

Request 26 1726832906 – Salesforce CRM for Retention Task Force

Updated 4/3/2017

Requestor Contact Info

George Thomas on behalf of 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

- 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.
 - 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.
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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

- **Delivery Method:** Hybrid Flat Files; Real-time Webservice; and APIs
- **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.
- **Project Execution:** This project will be executed by OU IT's Project Management Office.
 - **Project Acceptance:** This project is approved for planning via PGB.

Data Validation Checklist

Request 26 1726832906 – Salesforce CRM for Retention Task Force

Updated 4/3/2017

Restricted Data Classification Applicability:

X	FERPA		ePHI/HIPAA		
	PCI		PII		

Category 1: Academic Records

- Method: Email
- Time stamp: 4/11/2017
- Attendees/participants: JP Morgan, Aaron Biggs, Chris Kennedy, Marcus Glenn, Breck Turkington
- Data Spec presented: v1.0
- Session Notes: Validated 4/14/2017; Approval granted: 4/20/2017
- Validation Decision: Package was validated for use cases defined in exec summary

Category 2: Admissions & Recruitment

- Method: Email
- Time stamp: 4/11/2017
- Attendees/participants: JP Morgan, Chris Kennedy, Aaron Biggs, Susan Whyatt, Mark Arens, Chris Wallace
- Data Spec presented: v1.0
- Session Notes: Validated 4/11/2017; Approval granted: 4/21/2017
- Validation Decision: Package was validated for use cases defined in exec summary

Category 3: Advising

- Method: Email
- Time stamp: 4/11/2017
- Attendees/participants: Aaron Biggs, Kathleen Smith, JP Morgan, Chris Kennedy
- Data Spec presented: v1.0
- Session Notes: Validated 4/11/2017; Approval granted: 4/20/2017
- Validation Decision: Package was validated for use cases defined in exec summary

Category 4: Bursar

- Method: Email
- Time stamp: 4/11/2017
- Attendees/participants: Brad Cook, Jennifer Cook, Kathleen Schmidt, JP Morgan, Aaron Biggs, Chris Kennedy
- Data Spec presented: v1.0
- Session Notes: Validated 4/11/2017; Approval granted: 4/20/2017
- Validation Decision: Package was validated for use cases defined in exec summary

Category 5: Financial Aid

- Method: Email

- Time stamp: 4/11/2017
- Attendees/participants: Kathi Robinett, JP Morgan, Aaron Biggs, Chris Kennedy
- Data Spec presented: v1.0
- Session Notes: Validated and Approval granted - 4/19/2017
- Validation Decision: Package was validated for use cases defined in exec summary

Category 6: Student Success (Mapworks)

- Method: Email
- Time stamp: 4/11/2017
- Attendees/participants: JP Morgan, Chris Kennedy, Aaron Biggs, Becky Heeney
- Data Spec presented: v1.0
- Session Notes: Caveats documented in Supplementary Materials; Validated and Approval 4/19/2017
- Validation Decision: Package was validated for use cases defined in exec summary

Category 7: IRR

- Method: Email
- Time stamp: 4/13/2017
- Attendees/participants: JP Morgan, Chris Kennedy, Susannah Livingood, Aaron Biggs
- Data Spec presented: v1.0
- Session Notes: Validation and Approval granted - 4/13/2017
- Validation Decision: Package was validated for use cases defined in exec summary

Process Notes

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Updated 4/3/2017

Category 1: Academic Records

Validation Notes: For Developers Per Marcus Glenn (4/14/2017)

- For the pre-enrollment if you are wanting live data you will need to go against the banner system (student.sfrstcr) probably the ods will be at least a day behind. I think there is a banner api that will return this information but I am having problems locating it. The ellucian page is cumbersome when trying to get any specific information.
- Room and board: I am unaware of anything that records would have relating to room and board. Bursar might be able to tell you that from charges or housing.
- Ft_pt_at_cohort_ord: I would reach out to patti otto she should be able to tell you where exactly this is located.
- The transcript fields I don't think have made it to production yet I think they are in dev/uat if needed before they get moved it is possible to get the information from the banner system (Saturn.shtrtran)
- **Other note on curriculum I would get at least the first 3 active curricula (preferably all of them) that will give at least a better representation of the students academic pursuits.**
- Per Chris Kennedy: CURRENT_TERM_REDLANDS_COURSE (since we were notified last week Redlands will not be continuing to offer courses after the current spring semester), which will not have much utility in the future.

