Records and Registration Special Interest Group (SIG)

UR Student

Agenda

- ▶ Background
- ▶ Vision and Guiding Principles
- ▶ Project Objectives and Values
- ▶ Program Overview (Team, Scope, Timing and Stakeholders)
- ▶ Special Interest Groups
- ▶ Project Communications
- ▶ Terminology
- ▶ Workday Demonstration
- ▶ Q&A / Next Steps

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Background

Welcome to the Student Information Systems Replacement Project, UR Student!

The new UR Student system is geared to replace the highly complex, legacy Student Information System (SIS) in place for more than 30 years. A modern solution is now available to record the University's student finance, records and registration, admissions and financial aid activities.

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, and have the ability to easily 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

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Guiding Principles

- We will adopt common business 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 stakeholders

- We value integrated systems and processes over disparate systems and processes

- We will adapt business and academic practices as necessary to implement an effective solution

Project Values

- Respect for all opinions

- Successful partnering with stakeholders
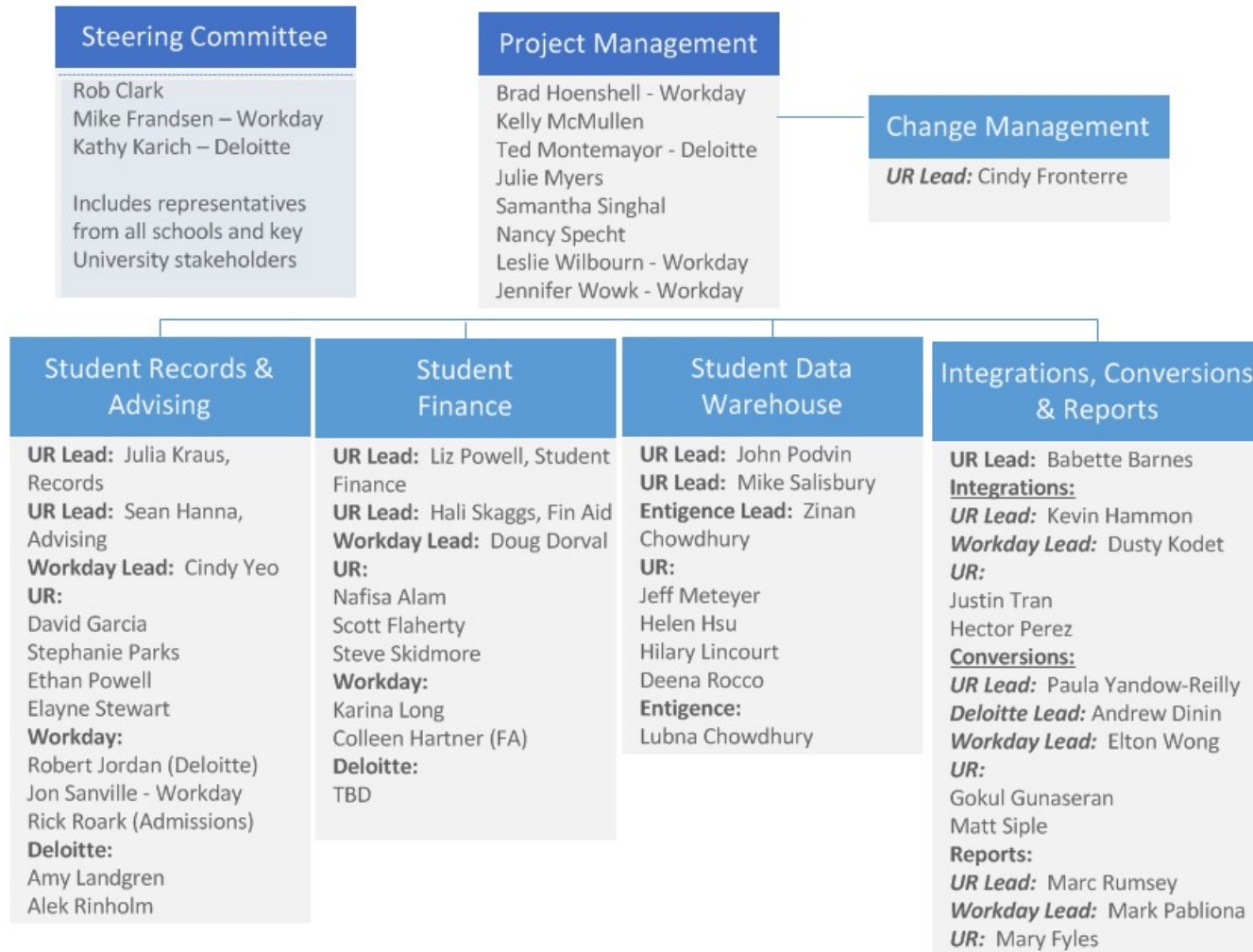
- Being accountable for our own work

