Community Forum

November 6, 2019

3:00-4:30pm

Agenda

- Acknowledgements

- Project Status

- Support Model

- UR Student Lingo

- Ice Cream!

  - Ask the Experts

Acknowledgements

The strength of the team
is each individual member.
The strength of each member
is the team.

Phil Jackson

Executive Sponsors

Robert Clark
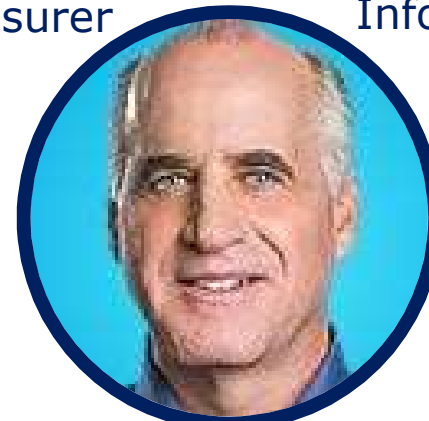Provost and Sr. VP
for Research

Holly Crawford
Sr. VP, Chief Financial
Officer & Treasurer

David Lewis
Vice President for IT & Chief
Information Officer

Lisa Faucher
Sr. VP, Business Innovation Office

Stan Swete
Executive Director, Technology

UR STUDENT

Project Sponsors

- Kathy Blackmon, University Bursar

- Bradley Hoenshell, Project Director, Workday

- Elizabeth Milavec, VP for Financial Operations & Controller

- Julie Myers, Co-Deputy CIO

- Nancy Specht, University Registrar

- Independent QA Review: John Hrusovsky, JJH Consulting

Project Champions

- AS&E – Gretchen Briscoe & Alan Czaplicki

- Eastman – John Hain

- ECMS – Jennifer Watson

- EIOH – Linda Lipani

- Simon – Jon Ramsey

- SMD-Grad – Sharon McCullough

- SMD-Med – Kathleen Kelly

- SON – Andrea Chamberlain

- Warner – Dave Garcia
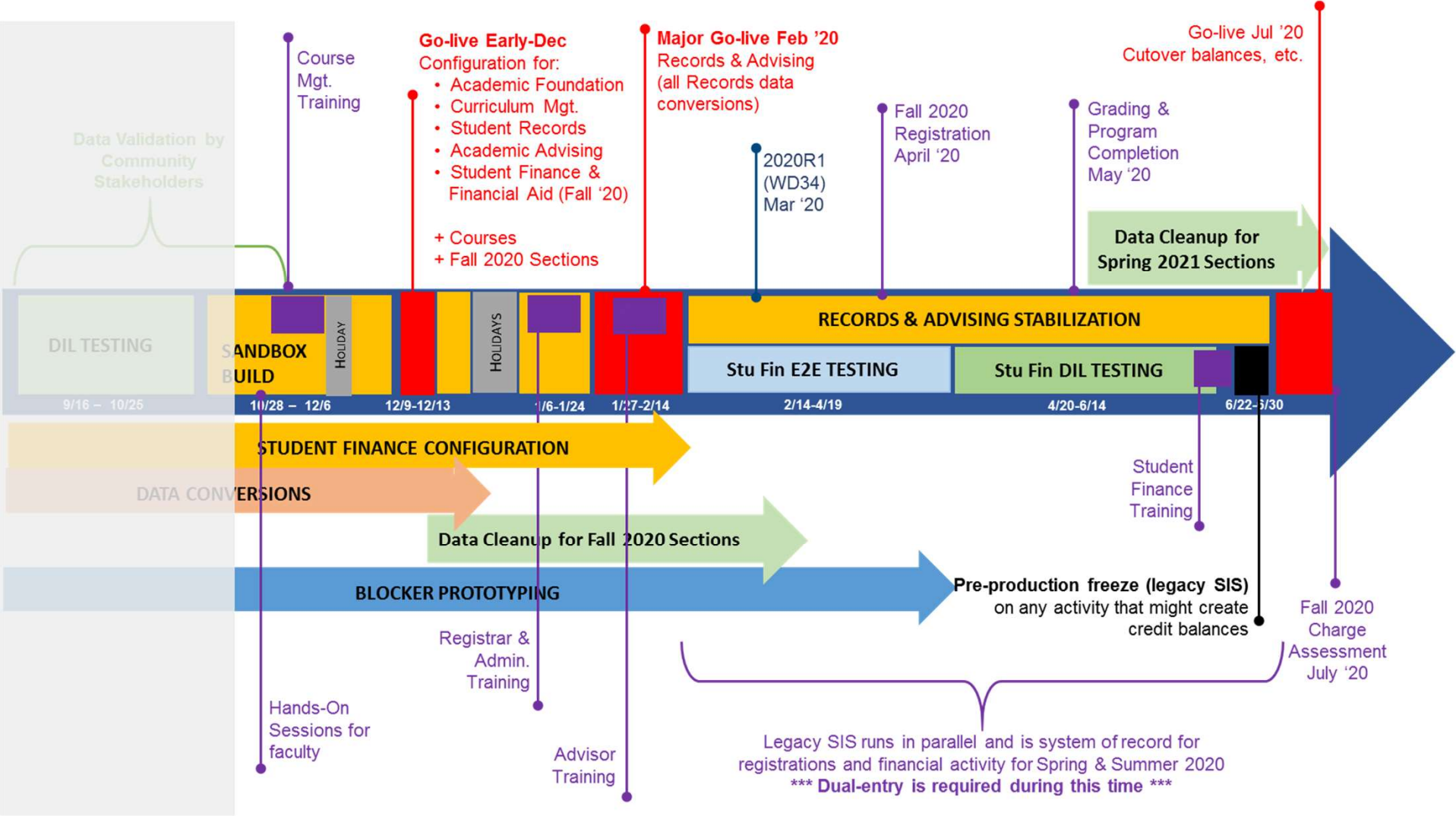
THANK YOU!!!

