

UR STUDENT SYSTEM

Community Forum

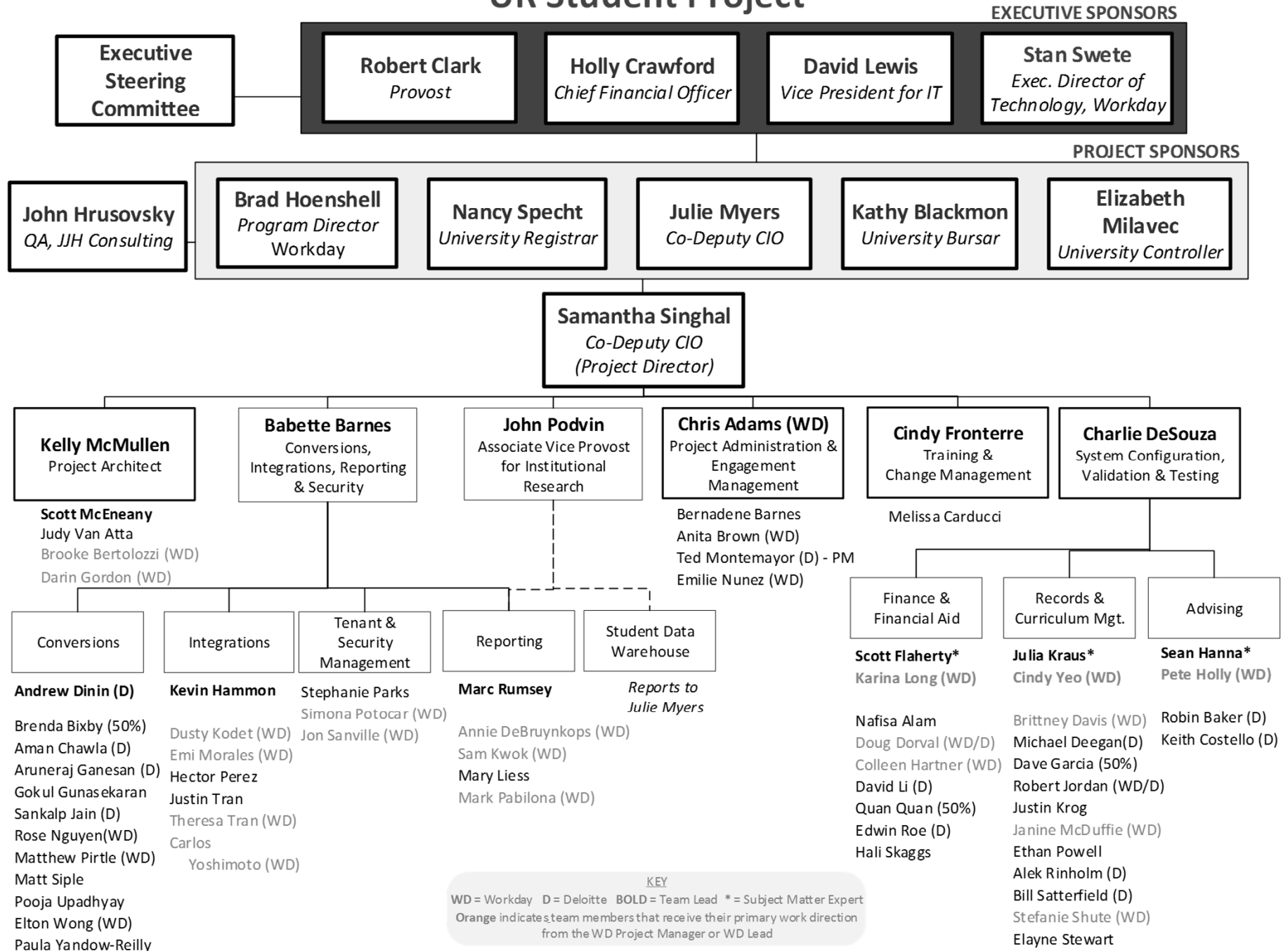
November 6, 2018



Agenda

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

UR Student Project



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

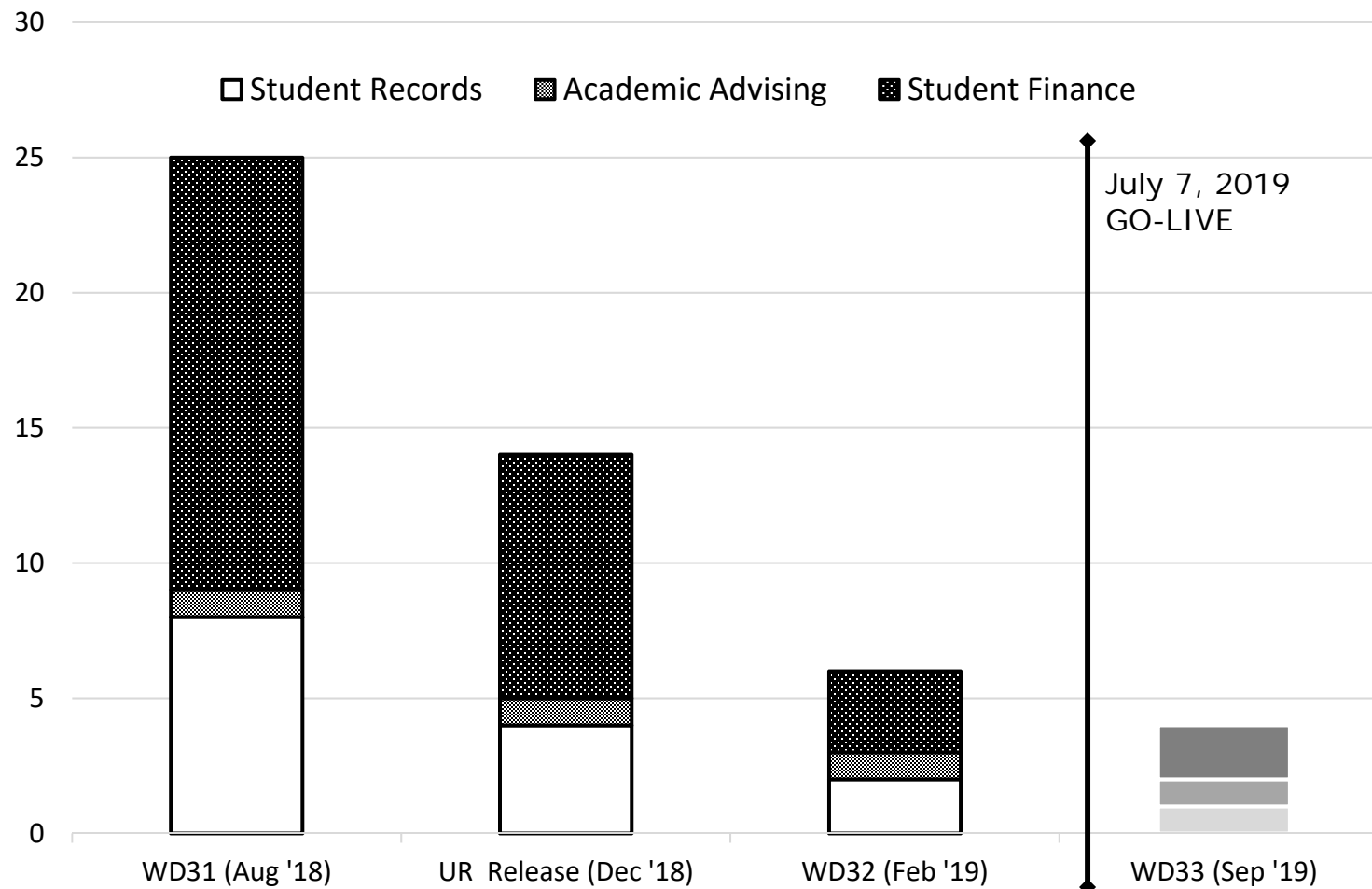
Reporting

- **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

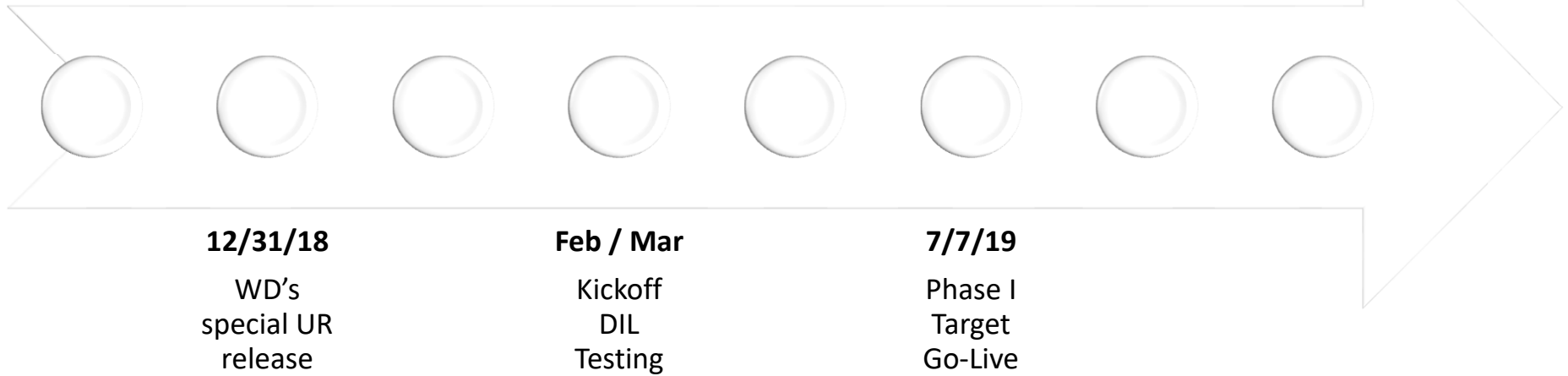
Kickoff
E2E
Testing

2/4/19

WD32
Preview

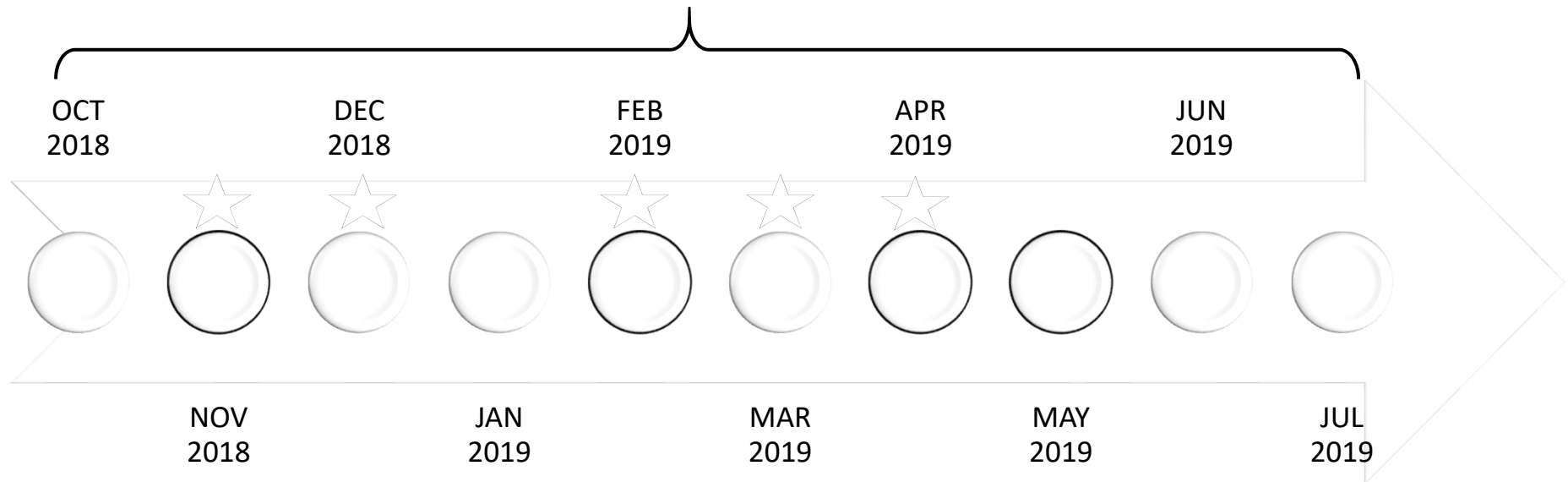
May '19
Go/No-go
Decision

9/7/19
WD33



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



UR STUDENT

Questions & Answers



UNIVERSITY *of* ROCHESTER



UR Student



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

UNIVERSITY of ROCHESTER

abby Anderson

Abby Anderson
Student | University of Rochester

Student Information
Student Status: Active

Student
Abby Anderson

Student Abby Anderson

Programs of Study: Mechanical Engineering BS Undergraduate Major

Applications: 1 item

Student Application	Academic Unit	Program of Study	Anticipated Start
	University of Rochester	Mechanical Engineering BS Undergraduate Major	Fall 2018

Requirements: 1 item

	Academic Level	Academic Unit	Anticipated Start
<ul style="list-style-type: none">Add to CohortRemove from CohortView Student Cohort History for StudentView Support Network for Student	Undergraduate	University of Rochester	Fall 2018

Actions

- Academic Faculty
- Academic Plan
- Academic Record
- Action Items
- Admissions
- Advising
- Business Process
- Cohorts
- Duplicate Records
- Engagement
- Financial Aid
- Friends and Family
- Hold
- Note
- Personal Data
- Residency

