Course Listing ID *e.g., CSC 240 - Intro To Data Mining*
- Cross-lists possible, but not hierarchically related
  - Uses the *Course Listing ID as a* "connector" linking both courses
  - Students see the course assigned to their Program of Study, not the cross-list
- Faculty Instructors can be assigned to their course when created, or after

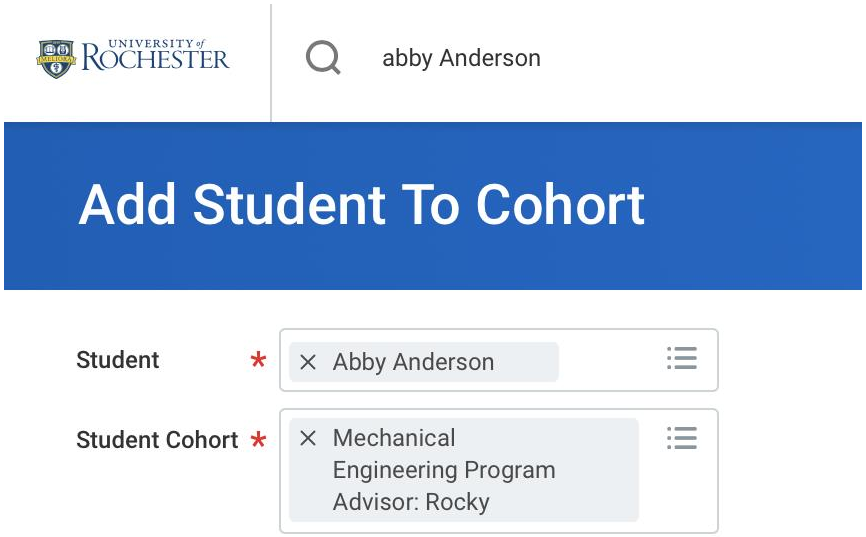
Come to December, 2019 Demo Day to learn more

Academic Advising Demo

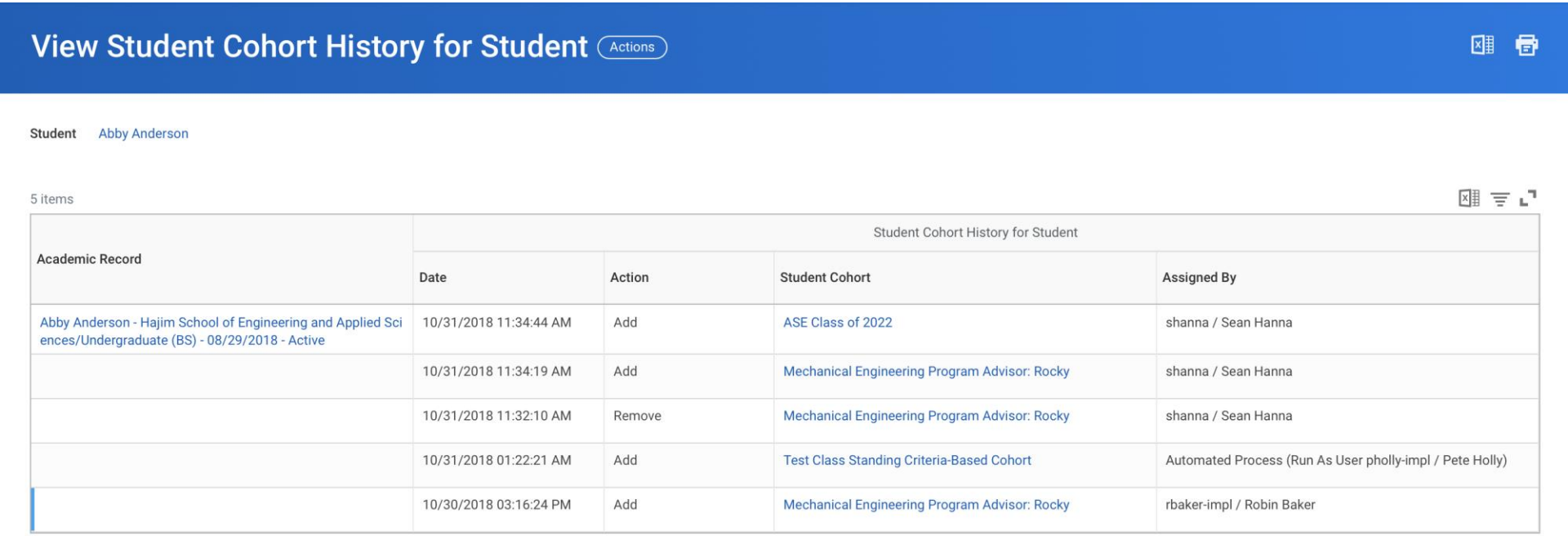
Academic Advising



Academic Advising



Academic Advising



Academic Record	Student Cohort History for Student			
	Date	Action	Student Cohort	Assigned By
Abby Anderson - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/29/2018 - Active	10/31/2018 11:34:44 AM	Add	ASE Class of 2022	shanna / Sean Hanna
	10/31/2018 11:34:19 AM	Add	Mechanical Engineering Program Advisor: Rocky	shanna / Sean Hanna
	10/31/2018 11:32:10 AM	Remove	Mechanical Engineering Program Advisor: Rocky	shanna / Sean Hanna
	10/31/2018 01:22:21 AM	Add	Test Class Standing Criteria-Based Cohort	Automated Process (Run As User pholly-impl / Pete Holly)
	10/30/2018 03:16:24 PM	Add	Mechanical Engineering Program Advisor: Rocky	rbaker-impl / Robin Baker

