

BUSINESS SYSTEMS INTELLIGENCE

ANNUAL REPORT 2013-14



FROM THE DIRECTOR

The 2013-14 academic year was an exciting year for the Business Systems Intelligence (BSI) Office. The BSI Office was officially created in late 2012, and the 2013-14 year was our first full academic cycle as a unit.

A large part of our work during this time was devoted to finding our fit within Enrollment Management and the University. We went through several staffing and organizational changes as well as a physical relocation. At the same time, we were heavily involved with multiple projects that have had significant impact on the departments we serve and the rest of the University.



Some of the key highlights of our office over the past year include: coordinating with the Associate Vice Chancellor for Enrollment Management to create and publish a monthly executive admissions and enrollment report; working with key members of Enrollment Management, Information Services and consultants from Blackboard to successfully implement phase 1 of Blackboard Analytics data warehouse and reporting system; and coordinating with Student Affairs staff members to implement a New Student Wellness Survey.

Looking ahead, we plan to build on our successes of the past year by continuing to improve Blackboard Analytics capabilities, furthering the campus use of Talisma, and enhancing the capabilities of ImageNow. We also plan on working with the campus community in creating and implementing an early alert system, implementing a confirmation of admission process, and much more. This next year will bring us many opportunities, and I am confident the BSI team will continue to accomplish amazing things.

Sincerely,

A handwritten signature in black ink, appearing to read 'Craig Adler'.

Craig Adler
Director, Business Systems Intelligence

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MEET OUR TEAM



Craig Adler has been with the University since 2004. He started as a student worker in the International Admissions Office and accepted a full-time position with the Undergraduate Admissions Office in 2006 as the Residency Coordinator. His strong technical knowledge, attention to detail, understanding of database systems, and big-picture vision are assets as he leads this team into the future. In his spare time, he enjoys hanging out with his family.

Pat White has worked at UNO in many capacities over the past two decades. She began in the Registrar's Office, moved on to ITS, then Admissions, and joined the BSI team two years ago. Whether it be a scheduled electronic message or an extremely complicated report code, she probably assisted in the development of it. Her knowledge and experience with UNO databases lends invaluable insight to the BSI team. In her spare time, she enjoys playing with her grandchildren, walking recreationally, running, hiking, and reading.



Patti Martin has been with the University since February 2014. Her attention to detail, experience and understanding of Talisma, organizational skills and patient/witty way of explaining things adds a dimension to the BSI team that is unmatched. In her spare time, Patti volunteers at Joslyn Art Museum and enjoys reading, travelling, and taking in the sights and sounds of midtown Omaha with her husband.



Melissa Routh is the newest member of the BSI Team. She came to UNO from the University of Nebraska Foundation. With her she brought over a decade of experience with databases and report writing. Her attention to detail and desire to continually learn new technology makes her a valuable asset to the team. In her spare time, she enjoys gardening, traveling and spending time with her husband and son.



Christy Tilford has been with the University for nearly thirty years since first enrolling in classes. While a student, she worked in UNO's Learning Center, Registrar's Office and Orientation. Christy moved on to full-time employment in Records and Registration, Admissions and, most recently, BSI. She thrives on the day-to-day challenges of data integrity, process improvement and enhancing the student experience.



In her spare time, Christy enjoys volleyball, reading, bowling and traveling. She is currently the treasurer for the UNO Faculty/Staff Bowling League as well as the UNO chapter of Phi Kappa Phi.

Laura Rejda originally started at UNO in Undergraduate Admissions. After living in Arizona for a period of time, she moved back to Omaha and rejoined UNO as a member of the BSI team to assist with the implementation of the Talisma database. Her friendly, calm demeanor is a huge asset as she navigates campaigns and orientations for Undergraduate Admissions. In her spare time, she enjoys spending time with family, hiking, and traveling.



Blake Eno has been on the BSI team since April 2014. He has worked in several different areas of information technology over the past 9 years, ranging from technical writing/editing to systems administration and report writing. Blake has experience working in education, including stops at Waldorf College and The University of Alabama. In his spare time, he enjoys watching sports and spending time with his wife and two sons.

MISSION & VALUES

What We Do

The Business Systems Intelligence (BSI) Office provides reporting, operational, Customer Relationship Management (CRM) and project support for the offices in the Enrollment Management division, including Undergraduate Admissions Operations, Recruitment and Records & Registration.

