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
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

- WD31 (Aug '18)
- UR Release (Dec '18)
- WD32 (Feb '19)
- WD33 (Sep '19)

- Student Records
- Academic Advising
- Student Finance

July 7, 2019
GO-LIVE
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
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
### Add Student To Cohort

<table>
<thead>
<tr>
<th>Student</th>
<th>Abby Anderson</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Cohort</td>
<td>Mechanical Engineering Program Advisor: Rocky</td>
</tr>
</tbody>
</table>
### View Student Cohort History for Student

**Student**: Abby Anderson

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

**Student**  Abby Anderson  

1 item

<table>
<thead>
<tr>
<th>Role</th>
<th>Person</th>
<th>Public Work Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advisor</td>
<td>Rocky Advisor</td>
<td><a href="mailto:sean.hanna@rochester.edu">sean.hanna@rochester.edu</a></td>
</tr>
</tbody>
</table>
Academics

My Academics

- View My Academic Plan
- View My Registration Appointments
- Apply for Program Completion
- Generate Unofficial Transcript
- View My Support Network

View
- View My Academic Progress
**View My Academic Plan**

- **Academic Advising**
- **November 12, 2018**

### Academic Plan Details

- **Accounted for Academic Requirements**: 3
- **Unaccounted for Academic Requirements**: 11

- **Academic Plan Last Approved**: 10/30/2018
- **Plans Submitted for Approval**: 1

### 2018-2019 Semester Calendar

<table>
<thead>
<tr>
<th>Academic Period</th>
<th>Requirement</th>
<th>Course</th>
<th>Units</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2018</td>
<td>Mechanical Engineering B.S. Mathematics Courses</td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>CHEM 131 - Chm Concepts, Syst, Pract I</strong></td>
<td>0</td>
<td>Eligible to Enroll</td>
</tr>
<tr>
<td></td>
<td>Mechanical Engineering B.S. Technical Elective Course</td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Primary Writing Requirement</td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Spring 2019</td>
<td>Mechanical Engineering B.S. Mathematics Courses</td>
<td></td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>
Request Plan Approval

Request Plan Approval for:

- Select Entire Academic Plan
- Select Specific Academic Periods

Academic Periods

- Fall 2018
### Request Plan Approval

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</tr>
<tr>
<td></td>
<td>CHEM 131 - Chm Concepts, Syst, Pract I</td>
<td></td>
<td>0</td>
<td>Not Eligible</td>
</tr>
<tr>
<td></td>
<td>Mechanical Engineering B.S. Technical Elective Course</td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
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<td></td>
<td>0</td>
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Mr. Rocky, please review my plan for Fall 2018 for approval. Thanks - Abby
### 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

#### Process

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</table>
**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 Status: In Progress

Details to Review

4 items

<table>
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<td></td>
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<td></td>
<td></td>
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<td>Eligible to Enroll</td>
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<td></td>
<td>Mechanical Engineering B.S. Mathematics Courses</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Primary Writing Requirement</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Looks Good, Abby!

[Approve] [Send Back] [Cancel]
Student Finance Demo
Student Account Information in real time

Welcome, On behalf of: Chewie Bacca

Inbox
0 items

Applications
5 items

Academics
Financial Reports

Requests
Favorites

Finances
Finances

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

- 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)
- 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

<table>
<thead>
<tr>
<th>Academic Period</th>
<th>Transaction Date</th>
<th>Due Date</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2018</td>
<td>10/04/2018</td>
<td></td>
<td>Health Insurance Grant</td>
<td>(150.00)</td>
</tr>
<tr>
<td>Fall 2018</td>
<td>10/04/2018</td>
<td></td>
<td>UR Room Grant</td>
<td>(1,200.00)</td>
</tr>
<tr>
<td>Fall 2018</td>
<td>10/04/2018</td>
<td></td>
<td>Federal Direct Parent PLUS Loan</td>
<td>(11,500.00)</td>
</tr>
<tr>
<td>Fall 2018</td>
<td>10/04/2018</td>
<td></td>
<td>Federal Pell Grant</td>
<td>(12,000.00)</td>
</tr>
<tr>
<td>Fall 2018</td>
<td>10/01/2018</td>
<td></td>
<td>Cash Payment</td>
<td>(7,500.00)</td>
</tr>
<tr>
<td>Fall 2018</td>
<td>09/09/2018</td>
<td>10/10/2018</td>
<td>Tuition: Tuition Undergrad Earn</td>
<td>26,670.00</td>
</tr>
<tr>
<td>Spring 2019</td>
<td>09/09/2018</td>
<td>10/10/2018</td>
<td>Tuition: Tuition Undergrad Earn</td>
<td>26,670.00</td>
</tr>
</tbody>
</table>
Sign up for a payment plan
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.
Display various totals & a breakdown of payment plan installments

Sign Up for a Payment Plan

Your Payment Plan Installsments

Here’s the list of installments for Spring 2019:

- Total Charges: $26670
- Payment Plan Fee: $25
- Anticipated Payments: -$24850
- Payment Plan Total: $1845

<table>
<thead>
<tr>
<th>Installment Number</th>
<th>Due Date</th>
<th>Amount Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>12/10/2018</td>
<td>369.00</td>
</tr>
<tr>
<td>2</td>
<td>01/10/2019</td>
<td>369.00</td>
</tr>
<tr>
<td>3</td>
<td>02/10/2019</td>
<td>369.00</td>
</tr>
<tr>
<td>4</td>
<td>03/10/2019</td>
<td>369.00</td>
</tr>
<tr>
<td>5</td>
<td>04/10/2019</td>
<td>369.00</td>
</tr>
</tbody>
</table>

Click ‘Submit’ to finish signing up for your payment plan.

Submit  Cancel
Sign Up for a Payment Plan

**Success**

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

Your first installment for $5,339 is due on 12/10/2018.

<table>
<thead>
<tr>
<th>Installment Number</th>
<th>Due Date</th>
<th>Amount Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>12/10/2018</td>
<td>5,339.00</td>
</tr>
<tr>
<td>2</td>
<td>01/10/2019</td>
<td>5,339.00</td>
</tr>
<tr>
<td>3</td>
<td>02/10/2019</td>
<td>5,339.00</td>
</tr>
<tr>
<td>4</td>
<td>03/10/2019</td>
<td>5,339.00</td>
</tr>
<tr>
<td>5</td>
<td>04/10/2019</td>
<td>5,339.00</td>
</tr>
</tbody>
</table>

Would you like to pay your first installment now?

- Yes
- No

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