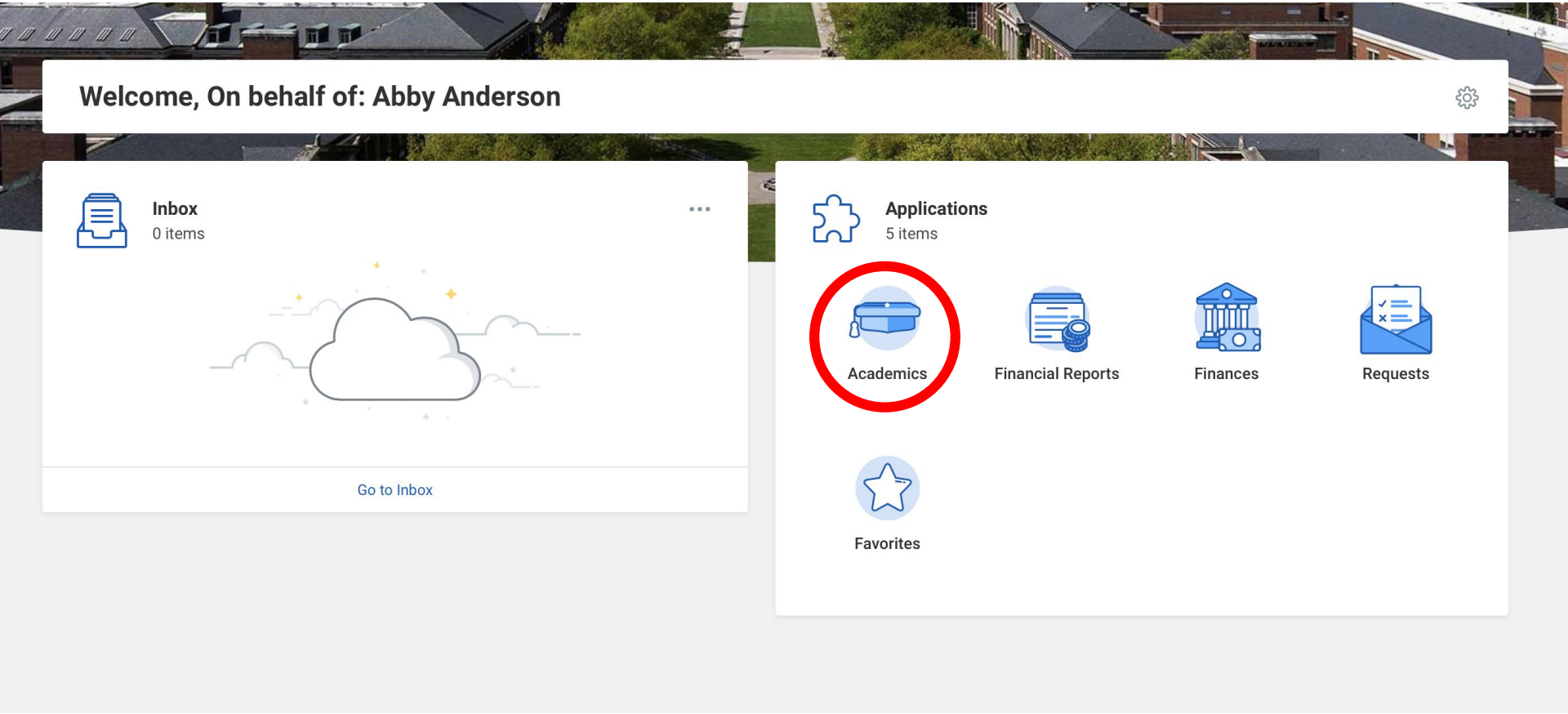
View Support Network for Student

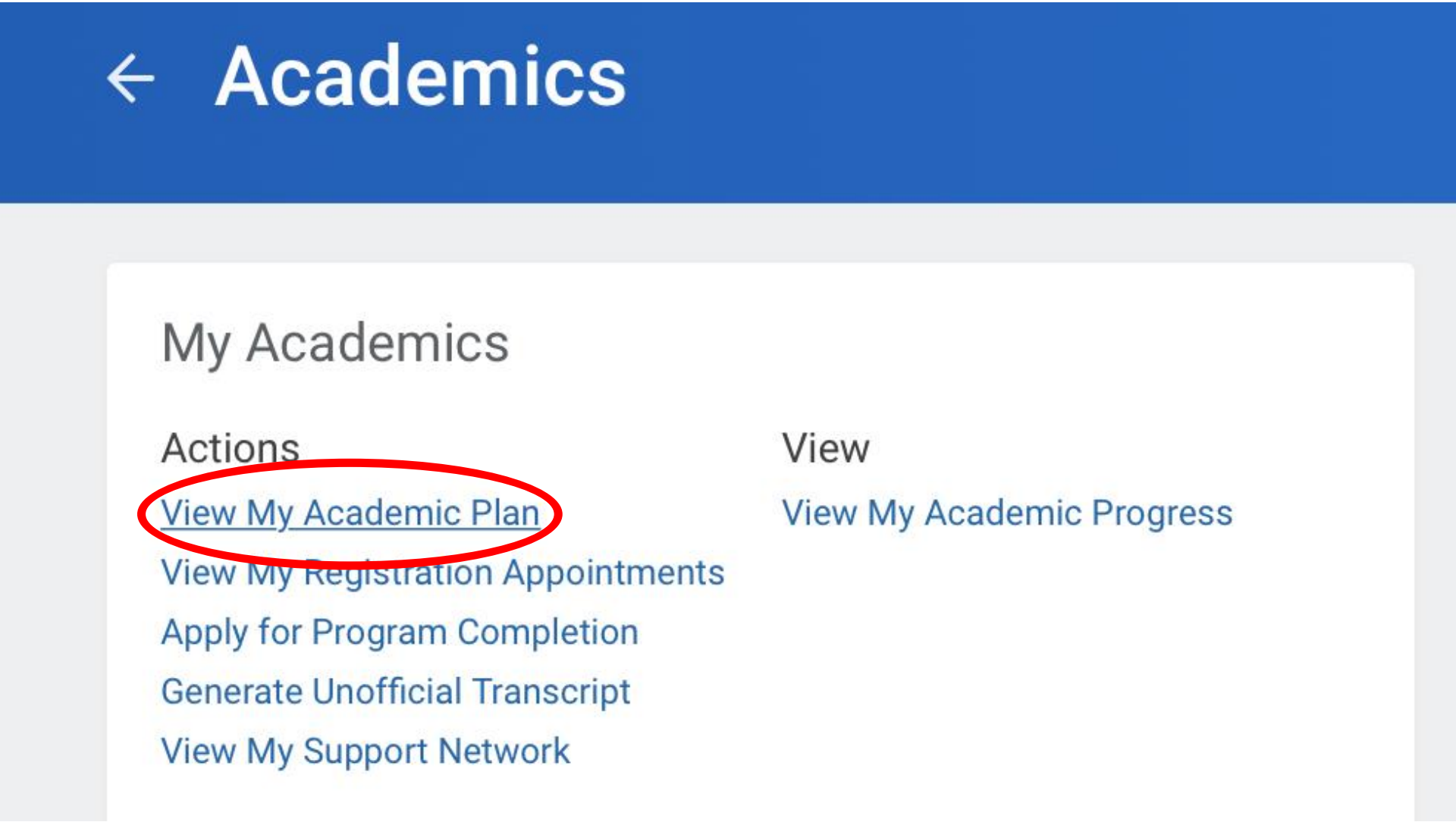
Student Abby Anderson

1 item

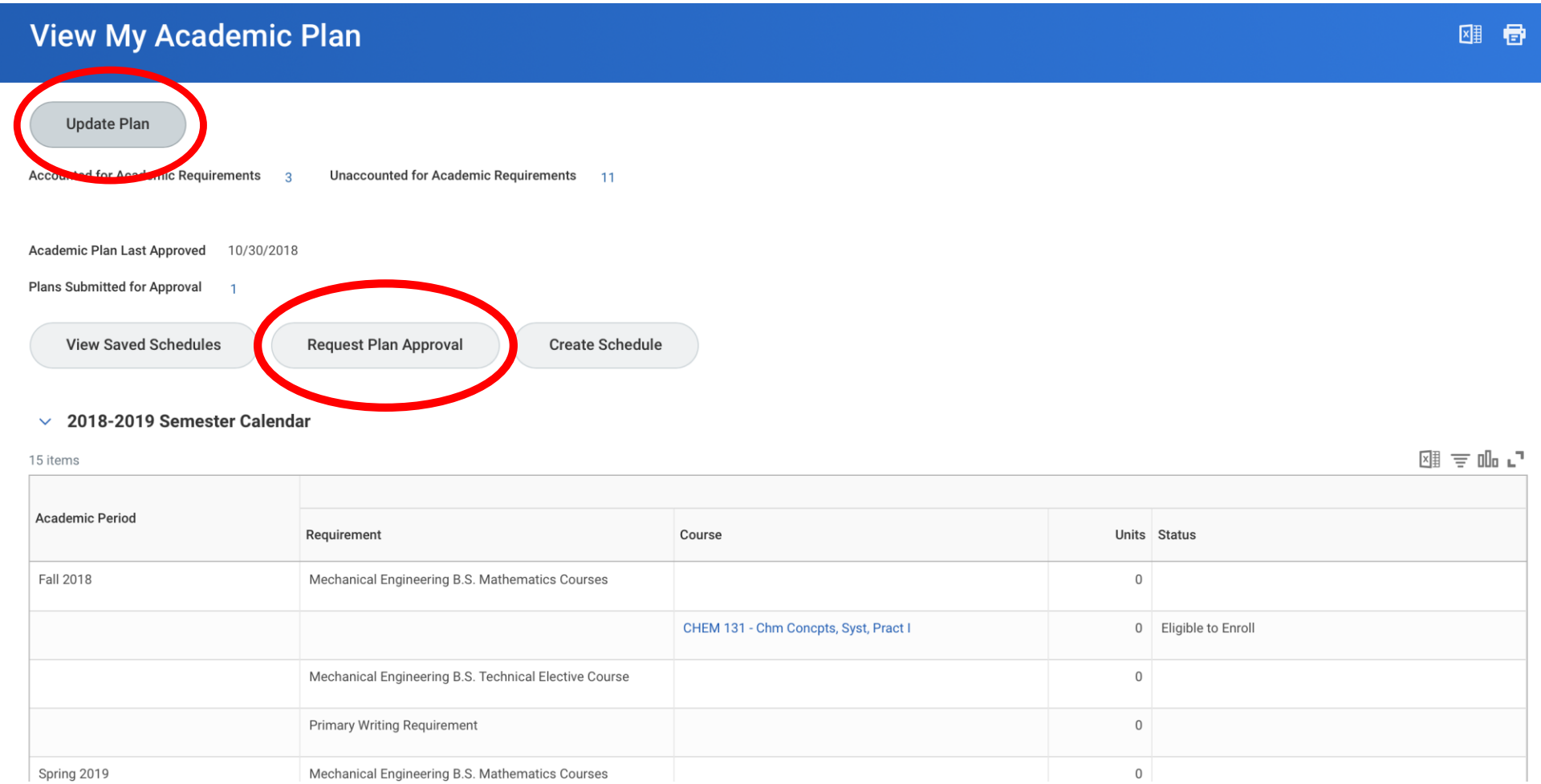
Role	Photo	Person	Public Work Email
Advisor		Rocky Advisor	sean.hanna@rochester.edu