The BSI team offers reporting services for the UNO community in collaboration with Information Services and the Office of Institutional Effectiveness.

Mission

To be adaptable and responsive in delivering quality data and operational support within Enrollment Management and Student Affairs, as well as the UNO community, allowing for more efficient and data-driven decision making.

Values

BSI holds these values within our own team and in support of Enrollment Management and the campus community:

- Foster collaboration and teamwork through effective communication.
- Serve through innovative strategic and purposeful actions.
- Demonstrate integrity by providing support in an ethical and accountable manner.
- Provide service with a positive attitude.

ACHIEVEMENTS

Staffing Changes & Relocation

The BSI Office has been through multiple staffing and structural changes over the past year, and we have expanded from an original four-person office in 2012 to seven people in 2014. The newest members of the BSI Office are Patti Martin, who joined the team in February; Blake Eno, who was added in April; and Melissa Routh, who started in June. Christy Tilford also joined the team this year, and her position was reclassified to Associate Director in January. A list of the BSI team members and their responsibilities is included at the end of this report. At the start of the 2013-14 academic year, the BSI Office had 5 staff members physically located in 4 different offices in 3 different buildings across campus. One of our primary goals last year was to create a single physical location for our staff members. Having disparate physical locations creates issues with team unity and oversight, especially within a newly created office such as the BSI team.

The Records and Registration office was able to move student files to the basement of the Eppley Administration Building which opened up space for the BSI team. We built workspaces and moved into our new location in September, 2013. The BSI team affectionately labeled their new workspace the “BSiPad.”

(See Appendix A & B – BSI Office Structure & Enrollment Management Structure)

Blackboard Analytics Implementation Phase 1

The BSI Office continues to be heavily involved with the implementation of the Blackboard Analytics (BBA) project. BBA is a data warehouse that contains data from the student information system and provides instant and consistent reporting capabilities. BBA has the potential to completely transform the University’s existing student reporting mechanism and will allow us to make more informed and timely decisions. Phase 1 of the implementation project started in March and focused on delivery-site enrollment and admissions reporting. BSI worked very closely with Information Services, the Office of Institutional Effectiveness and other University offices to create consistent reporting definitions, and implement and validate the data warehouse. We are currently in the planning stages for Phase 2 which will include administrative-site data.

Monthly Executive Admissions and Enrollment Report

One of the goals of Enrollment Management and the BSI Office was to create a formal undergraduate admissions and enrollment report. This report would be generated on a regular basis to provide a snapshot of the current admissions and enrollment trends to campus executives. In January, 2014, the BSI Office partnered with the Vice Chancellors in Enrollment Management and graphic designers to create this informative report.

ACHIEVEMENTS

MavLINK Upgrade

NeSIS released an in-house portal solution for online academic and administrative services several years ago that has been enhanced within the last year. In November 2013, BSI team members coordinated with multiple members of the functional offices and Information Services to create the UNO dashboard. The self-service team began to review existing NeSIS portal functionality as well as desired functionality required for UNO to move forward without loss of current services.

UNO web developers and the dashboard team, in coordination with University Communications, began to explore a new look/feel for MavLINK for students, faculty and staff. This included re-branding to match the current UNO online presence. We continued to explore and test new functionality that allows checklist/"To Do" items and service indicators/holds to be more visible and provide more useful information to students. Students no longer need to drill down multiple levels for details. Hyperlinks within checklist item and service indicator descriptions allow students to directly access online forms or websites with additional information. Campus-specific configuration allowed us to remove campus designations on these elements previously needed due to the shared nature of the previous portal that allowed students to see information for all NU campuses with which they were affiliated. Additionally, we are now able to display communications generated in PeopleSoft to students. Based on the new configuration options, we updated checklist items, service indicators and communications for Undergraduate Admissions, International Admissions, Orientation and Health Services. We also provided basic HTML coding to other functional areas so they could set up their own checklist items and service indicators.

This MavLINK upgrade is the first major update to the student portal since going live in October, 2009.

