Advising Special Interest Group (SIG) - Orientation

UR Student

Agenda

▶   Background
▶   Vision and Guiding Principles
▶   Project Objectives and Values
▶   Program Overview (Team, Scope, Timing and Stakeholders)
▶   Special Interest Groups
▶   Project Communications
▶   Q&A / Next Steps
▶   Terminology
▶   Workday Demonstration

UR STUDENT

Background

Welcome to the Student Information Systems Replacement Project, UR Student!

The new UR Student system is geared to replace the highly complex, legacy Student Information System (SIS) in place for more than 30 years. A modern solution is now available to record the University's student finance, records and registration, admissions and financial aid activities.

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, and have the ability to easily 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 business 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 stakeholders

- We value integrated systems and processes over disparate systems and processes

- We will adapt business and academic practices as necessary to implement an effective solution

SIG Short Term Objectives

- Sean educates the Advising SIG on UR Student project to date (TODAY)

- Determine methods for communication and documentation

- Create an exhaustive cohort inventory

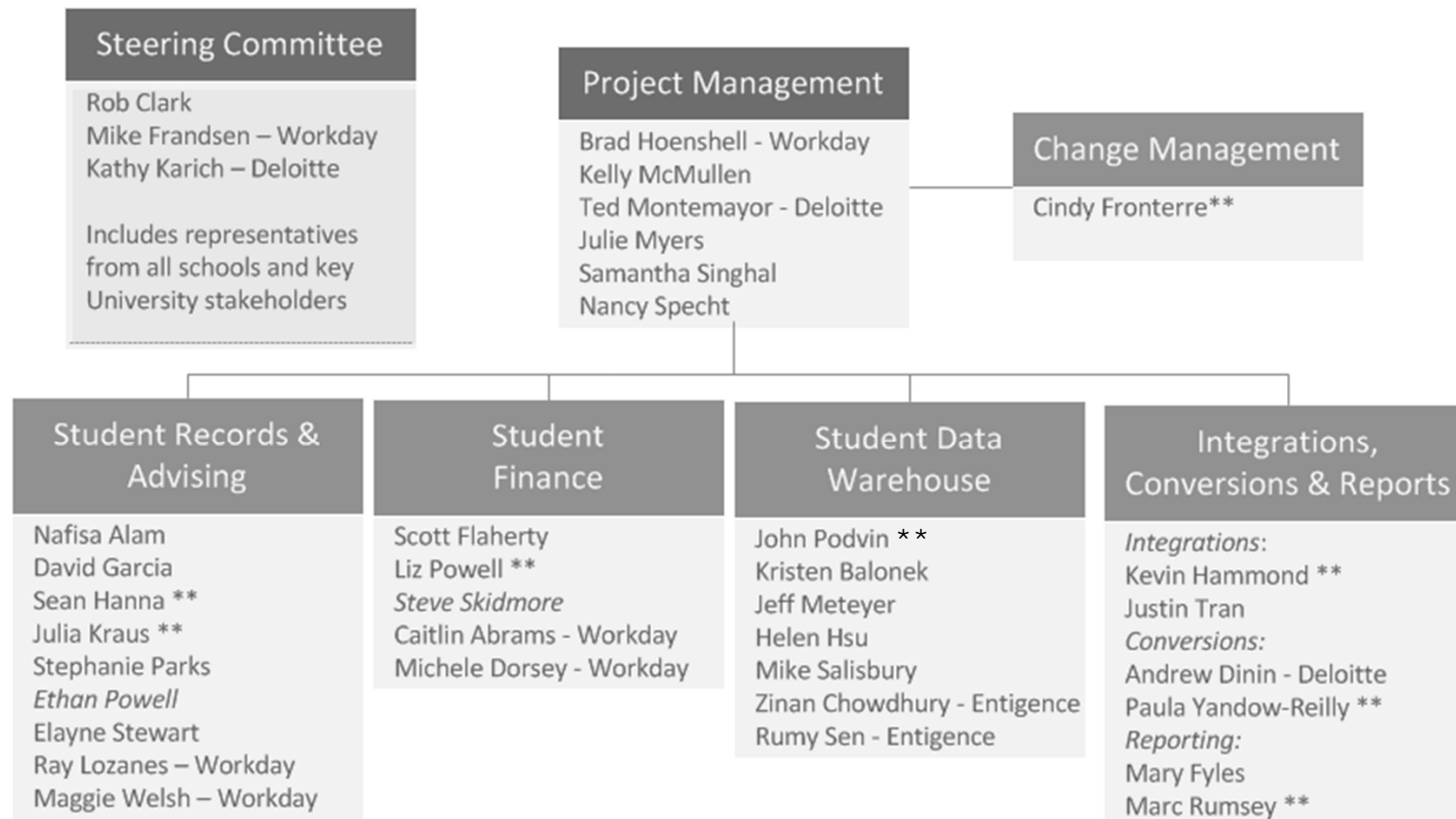- Identify project risks related to advising

