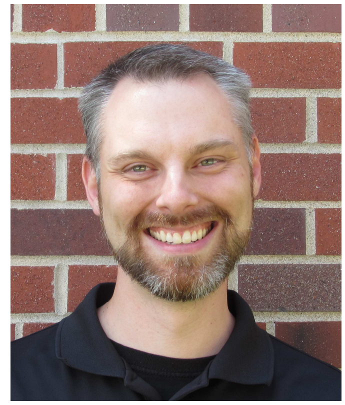
UNIVERSITY OF NEBRASKA AT OMAHA

BUSINESS SYSTEMS INTELLIGENCE

ANNUAL REPORT

2014-15

FROM THE DIRECTOR



This is the second Annual Report the BSI Office has produced. As I was reviewing last year's report and gathering information for this year, I am continually impressed by the amazing amount of work the BSI team accomplishes. The team members work hard every day, but it isn't until you step back and look at everything they have undertaken in the past twelve months that you gain perspective on the sheer amount of effort they have put in. The BSI team has completed—or is in the process of completing—all of the goals mentioned in the report last year, as well as several major items that weren't mentioned. All of this is on top of the regular day-to-day duties like building reports or managing our CRM system. These accomplishments are due to the efforts of the talented BSI staff.

Below are some of the office highlights from this past year:

- Melissa Routh, along with many others, assisted in implementing a Confirmation of Admission mechanism for new admits and an enrollment deposit for the College of Engineering.
- Blake Eno took major strides in furthering our use of the Blackboard Analytics data warehouse.
- Pat White worked with several departments to develop an online Change of Grade form.
- Patti Martin has been working on data management and improvements in the use of our CRM system and has developed a robust set of training resources to help onboard new users.
- Laura Rejda worked with Campus Visits and Orientation teams on improving the Orientation experience for both UNO staff and students.
- Christy Tilford worked with Information Services for a much-needed upgrade to the PS Account Request system.

I am excited to see the new opportunities this next year will bring. I am confident the BSI team will continue to accomplish amazing things.

Sincerely,

Craig Adler
Director, Business Systems Intelligence

TABLE OF CONTENTS

BSI OFFICE STAFF

Craig Adler, Director

- Planning, management, and overall direction of the BSI Office
- Lead PeopleSoft/SIS systems support for Enrollment Management division
- Lead data analysis and reporting support for Enrollment Management division

Christy Tilford, Associate Director

- Lead Undergraduate Admissions business analysis and intelligence support
- Campus representative for Admissions and Campus Community PeopleSoft modules
- Security coordinator and Identity Management for PeopleSoft and related systems

Pat White, Enrollment Management Analyst II

- Transactional system data analysis and reporting
- Support ImageNow system and PeopleSoft communications
- BI Project support for Enrollment Management

Laura Rejda, Enrollment Management Analyst

- CRM support for Orientation
- CRM support for Campus Visits
- Support for Undergraduate Admissions and New Student and Family Programs units in CRM event management

Patti Martin, Enrollment Management Analyst

- Manage CRM data for Undergraduate Admissions
- CRM support and training for Undergraduate Admissions
- Manage non-event based CRM communications for Undergraduate Admissions

Blake Eno, Enrollment Management Analyst

- Transactional system data analysis and reporting
- Support Blackboard Analytics data warehouse dashboard and reporting needs for Enrollment Management
- Coordinate testing of PeopleSoft quarterly maintenance bundles for Student Records module

Melissa Routh, Enrollment Management Analyst

- Business analysis and intelligence support to enhance collaborative efforts between UNO and UNL for the College of Engineering.
- Transactional system data analysis and reporting

Taylor Gehringer, Graduate Assistant

- Provide statistical analysis support for the UNO Remissions Taskforce, Dual Enrollment, and Enrollment Management

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 (EM) division. This includes EM Senior staff, Undergraduate Admissions Operations, Recruitment and Records & Registration.

