Request 32.2 – Salesforce CRM for JRCOE (Addendum)

Updated 3/14/18

Requestor Contact Info

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Executive Summary

The JRCOE is consulting with Huron to implement SalesForce CRM for recruiting, monitoring student progress, communication, and analytics. This CRM will also replace our existing student database in FileMaker Pro, which is not integrated with OU data structures and thus requires a significant amount of manual data entry.

User Stories

- As a JRCOE user, I need to able to communicate more effectively with prospective students and current students in order to both recruit and retain undergraduate and graduate students.
- As a JRCOE user, I need to be able to monitor student progress through a single system, including easily identifying students who are at risk.
- As a JRCOE user, I need to be able to analyze student data to develop student proles and identify applicants who are most likely to be successful in our program and in the workforce.
- As a JRCOE admissions user, I should be able to determine when a student has started an application and when one has been submitted in order to follow up to increase applicant pools.
- As a JRCOE user, I want to be able to see information about incoming freshmen who have declared an interest in education.
- As a JRCOE user, I want to be able to obtain the information needed for US News and World Report in one place.
- As a JRCOE user, I want to be able to track students throughout the life span - prospect, applicant, student, alumni.
- As a JRCOE user, I need to spend less time entering data and more time on providing outstanding service to faculty and students.
- As a JRCOE user, We need to be able to identify at a glance whether or not a student is able to enroll.
- As a JRCOE user, It would be helpful for us to know at a glance if a student has not enrolled because they are deceased. Also, this will help us to not reach out to people who are deceased to ask them for money, alumni engagement, recruiting for additional degrees (e.g. master's or Ph.D.), etc.

Sample Application

Data will be consumed by a SalesForce CRM and used to monitor student progress, including identifying students who are "at risk", capture information on prospective students and communicate with them more effectively, and analyze data through a single source.

Delivery and Timeline

- **Delivery Method:** This data will be delivered through a hybrid of flat file and API.

- **Timeline:** To meet initial timelines for the IT Project Governance Board (PGB), Data Governance must be completed by .
- **Project Execution:** This project will be executed by OU IT's Project Management Office.
  - **Project Acceptance:** This project will be complete when data is integrated into the SalesForce system and user testing and acceptance has occurred. Any other application development will fall outside of the project scope.

Data Validation Checklist
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Category 1: Admissions and Recruitment
- Method: Email
- Time stamp: 2/13/2018
- Attendees/participants: Chris Kennedy, JP Morgan, Aaron Biggs, Marcus Glenn, Susan Whyatt
- Data Spec presented: v1.0 Addendum III
- Session Notes: See Notes Section
- Validation Decision: Approved

Category 2: Academic Records
- Method: Email
- Time stamp: 3/13/18
- Attendees/participants: Chris Kennedy, JP Morgan, Aaron Biggs, Marcus Glenn, Breck Turkington
- Data Spec presented: v1.0 Addendum III
- Session Notes: Required Additional User Stories to support the use of Hold Indicator and Deceased Indicator
- Validation Decision: Approved

Process Notes

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Category 2: Admissions and Recruitment Notes:

I asked Chris Wallace for the fields and he sent the following. I approve sharing this information and what was on the spreadsheet with them.

NEED FIELD READ

Admit term for the program in Banner. Needed for both grad and undergrad. Previous request was grad only.

TERM_ENTER_CODE, ADMIT_DECISION_LATEST_CODE, ADMIT_TYPE, CAMPUS_CODE, and CURRIC1_MAJOR_CODE from Admission Application.

NEED FIELD READ

Admitted to the University with an Education major code, but never enrolled.

Same as above, plus TERM_CODE, DECISION_CODE, and DECISION_DATE from Admission Decision.

NEED FIELD READ

A student's SAT score (composite and sub-scores)

SAT_TOTAL, SAT_MATH, SAT_EVIDENCE_READ_WRITE, (and 20+ other subscores if needed) from Person OU.

NEED FIELD

READ Transfer coursework GPA - UG only

TRANS_RETN_UG_GPA from Person GPA.

DGCC Approval Notes

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Request 32.1 – Salesforce CRM for JRCOE (Addendum)

Updated 10/26/2017

Approved 10/26/2017

Request 32 – Salesforce CRM for JRCOE

Updated 9/13/2017

A reduced version of the data spec and request package was submitted in the interest of time. Approval was granted on 9/7/2017 for the updated request. Per the requestor, they will submit an addendum once the project gets rolling.