SIG Short Term Objectives

- Overview of the Project Status

- Program of Study: what does this look like in UR Student?

- Preview of a Course in UR Student

- Identify concerns related to records and registration

SIG Meeting Principles

- Be on time

- Use specific examples, when possible

- Attack problems, not people

- Limit sidebar conversations

- Ask questions

- Be willing to discuss the 'undiscussable'

- Stay on point as best as possible

- Be humble and honor the group

- Represent your area to the best of your abilities

Program Overview – Team

Steering Committee

Rob Clark
Mike Frandsen – Workday
Kathy Karich – Deloitte

Includes representatives from all schools and key University stakeholders

Project Management

Brad Hoenshell - Workday
Kelly McMullen
Ted Montemayor - Deloitte
Julie Myers
Samantha Singhal
Nancy Specht
Leslie Wilbourn - Workday
Jennifer Wowk - Workday

Change Management

UR Lead: Cindy Fronterre

Student Records & Advising

UR Lead: Julia Kraus, Records
UR Lead: Sean Hanna, Advising
Workday Lead: Cindy Yeo
UR:
David Garcia
Stephanie Parks
Ethan Powell
Elayne Stewart
Workday:
Robert Jordan (Deloitte)
Jon Sanville - Workday
Rick Roark (Admissions)
Deloitte:
Amy Landgren
Alek Rinholm

Student Finance

UR Lead: Liz Powell, Student Finance
UR Lead: Hali Skaggs, Fin Aid
Workday Lead: Doug Dorval
UR:
Nafisa Alam
Scott Flaherty
Steve Skidmore
Workday:
Karina Long
Colleen Hartner (FA)
Deloitte:
TBD

Student Data Warehouse

UR Lead: John Podvin
UR Lead: Mike Salisbury
Entigence Lead: Zinan Chowdhury
UR:
Jeff Meteyer
Helen Hsu
Hilary Lincourt
Deena Rocco
Entigence:
Lubna Chowdhury

Integrations, Conversions & Reports

UR Lead: Babette Barnes
Integrations:
UR Lead: Kevin Hammon
Workday Lead: Dusty Kodet
UR:
Justin Tran
Hector Perez
Conversions:
UR Lead: Paula Yandow-Reilly
Deloitte Lead: Andrew Dinin
Workday Lead: Elton Wong
UR:
Gokul Gunaseran
Matt Siple
Reports:
UR Lead: Marc Rumsey
Workday Lead: Mark Pabliona
UR: Mary Fyles

Program Overview – Phase 1 Scope

Phase 1	Systems Being Replaced
▪ Academic Foundation/Core	▪ The SIS
▪ Engagement	▪ CDCS
▪ Student Finance	▪ Darden (Simon)
▪ Student Records and Registration	▪ SON Database (SON) – *partial*
▪ Curriculum Management	▪ Warner Internet (WAIS) - *partial*
▪ Academic Advising	▪ Web Registration
▪ Data Warehouse for Student Finance, Student Records and Academic Advising	▪ Instructor Access
	▪ Advisor Access
	▪ Student Access
	▪ Alumni Access