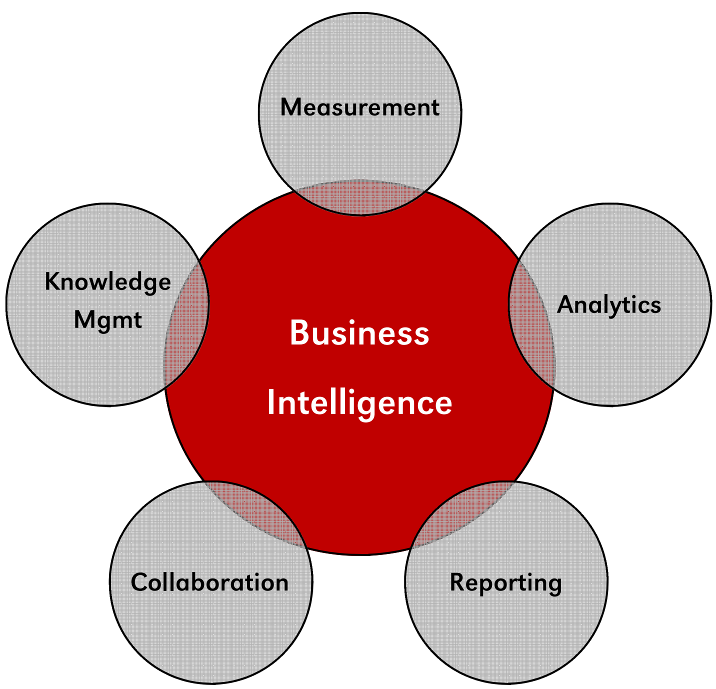
Mission

Improve student experience by offering a high level of service to and collaboration with Enrollment Management, Student Affairs and the UNO Community. This is accomplished by intentional and proactive systems and staff support, as well as being adaptable and responsive to ongoing business intelligence needs.

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

BSI Office Relocation

The BSI Office has relocated. At the beginning of 2015, team members moved from a space referred to as the BSiPad located in the Registrar's area to EAB 106V next to the Eppley break room. Our new space is now referred to as the BSI Bunker. Christy Tilford can be found in EAB 106F across the hall and Craig Adler's office is in EAB 117.

PS Account Request System Upgrade

A major initiative for BSI this past year has been upgrading the PeopleSoft Account Request (PSAR) system. We released version 1.0 of the new system in May. This upgrade is the first step in a multi-stage project intended to provide a more efficient and secure way to manage Faculty/Staff security access to student data.

Christy and Craig have worked closely with Administrative Information Services (ADIS) for this update. The architecture for the system was converted from MySQL to Oracle. During this time, Christy and Craig submitted desired enhancements along with priorities for future releases. Testing of the converted system began mid-March to ensure no existing functionality was lost. Several enhancements focused on the communication flow to requestors, approvers, and BSI were also in place when version 1.0 was released on May 15, 2015. Overall feedback from users has been positive. Work continues on enhancements for the next release which is slated for September 2015.

From May 1, 2014 through April 30, 2015:

	Count	Avg Days to Completion
SIS	316	7.8
Reporting	88	9.7

Health Services Immunization Module

1,499

Immunizations uploaded using new functionality

In order to provide a better overall experience for students and staff in managing immunization records, the BSI office integrated a new health immunization module into our PeopleSoft environment. Blake coordinated with the NeSIS office and UNO Health Services to set up, test, and implement this process. With the new PeopleSoft module, our students now have the convenient option to submit their immunization records online. The response so far has been very positive, especially from members of the Health Services office. Staff members can now easily see and manage all of a student's immunization records from one location in PeopleSoft.

ACHIEVEMENTS

Confirmation of Admission (Intent to Enroll) & Engineering Enrollment Deposit

Colleges and universities utilize an "Intent to Enroll" process for admitted students to confirm their plans to enroll and serve as a tool for enrollment management, projections and budget forecasting. It is a good faith agreement between the student and the school and often requires a monetary commitment by the student. This enables institutions to plan effectively for class offerings and student resources and report new student class data more accurately as part of the budgeting process.

In Summer 2013, a committee was formed with representatives from multiple functional offices and academic departments to review best practices and evaluate the need of an Intent to Enroll process. The committee strongly recommended that UNO implement an Intent to Enroll process at the Undergraduate Admissions level, but it was split on requiring a financial deposit as part of the intent to enroll.

- The recommendation was reviewed and approved to be implemented starting with the 2015 Admissions cycle.
- It was decided there would be no financial deposit required except for the College of Engineering.

On September 15, 2014, the project successfully went live. A total of 4,332 students confirmed their admission for the Fall term. In addition, 197 Engineering students paid the enrollment deposit.

63%
of Admitted Students Confirmed Enrollment

Coordination Between Multiple Departments

This project has been a joint collaborative effort in which Craig, Christy, and Melissa worked with members from Undergraduate Admissions, UNL College of Engineering, UNL Admissions, UNO Information Services, the NeSIS team in Lincoln, Cashiering/Student Accounts, and UNO senior staff.

Numerous reports have been developed by Craig and Melissa to ensure data integrity, send information to interested parties, and troubleshoot processes and inconsistencies. Existing admissions and recruitment communications were updated, and new communications were created and scheduled.

