# UR STUDENT

## UR Student Demo Days
*July 2018 - **Engagements***

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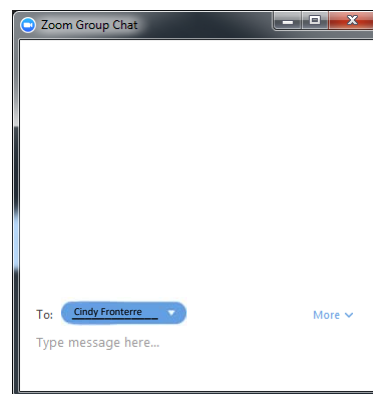
## Chatting for Zoom Participants

For those joining the Zoom:

- 1) Please access the **Chat** feature at the bottom of your screen

- 2) Please chat directly with Cindy Fronterre (She will then pose questions on your behalf)

- 3) Select Cindy Fronterre in the drop down menu in the chat window (do not select "everyone")

Zoom Group Chat

To: Cindy Fronterre          More ∨

Type message here...

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# Agenda

| | |
|---|---|
| ▶ | Campus Engagement Components |
| ▶ | Engagement Tasks |
| ▶ | Student Emails |
| ▶ | UR Student Engagements Demonstration |
| ▶ | UR Student Email Tasks, Tags and Printed Items |
| ▶ | Engagement Business Processes |
| ▶ | Engagement Design Discussion |
| ▶ | Q&A |
| ▶ | Wrap up |

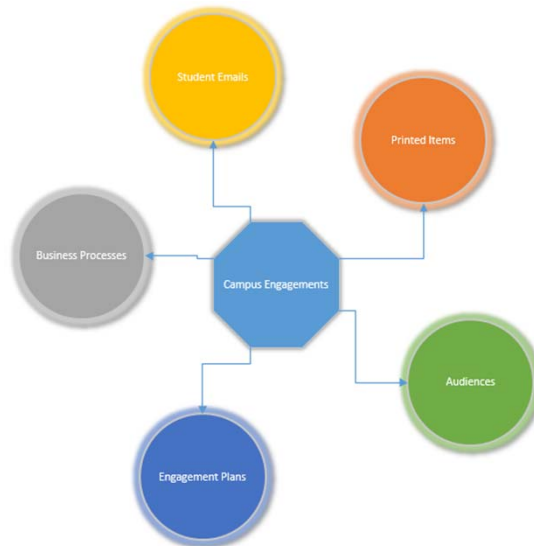July 16, 2018                    **UR STUDENT**                    3

# Campus Engagement Components

- Student Emails
- Student Printed Items
- Student Audience
- Engagement Plans
- Business Processes



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## Engagement Tasks

- **Create Student Email Task**
  - Use Student Recruiting so that we can show all the merge fields
  - Can talk about Printed Items as another option
- **Create Faceted Search and Save**
  - Will have already created from Find Students Report
- **Create Student Audience**
  - Use saved search
- **Create Student Engagement Plan**
  - Will need to use a Recruiting Plan
  - Pull in a few templates
  - Will need to create these (possibly three)
  - Timing of the engagements
  - Audience will show the number of students in the plan
- **Explain Business Process Aspect of these tasks**
  - Toggle back to slide show to show BP grid

## Student Emails

- Student Emails are email items the institution creates and sends to prospects and students.



- Based on Category (Student Recruiting, Admissions, Student Records, etc.)
- Based on Usage (Plans and Ad Hoc, Recruiting Events, Holds, etc.)
- Can incorporate merge fields (First Name, Last Name, Event Name, etc.)
- Can be secured to Academic Units and optionally Academic Levels

## Demonstration

- Administrators perspective
- Behind the scenes
- Student perspective

- https://wd5-impl.workday.com/wday/authgwy/rochester1/login.htmld

- https://wd5-impl.workday.com/wday/authgwy/rochester4/login.htmld

## Create Student Email task

**Create Student Email**

| Name | * | Welcome - AMU Undergraduate |
| Description | | Normal ∨ B I U A ∨ ☰ ✎ |
| | | Welcome AMU Undergraduate prospective students. |
| Category | * | × Student Recruiting |
| Use For | * | × Plans and Ad Hoc |
| Academic Unit | * | × Alma Mater University |
| Academic Level | | |
| Email Format | * | × Rich Text |

OK    Cancel

## Student Email Content & Merge Field Tags

## Student Email View

# Create Student Printed Item task

Printed Items can be physically printed out as a PDF and mailed to the recipients in an engagement plan.