Data Specification

Req 32.2 - JRCOE Salesforce Addendum III

v1.0 - Updated: 2/13/2018

Category	Attribute Name	Source (SOR)/API Address	Read/Write	Description	Notes	Validated By	Approved By
Academic Records	REGISTRATION_HOLD		READ				
Academic Records	CURRIC1_MAJOR_CODE		READ				
Academic Records	CURRIC2_MAJOR_CODE		READ				
Academic Records	CURRIC3_MAJOR_CODE		READ				
Academic Records	CURRIC4_MAJOR_CODE		READ				
Academic Records	CURRIC5_COLLEGE_DESC		READ				
Academic Records	CURRIC5_DEPARTMENT_DESC		READ				
Academic Records	CURRIC5_MAJOR_DESC		READ				
Academic Records	CURRIC5_MAJOR_CODE		READ			Breck Turkington 3/13/2018	Breck Turkington 3/13/2018
Academic Records	CURRIC6_COLLEGE_DESC		READ				
Academic Records	CURRIC6_DEPARTMENT_DESC		READ				
Academic Records	CURRIC6_MAJOR_DESC		READ				
Academic Records	CURRIC6_MAJOR_CODE		READ				
Academic Records	CURRIC7_COLLEGE_DESC		READ				
Academic Records	CURRIC7_DEPARTMENT_DESC		READ				
Academic Records	CURRIC7_MAJOR_DESC		READ				
Academic Records	CURRIC7_MAJOR_CODE		READ				
Academic Records	COMB_RETN_GRAD_HOURS_EARNED		READ	Person Other > Person GPA - This field was previously requested as "Hours Passed" and we need "Hours Earned" instead.			
Academic Records	COMB_RETN_UG_HOURS_EARNED		READ	Person Other > Person GPA - This field was previously requested as "Hours Passed" and we need "Hours Earned" instead.			
Admissions and Recruitment	HS_GRADUATION_DATE		READ	High school grad date (Year)			
Admissions and Recruitment	TERM_ENTER_CODE		READ	Admitted to the University with an Education major code, but never enrolled.			
Admissions and Recruitment	ADMIT_DECISION_LATEST_CODE		READ	Admitted to the University with an Education major code, but never enrolled.			
Admissions and Recruitment	ADMIT_TYPE		READ	Admitted to the University with an Education major code, but never enrolled.			
Admissions and Recruitment	CAMPUS_CODE		READ	Admitted to the University with an Education major code, but never enrolled.			
Admissions and Recruitment	CURRIC1_MAJOR_CODE		READ	Admitted to the University with an Education major code, but never enrolled.			
Admissions and Recruitment	TERM_CODE		READ	Admit term for the program in Banner. Needed for both grad and undergrad. Previous request was grad only.			
Admissions and Recruitment	DECISION_CODE		READ	Admit term for the program in Banner. Needed for both grad and undergrad. Previous request was grad only.			
Admissions and Recruitment	DECISION_DATE		READ	Admit term for the program in Banner. Needed for both grad and undergrad. Previous request was grad only.			
Admissions and Recruitment	SAT_TOTAL		READ	A student's SAT score (composite and sub-scores)	See complete notes from Susan Whyatt in package.	Chris Wallace 2/13/2018	Susan Whyatt 2/13/2018
Admissions and Recruitment	SAT_MATH		READ	A student's SAT score (composite and sub-scores)			
Admissions and Recruitment	SAT_EVIDENCE_READ_WRITE		READ	A student's SAT score (composite and sub-scores)			
Admissions and Recruitment	TRANSFER_INST_DESC		READ	Institution for previous degree and/or transfer coursework; from Person_Transfer_Institution table			
Admissions and Recruitment	STATE_DESC		READ	transfer or previous institution state; from Person_Previous_College table			
Admissions and Recruitment	CITY		READ	transfer or previous institution city; from Person_Previous_College table			
Admissions and Recruitment	ATTENDANCE_PERIOD		READ	From the Person_Transfer_Institution table			
Admissions and Recruitment	TRANSFER_DEGREE_DESC		READ	From the Person_Transfer_Institution table			
Admissions and Recruitment	TRANSFER_LEVEL_CODE		READ	From the Person_Transfer_Institution table			
Admissions and Recruitment	TRANSFER_COURSE_CREDIT_HOURS		READ	Transfer coursework hours - UG only			
Admissions and Recruitment	TRANS_RETN_UG_GPA		READ	Transfer coursework GPA - UG only			
General Person	DECEASED_IND		READ	Deceased Indicator (Y or Blank)		Breck Turkington 3/13/2018	Breck Turkington 3/13/2018