Academic Advising

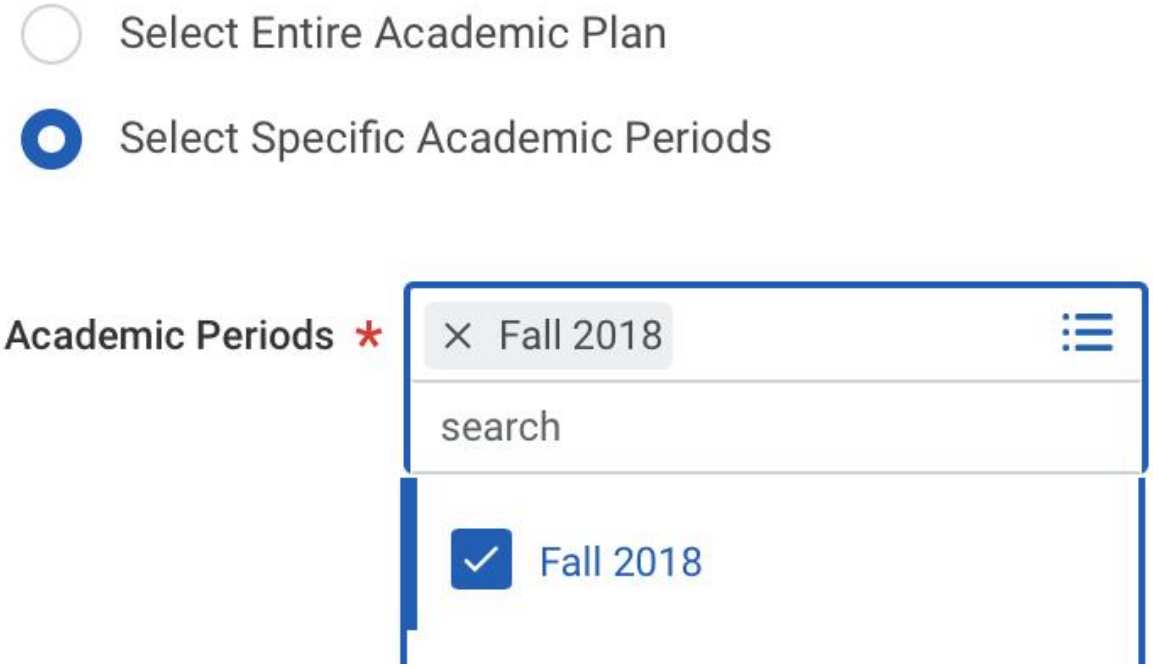



Academics
My Academics
Actions
View My Academic Plan
View My Registration Appointments
Apply for Program Completion
Generate Unofficial Transcript
View My Support Network
View
View My Academic Progress

Academic Advising



Request Plan Approval



Academic Advising

Request Plan Approval

4 items

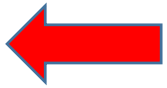
Academic Period	Requirement	Course	Units	Status
Fall 2018	Mechanical Engineering B.S. Mathematics Courses		0	
		CHEM 131 - Chm Concpts, Syst, Pract I	0	Not Eligible
	Mechanical Engineering B.S. Technical Elective Course		0	
	Primary Writing Requirement		0	

Mr. Rocky, please review my plan for Fall 2018 for approval. Thanks - Abby

Academic Advising

Up Next

Rocky Advisor



Approval by Advisor

Due Date 11/03/2018

Details and Process

For Abby Anderson - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/29/2018 - Active

Overall Process Academic Plan Event: Abby Anderson - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/29/2018 - Active