Category 5: Academic Records

Validation Notes: Approval Granted based on two caveats per Kathi Robinett (4/19/2017)

- Is the retention group utilizing the EFC to support the awarding of the retention scholarship? YES
- Also, Once this data is in the CRM – In the future **only** the retention group will **ever** have access to this information. YES

Category 6: Student Success (Mapworks)

Validation Notes: Validation and Approval granted via Becky Heeney

- Permission granted to use Skyfactor Mapworks student Notes for Retention Taskforce through the Salesforce CRM.
- I have visited with our Skyfactor Mapworks Client Manager, Nate Cole, this morning and he asked that I pass along his name and contact information to you so he can be of assistance to you in this process. Nate can be reached 417-429-0081 extension 232 or via email nate.cole@macmillan.com. He also will be happy to help with connections to Duane Burriss, Skyfactor VP of Engineering and Joe Dubin, Skyfactor Engineer
- Per Glenn Hansen – This (Mapworks data) will be a flat file that I (or someone else) will load into salesforce. We will get the file by downloading it from the mapworks website.

DGCC Approval Notes

Request 26 1726832906 – Salesforce CRM for Retention Task Force

Updated 4/26/2017

Request 26: approved, with addition of caveat to Category 7: IRR needs to review the two elements attributed to it on the validation document; one of them was not validated by IRR and needs review of calculation and intended storage (also need to correct descriptions of both elements)