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Program Overview – Phase 1 Timeline
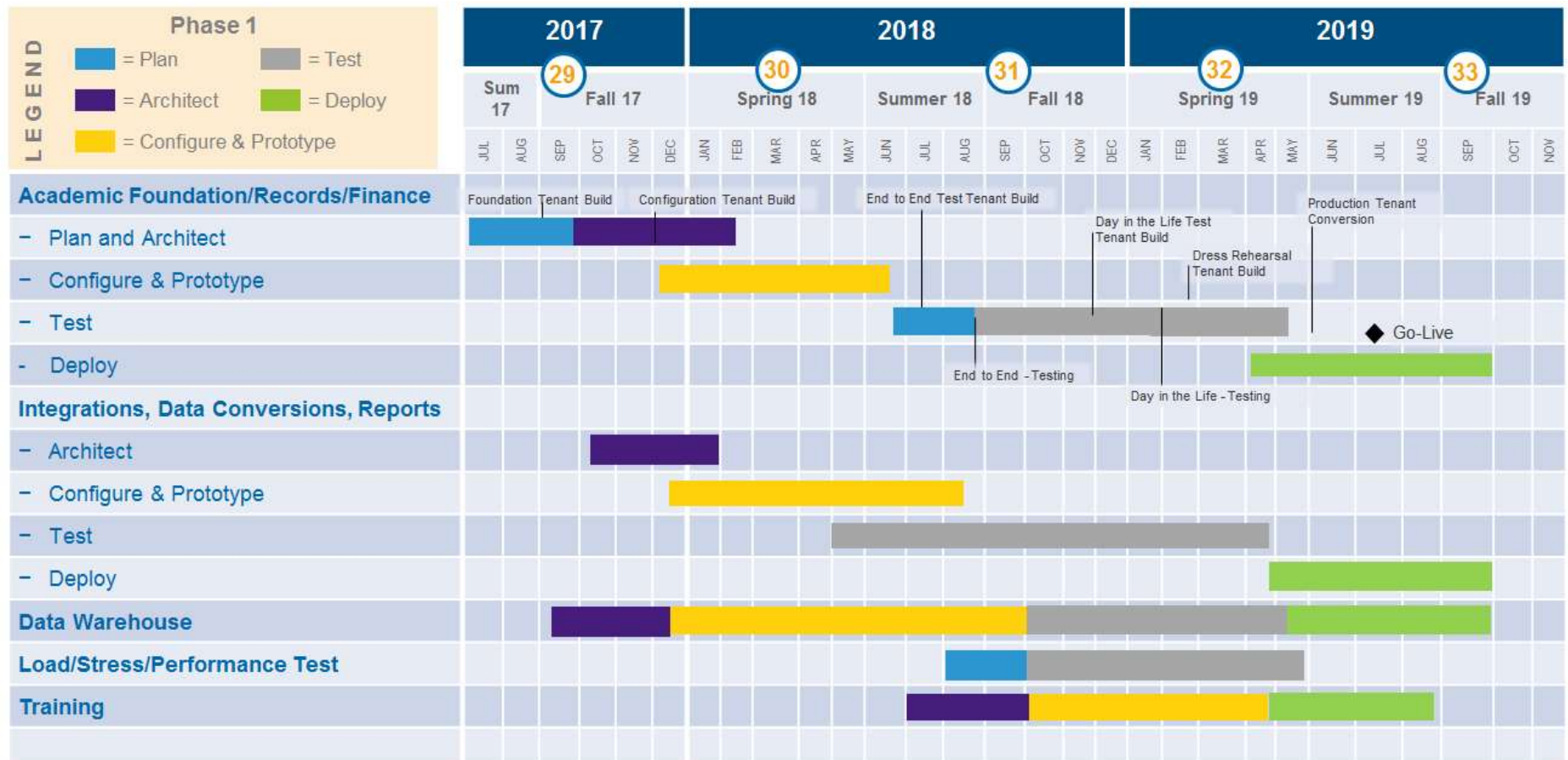
Special Interest Groups

