UR Student Demo Days

June 2018

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”)
Agenda

- UR Student Cohort Explanation
- UR Student Cohorts Demonstration
- Q&A
- Wrap up

UR Student Cohort: Defined

- Big C v. UR Student 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)

- 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)
Why a cohort?

There are three reasons for which we will create cohorts in UR Student:

- **Reason 1 - Advisors:** To assign an advisor to his or her advisees
  - Cohorts are the only mechanism in UR Student that allows us to assign an advisor to students

- **Reason 2 - Transactional:** Because the cohort is required for transactional purposes
  - When a policy or rule is created in UR Student it may require a cohort to determine the correct student audience to which the rule should be applied.
    - E.g., Enrollment Unit Limit Rule Set for ASE UG students (allows students to register for up to 19 credits per academic period)
  - Student Financials/Student Billing will require a considerable set of cohorts to apply charges to students correctly.
Why a cohort?

- **Reason 3 - Missing Attributes**: 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 – There is no class year field in UR Student, so we will create class year cohorts and then reclassify students according to policy (i.e., remove the student from one class year cohort and add them to another class year cohort).

Cohort Types

- We can create cohort types in UR Student to help us categorize the cohorts that we create, such as:
  - Advising
  - IPEDS
  - Student Group
  - Class Year
  - Special Population
  - ECMS
  - Scholarship Group
  - Student Financials
  - Enrollment Policy Rule Set
Cohorts: Behind the Scenes

- UR Student will allow us to create cohorts using two different methods:
  - Manual
  - Criteria-based

Manual Cohort Assignment

- Users with appropriate security can add and remove students from cohorts manually
- Cohorts can be populated manually “en masse” via web service

(We will demonstrate manual cohort assignment later in this presentation.)
Criteria Based Cohorts – June 2018

- **Criteria Based Cohorts**: Create Student Cohorts with Custom Reports & Saved Searches
  - Criteria must be an indexed field on the academic business object
  - Can use AND or OR filters to create flexible “bundles” of criteria
- Set criteria basis (i.e., How is the criteria being selected that groups the students together?)
  - Saved Search
  - Custom report
- Ability to refresh automatically when criteria changes
- **PLEASE NOTE: THIS FUNCTIONALITY HAS NOT YET BEEN RELEASED** (the following image is a mock-up of what we expect)
Cohort v. Report

- When considering whether to create a cohort in order to apply an attribute to a group of students who do not need to be grouped together for transaction purposes, we will need determine whether it makes more sense to create custom report to meet our needs.

Cohort Champions

- The UR Student Project will be seeking out our Cohort Champions, who will hopefully also be some of the same people who will maintain cohorts for their academic units after we go-live in the new student system.
  - Registrars
  - Undergraduate and Graduate Department Coordinators
  - Student Financials Representatives
  - Student Records Representatives
  - Dean’s Office Staff Members
Gathering Cohort Requirements

Advising SIG Materials
UR Student

Advising SIG meeting materials and recording are located below. Please contact Sean Hanna regarding any questions related to this SIG.

January 25, 2018 meeting
SIG meeting Orientation with a cohort discussion – (PowerPoint, Playback)
  - Student Cohort Worksheet (Word doc)
  - Student Cohort Worksheet (Excel doc)

- Email to Sean Hanna at sean.hanna@rochester.edu
  http://www.rochester.edu/urstudent/phase-1-advising/advising-sig-materials/

Finding Cohorts

- “Find Student Cohort”
  - Filter options:
    - Find Student Cohorts
      - Cohort Name
      - Academic Unit
      - Academic Level
      - Cohort Type
Demonstration

- Administrators perspective
- Behind the scenes
- Student perspective

- [https://wd5-impl.workday.com/wday/authgwy/rochester1/login.html](https://wd5-impl.workday.com/wday/authgwy/rochester1/login.html)

- [https://wd5-impl.workday.com/wday/authgwy/rochester4/login.html](https://wd5-impl.workday.com/wday/authgwy/rochester4/login.html)

Demo Days Appendix

- Appendix Includes:
  - Terminology
  - Timeline
  - Special Interest Groups (SIG)
  - UR Student Communications and website
  - UR Student Screen Navigation
Next Steps

- 5 minute survey to be sent to all June Demo Days registrants
- Next Demo Days July 18, 2018
  - Agenda: Holds within UR Student
  - Recommended Attendance: Bursars (steps), Divisional Finance (reports) and for awareness; Advisors, Registrars, Affiliate offices.
    Note: This topic relates to Student Onboarding
  - Details to come in UR Student News
Appendix

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.

- **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 GPAs for undergraduate v. graduate academic career at UR).

- **Credential**
  - Degree

- **Dashboard**
  - A collection of reports tailored to the user or role.
UR Student Terminology

- **Eligibility Rules**
  - System-based guardrails to enforce policies

- **Enrollment**
  - Registration

- **Faceted Search**
  - A search where the end user has the ability to identify particular criteria for a population.

- **Onboarding**
  - A targeted communications for new and returning students to ensure that tasks and other necessary documentation is completed (FERPA, Financial Responsibility Agreement, etc.)

- **Programs of Study**
  - Includes Certificates, Majors, Minors, Cluster

- **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)**
  - Workday calls these widgets and they can take you to functional areas, reports, or dashboards

- **Categories (within the search function)**
  - Are the different areas within Workday 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
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

Program Overview – Phase 1 Timeline

- [Diagram of Phase 1 Timeline]

We are here
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

UR Student System
UR Student - Mobile Student View

Personalized Cards

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

Profile or Search icon (iPhone/Android)

Image Role: Student (student security)