Project Values

- Respect for all opinions

- Successful partnering with stakeholders

- Being accountable for our own work

SIG Meeting Principles

- Be on time

- Use specific examples when possible

- Attack problems, not people

- Limit-Sidebar conversations

- Ask questions without interrupting

- Be willing to discuss the "un-discussable" (i.e. things we have always done the way we've done them, etc.)

- Stay on point as best as possible

- Be humble and honor the group

- Represent your area to the best of your abilities

Program Overview – Team

Steering Committee

Rob Clark
Mike Frandsen – Workday
Kathy Karich – Deloitte

Includes representatives
from all schools and key
University stakeholders

Project Management

Brad Hoenshell - Workday
Kelly McMullen
Ted Montemayor - Deloitte
Julie Myers
Samantha Singhal
Nancy Specht

Change Management

Cindy Fronterre**

Student Records & Advising

Nafisa Alam
David Garcia
Sean Hanna **
Julia Kraus **
Stephanie Parks
Ethan Powell
Elayne Stewart
Ray Lozanes – Workday
Maggie Welsh – Workday

Student Finance

Scott Flaherty
Liz Powell **
Steve Skidmore
Caitlin Abrams - Workday
Michele Dorsey - Workday

Student Data Warehouse

John Podvin **
Kristen Balonek
Jeff Meteyer
Helen Hsu
Mike Salisbury
Zinan Chowdhury - Entigence
Rumy Sen - Entigence

Integrations, Conversions & Reports

Integrations:
Kevin Hammond **
Justin Tran
Conversions:
Andrew Dinin - Deloitte
Paula Yandow-Reilly **
Reporting:
Mary Fyles
Marc Rumsey **

Special Interest Groups planned across all functional areas to include key stakeholders from student administration, faculty, and the student body.

** Denotes UR team lead

Program Overview – Phase 1 Scope

Phase 1

- Academic Foundation/Core
- Engagement
- Student Finance
- Student Records and Registration
- Curriculum Management
- Academic Advising
- Data Warehouse for Student Finance, Student Records and Academic Advising

Systems Being Replaced

- The SIS
- CDCS
- Darden (Simon)
- SON Database (SON) – *partial*
- Warner Internet (WAIS) - *partial*
- Web Registration
- Instructor Access
- Advisor Access
- Student Access
- Alumni Access