The UNO team consulted with Disability Services regarding ADA compliance needs while development and testing of the enrollment piece continued along with ongoing review of the site and its functionality. MavLINK went live Saturday, May 24, as the NeSIS team offered to move the changes to production instead of waiting for Memorial Day. Since Go Live, the NeSIS team has expediently responded to minor bug fixes and has been preparing multiple feature enhancements for a future release expected in August 2014.

ACHIEVEMENTS

ImageNow Phase 2 Implementation

BSI has the responsibility to provide ongoing support of the ImageNow document management system for a variety of offices within Enrollment Management and Student Affairs. In fall 2013, the BSI Office coordinated with Information Services (IS), Perceptive Software and multiple members of the UNO community to perform a Health Check on the current use of the ImageNow system. A representative from Perceptive Software met with Undergraduate Admissions, Dual Enrollment, Health Services, Registrar, Financial Aid and Graduate Studies (GS) to discuss any problems we had. They then provided us with an analysis of our existing “pain points,” gave us a few quick fixes and some recommendations for the problems that would require involvement on their part and additional services and/or products.

To date we have completed several fixes/modifications/trouble-shooting:

For all Departments:

- ImageNow was updated to version 6.7. This required extensive testing in the TEST environment before implementing it to the Production environment and testing in Production to be sure it functioned as it should.
- Added department prefix to all document types, excluding FA.
- Re-indexed all documents.
- Converted the student name to the Last Name, First Name format with a re-order script created by Perceptive.
- INMAC - Conversion module to convert PDF documents to TIFF.

Dual Enrollment:

- Created a View for Student Financials to allow search capability for account collection purposes.
- Created an application plan to provide auto-linking of the documents to PeopleSoft.
- Currently working to create workflows and routing rules for Dual Enrollment and Early Entry.

UG Admissions:

- Reinstalled the scanner and recreated scanner profiles after computer tune-up.
- Updated processor profiles after computer tune-up.
- Created routing rule to auto-route applications to the File Repository queue from the External Load queue.
- Created an alpha-sort routing rule to auto-route other documents to the appropriate processor’s New Documents queue.
- Currently working to create an archiving queue to move documents that completed the admission process.
- Currently working with IS and GS to create e-Forms.
- Ensure the correct version of JAVA is installed and working correctly with ImageNow.

We are currently working on converting commonly used paper forms, such as the Grade Change and the Program/Plan Change forms to electronic versions with ImageNow workflows.

ACHIEVEMENTS

New Student Wellness Survey

In 2013, a New Student Wellness Survey (NSWS) was created to capture information regarding incoming student perceptions of personal wellness. The NSWS consisted of 22 questions covering the eight areas of wellness and supplemental information, and it was incorporated into the Orientation sign-up process. Because of the survey method, we received an incredibly high response rate (94% for first-year & 70% for transfer students) which gave us a much clearer picture of the wellness of the incoming class.

The BSI Office analyzed the incoming data and worked with Student Affairs and other offices to formulate an action plan. Armed with the wellness data, along with other information from the student information system, members of the UNO community contacted over 600 students with strong concerns in one or more wellness categories. The feedback from the students we contacted was extremely positive: UNO is “more personable” & “teachers seem to care” were just a couple of the positive comments we received.

Over 600 students with wellness concerns were called by University staff members.

In spring 2014, we reviewed the previous survey and worked to improve it for the Fall 2014 class. The 2014 survey went live on March 31 and was expanded from 26 to 35 possible questions. We also added many dynamic and optional questions, as well as some free text fields.

Joe Kaminski and Craig Adler, the leaders of the NSWS project, have presented the results to multiple campus constituent groups including the Student Affairs senior staff retreat, the campus Deans, Chancellor’s Cabinet, and the Strategic Planning Forum.

WebFOCUS 8 Conversion

During fall, 2013, the University system upgraded from WebFOCUS 7 to 8. WebFOCUS is our main Business Intelligence tool, and this conversion had a substantial impact to all developers and end users. All reports needed to be converted, and launch pages needed to be created and added to the new portals. BSI staff spent an estimated 80+ hours between three developers converting reports within 12 different reporting portals during this period.