Academic Advising



Q abby Anderson

Add Student To Cohort



Student * ⋮

Student Cohort * ⋮

Academic Advising

View Student Cohort History for Student Actions

Student Abby Anderson

5 items   

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

Academic Advising

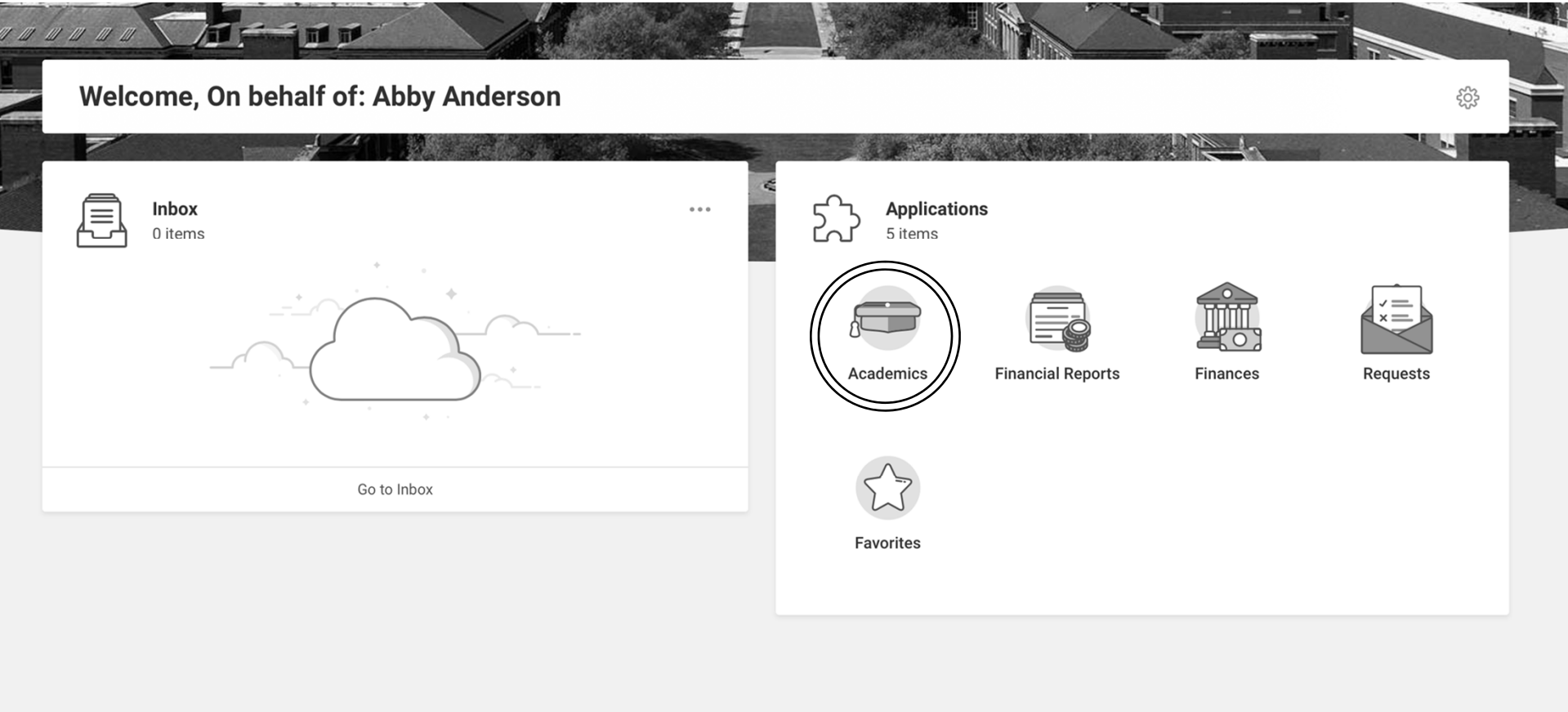
View Support Network for Student

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

View My Academic Plan



Update Plan

Accounted for Academic Requirements 3 Unaccounted for Academic Requirements 11

Academic Plan Last Approved 10/30/2018

Plans Submitted for Approval 1

View Saved Schedules

Request Plan Approval

Create Schedule

2018-2019 Semester Calendar

15 items



Academic Period	Requirement	Course	Units	Status
Fall 2018	Mechanical Engineering B.S. Mathematics Courses		0	
		CHEM 131 - Chm Concepts, Syst, Pract I	0	Eligible to Enroll
	Mechanical Engineering B.S. Technical Elective Course		0	
	Primary Writing Requirement		0	
Spring 2019	Mechanical Engineering B.S. Mathematics Courses		0	

Request Plan Approval

Request Plan Approval for:

- Select Entire Academic Plan
- Select Specific Academic Periods

Academic Periods *

× Fall 2018 ☰

search


Fall 2018

Academic Advising

Request Plan Approval

4 items ☰ ☐

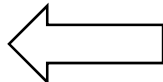
Academic Period	Requirement	Course	Units	Status
Fall 2018	Mechanical Engineering B.S. Mathematics Courses		0	
		CHEM 131 - Chm Concepts, Syst, Pract I	0	Not Eligible
	Mechanical Engineering B.S. Technical Elective Course		0	
	Primary Writing Requirement		0	

 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 Concepts, Syst, Pract I	0	Eligible to Enroll