Project Status

Project Timeline

Data validation results for Courses

- Roughly 98% of reported issues have been resolved

  - Manually updated the Fall 2020 version of Courses where necessary

- All remaining issues will be remediated post-cutover

- End-dated 5,021 courses so that there wouldn't be a version 2 (Fall 2020)

6 schools

456 issues

Office Hours feedback

5,437 corrections to Course file
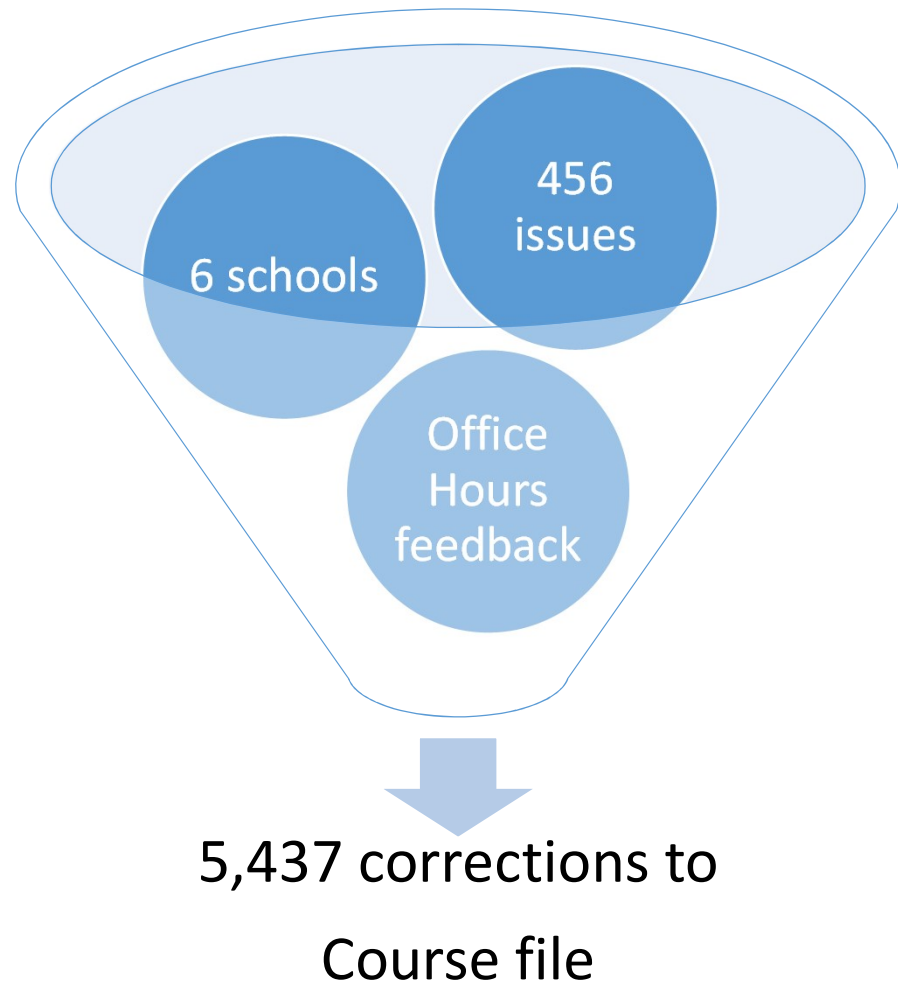
Wins!