ACHIEVEMENTS

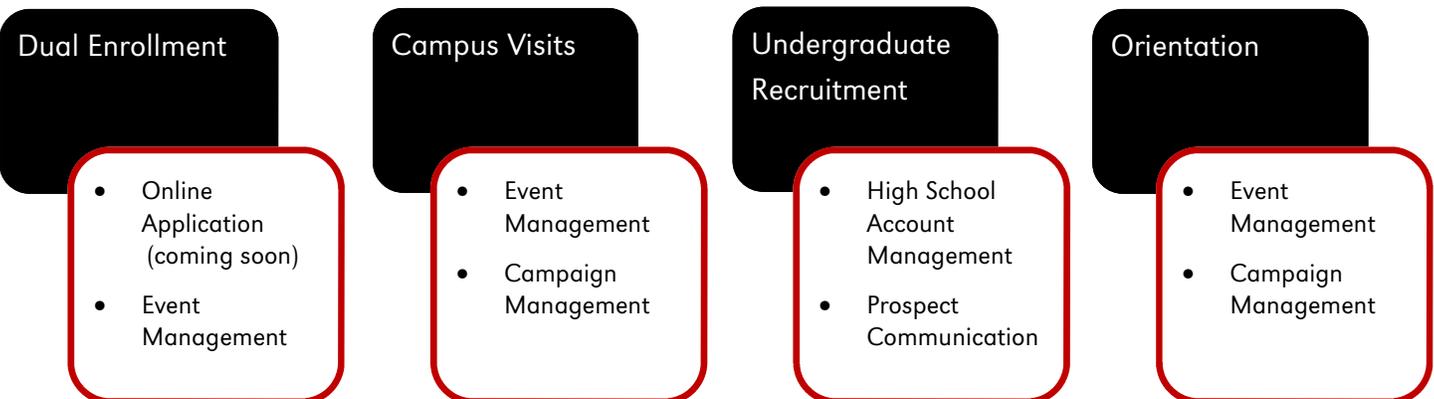
Talisma

The Talisma CRM software was implemented at UNO in late-2012 and 2013, and this academic year was the first full business cycle using this product.

Talisma is a very capable database software that allows us to better communicate with prospective students and applicants, and we have taken amazing strides over the past year. We were able to successfully implement our CRM product within our original planned scope which included: Undergraduate Admissions & Recruitment, Graduate Admissions, International Studies and Programs, and Orientation. After the initial implementation, there was a lot of interest by various campus departments in participating and we quickly realized that a governing structure was needed to set priorities. BSI team members are core participants in the creation and ongoing governance of Talisma.

From Fall 2013 to Fall 2014, over 223,000 emails were sent through Talisma Campaigns.

The BSI Office has been tasked with supporting Undergraduate Admissions & Recruitment, Campus Visits and Orientation. This support includes initial and ongoing training of end users, the creation and maintenance of events, the creation and maintenance of communications, and data cleanup. We create and maintain customized workspaces to meet the specific needs of each department and end user. Our team members also spend a significant amount of time assisting with Orientation events.



ACHIEVEMENTS

Talisma (continued)

Data integrity is essential in using Talisma effectively to help drive the enrollment process and meet UNO's 20 by 20 goals. Using accurate data points, campaigns can be designed to provide the right message to the right student and the right time. Over the past year, data clean-up has been a top priority with goals of improving Enrollment Counselor efficiency, enhancing the student's enrollment experience by making them feel more connected, as well as identifying trends and conversion rates in order to concentrate time and resources in the best manner.

Data Management has become a daily routine involving validation of Peoplesoft, Portal and Web Form feeds into Talisma, maintenance of consistent records (email, address, contact, lead, participant, student type, etc) and involving the end user to assist with updates. Through the combined efforts of the Enrollment Analysts, Counselors and the Call Team Student Workers, it is estimated that 40 hours a week is spent refining data.

Talisma is the first robust CRM product UNO has worked with, and we are still very early in the implementation and adoption of this technology. Because of this, we realize that there are many opportunities to improve this product, and we are currently in the process of prioritizing these opportunities moving forward. Some of the areas that we are exploring are higher education "best practices" including using trackable URLs and adding Unsubscribe features to our communications.

Other

In addition to our other accomplishments this year, the BSI Office played a key role in:

- Implementing updates and enhancements for the application for admission.
- Creating a formal admission count report that is sent on a weekly basis and keeps all constituents up to date on the current admissions cycle.
- Implementing the second phase of the Undergraduate Admissions KPI report, a robust WebFOCUS dashboard with drilldown capabilities.
- Creating an Enrollment Management business cycle calendar to track important dates throughout the year.