	Mechanical Engineering B.S. Mathematics Courses		0	
	Primary Writing Requirement		0	

Academic Advising

The screenshot shows the Rocky Advisor dashboard. At the top left is the University of Rochester logo and a search bar. At the top right are notification and help icons. The main header reads "Welcome, Rocky Advisor" with a settings gear icon. Below this, there are two main sections. The left section, titled "Inbox" (1 item), contains a notification for an "Academic Plan Event: Abby Anderson - Hajim School of Engineering and Applied Sciences/Under..." with a "Go to Inbox" link. The right section, titled "Applications" (4 items), contains four icons for "Financial Reports", "Reporting and Analytics", "Requests", and "Favorites". A hand-drawn oval highlights the "Inbox" section.

UNIVERSITY OF ROCHESTER

Search

Welcome, Rocky Advisor

Inbox
1 item

Academic Plan Event: Abby Anderson - Hajim School of Engineering and Applied Sciences/Under...
2 minute(s) ago - Due 11/03/2018

Go to Inbox

Applications
4 items

Financial Reports

Reporting and Analytics

Requests

Favorites

Academic Advising

Inbox

Actions (1) Archive

Viewing: All Sort By: Newest

Academic Plan Event: Abby Anderson - Hajim School of Engineering and Applied Sciences/Undergraduate (BS) - 08/29/2018 - Active
4 minute(s) ago - Due 11/03/2018

Review

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

4 minute(s) ago - Due 11/03/2018

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 to Review

4 items

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

Looks Good, Abby!