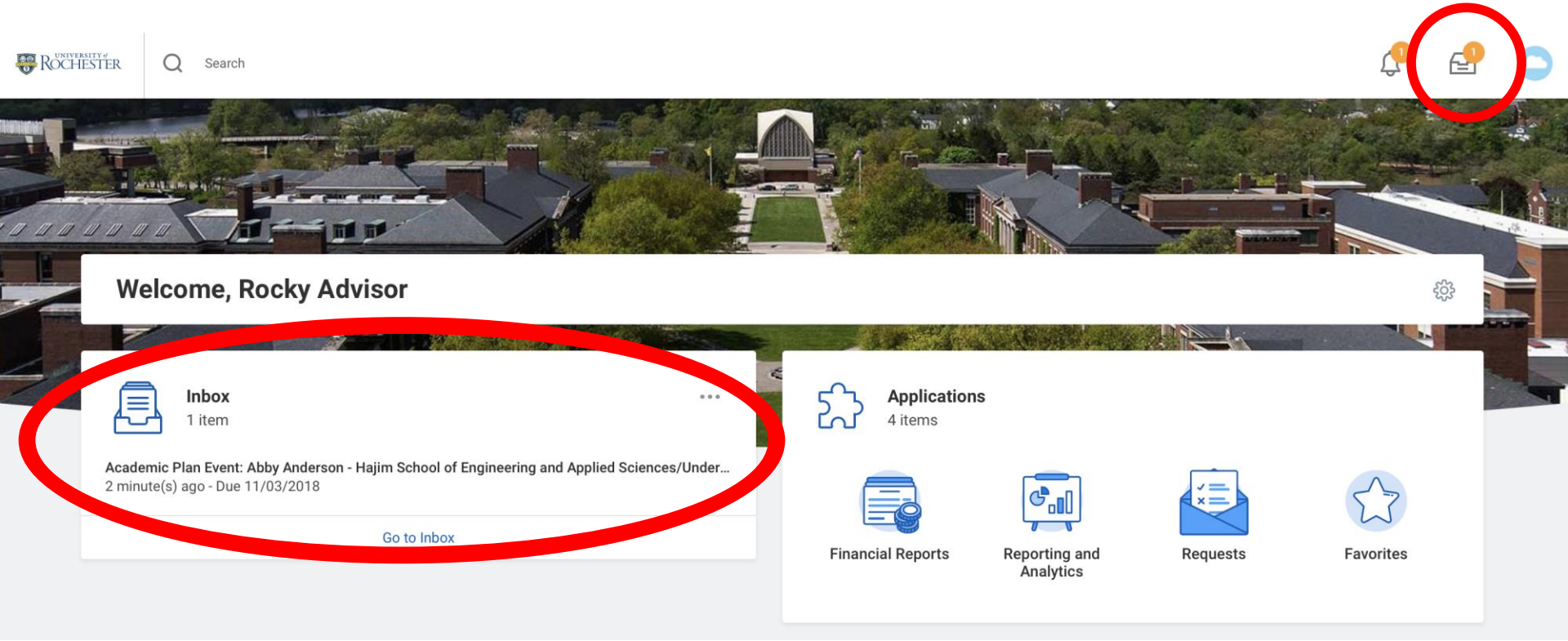
Overall Status In Progress

Details Process

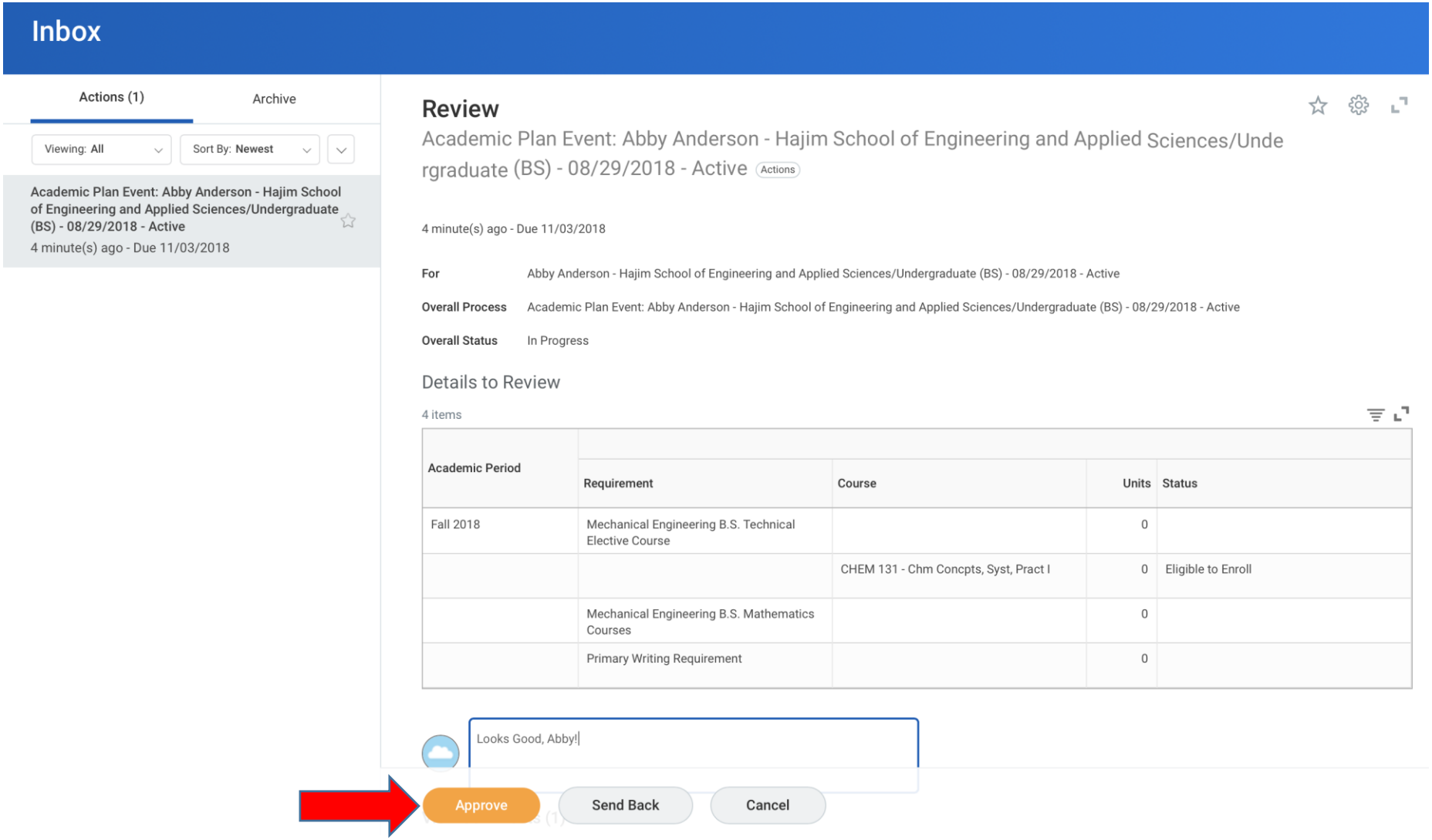
4 items

Academic Period	Requirement	Course	Units	Status
Fall 2018	Mechanical Engineering B.S. Technical Elective Course		0	
		CHEM 131 - Chm Concpts, Syst, Pract I	0	Eligible to Enroll
	Mechanical Engineering B.S. Mathematics Courses		0	
	Primary Writing Requirement		0	