KEY PERFORMANCE INDICATORS

Batch Jobs

The BSI Office creates and provides ongoing support for various batch jobs that are core business cycles processes within the departments we support. We currently maintain 124 separate jobs that are scheduled at different points throughout the admissions and enrollment cycles.

Quarterly PeopleSoft Maintenance

The BSI Office coordinates testing of four maintenance bundles and one PeopleTools upgrades each year.

PS Modification Testing / Implementation

The BSI Office coordinates testing of multiple modifications for the departments we support. Over the past year, the BSI Office has been involved with testing 15 total mods for these departments.

Reporting

From March 1 – August 31, 2014, the BSI Office received a total of 133 report requests with an average completion time of 5.04 workdays.

	Count	Average Workdays to Completion
New Reports	88	5.76
Modifications to Existing Report	45	3.64
TOTAL	133	5.04

KEY PERFORMANCE INDICATORS

Talisma Events, Campaigns & Reports

Talisma Event Management enables us to plan and execute events by managing registrations, handling seating capacity and managing participants. Within the Event, a Campaign is created to enhance and automate the communication process. Within the Campaign, students are represented as “Targets.” The Target stores information related to the student’s participation in the specific campaign.

BSI works with Orientation, Campus Visits, and Undergraduate Recruitment on Events throughout the year.

Fall 2013 Orientation

	Events	Campaigns	Total Eligible Targets	Total Registered Targets Fall 2013	Total Fall 2013 Attendees	Reports
Fall 2013 Eligible Campaign	N/A	1	2,206			
Freshman*	10	10		927	764	
Transfer*	7	7		596	443	
Waived	1	N/A			89	
Parent	7	7		226	N/A	
TOTAL	25	25	2,206	1,749	1,296	8

*includes Express Orientation

Spring 2014 Orientation

	Events	Campaigns	Total Eligible Targets	Total Registered Targets Spring 2014	Total Spring 2014 Attendees	Reports
Spring 2014 Eligible Campaign	N/A	1	1,021			
Freshman*	3	3		14	7	
Transfer*	3	3		126	83	
TOTAL	6	7	1,021	140	90	8

*includes Express Orientation

KEY PERFORMANCE INDICATORS

Talisma Events, Campaigns & Reports (continued)

Fall 2014 Orientation

	Events	Campaigns	Total Eligible Targets	Total Registered Targets Fall 2014	Total Fall 2014 Attendees	Reports
Fall 2014 Eligible Campaign	N/A	1	5,889			
Freshman*	5	5		533	407	8
Transfer*	6	6		543	406	
Military	1	1		9	8	
Thompson Learning Center	2	2		211	192	3
Honors	2	2		116	95	
Waived	1	N/A				
Parent	7	7		419	347	
TOTAL	24	25	5,889	1,831	1,455	11

*includes Express Orientation

Campus Visits Start Date Between 7/1/13–6/30/14

	Events	Campaigns by Start Date	Targets	Participation Count for Events	Reports
Daily Campus Visits	212	212	2,062	1,850	5
Be a Mav	6	13	117,997	643	1
PKI Friday at UNO	3	6	2,444	63	1
Mammel Hall Friday at UNO	2	4	901	19	1
TOTAL	223	235	123,404	2,575	8

KEY PERFORMANCE INDICATORS

Talisma Events, Campaigns & Reports (continued)

Campaign Management occurs independent of Event Management. Using Talisma Campaigns, we are able to select a target audience, create a marketing message, monitor the effectiveness of the messages and analyze results to create new campaigns. Below are examples of Campaigns. They include responses triggered by a student action, invitations to special events, and reminders that help drive the enrollment process.

Undergraduate Recruitment Campaigns—Targets Created Between 7/1/13 and 6/30/14

Ongoing Auto Response Campaigns

	Count
Request For Information Response	2,389
New Lead Response	12,472
Application Started	6,249
Application Submitted	10,996
TOTAL	32,106

One-Time Campaigns

	Count
Convocation Invite	2551
Convocation Reminder	2482
Holiday Mailer	22,054
Housing Showcase	26,217
Housing Showcase Reminder	13,195
Transfer FAFSA Reminder	810
Transfer Summer App	124
Transfer Fireworks	743
Transfer Fall Deadline	698
TOTAL	68,874

Talisma contains a comprehensive reporting tool that efficiently analyzes and reports on data. Through analytics, we are able to view data from different perspectives and to analyze the data on a variety of parameters. This allows us to maximize data value and enable better planning.