UR STUDENT

Program Overview – Phase 1 Timeline
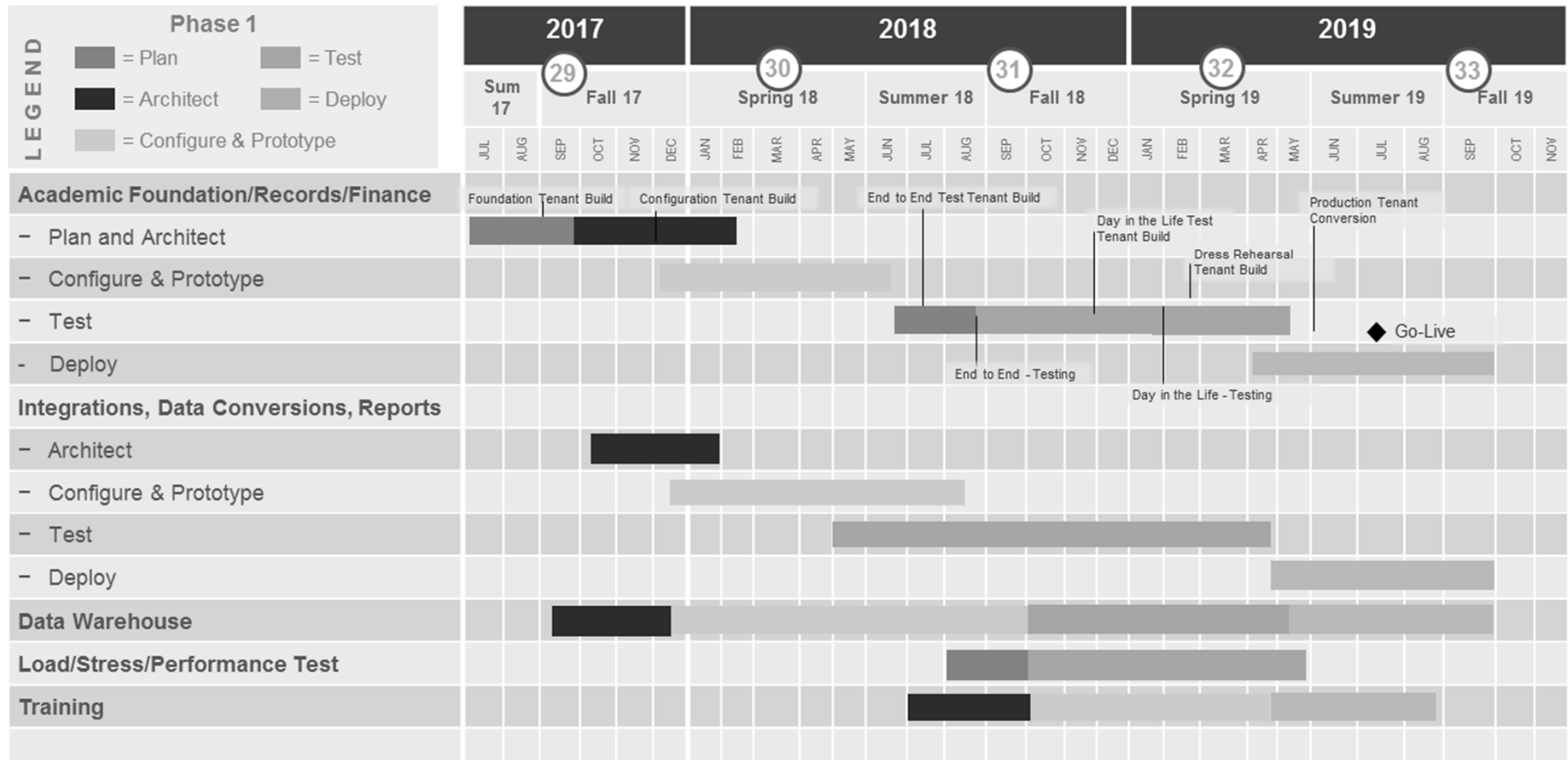
Project Stakeholders

- **Students (and Parents/Guardians)**
  - Achieving closed loop communications would create most conducive atmosphere for student development at any level.
  - Enhanced self-service capability for students (and parents/guardians via proxy access) to

- **Faculty**
  - Interim grading and last date of attendance reporting integrated with course roster
  - Automated waitlist (if desired)
  - Faculty dashboards to assist with pedagogical and administrative decisions

- **Staff**
  - By creating a comprehensive advising team inside UR Student and ability to integrate with other systems advisors will be better informed and spend less time searching for information (and more time advising)
  - Dashboard access to regularly used reports and the ability to interact with report objects (i.e., ability to click on elements of report to explore)

- **Users of Student Information (Reporting and Systems)**
  - Robust security configuration allows the same reports to work for multiple users across schools
  - Continued support after UR Student deployment

Special Interest Groups

- **Records and Registration SIG**
  - Function- To represent your area of the University and inform the UR Student Records and Registration team from the functional user perspective.
  - Roles– Advisors to the Student Records and Registration group
  - Responsibilities– exploration, conversation, communication, solutioning, problem solving, etc.
  - Interdependencies– Advising, Student Finance, Financial Aid, Admissions

- **Advising SIG**
  - Function – To represent your area of the University and inform the UR Student Advising team from a functional perspective.
  - Roles – Advisors to the UR Student team members who are working on the advising configuration
  - Responsibilities - exploration, conversation, communication, solutioning, problem solving, etc.
  - Interdependencies – Student Records, Institutional Research, Student Finance, Financial Aid, Admissions, Information Technology

UR STUDENT

Special Interest Groups

- **Student Finance**
  - Function- To represent your area of the University and inform the UR Student Finance team from the functional user perspective.
  - Roles– Advisors to the Student Finance group
  - Responsibilities– exploration, conversation, communication, solutioning, problem solving, etc.
  - Interdependencies– UR Financials, Financial Aid, Graduate Studies