Academic Advising

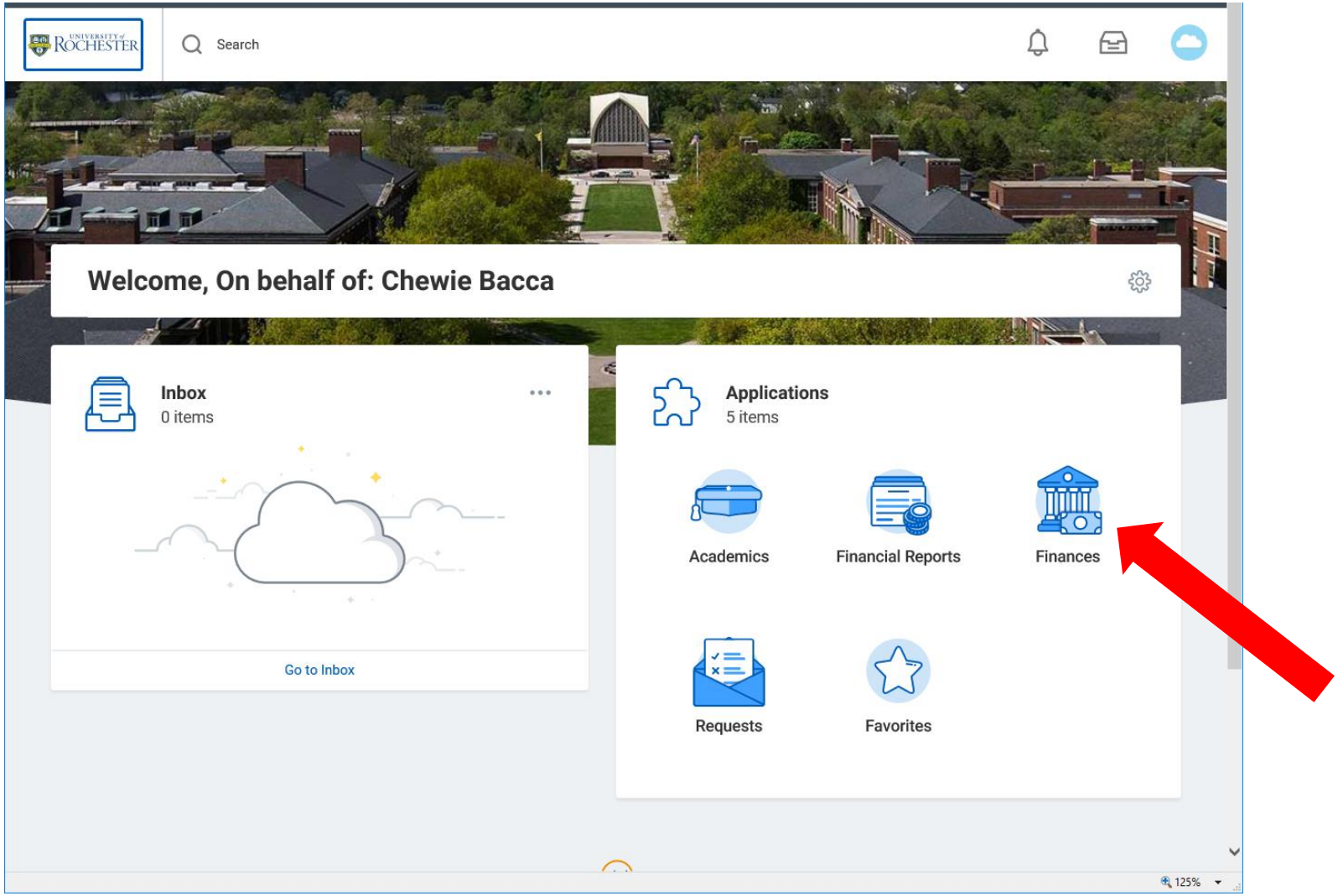


Academic Advising

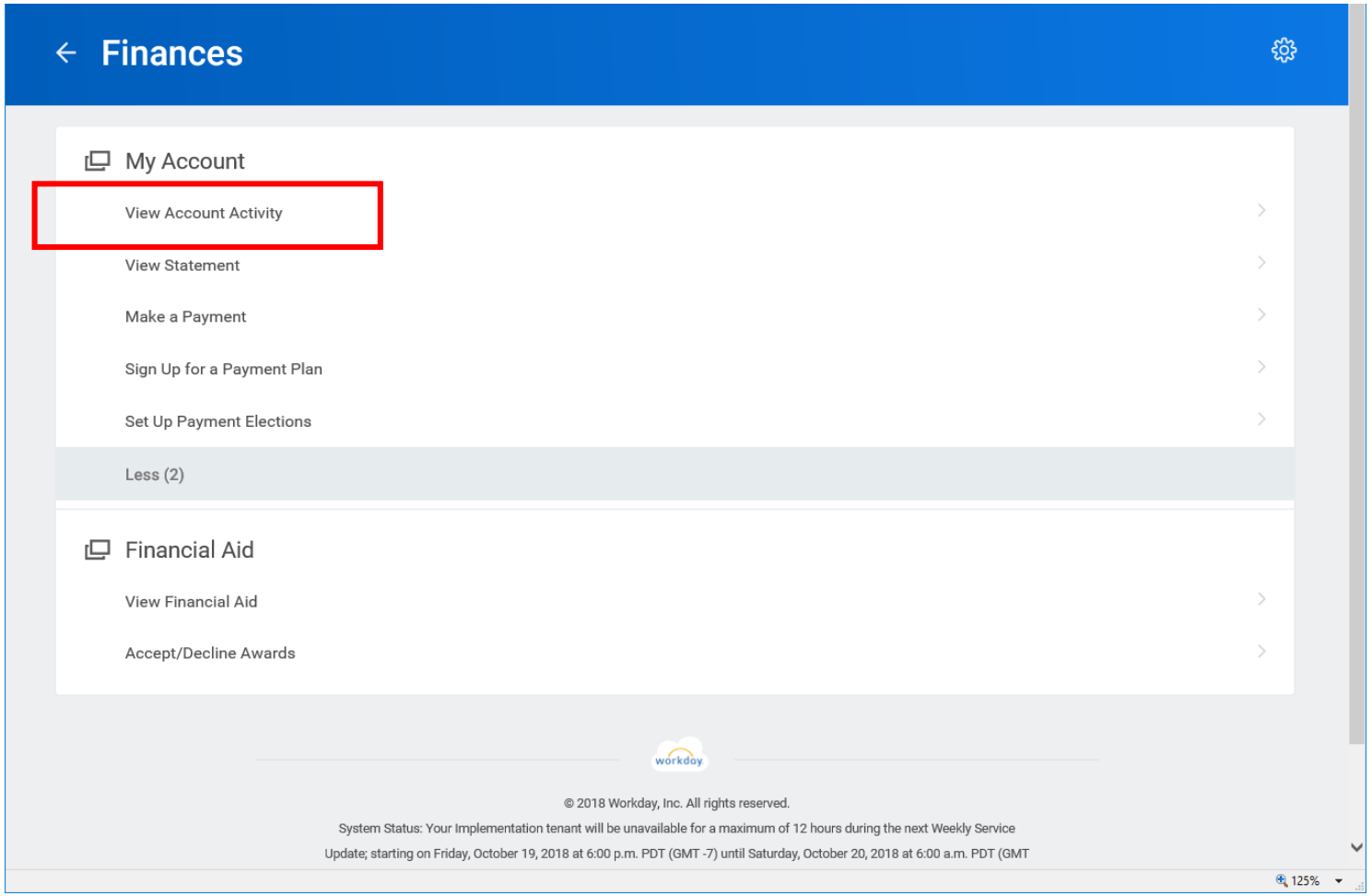


Student Finance Demo

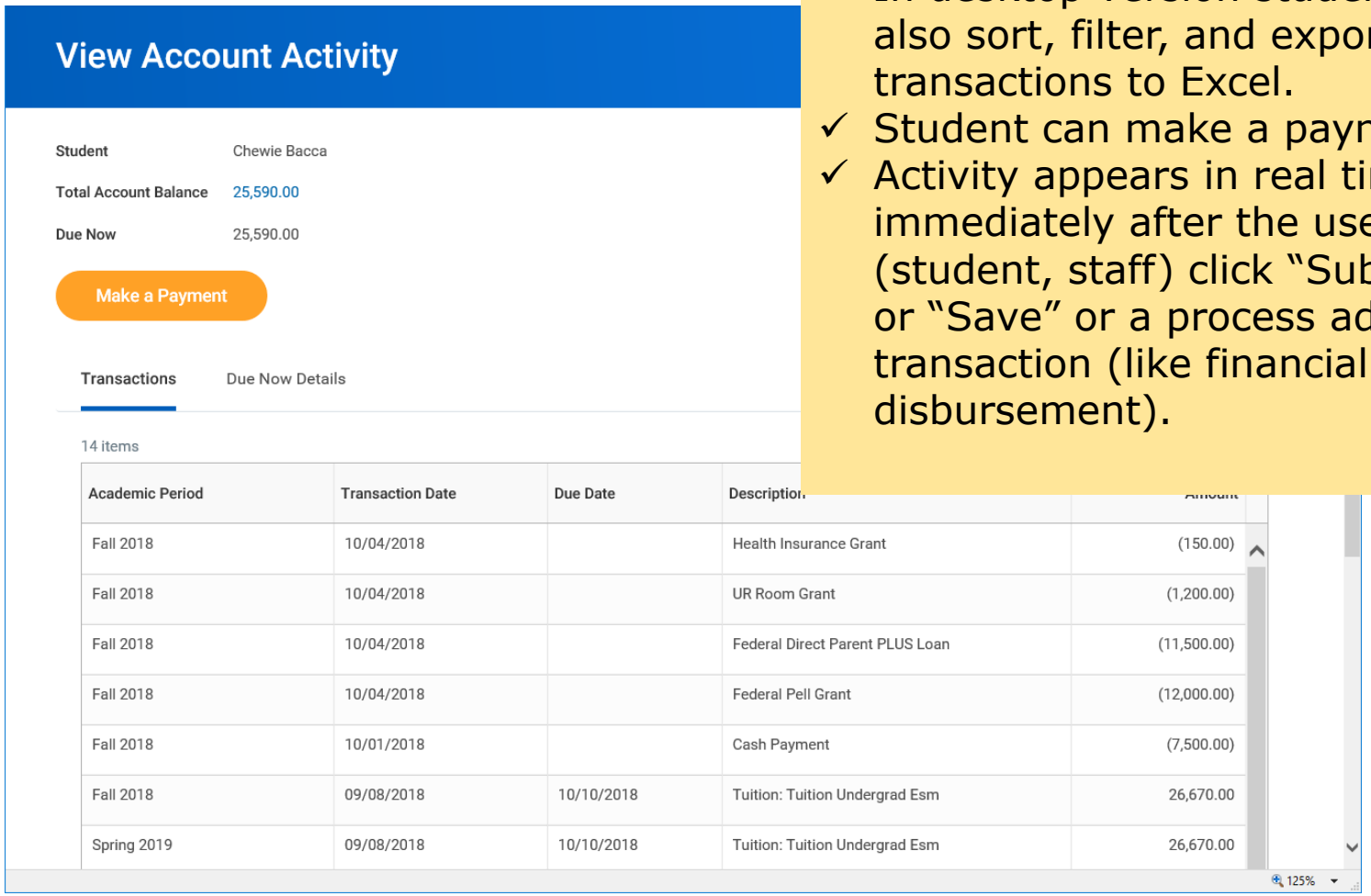
Student Account Information in real time



Student Finance



- ✓ Student can scroll through transactions.
- ✓ In desktop version student can also sort, filter, and export transactions to Excel.
- ✓ Student can make a payment.
- ✓ Activity appears in real time, immediately after the user (student, staff) click "Submit" or "Save" or a process adds a transaction (like financial aid disbursement).