Undergraduate Recruitment Reports

	One-Time	Ongoing
Recruitment Activity Support; including Be A Mav Postal Mailer Lists	19	5
Data Clean-up Lists	3	2
TOTAL	22	7

KEY PERFORMANCE INDICATORS

Security Requests and Feedchanges

Christy Tilford and Craig Adler are the NeSIS Security Coordinators for UNO. As part of this responsibility, we manage security access to the Student Information System, Reporting and other related systems. This includes granting new access (Requests) and removing access when a person leaves the University or changes departments (Feedchanges).

Requests

	Count	Average Workdays to Completion
PeopleSoft (Approved)	257	7.66
PeopleSoft (Denied)	61	19.2
Reporting (Approved)	108	9.91
Reporting (Denied)	20	33.9
TOTAL	446	10.96

Feedchanges

	Count	Average Workdays to Completion
Status Changes (Retired, Separated, etc.)	267	5.78
Department Change / Department Name Change	754	4.48
TOTAL	1,021	5.13

KEY PERFORMANCE INDICATORS

Identity Management

Count	Task	Average Workdays to Completion
78	NUID issues researched and confirmed with NE-Trust group UNO has no data; no additional action needed by UNO.	1.33 days
62	NUID issues researched and confirmed with NE-Trust group additional action needed by UNO – reloading application; coordinate with the following UNO offices—Records & Registration, Health Services, Student Accounts, Financial Aid and Information Technology Services, Parking Services, MavCard Services, Human Resources—to move enrollments or other data from one ID to another, ensure external systems are updated and new MavCard is issued if necessary. May also include coordination with NeSIS functional coordinator and CSN ID management groups for TrueYou and the NE-Trust Registry.	4.95 days
12	New application overlaid on an existing person’s record – requires restoring original record data by removing all data loaded by application; ensuring TrueYou/MavLINK accounts are secure; reloading application to manually created ID via the Registry. Coordinate with the following UNO offices—Records & Registration, Health Services, Student Accounts, Financial Aid and Information Technology Services, Parking Services, MavCard Services, Human Resources—to move enrollments or other data from one ID to another, ensure external systems are updated and new MavCard is issued if necessary. May also include coordination with NeSIS functional coordinator and CSN ID management groups for TrueYou and the NE-Trust Registry.	2.67
52	Verify identity of applicant prior to Admissions Associates matching to existing NUID or creating a new one.	Generally completed same day of request since application needs to load; not included in time to completion.
52	Bio/Dem reviews and updates based on FAFSA ISIR mis-matches	List reviewed within 1-5 days of receipt; not included in time to completion.
35	Miscellaneous assistance regarding TrueYou and NE-Trust Registry with UNO HelpDesk/IS, Dual Enrollment and Registrar’s	Phone call or email inquiry generally addressed within 1-2 days or list reviewed within 1-5 days of receipt; not included in time to completion.

MOVING FORWARD

Many of the BSI Office's key accomplishments over the past year were early phases of ongoing projects. For example, the activities of the Blackboard Analytics project was the first step in a larger vision, and we are currently in the process of incorporating Administrative Site data to give us more reporting opportunities and a better picture of UNO students. ImageNow is another project that is ongoing, and we are working on creating online versions for many of our major forms for students and faculty. Talisma is yet another area that continues to evolve.

In addition to these, we are currently in the process of implementing a Confirmation of Admission form for undergraduate admits. This is a common process used by many schools to help predict enrollment and plan for general education class needs. As part of this process and in coordination with the University of Nebraska-Lincoln, we are also creating an enrollment deposit for the new College of Engineering students. This will help the College coordinate communications and provide consistent messages and admission procedures regardless of the campus they are on.