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# Student Printed Item Example

Images / logos

Personalized information

Formatted text

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## Create Student Audience task

- Student Audiences allow users to target engagement communications to a specific population. Student Audiences are created using custom reports.
  - UR Student makes these report types available for creating your audience:
    - Simple
    - Search
    - Advanced

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## Engagement Plans

- Engagement Plans coordinate communications to be sent to groups of individuals, like prospective students, applicants, current students, etc.
- Communications, like Student Emails, are scheduled to be sent to the Student Audience specified.

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## Create/View Student Engagement Plan task
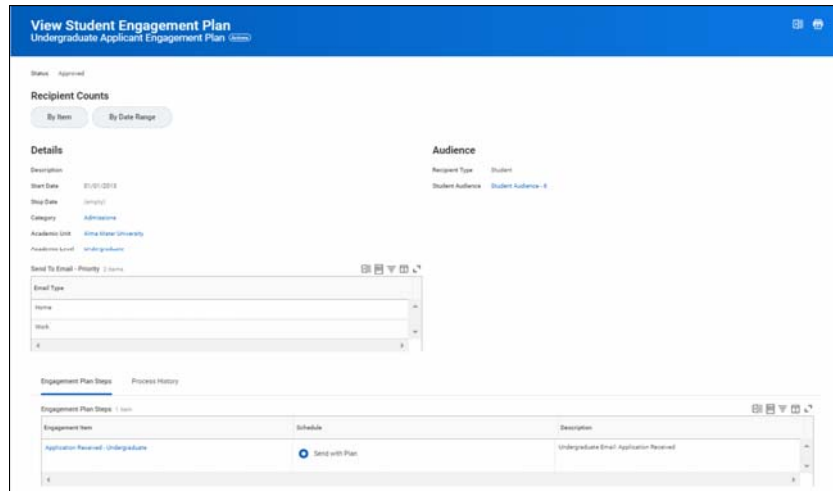


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## Engagement Plan Schedule



Engagement plan items that are scheduled as **Send with Plan** as soon as students qualify
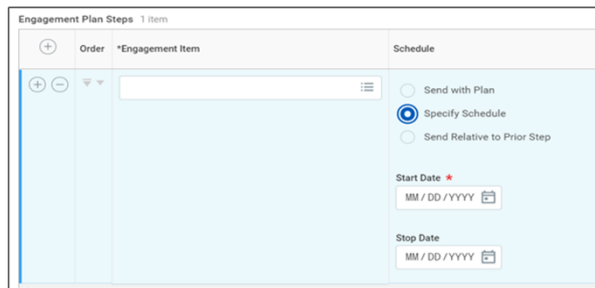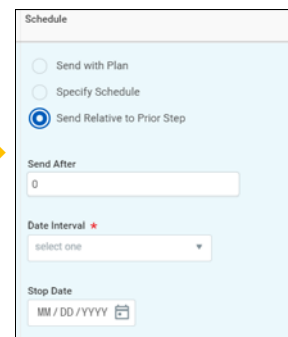
Use the **Schedule Engagement Run** task, secured to the *Manage: Sending Campus Engagement* domain, to schedule the time to run the daily delivery process

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## Campus Engagement Business Processes

| | |
|---|---|
| *Engagement Email Event* | Controls approval routing and notifications for new and updated engagement emails. |
| *Engagement Plan Event* | Controls approval routing and notifications for new and updated engagement plans. The default business process includes a step for launching the *Campus Engagement Service* upon approval of an engagement plan. This job immediately sends emails scheduled as Send with Plan to existing prospects who meet the recipient criteria instead of waiting for the scheduled delivery process to run. |
| *Engagement Recipient Threshold Event* | Notifies the designated approver when an email distribution exceeds the recipient threshold. |
| *Printed Engagement Item Assignment Event* | Creates an Inbox action item for the mail coordinator with the list of recipients eligible to receive a printed engagement item. |
| *Printed Engagement Item Event* | Controls approval routing for new and updated printed engagement items. |

## Initial Design Discussion Questions

**•Student Emails**
•Do you send targeted communications?
•How do you currently communicate with students?

**•Student Printed Items**
•What different communications are physically mailed?
•Who coordinates the mailing of these materials?

**•Student Audience**
•What reusable population should be targeted through an engagement plan?
•What is your typical audience size- 500 emails, 1000, etc..?