View Account Activity

Student Chewie Bacca

Total Account Balance 25,590.00

Due Now 25,590.00

Make a Payment

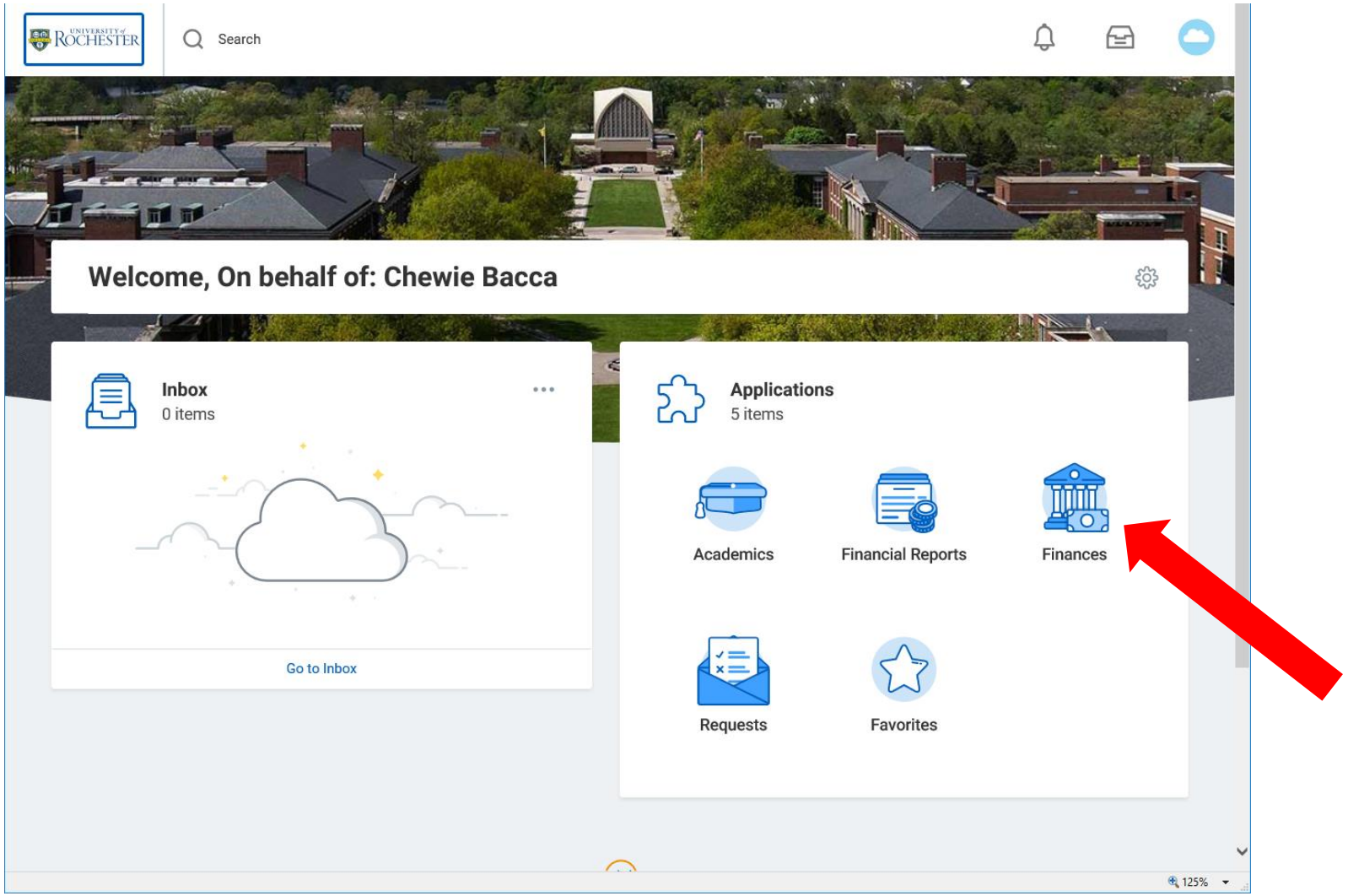
Transactions | Due Now Details

14 items

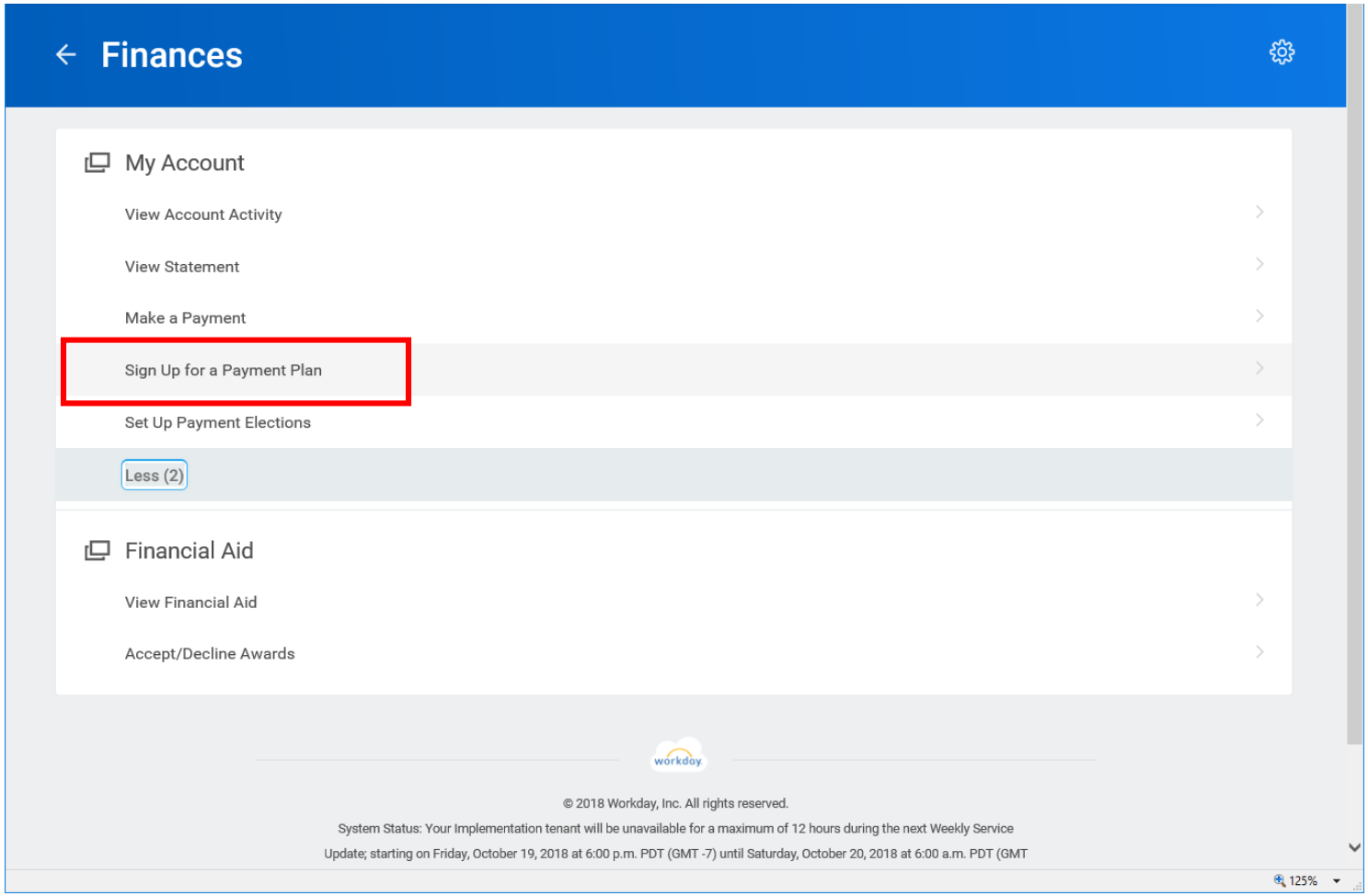
Academic Period	Transaction Date	Due Date	Description	Amount
Fall 2018	10/04/2018		Health Insurance Grant	(150.00)
Fall 2018	10/04/2018		UR Room Grant	(1,200.00)
Fall 2018	10/04/2018		Federal Direct Parent PLUS Loan	(11,500.00)
Fall 2018	10/04/2018		Federal Pell Grant	(12,000.00)
Fall 2018	10/01/2018		Cash Payment	(7,500.00)
Fall 2018	09/08/2018	10/10/2018	Tuition: Tuition Undergrad Esm	26,670.00
Spring 2019	09/08/2018	10/10/2018	Tuition: Tuition Undergrad Esm	26,670.00