Other future goals include the following:

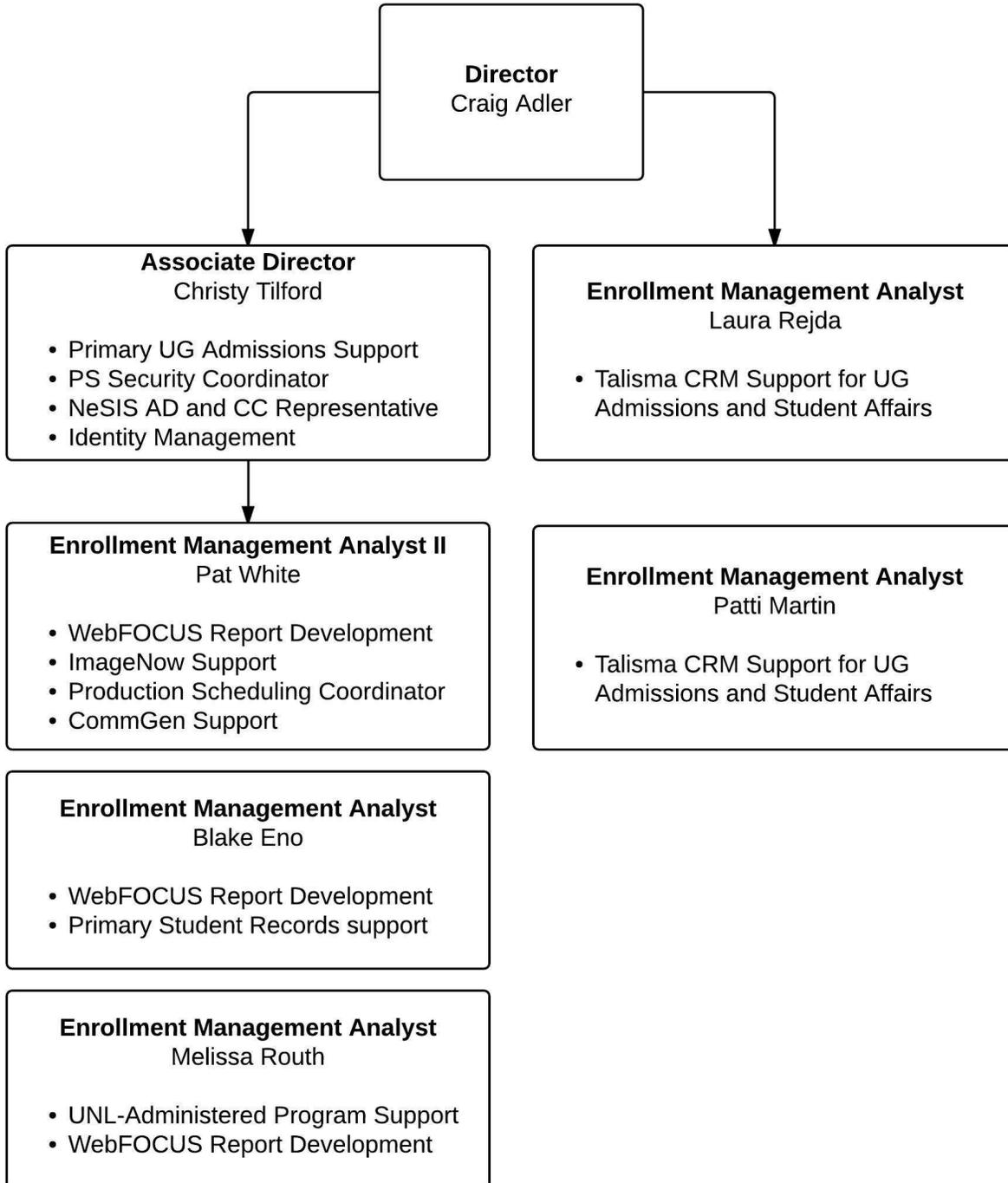
- Create more consistency and coordination in our support of the campus reporting needs.
- Implement a modification for Health Services to give students the opportunity to submit immunization records online.
- Work with a larger group of campus representatives to implement an early alert system.
- Continue to become more knowledgeable, efficient and customer oriented in the services we provide campus stakeholders.
- Work with Undergraduate Admissions to improve the Admission by Review admission and review processes.
- Enhance the Security Request System.



