Request 26.1 – Addendum Salesforce CRM for Retention Task Force
Updated 10/17/2017

Requestor Contact Info

Glenn Hansen (gjh@ou.edu)

Executive Summary

This is enrollment and student profile data that will be used by the Retention Working Group to identify students that are at risk of not being retained their second year. This feed will be a blend between nightly and real-time data. Indicators in this feed will inform how student outreach is prioritized within the CRM.

User Stories

- o As a Retention Task Force Administrative user, I want to be able to run analytics and reports within the cloud-based CRM tool in order to identify students that need additional outreach.
- o As a Retention Task Force Administrative user, I want to create and update cases pertaining to the first and second year cohort. These cases will track communication and touch points between the University of Oklahoma and individual users.

Sample Application

Data in this feed will be made available to Administrative users of the Salesforce CRM. This data will be used to build reports and identify individual students to be part of an outreach campaign.

Delivery and Timeline

- o **Delivery Method:** Hybrid Flat Files; Real-time Webservice; and APIs
- o **Timeline:** The selection and acquisition of the tool is currently in progress, but the intended timeline is to have the data feed available for integration with salesforce as soon as possible to begin work on outreach for the identified cohort. Huron has been identified as the consultant and meetings will begin taking place on April 11th, 2017.

- o **Project Execution:** This project will be executed by OU IT's Project Management Office.
  - o **Project Acceptance:** This project is approved for planning via PGB.

Data Validation Checklist

Request 26.1 – Addendum Salesforce CRM for Retention Task Force

Updated 10/17/2017

Category 1: Bursar

- Method: Email
- Time stamp: 10/25/2017
- Attendees/participants: JP Morgan, Aaron Biggs, Kathleen Schmidt
- Data Spec presented: v5.0
- Session Notes:
- Validation Decision: Approved 12/6/2017 - Kathleen Schmidt

Category 2: Advising

- Method: Email
- Time stamp: 10/25/2017
- Attendees/participants: JP Morgan, Aaron Biggs, Kathleen Smith
- Data Spec presented: v5.0
- Session Notes: Approved
- Validation Decision: Approved 10/25/2017 - Kathleen Smith

Category 3: Academic Records

- Method: Email
- Time stamp:10/25/2017
- Attendees/participants: JP Morgan, Aaron Biggs, Breck Turkington
- Data Spec presented: v5.0
- Session Notes: Approved
- Validation Decision: Approved 10/25/2017 - Breck Turkington

Category 4: Institutional Reporting (IRR)

- Method: Email
- Time stamp: 10/25/2017
- Attendees/participants: JP Morgan, Aaron Biggs, Susannah Livingood
- Data Spec presented: v5.0
- Session Notes: I approve use of this field for the Retention CRM. This is under the assumption that it will be labeled appropriately (indicating that it is IRR's code) and that no derivations or calculations based on the field will be done in the CRM without verifying the logic with IRR.
- Validation Decision: Approved 10/26/2017 - Susannah Livingood

Category 5: HR

- Method: Email
- Time stamp: 10/25/2017
- Attendees/participants: JP Morgan, Aaron Biggs, Terri Pinkston
- Data Spec presented: v5.0
- Session Notes: Approved

- Validation Decision: Approved 11/16/2017 - Terri Pinkston

Category 6: Financial Aid

- Method: Email
- Time stamp:10/25/2017
- Attendees/participants: Kathi Robinett, JP Morgan, Aaron Biggs
- Data Spec presented: v5.0
- Session Notes: Approved
- Validation Decision: Approved 10/25/2017 - Kathi Robinett

Category 7: Course Management

- Method: Email
- Time stamp:11/9/2017
- Attendees/participants: Kevin Buck, JP Morgan, Matt Wesley, Mark Morvant
- Data Spec presented: v5.1
- Session Notes:
- Validation Decision: Approved 12/6/2017 - Mark Morvant

Process Notes

Request 26.1 – Addendum Salesforce CRM for Retention Task Force

Updated 10/17/2017

DGCC Approval Notes

Request 26.1 – Addendum Salesforce CRM for Retention Task Force

Updated 10/17/2017

Data Specification

Request 26.1 - Addendum Salesforce CRM for Retention Task Force

v5.1 - Updated: 11/14/2017

Category	Attribute Name	Source (SOR)	Timing	Read/Write	Description	Existing API	Notes	Validated By	Approved By
Bursar	FA_AID_YEAR_UDF281_CODE	OUCUSTOM.FA_STUDENT_AID_YEAR_UDF	Ongoing	Read	Fall Bursar Balance Past Due Code (Yes/Null)		Working with Brad Cook, they would like to use EDIFAR flag. These correspond to the 'Slow Pay' and 'Slow Pay Date' fields in Salesforce. We need to use the Fall and Spring fields during the corresponding semester. Additionally, we need to use the maximum date in the table and select only the students that have that same max date.	Brad Cook 10/23/2017	Kathleen Schmidt 12/6/2017
Bursar	FA_AID_YEAR_UDF282_CODE	OUCUSTOM.FA_STUDENT_AID_YEAR_UDF	Ongoing	Read	Spring Bursar Balance Past Due Code (Yes/Null)				
Bursar	FA_AID_YEAR_UDF283_CODE	OUCUSTOM.FA_STUDENT_AID_YEAR_UDF	Ongoing	Read	Fall Bursar Balance Past Due Code (Date)				
Bursar	FA_AID_YEAR_UDF284_CODE	OUCUSTOM.FA_STUDENT_AID_YEAR_UDF	Ongoing	Read	Spring Bursar Balance Past Due Code (Date)				
Advising	Academic Advisor	iAdvise	Ongoing	Read	Academic Advisor			Aaron Biggs 10/23/2017	Kathleen Smith 10/25/2017
Advising	OU Scholars	iAdvise	Ongoing	Read	Advised by OU Scholars				
Academic Records	Student Athlete		Ongoing	Read	Student Athlete Indicator			Chris Kennedy 10/23/2017	Breck Turkington 10/25/2017
IRR	Cohort Code(e.g., FTFTDS, FTFORD)		Ongoing	Read	Cohort Code(e.g., FTFTDS, FTFORD)			Susannah Livingood 10/26/2017	Susannah Livingood 10/26/2017
HR	JOBCODE	OUSTUDENT_FICA	Ongoing	Read	Student Employee Indicator based on Job Code		SELECT A.JOBCODE, A.EFF_STATUS FROM PS_OUSTUDENT_FICA A WHERE (A.EFF_STATUS = 'A')	Michelle Boydstun 11/14/2017	Terri Pinkston 11/16/2017
HR	EFF__STATUS	OUSTUDENT_FICA	Ongoing	Read	Student Employee Indicator based on Job Code		SELECT A.JOBCODE, A.EFF_STATUS FROM PS_OUSTUDENT_FICA A WHERE (A.EFF_STATUS = 'A')		
Financial Aid	President Leadership Class	FUND_CODE	Ongoing	Read	President's Leadership Class (Y/N)	100102', '100107', '150102' = 'PLC'		Kathi Robinett 10/26/2017	Kathi Robinett 10/26/2017
Financial Aid	President's Community Scholar	FUND_CODE	Ongoing	Read	President's Community Scholar (Y/N)	100103', '100106', '150103' = 'PCS'			
Course Management	Canvas	Last User Access	Ongoing	Read	Last Login for the course			Kevin Buck 11/14/2017	Mark Morvant 12/6/2017
Course Management	Canvas		Ongoing	Read	Login Current Week (Saturday - Sunday)				
Course Management	Canvas		Ongoing	Read	Login Current Semester				