Melissa developed a Frequently Asked Questions document. Once approved by UNL and UNO, it was added to the UNO Undergraduate Admissions Website. This document serves as a resource to students who may have questions regarding the Engineering Enrollment Deposit.

ACHIEVEMENTS

Blackboard Analytics/Dashboards

Over the past year, the University has taken great strides in the implementation and use of the Blackboard Analytics (BbA) data warehouse, and Blake has played an integral part in this project. Two of our major accomplishments are the inclusion of the UNO-Administered programs on the Lincoln campus and the creation of a recruitment scorecard.

BbA Admin Site

The University of Nebraska at Omaha is evaluated on the programs it administers, including those on the UNL campus. Historically, we have not had access to “live” data from those programs. Enrollment information for UNO programs at Lincoln was provided weeks after the start of the term, and made accurate and timely University-wide enrollment predictions nearly impossible. It is also made management of the cross-campus programs difficult. To resolve these issues, the Blackboard Analytics team, including Blake, coordinated with their counterparts at Lincoln and developed a method to incorporate administrative-site data into the warehouse.

Several weeks were spent checking data and ensuring the new administrative site information was accurate and did not negatively affect previously built reports. Once the changes were validated, all of the Undergraduate dashboards were updated. We now have a more complete picture in campus decision-making.

BbA Recruitment Scorecard

To better assist with predicting future enrollment for our freshman class, we developed a monthly scorecard report that assesses the likelihood of enrollment for each applicant. This prediction allows us to use recruitment resources in a more informed and strategic method. To get this score, we analyzed several years’ worth of admissions and enrollment data and assigned a value to a variety of constants—both positive and negative—including gender, age, ethnicity, application date, college choice, GPA, and ACT scores. This report is produced on a monthly basis and has been helpful in predicting the enrollment of our new freshman class.

ACHIEVEMENTS

ImageNow

ImageNow (IN) is a document imaging and management system that enables organizations to scan, submit, and receive documents electronically. Documents are indexed with document keys and stored on a central server. The system has a workflow component that allows the documents to be searched, retrieved, and electronically moved to other queues by the user. WebNow is the browser-based version of ImageNow used by the campus community.

Pat provides support for ImageNow. Below are highlights from the past year:

- Developed workflows and routing rules for the Dual Enrollment and Early Entry online application that were in process last year. The ability to auto link the documents to the student's PeopleSoft data was also configured.
- Defined the Archiving Document Removal process. This removes documents from the Undergraduate Admissions workflow but retains them within the ImageNow application. Archiving documents decreases the amount of time the search process has to work. The process has been set up to archive documents that have been in the File Repository or No Homes queues with a Time in Queue of 366 days or more. All archived documents can be viewed by searching on the student's NUID or name and can easily be added back into the workflow.
- Completed work on the Change of Grade eform. Pat is currently working with the Office of the University Registrar to present demonstrations to the various colleges and departments regarding what the eform can do for them and how it works. Once a department has decided to use it, they are added to the Change of Grade eform workflow. So far, three departments in CPACS (Social Work, Criminal Justice, and Gerontology) are using it.
- Provided backup support for Graduate Studies and International Studies & Programs while their primary support person was out of the office.

ACHIEVEMENTS

Reporting

JIRA

There have been many beneficial changes to BSI reporting over the past year. Last fall, the BSI Office began using JIRA, an issue-based project tracking system, to manage requests and projects. Melissa worked with UNO Information Services to set up JIRA for use by the team. Prior to using JIRA, the BSI Office used an Excel spreadsheet to track requests. Being able to use this sophisticated program has made report request and tracking more efficient. It also allows for more transparent reporting that enables BSI to eliminate redundant requests and design the best way to approach a report and gather feedback from other report-writers. The software allows users to input request details, assign to other staff members, track work progress, and add comments throughout the life of the report. JIRA assists the team with time management, project prioritization, better workflows, and continuous review of what is in the queue. Requests are easily assigned to report-writers based on current workload and availability.

From July 1, 2014 through June 30, 2015:

267 **Total Reports** → 121 Modifications to Existing Reports; → 146 New Reports

Average Workdays to Completion = 4.9

Standardization

Blake, Pat, and Melissa created reporting standards for dashboards and report formatting. Blake reviewed dashboards and developed guidelines for formatting that will be applied to all existing and new dashboards. The updates will create a more visually consistent and user-friendly landing page for end-users. Pat and Melissa jointly worked on creating a report template to be used for writing reports that incorporate code examples and end-product formatting. All reporting standards are currently being used by BSI WebFOCUS report-writers when creating new reports. This will allow final reports to have the same inclusions and visual appearance regardless of who is doing the development.