APPENDIX

APPENDIX—A

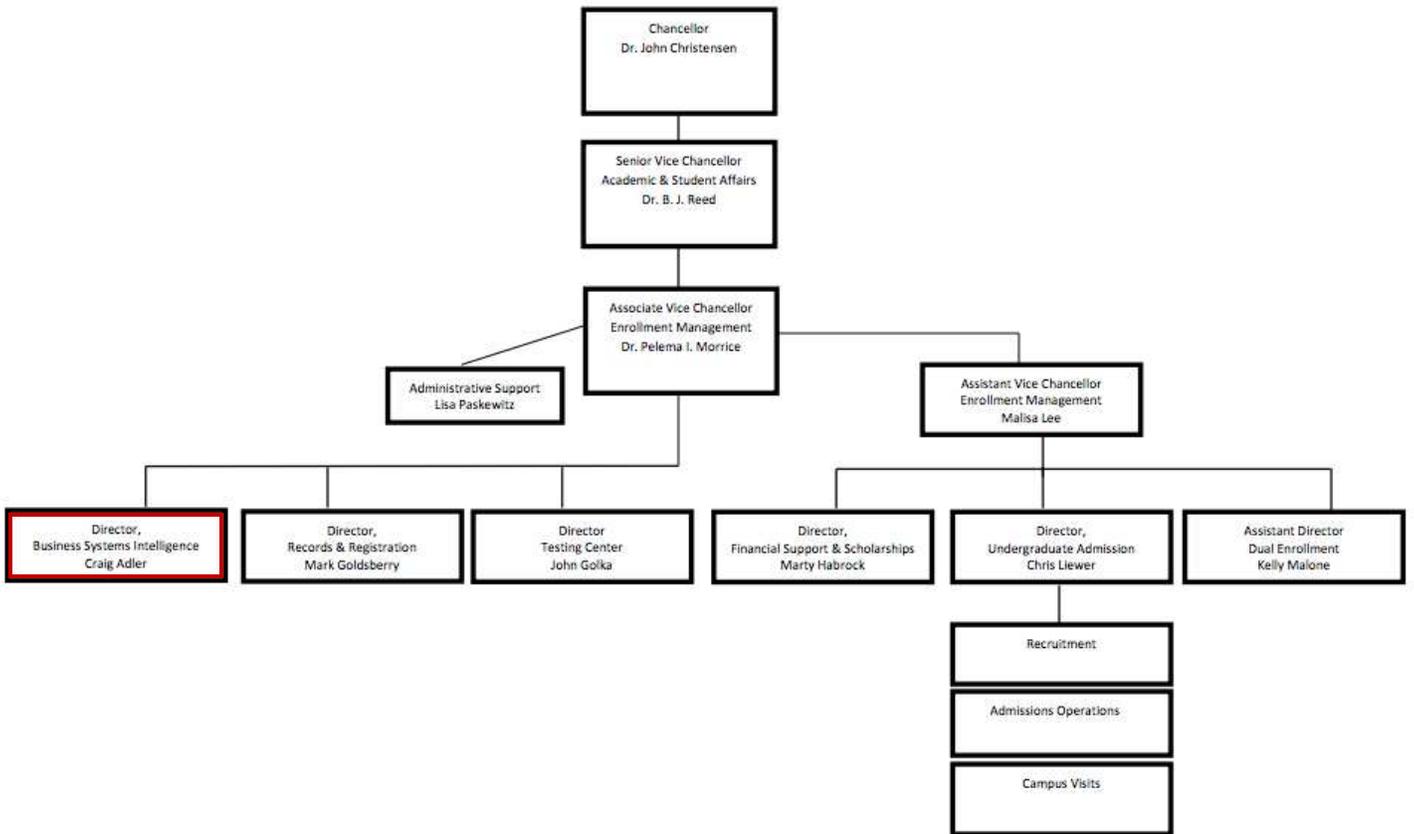
Business Systems Intelligence (BSI) Office Structure



APPENDIX—B

Enrollment Management Structure

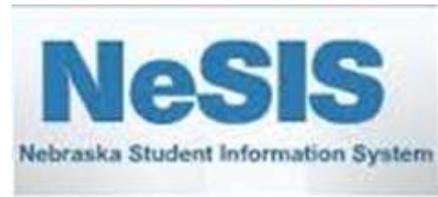
ENROLLMENT MANAGEMENT ORGANIZATIONAL CHART



APPENDIX—C

List of Tools

PeopleSoft



T A L I S M A



Blackboard