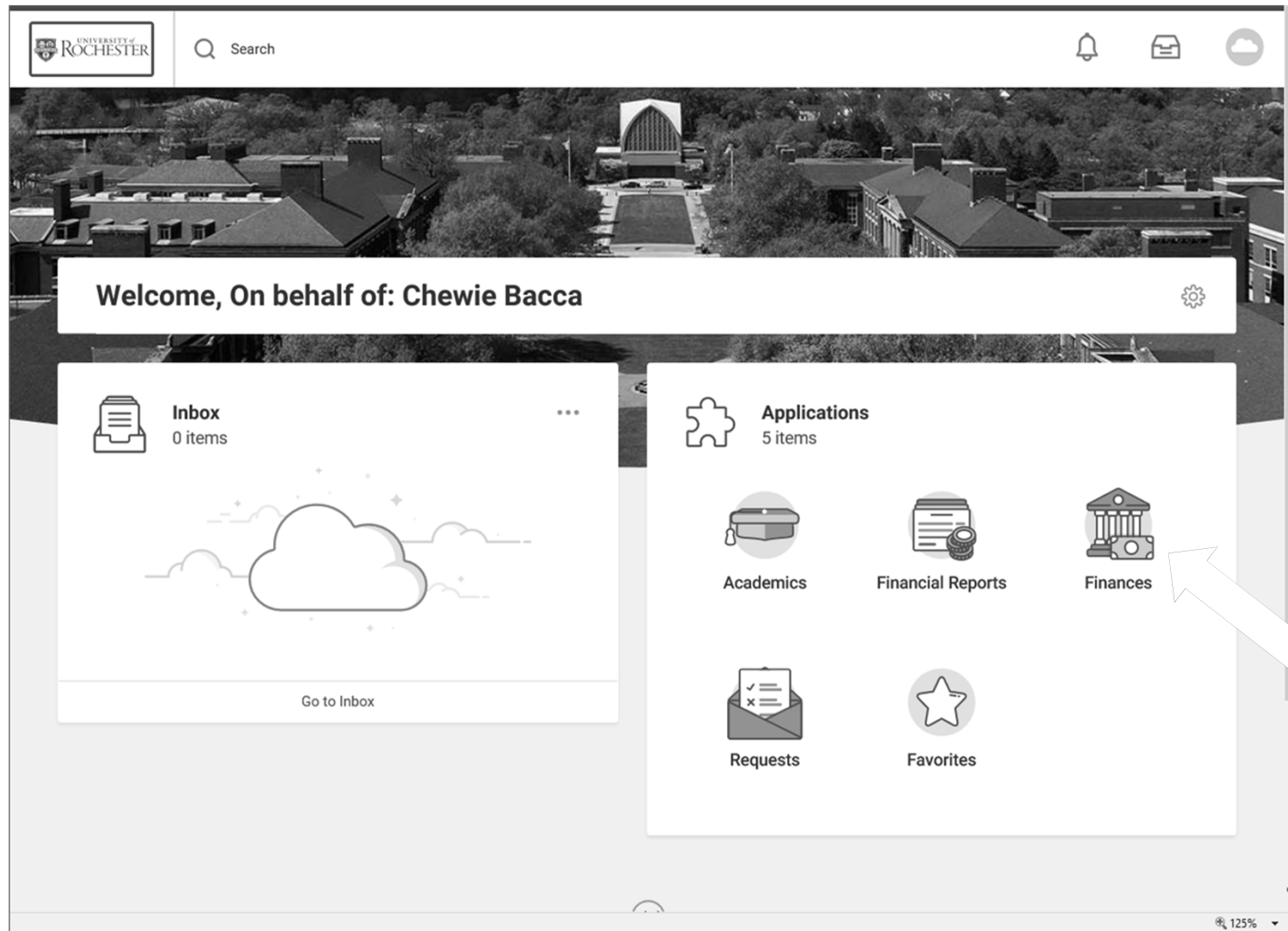
Approve **Send Back** **Cancel**



Student Finance Demo

Student Finance

Student Account Information in real time



Student Finance

The screenshot shows a mobile application interface for 'Finances'. At the top, there is a dark header with a back arrow and the word 'Finances', and a gear icon for settings. Below the header, there are two main sections: 'My Account' and 'Financial Aid'. The 'My Account' section is highlighted with a black box and contains five items: 'View Account Activity', 'View Statement', 'Make a Payment', 'Sign Up for a Payment Plan', and 'Set Up Payment Elections'. Below this section is a grey bar with the text 'Less (2)'. The 'Financial Aid' section contains two items: 'View Financial Aid' and 'Accept/Decline Awards'. At the bottom of the screen, there is a 'workday' logo, a copyright notice '© 2018 Workday, Inc. All rights reserved.', and a system status message: 'System Status: Your Implementation tenant will be unavailable for a maximum of 12 hours during the next Weekly Service Update, starting on Friday, October 19, 2018 at 6:00 p.m. PDT (GMT -7) until Saturday, October 20, 2018 at 6:00 a.m. PDT (GMT)'. A zoom level indicator '125%' is visible in the bottom right corner.