Expanded Services

Over 25 UNO colleges & offices were served by BSI reporting

New reports and dashboards were created for two first-time users—Disability Services and Honors. Blake, Pat and Melissa worked to develop self-service reports placed on the newly created dashboards. A significant number of reports have also been created or modified for use by the Office of Military and Veterans Services over the past year. We are excited to see an increase in services provided to areas outside of Enrollment Management which allows the BSI Office to assist the campus community in better serving students.

ACHIEVEMENTS

Talisma

This report highlights major achievements. For further information, please refer to the 2014-15 Talisma Year End Report.

Dual Enrollment/Early Entry Online Application

In August 2014, we went live with an online application for Dual Enrollment/Early Entry. The new application allows us to communicate to applicants their current status and other important information.

Talisma Upgrade to 9.2.2

The Talisma CRM database was upgraded in December 2014. Among other enhancements, this upgrade enables us to merge leads. This will give admissions counselors the entire history of prospective students for a holistic view of their enrollment and communication.

New abilities in email communications were also provided. This will save time and allow the counselor to potentially send more student-specific messages.

As part of the upgrade, the University developed remote desktops for the Talisma client to allow for easier management of future enhancements and to assist with troubleshooting issues. The remote desktops also enable end-users to have easier access to Talisma. As an example, Orientation is now able to use any machine to access and respond to emails.

JIRA

The Talisma Development team also began using JIRA (explained in Reporting) to track data and report requests. Since January 2015, over 300 tickets have been created. This allows for workflow visibility between Enrollment Analysts and the Development Team.

Admissions Counselor Training

Over the past year, training resources have been developed to empower Admissions Counselors to manage their recruitment territories. During that time, Patti assisted in onboarding five new Admissions Counselors. She created a Back to Basics Training and followed that up with an Admissions Counselor Training Schedule for New and Continuing Admissions Counselors during Summer 2014. As part of these sessions, Patti also created a 100-page training guide as a reference (point during and after formal training sessions).

ACHIEVEMENTS

Talisma

Data Management

In 2014–2015, data management continued to be a major focus for BSI. The total amount of new leads received August 2014-July 2015 was 33,259. Compared to August 2013-July 2014, leads were up 384. These leads are reviewed on a daily basis to ensure accuracy. Through these efforts, 20-25% of new leads were identified as duplicates and merged. Efforts include daily scrubbing of applicants, non-high school new leads, blank student type or lead stage properties, manual updating of suspect to prospect when students register for events or send their ACTs, team identified duplicates, participant review, ACT feed review, high school leads with Graduate or International recruitment leads, applicant with a deleted status, and high school leads assigned to the transfer team. The high school pipeline is reviewed on a weekly basis. These contacts created without leads are reviewed for missing recruitment lead opportunities, as well as undeliverable emails, and recruitment counselor unassigned lists. Mailer lists are scrubbed before a postal mailer or email campaign.

33,259
New leads created between August 2014 and July 2015

Data Management Highlights:

- Students with missing student types decreased by 88%
- High School leads increased by 1,417
- Adult Learner leads increased 5%. This is partially due to manual imports from student who included UNO on their FAFSA (Free Application for Federal Student Aid)
- Transfer leads are now more accurate due to aligning student types with PeopleSoft admit types.

Campaign Management

The 9.2.2 upgrade allowed Admissions Counselors to send group emails based on enrollment criteria defined on the lead. Admissions Counselors are able send targeted messaging such as high school visit announcements. Beginning in June 2015, Talisma enhancements allowed us to be able to determine both the email open rate and successful campaigns. Additionally, Patti and Laura compiled a 90-page document of all Talisma campaign workflows and email mailer templates to assist in the communication review efforts in Undergraduate Admissions.

Through Talisma, BSI compiled 26 postal mailer lists, 25 one-off email campaigns, and six ongoing campaigns for new leads, request for information, and Admissions and Dual Enrollment notifications.