- **Institutional Research & IT, Reporting SIG**
  - Function – To represent your area of the University and inform the UR Student Institutional Research team from a functional perspective.
  - Roles – Advisors to the UR Student team members who are working on the datawarehouse rebuild and Institutional Research
  - Responsibilities - exploration, conversation, communication, solutioning, problem solving, etc.
  - Interdependencies – Student Records, Advising, Student Finance, Financial Aid, Admissions, Information Technology

Terminology

- Academic Units = Schools/Colleges/Departments
- Academic Periods = Term/Semester/Quarter
  - Dynamic Dates
- Academic Level = Division 1, 2 or 3 in SIS (UG, Grad, Med)
  - Many more levels in UR Student to assist with administration of programs
- Programs of Study = certificates, programs, majors, minors, clusters…
- Enrollment = Registration
- Eligibility Rules = System based guardrails to enforce policies
- Dashboard = Collection of reports tailored to the user or role
  - Widget
- Cohorts… We will discuss these in more detail

What's a cohort?

- IPEDS Cohort
  - Fixed admissions cohort that is defined after census and used for external reporting and retention/graduation rate analysis

- Workday Cohort
  - To connect advisers to advisees
  - To capture special populations for tracking and communications
  - To create a student category for which there is no field in UR Student (at least not yet)

Later on in the meeting I will show you a demonstration for UR Student and we will spend some time looking at and discussing cohorts... Stay tuned!

UR STUDENT

Project Team Directory

- See project directory for
  - Contact information for members

http://www.rochester.edu/urstudent/team-staff/

Project Milestones

- Demo Days – March 2018
- End to End Testing – August 2018
- Day in the Life Testing – February 2019
- Go-Live! – July 2019

Other Important Deadlines

It's all about cohorts (for now)…

- **February 9, 2018** – Advising SIG members submit initial student cohort list to Sean, along with a list of all advisors
- **March 1, 2018** – Sean has initial cohort inventory configured to share with Advising SIG

Expectations: Communication

Internal
- Provide regular updates on your progress to those who are effected
- Provide immediate alerts to changes in business requirements

External
- Be an advocate for the project
- Promote events
- Use the website
  - Contact Us for questions/feedback
  - Subscribe for project updates (and encourage your colleagues to do the same
- Answer questions you know and provide feedback
  - forward ones you do not for response (1-2 day turnaround)
  - http://www.rochester.edu/urstudent/contact-us/
- Participate in UR Student training and support activities

Expectations: Collaboration

- Provide other teams with inputs in a timely fashion
- Identify and explain necessary requirements on current business processes
- Suggest process improvements where applicable
- Provide input to the benefit of the design as a whole
- Participate in testing activities providing status and feedback
- **Identify risks** as soon as possible
- Remember think globally and full transparency

Project Interaction Tools

- **Primary Tools:**
  - Zoom – http://tech.rochester.edu/tutorials/zoom-client
  - UR Student Website
  - Email (Advising SIG Listserv - URSTUDENTADVISING-SIG@lists.rochetser.edu)

- **Other Options:**
  - MS Teams
  - Box
  - Sharepoint
  - Jira
  - Google Docs
  - Others?

(I am leaning toward relying on the website and email for communications, and the website and Box for documentation, but I am open to suggestions!)

Next Steps

- Sean educates the Advising SIG on UR Student project to date (TODAY)

- Advising SIG members determine desired advising relationships and special populations and share with Sean Hanna (HOMEWORK)

- Advising SIG members provide feedback on the views and discussions from first SIG meeting (HOMEWORK)

- Sean Hanna will develop a cohort inventory (SEAN's LIFE)

SIG Decision Areas

- Cohorts (more on this in a moment)
- Eligibility rules
- Notifications
- Business processes for change in status
- Transfer credit articulation
- Academic standing / Student Success
- Dashboards and scorecards

Demonstration

- UR Student Tenant
- Student Profile Walk Through
- Dashboard sample
- Adviser Roles
- Cohorts (possible cohort types below)
  - Advisers
  - Admissions Tags (legacy, employee, scholarship, etc.)
  - Special Populations
  - Instrument/Instrument Group
  - Admissions Cohorts
  - Research Lab
  - Work/Study Team
  - Academic Standing / Student Success
  - Program of Study subgroups (tracks, advising groups, thesis cohort)
  - IPEDS cohort
  - Class Year

Q&A

- What didn't this orientation cover about the project?
- What advantage can you bring from your previous experiences?

Appreciation / Thank You!

- Pens

- A better system – This is what we are all working for! A better system will serve each of us, as well as our stakeholders, by providing a SIS that improved the educational and developmental environment.