Student Finance

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

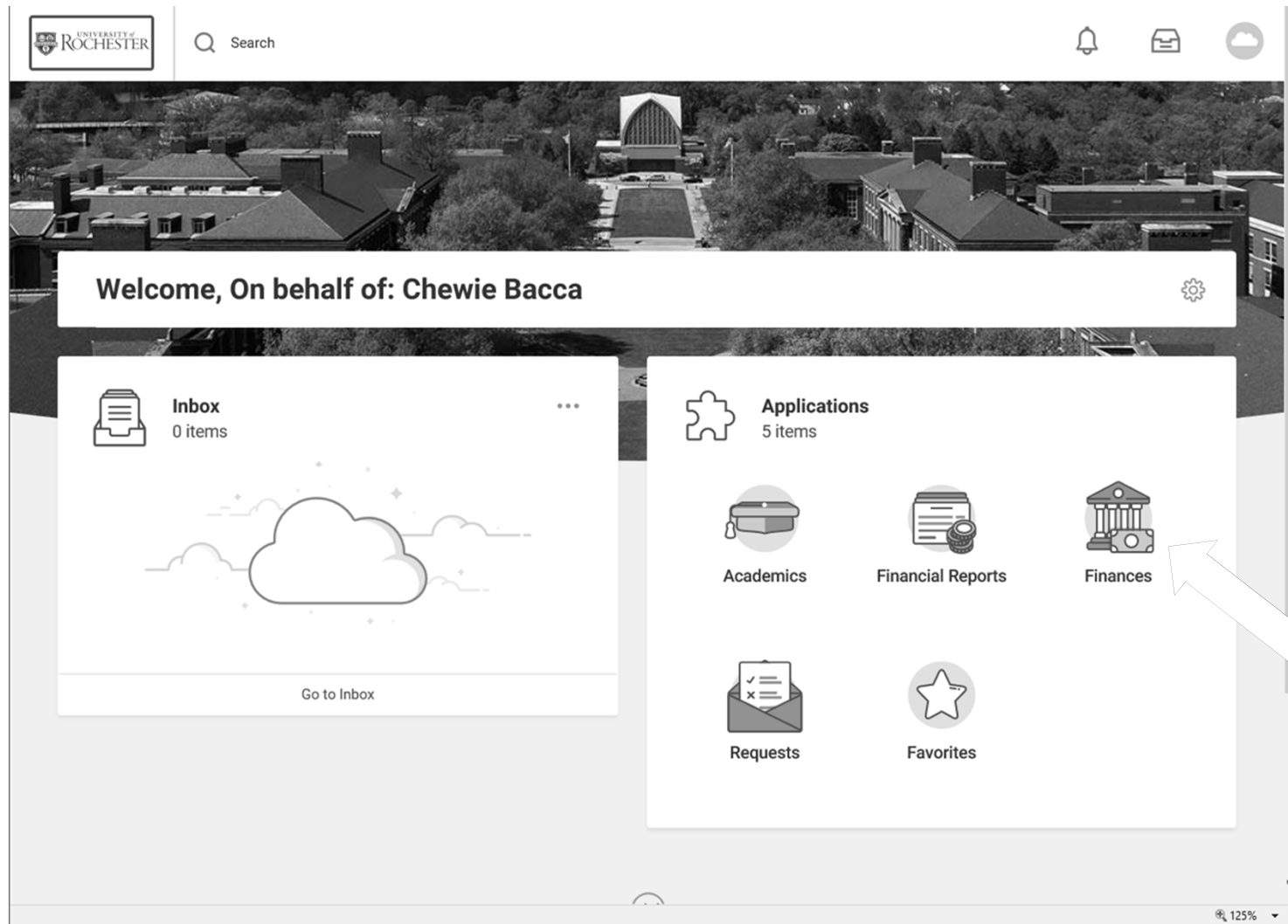
Academic Period	Transaction Date	Due Date	Description	Amount
Fall 2018	10/04/2018		Health Insurance Grant	(150.00)
Fall 2018	10/04/2018		UR Room Grant	(1,200.00)
Fall 2018	10/04/2018		Federal Direct Parent PLUS Loan	(11,500.00)
Fall 2018	10/04/2018		Federal Pell Grant	(12,000.00)
Fall 2018	10/01/2018		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%