125%

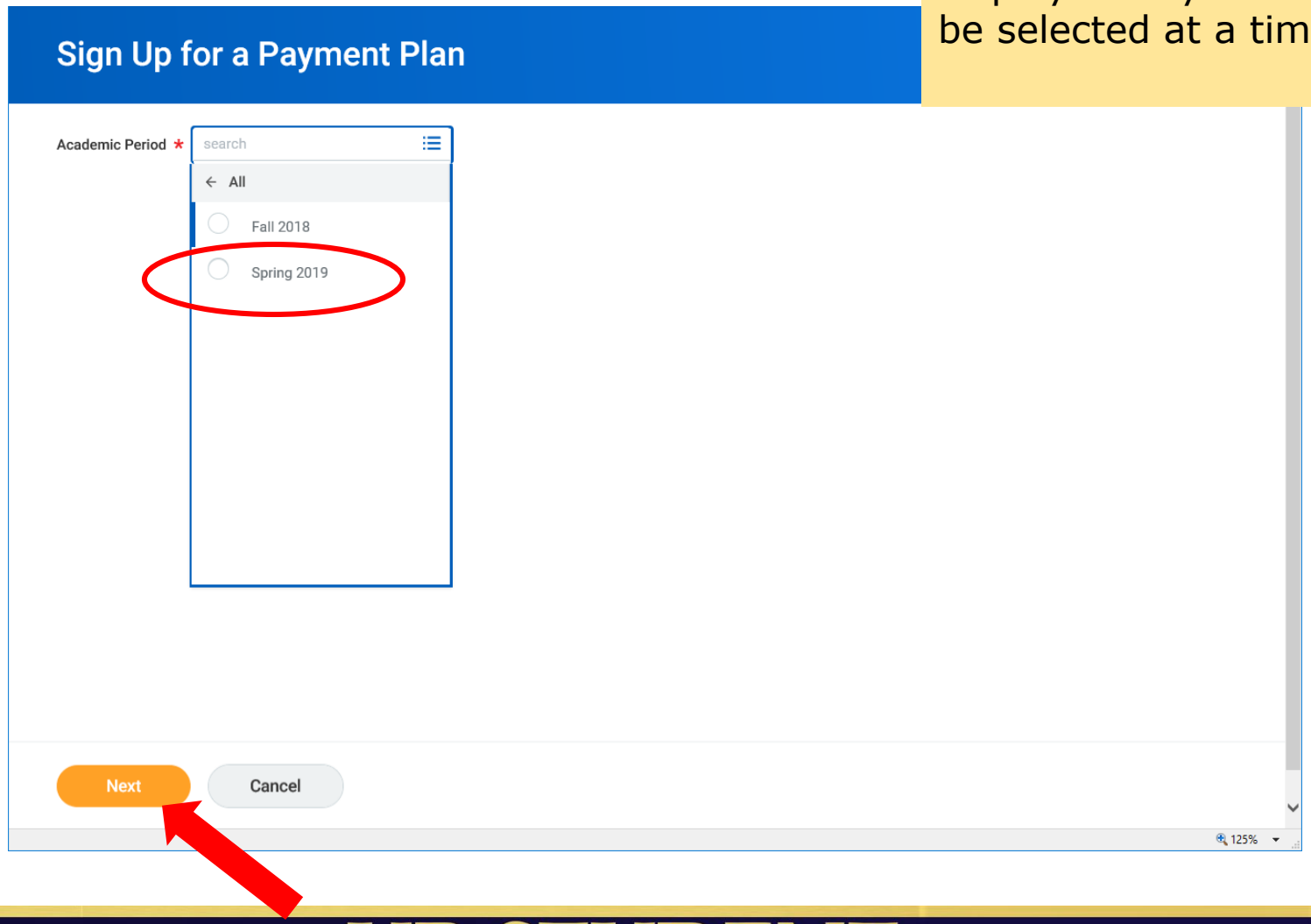
Sign up for a payment plan



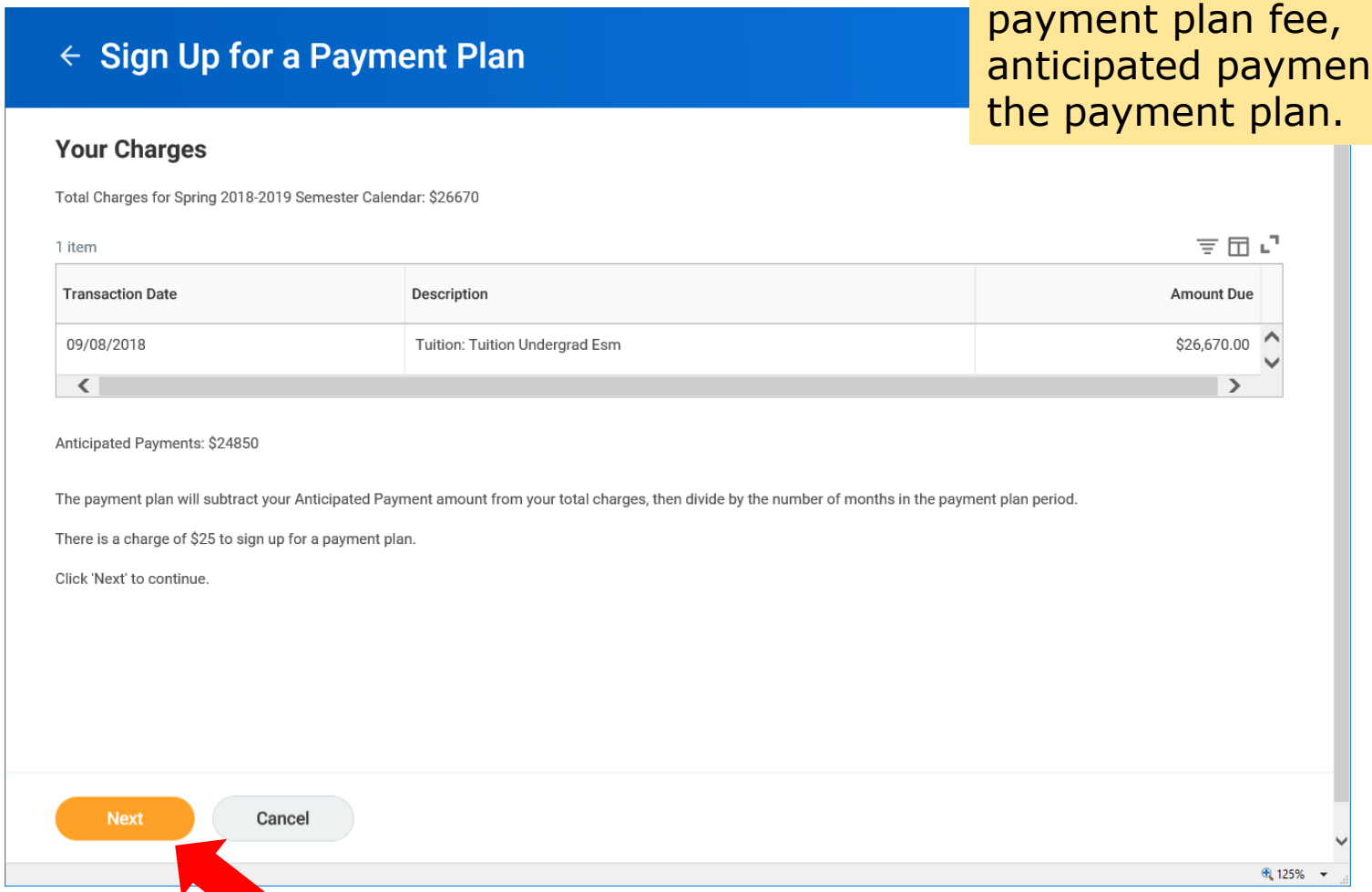
Student Finance

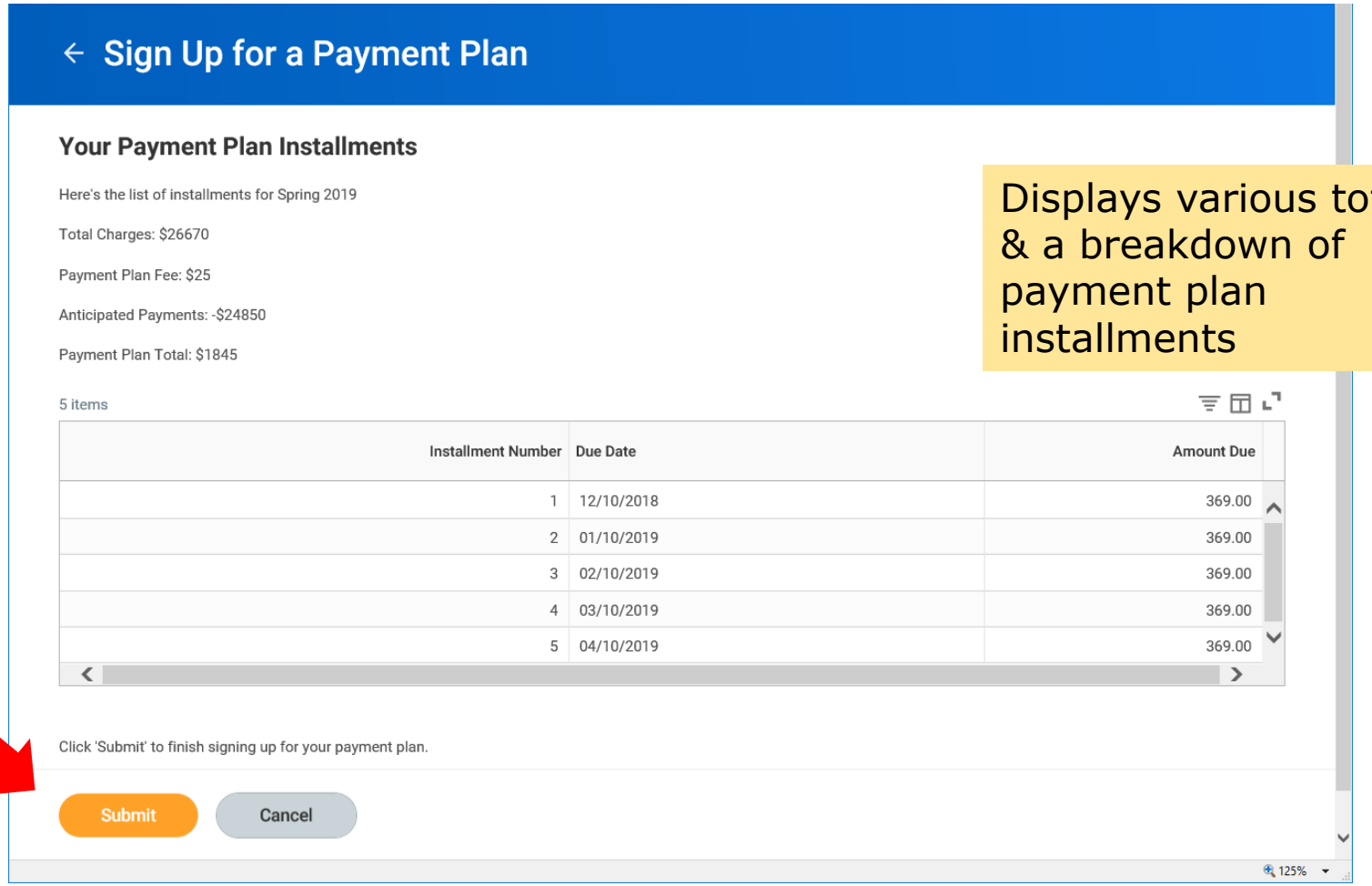


Only terms with charges eligible for payment plans will display & only one may be selected at a time.