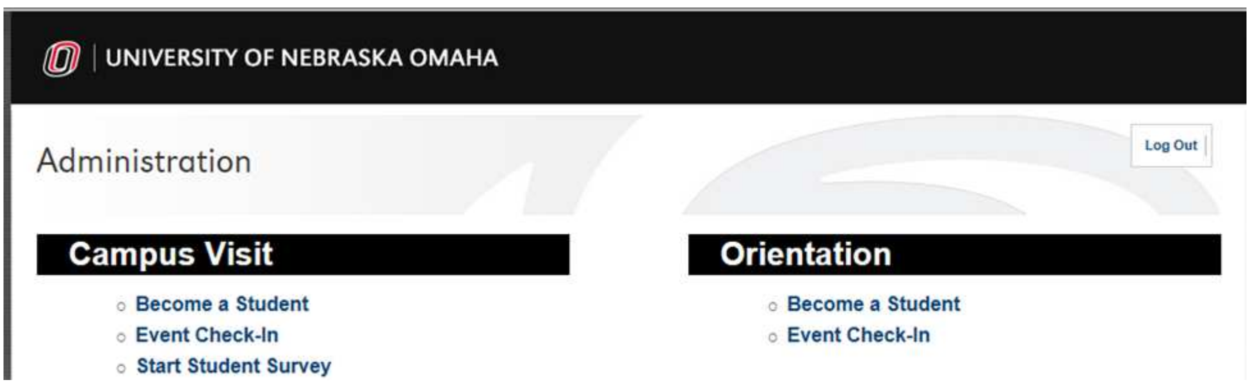
27,450
Email interactions sent out through Talisma

219,705
Email mailers sent to undergraduate students

Talisma

Event Management

In December 2014, the Talisma development team launched a new event portal which allowed for account creation, password reset, and sign-in capabilities. The portal allows for a comprehensive calendar of campus visits including event description and details. In addition to registering participants for events, the portal also has a check-in feature for students and guests.



Laura worked with the Campus Visits and Orientation teams on ongoing training and support including portal administration, Talisma email communication workflows, and Family Orientation check in. Based on her experience supporting three Orientation cycles, Laura developed a Fall Orientation Checklist Timeline for future sessions.

80,319
Invitations sent for 26 Undergraduate Recruitment Events

Building an event is a multi-step process that requires Laura to work closely with the New Student Family Programs and Undergraduate Recruitment Event Managers in order to create a seamless experience for the student. BSI sent out 80,319 invitations for 26 Undergraduate Recruitment events. In addition, 43 reports were developed and maintained to communicate advising needs, Matador feedback and group visit schedules.

ACHIEVEMENTS

Talisma

Orientation

Over

40

Mailers created for Spring and Fall Orientation campaigns

Online Orientation was piloted for Spring 2015 with149 registrations. Also starting in Spring, students were able to submit their MavCard photo as part of the registration process. The photos are gathered and presented to MavCard services for approval. Based on the approval status, Talisma sent a series of mailers to encourage submission of photos before attending Orientation which included 285 mailers within 15 campaigns.

Beginning Fall 2015, the registration process for Family orientation events was updated to make the process easier for students and family members. Family members are encouraged to register via postal notifications and prompts from their student. As of August, Online Orientation became available to all admit types regardless of Military affiliation or distance from campus. No orientation holds were lifted without completing orientation. Online remained available until Friday, August 28. Attendance was manually updated in Talisma for tracking.

	Events	Campaigns	Registered Targets Fall 2015	Attendees Fall 2015	Mailers
Freshman	22	22	1856	1710	2
Freshman for Engineering	1	1	34	29	2
Honors	3	3	109	106	2
Thompson Learning Center	2	2	196	195	2
Adult Learner	4	4	84	71	2
Military and Veteran	4	4	134	119	2
Transfer	4	4	584	535	2
Online	1	1	827	756	3
Student Total	**41**	**41**	**3824**	**3521**	**17**
Family	26	26	864	822	2
TLC Family	2	2	72	72	2
Family Total	**28**	**28**	**936**	**894**	**4**

LOOKING AHEAD

The BSI Office is not a student-facing office, and we don't work in a vacuum. We do not develop anything solely for ourselves. We are a team of talented individuals whose (only) responsibility is to enable offices in Enrollment Management and the University to better serve students. We provide support in a variety of ways, but they all ultimately get back to helping offices help students. This overriding mission is at once focused, yet broad. Because of this, we have a variety of upcoming and ongoing projects:

- Continue enhancing the services and products we already provide. We are not a static organization, and there is no finish line for this. Our primary goal is to continuously improve on what we do.
- Partner with Information Services, Undergraduate Admissions, New Student & Family Programs, and other offices to continue our work in developing a more stable and scalable CRM product.
- Improve the Online Orientation sign-up process for students.
- Work with Undergraduate Admissions in enhancing the communication plan to prospective and new students.
- Develop an improved campus visit sign-up process for prospective students.
- Add new workflows in the PS Account Request system to ensure a secure, stable and consistent method for faculty/staff to gain access to student data.
- We also plan on expanding our use and knowledge of the data warehouse to increase reporting consistency and capabilities.