**•Engagement Plans**
•How do you currently schedule your engagements?

## Next Steps

- 5 minute pulse check to be sent to all July Demo Days registrants
- No Demo Days for August
- Next Demo Days September 18/19, 2018
  - **Agenda:**
    Registration Process in UR Student AND Undergraduate Major Declaration Process within UR Student
  - **Recommended Attendance:**
    Faculty and Staff – Registration Process
    Undergraduate Advisors, Student Records, Registrars, Undergraduate Dept. Coordinators, Undergraduate AS&E Faculty – Declaration Process
  - Details to come in UR Student News

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## Questions?

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## Appendix

**Includes:**
UR Student Terminology
Program Overview Timeline
Special Interest Groups (SIG)
UR Student Communications and website
System Interface Guide

# UR Student Terminology

- **Academic Level Refers to Division.**
  - This includes division 1, 2 or 3 in SIS (UG, Grad, Med). There are many more levels in UR Student to assist with administration of programs
- **Academic Periods**
  - Refers to Term/Semester/Quarter. These are dynamic dates
- **Academic Units**
  - Refers to Schools/Colleges/Departments
- **Business Processes**
  - A set of tasks that people initiate, act upon, and complete in order to accomplish a desired business objective. When a business process is initiated, UR Student routes the tasks to the responsible roles (users who are capable of completing the tasks based on their membership in security groups) and enforces security and business rules throughout the business process.
- **Campus Engagement (Slide campus Engagement Business Processes)**
  - The ability to configure UR Student to manage and track interactions with students and prospective students. Today it includes Emails and Printed items. This will evolve over time to include other forms of communications.
- **Cohorts**
  - Cohorts are valuable when the purpose is to INTERACT with and/or TRANSACT on groups of students (otherwise a custom report may be a good choice). They are based on the Academic Record and recorded by academic period
    - Multi-Lifecycle Students will have multiple academic records in UR Student (this allows us to calculate different GPA's for undergraduate v. graduate academic career at UR)
- **Credential**
  - Degree

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# UR Student Terminology

- **Dashboard**
  - A collection of reports tailored to the user or role
- **Eligibility Rules**
  - System based guardrails to enforce policies
- **Engagement Plans**
  - In UR Student we configure an engagement plan for sending coordinated communications to students and prospective students, their parents, guardians, or other proxies. A plan is specific to an academic unit and identifies the:
    - Plan start and end dates
    - Student emails or student printed items to send
    - Recipients
    - Mailing schedule for engagement items
- **Enrollment**
  - Registration
- **Faceted Search**
  - A search where the end user has the ability to identify particular criteria for a population .
- **Merge Fields**
  - Combining select student related felids (First Name, Last Name, Event Name, etc.) to create personalized email communications within UR Student.
- **Onboarding**
  - A targeted communications for new and returning students to ensure that tasks and other necessary documentation is completed (FERPA, Financial Responsibility Agreement, etc.)

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# UR Student Terminology

- **Programs of Study**
  - Includes Certificates, Majors, Minors, Cluster
- **Student Audience**
  - The segment or population to whom you want to send engagements
- **Tags**
  - Selected markers or labels that can be attached to certain student data objects within UR Student to aid in business processes, searching and reporting
- **Tenant**
  - An instance or system environment of UR Student (Workday) where project design and testing work is done. There are several tenants the project team uses for Conversions, Configuration, Integrations. etc.. This will combine into a production build for go live.

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# UR Student Interface Terminology

- **Home (University of Rochester Logo)**
  - Will always navigate you back to the landing page
- **Inbox (Envelope)**
  - Contains all activity that is required of you
- **Notifications (Bell)**
  - Displays notifications regarding business processes and rule-based alerts
- **Profile Page (Cloud or Your Photo)**
  - Opens all sections available from the Home page. You can configure your personal setting here as well.
- **Ellipses (Twinkie, Related Action)**
  - Displays the related actions menu for an object (available only if the user has permission to perform additional actions on that object)
- **Search Bar (Magnifying Glass)**
  - Can type three letters of a given word (or the whole word) to receive a response from the system
- **Applications (Picture Icons in the middle of the page)**
  - UR Student calls these widgets and they can take you to functional areas, reports, or dashboards
- **Categories (within the search function)**
  - Are the different areas within UR Student such as Banking, Payroll, People, Reporting, Student, etc.
- **Student Profile**
  - Includes the student's personal information, registration, billing, financial aid, contact information, etc. in one convenient place
- **Functional Areas**
  - Tabs on the student profile for Academics, Student Financials, Financial Aid, etc.
- **Workday App (for Mobile)**
  - Can be downloaded from the App Store to use on a Droid, iPhone, or iPad

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# Prepare for UR Student Changes

The UR Student implementation will affect all Faculty, Students and related Staff