- **Records and Registration SIG**
  - Function- To represent your area of the University and inform the UR Student Records and Registration team from the functional user perspective.
  - Roles– Advisors to the Student Records and Registration group
  - Responsibilities– exploration, conversation, communication, solutioning, problem solving, etc.
  - Interdependencies– Advising, Student Finance, Financial Aid, Admissions, Institutional Research, Information Technology

- **Advising SIG**
  - Function- To represent your area of the University and inform the UR Student Advising team from a functional perspective
  - Roles- Advisors to the UR Student team members who are working on the advising configuration
  - Responsibilities- exploration, conversation, communication, solutioning, problem solving
  - Interdependencies- Student Records, Institutional Research, Student Finance, Financial Aid, Admissions, Informational Technology

Special Interest Groups

- **Student Finance**
  - Function- To represent your area of the University and inform the UR Student Finance team from the functional user perspective.
  - Roles– Advisors to the Student Finance group
  - Responsibilities– exploration, conversation, communication, solutioning, problem solving, etc.
  - Interdependencies– UR Financials, Financial Aid, Graduate Studies

- **Institutional Research & IT, Reporting SIG**
  - Function- To represent your area of the University and inform the UR Student Institutional Research team from the functional user perspective
  - Roles- Advisors to the UR Student team members who are working on the datawarehouse rebuild and Institutional Research
  - Responsibilities- exploration, conversation, communication, solutioning, problem solving, etc.
  - Interdependencies- Student Records, Advising, Student Finance, Financial Aid, Admissions, Information Technology

Project Team Directory

- See project directory for contact information for members

  http://www.rochester.edu/urstudent/team/

Key Project Dates

- Demo Days- April 2018

- End to End Testing- August 2018

- Day in the Life Testing- February 2019

- Go-Live!- July 2019

Expectations: Communication

Internal

- Provide regular updates on your progress to those who are effected
- Provide immediate alerts to changes in business requirements

External

- Be an advocate for the project
- Promote events
- Use the website
  - Contact Us for questions/feedback
- Answer questions you know and provide feedback
  - forward ones you do not for response (1-2 day turnaround)
- Participate in UR Student training and support activities

Expectations: Collaboration

- Provide other teams with inputs in a timely fashion
- Identify and explain necessary requirements on current business processes
- Suggest process improvements where applicable
- Provide input to the benefit of the design as a whole
- Participate in testing activities providing status and feedback
- Identify risks as soon as possible
- Remember think globally and full transparency

Project Interaction Tools

- **Primary Tool:**
  - Zoom
  - UR Student Website
  - Email (Records & Registration SIG Listserv-
    UR_STUDENT_RECORDS_SIG@LISTS.ROCHESTER.EDU)
- **Other useful methods to communication**
  - Box
  - Jira
  - SharePoint

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Program of Study- Today

Program of Study- Today

Program of Study- Today

Terminology- Future v. Current

- Academic Unit- Schools/Colleges/Departments
- Academic Periods- Term/Semester/Quarter
- Academic Level- Division
- Program of Study- Major/Minor/Cluster/Certificate
- Enrollment- Registration
- Credential- degree