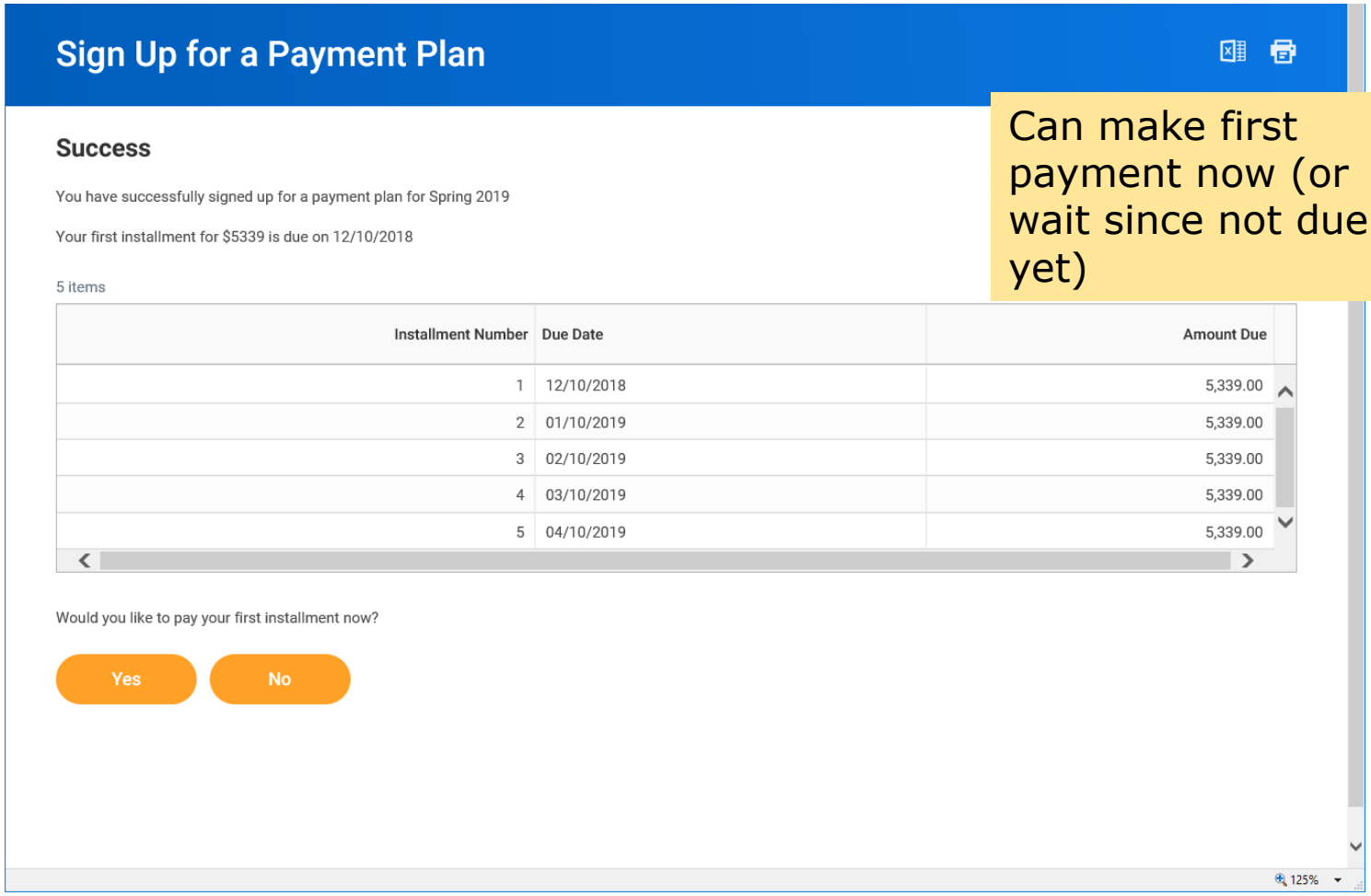


Screen displays the eligible charges, payment plan fee, anticipated payments & the payment plan.





Displays various totals & a breakdown of payment plan installments



Can make first payment now (or wait since not due yet)