- Multiple schools identified gaps in security configuration

- Multiple schools helped with data validation efforts and identified anomalies that will be investigated before cutover

- Ability to connect ALL of a students' advisors to them (program advisors, special population advisors, program coordinators, research advisors, applied teachers, etc.)

- Dashboards will provide easy access to reports and quick links to tasks for users

- More than 50 faculty have now participated in some level of hands on work within UR Student with productive feedback and mostly positive results

- Students in the IT Center helped to test the system by validating their own data in UR Student and testing access using their mobile device

Wins!

- AS&E identified a potential issue with their graduate students that take Simon classes; will be working to review impact and remediate

- School of Nursing updated program information for some of their students in the legacy SIS so that students in combined programs are converted with their academic history in a single academic record

- Eastman honors currently configured as "minors" in the legacy SIS will be configured going forward as Honors & Awards

- EIOH finds the system easy to navigate and are excited to use it

- Warner really likes that UR Student has a place to enter an incomplete completion date when grading a course as an I (Incomplete)

- ECMS likes that they now have a new course subject of ECMS for their courses

How do we define success?

- ☑ Students are able to onboard to UR Student successfully
- ☑ Faculty are able to grade successfully
- ☑ Student transcripts are accurate
- ☑ Academic advisors are able to access the information they need (this will vary by school)
- ☑ Schools are able to manage their course catalog and course schedule

Starting with Fall 2020:
- ☑ Students are able to register for classes successfully
- ☑ Reporting to National Student Clearinghouse is accurate
- ☑ Student billing is accurate and revenue is appropriately recognized
- ☑ Students and families view student account transactions in real time
- ☑ Students and families receive refunds in a timely manner
- ☑ 1098-T tuition tax reporting is accurate
- ☑ Reporting for Audit purposes and for schools is accurate and meets requirements
- ☑ Financial assistance is accurately credited to student accounts in a timely manner
  - o Financial aid awards
  - o Graduate tuition awards
  - o Employee tuition benefits
  - o Other waivers and discounts

Support Model

Identifying your Support Team

Sam Singhal

UNIVERSITY OF ROCHESTER

UR STUDENT INFORMATION DESK
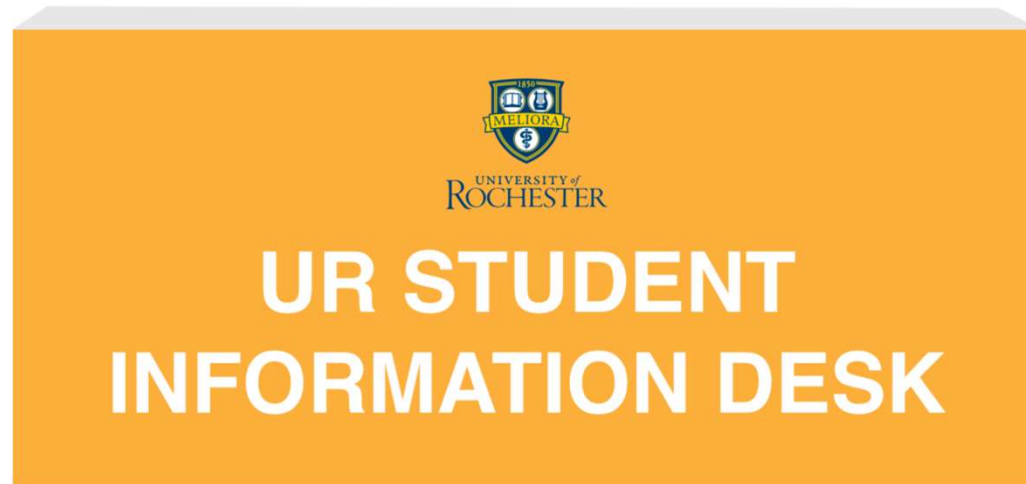
How to get help…