Academic Unit Structure
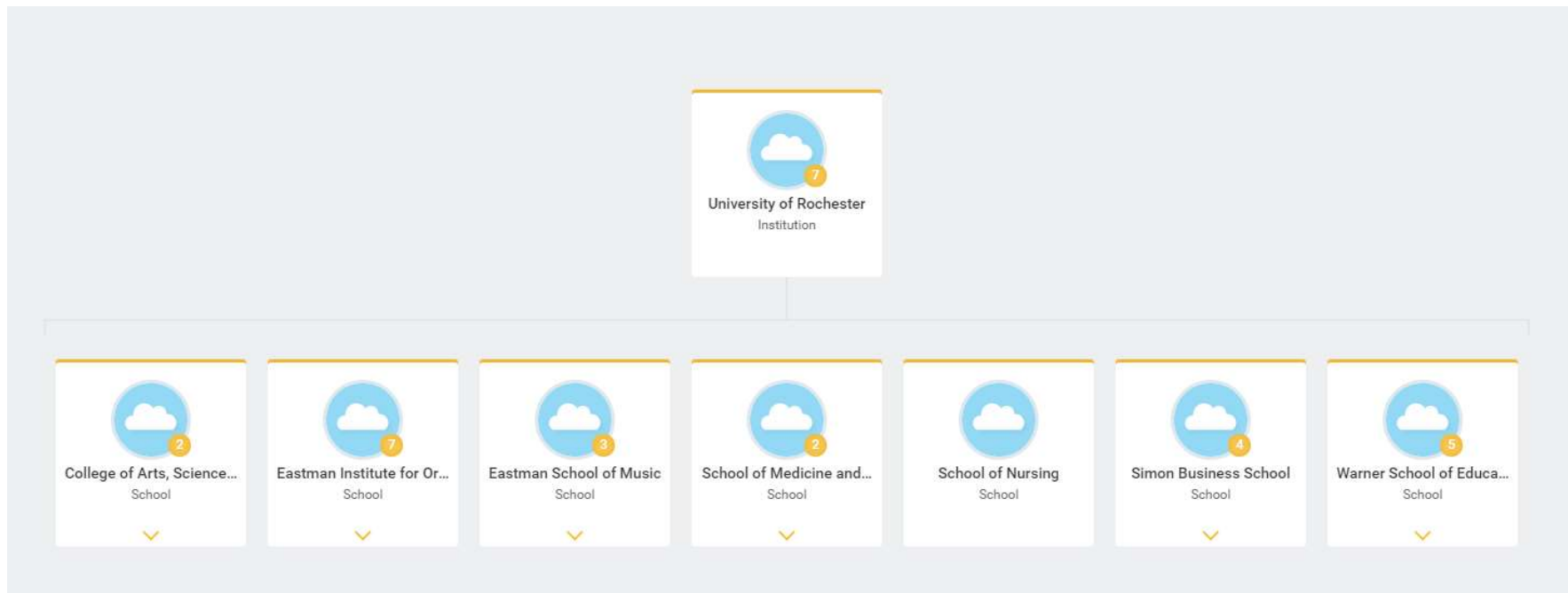
Program of Study- UR Student

- College, Division, Degree, Major, Minor, Instrument is transformed

- Ability to capture infinite numbers of programs on an individual student

- Program codes are smart coded, to leverage current structures
  - School Code
  - Credential/ Program Type
  - Major/Minor/Cluster code
    - 01_BS_MTH Mathematics BS Undergraduate Major
    - 01_BA Bachelor of Arts
    - 01_BA_ANT Anthropology BA Undergraduate Major
    - 01_CL_H1ASL002 Advanced Proficiency in American Sign Language Cluster
    - 06_BM_INS_CL Clarinet
    - 02_MS_HCC Health Care Management Masters of Science

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Program of Study- UR Student

Program of Study- UR Student

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UR Student Demo

- https://wd5-impl.workday.com/wday/authgwy/rochester1/login.htmld?returnTo=%2frochester1%2fd%2ftask%2f3005%242658.htmld

- Programs of Study

Data that you are about to see is not real student data. Scenarios have been created, with the attempt to be as close to a real scenario as possible.

Q&A

- What didn't this session cover about the project, that you have questions on?

- What concerns come to mind with the change in Program of Study structure?

Next Steps

- Meeting frequency
  - Monthly?
  - Days/times preferred?

- Topics
  - Subjects & Courses
  - Registration
  - What would you like to see?

Thank you!

Thank you for attending today's Records and Registration SIG meeting. Should you have any questions, please do not hesitate to contact me.