- ✓ 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).


Student Finance


Sign up for a payment plan



Student Finance


The screenshot shows a web application interface for 'Finances'. At the top left, there is a back arrow and the word 'Finances'. At the top right, there is a gear icon for settings. Below this, there are two main sections: 'My Account' and 'Financial Aid'. The 'My Account' section contains a list of options: 'View Account Activity', 'View Statement', 'Make a Payment', 'Sign Up for a Payment Plan' (highlighted with a black box), and 'Set Up Payment Elections'. A 'Less (2)' button is located below this list. The 'Financial Aid' section contains 'View Financial Aid' and 'Accept/Decline Awards'. At the bottom, there is a 'workday' logo, a copyright notice for 2018 Workday, Inc., and a system status message: 'System Status: Your Implementation tenant will be unavailable for a maximum of 12 hours during the next Weekly Service Update; starting on Friday, October 19, 2018 at 6:00 p.m. PDT (GMT -7) until Saturday, October 20, 2018 at 6:00 a.m. PDT (GMT -7)'. A zoom level of 125% is shown in the bottom right corner.

← Finances 


 My Account

- View Account Activity >
- View Statement >
- Make a Payment >
- Sign Up for a Payment Plan >**
- Set Up Payment Elections >

Less (2)

 Financial Aid

- View Financial Aid >
- Accept/Decline Awards >



© 2018 Workday, Inc. All rights reserved.

System Status: Your Implementation tenant will be unavailable for a maximum of 12 hours during the next Weekly Service Update; starting on Friday, October 19, 2018 at 6:00 p.m. PDT (GMT -7) until Saturday, October 20, 2018 at 6:00 a.m. PDT (GMT -7)

125%

Student Finance

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

Sign Up for a Payment Plan

Academic Period *

search

← All

- Fall 2018
- Spring 2019

Next Cancel

125%

Student Finance

← Sign Up for a Payment Plan

Your Charges

Total Charges for Spring 2018-2019 Semester Calendar: \$26670

1 item

Transaction Date	Description	Amount Due
09/08/2018	Tuition: Tuition Undergrad Esm	\$26,670.00

Anticipated Payments: \$24850

The payment plan will subtract your Anticipated Payment amount from your total charges, then divide by the number of months in the payment plan period.

There is a charge of \$25 to sign up for a payment plan.

Click 'Next' to continue.

Next Cancel

125%

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

← Sign Up for a Payment Plan

Your Payment Plan Installments

Here's the list of installments for Spring 2019

Total Charges: \$26670

Payment Plan Fee: \$25

Anticipated Payments: -\$24850

Payment Plan Total: \$1845

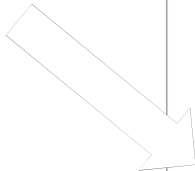
5 items

Installment Number	Due Date	Amount Due
1	12/10/2018	369.00
2	01/10/2019	369.00
3	02/10/2019	369.00
4	03/10/2019	369.00
5	04/10/2019	369.00

Click 'Submit' to finish signing up for your payment plan.

125%

Displays various totals & a breakdown of payment plan installments



Student Finance

Sign Up for a Payment Plan

Success

You have successfully signed up for a payment plan for Spring 2019

Your first installment for \$5339 is due on 12/10/2018

5 items

Installment Number	Due Date	Amount Due
1	12/10/2018	5,339.00
2	01/10/2019	5,339.00
3	02/10/2019	5,339.00
4	03/10/2019	5,339.00
5	04/10/2019	5,339.00

Would you like to pay your first installment now?

125%

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