- Call into regularly scheduled Office Hours

- Stop by the "UR Student Support Center" (Gleason Theatre)
  - 3-4 team members will be located in Lattimore Hall to support curriculum management

- Stop by IT Center (login / connectivity issues only)

- Call x52000
  - Login / connectivity issues resolved at Help Desk
  - All other issues escalated to Student Systems Support team

- Open a service request via Service Desk portal

- Self Help will include access to training materials, FAQs, tutorials, etc.

- Still under consideration:
  - Scheduling Office Hours

Scope of Student Systems Support

- ✓ Updates to Academic Calendar
- ✓ Updates to Program of Study
- ✓ Updates to Security
- ✓ Updates to Academic Foundation
- ✓ Updates to cohort configuration
- ✓ Running EIBs (examples below)
  - o Put Student Cohort Membership (for Class Year & Advising cohorts with large volumes)
  - o Put Student Hold Assignment (mass add / removal of Holds during certain times of year)
  - o Import Change Expected Program Completion Dates
- ✓ Scheduling integrations
- ✓ Scheduling and running the NSC Enrollment Status Report
- ✓ Updates to UR Student reports
- ✓ Generating transcripts for the requests that come in through NSC
- ✓ Routine troubleshooting
- ✓ Configure and test new functionality

- ✘ Entering / submitting grades
- ✘ Processing change of status form(s) for a student
- ✘ Requesting a transcript
- ✘ Registering a student
- ✘ Processing a change to a student's Program of Study
- ✘ Adding students to (or removing students from) manual cohorts
- ✘ Articulating transfer credit
- ✘ Reactivating a historical student record

A similar review of scope will be outlined for the Student Finance team in preparation for the July, 2020 cutover

Lingo!

Supporting Materials

SUPPORT MODEL

Support Model

SELF-SERVICE	LEVEL 1	LEVEL 2/ 3	WD SUPPORT
• Students • Instructors • Advisors • Staff	▪ IT Center (Students Only) ▪ University IT Help Desk ▪ Data Center Operations	• Functional & technical team	• WD Services team • WD Customer Success Manager *Only engaged by Level 3*
✓ How To ✓ Data Definitions	✓ Student as Self (IT Center Only) ✓ Password Reset ✓ Duo ✓ Connectivity issues	✓ Break / fix ✓ Complex "How To" ✓ Data issues ✓ Integrations / reporting issues	✓ Any issues requiring Workday consulting or Product support
• Quick Reference Cards • Training Videos • FAQs • Data Glossary	• Drop-in (IT Center) • Service Catalog • x52000	• Student Systems War Room (Lattimore Hall) • Service Catalog • Student Systems Support ACD	• WD Community (Support cases, Brainstorms, Friday release notes, Student User Group & other posted materials)

UR STUDENT

Support Procedures

- Daily Office Hours for Records & Advising

- On-site presence for major academic events
  - Grading
  - Registration

- Requests for security access will require approval
  - May have an expedited process in place during stabilization

- Enhancement requests will be prioritized through the Student Systems Governance process
  - Break / fix service requests and requests for security will not go through governance

After-Hours Support

Extended Hours
to support major academic events

In-person (War Room)
Zoom video conferencing

Call x52000

Password Reset
Duo
Connectivity issues
24x7

Service Desk Portal

Service Catalog (Self Help)

- https://tech.rochester.edu/services/ur-student/

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University IT

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UR Student (Workday)

Instructors, Advisors, Registrars, Program Coordinators and Bursars are some of the roles that use the new system to generate class rosters, grade, review student information, place holds and generate billing and financial reports. Students will use it for class registration, student financials and student records system at the University of Rochester.

Log In to UR Student

Service Details

Forms	Security forms needed to gain permissions for UR Student
Remote Access Tutorials	How to access UR Student from outside the University Network
Frequently Asked Questions	Answers to common questions or issues
Training	A list of training dates and program types available