- Project Website (http://www.rochester.edu/urstudent/)
  - News – Stay in the know on project announcements and system demonstrations, Subscribe for updates
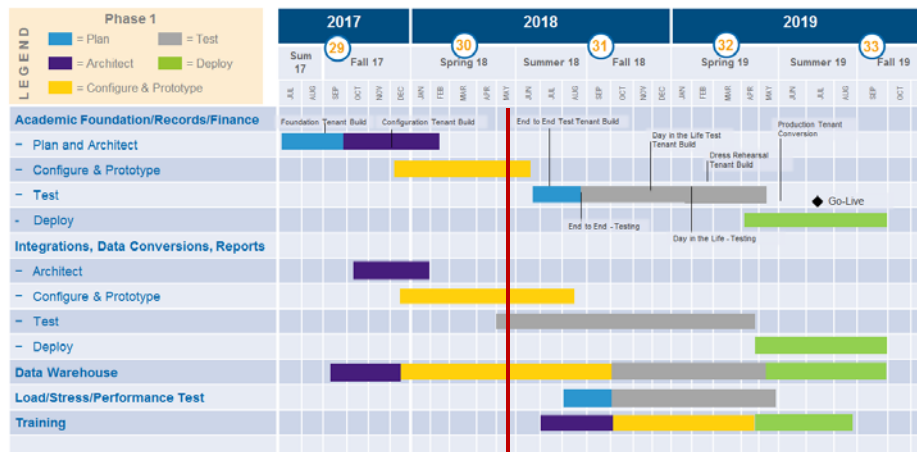  - Subscribe to receive up to the minute news
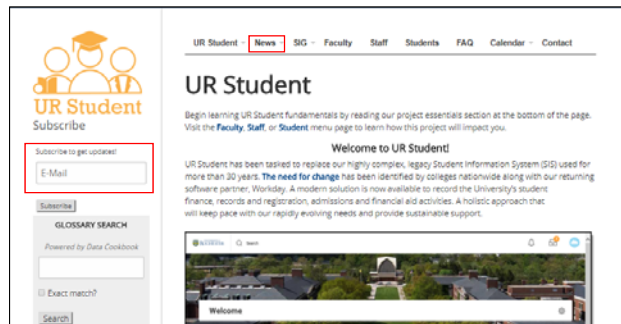


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# Program Overview – Phase 1 Timeline



We are here

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## University Involvement

The project team includes membership from all schools with our Special Interest Groups (SIGs). Participation of SIG members is integral to the success of the program; membership is intended to be part-time.

SIG Members Contributions to include:
- Input into common business practices
- Input into system configuration
- Business requirements' definition
- Identification of necessary data for conversion
- Validation of converted data
- Creation of test cases
- Execution of user testing
- Serving as a project champion

Advising SIG

Faculty SIG

Student Records & Registration SIG

Student Finance SIG

Institutional Research & Reporting SIG

Information Technology SIG

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# UR Student System

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# UR Student - Landing Page

Home Icon

Search Bar

Notifications

Inbox

Profile

Search

Greeting

Welcome, *(Your Name Here)*

Inbox

**Inbox**
4 items

Publish Admissions Cohort Event:
6 hour(s) ago

Publish Admissions Cohort Event:
6 hour(s) ago

Business Process Definition Error for Student Application Fast Path Event
7 hour(s) ago

Go to Inbox

**Applications**
16 items

Department Information

Records & Advising

Financial Aid

Curriculum & Enrollment

Worklet

Student Finance

Financial Reports

Financials

Reporting and

Application Card with Worklets

Image Role: Project Team Member (high access/security)

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# UR Student - Student Profile

Navigation for a student record

Dashboard Cards

julia smith

Julia Smith

Student | University of Rochester

Actions

Email

Summary

Personal

Contact

Academics

Student Financials

More (5)

**Academic Progress**

40%

Mechanical Engineering B.S.
Undergraduate Major
2 Satisfied
of 5 Requirements

**Current Classes**

> Enrolled Sections - Fall 2018

**Student Information**

Student ID    STU001110

Academic Level    Undergraduate

Class Standing    Second Year

Academic Unit    Hajim School of Engineering & Applied Sciences

Program of Study    Mechanical Engineering B.S. Undergraduate Major

Image Role: Project Team Member (high access/security)

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## UR Student - Mobile Student View

Profile or Search Icon
(iPhone/Android)

Personalized Cards

Navigation bar;
Home|Inbox|Notifications|Apps
(*bubbles indicate new items*)

Image Role: Student *(student security)*

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