Data Specification

Request 26 1726832906 - Salesforce CRM for Retention Task Force

v4.0 - Updated: 4/25/2017

Category	Attribute Name	Source (SOR)	Schema	Location	Timing	Read/Write	Description	Existing API	Notes	Validated By
Academic Records	PRE_ENROLLED_FOR_NEXT_TERM	BANNER (BannerAPI)	Saturn	Saturn.sfrstrc	Live	Read	Has pre-enrolled for the next major term (fall or spring only)		To relate a historical term min payment to a student	Marcus Glenn 4/14/2017
Academic Records	PRE_ENROLLED_FOR_NEXT_TERM HOURS	BANNER (BannerAPI)	Saturn	Saturn.sfrstrc	Live	Read				
Academic Records	ENROLLMENT_STATUS_CODE	ODSPRD	OUCUSTOM	STUDENT_TERM		Read	Enrollment Status as of this term		To relate a current min payment to a student	
Academic Records	ENROLLMENT_STATUS_DATE	ODSPRD	OUCUSTOM	STUDENT_TERM		Read	Date Enrollment Status was updated		To relate a current min payment to a student	
Academic Records	LAST_GRADED_TERM_CODE	ODSPRD	OUCUSTOM	STUDENT_OU		Read	The last term the student earned a grade			
Academic Records	ADVISING_NEEDED_IND	ODSPRD	OUCUSTOM	STUDENT_TERM		Read	If the Student still needs to be Advised for the upcoming Enrollment Term, this will be a Y		To relate a balance to a student	
Academic Records	REMEDIAL_COHORT_IND	ODSPRD	OUCUSTOM	STUDENT_COHORT		Read	Y - for the students placed in the Admission's office contract to be restricted to parttime enrollment			
Academic Records	COMB_RETN_UGGRAD_GPA	ODSPRD	OUCUSTOM	PERSON_GPA		Read	Combined Retention UG GR GPA			
Academic Records	COMB_RETN_UGGRAD_CREDITS_PASS	ODSPRD	OUCUSTOM	PERSON_GPA		Read	Combined Retention Credit Hours Passed			
Academic Records	OU_RETN_UGGRAD_GPA	ODSPRD	OUCUSTOM	PERSON_GPA		Read	OU Retention GPA			
Academic Records	OU_ACAD_PER_UGGRAD_GPA	ODS	OUCUSTOM	PERSON_GPA		Read	Last Graded Term GPA			
Academic Records	ACADEMIC_STANDING	ODSPRD	OUCUSTOM	STUDENT_TERM		Read	Current Academic Standing			
Academic Records	HOME_PHONE	ODSPRD	OUCUSTOM	PERSON_OU		Read	Current Home Phone			
Academic Records	CELL_PHONE	ODSPRD	OUCUSTOM	PERSON_OU		Read	Current Cell Phone			
Academic Records	EMERGENCY1_PHONE	ODSPRD	OUCUSTOM	PERSON_OU		Read	Emergency Phone			
Academic Records	PARENT1_PHONE	ODSPRD	OUCUSTOM	PERSON_OU		Read	First Parent listed phone			
Academic Records	CURRIC1_COLLEGE_DESC	ODS	OUCUSTOM	STUDENT_TERM		Read	The College description of the major program (as of current_extract_term_code OR Last_graded_term_code)			
Academic Records	CURRIC1_major_DESC	ODS	OUCUSTOM	STUDENT_TERM		Read	The major description of the major program (as of current_extract_term_code OR Last_graded_term_code)			
Academic Records	HOLD_COLLEGE_ACADEMIC	ODS	OUCUSTOM	PERSON_HOLD		Read	College Hold			
Academic Records	HOLD_CTR_STUDENT_ADVANCEMENT	ODS	OUCUSTOM	PERSON_HOLD		Read	CSA Hold			
Academic Records	HOLD_GRADUATION	ODS	OUCUSTOM	PERSON_HOLD		Read	Graduation Hold			
Academic Records	HOLD_PEND_ACADEMIC_MISCONDUCT	ODS	OUCUSTOM	PERSON_HOLD		Read	This student has Student Acad Misconduct pending			
Academic Records	HOLD_STUDENT_CONDUCT	ODS	OUCUSTOM	PERSON_HOLD		Read	Student Conduct Hold			
Academic Records	HOLD_TRANSCRIPT	ODS	OUCUSTOM	PERSON_HOLD		Read	Transcript Release Hold			
Academic Records	HOLD_ATHLETICS_REG	ODS	OUCUSTOM	PERSON_HOLD		Read	Athletics Registration Hold			
Academic Records	HOLD_STUDENT_AFFAIRS	ODS	OUCUSTOM	PERSON_HOLD		Read	Student Affairs Hold			
Academic Records	EXTRACT_DATE	ODS	OUCUSTOM	CURRENT_DATE		Read	The date this report data was extracted from the OU ODS			
Academic Records	PERSON_UID	ODS	OUCUSTOM	PERSON_OU		Read	PIDM			
Academic Records	CURRENT_TERM_REGISTERED_IND	ODS	OUCUSTOM	STUDENT_TERM		Read	Y or N. The student is enrolled in the current term. The term that is in the column Current_Extract_term_code			
Academic Records	CURRENT_TERM_CREDIT_HOURS	ODS	OUCUSTOM	STUDENT_TERM		Read	Total Credit hours enrolled for the term. These include all campuses (not Redlands) and intersession.			
Academic Records	EMAIL_ADDRESS_PREFERRED	ODS	OUCUSTOM	PERSON_OU		Read	The student's preferred email address			
Academic Records	CURRENT_TERM_REDLANDS_COURSE	ODS	OUCUSTOM	STUDENT_OU		Read				
Academic Records	LATEST_TRANSCRIPT_REQ_CUR_TERM	BANNER (BannerAPI)	Saturn	Saturn.Shttran		Read				
Academic Records	LATEST_TRANSCRIPT_REQ_NXT_TERM	BANNER (BannerAPI)	Saturn	Saturn.Shttran		Read				
Academic Records	SOONER_ID	ODSPRD	OUCUSTOM	PERSON_OU		Read	Student ID			
Academic Records	NAME_FULL_LFMI	ODSPRD	OUCUSTOM	PERSON_OU		Read	Student Name			
Academic Records	GRADUATED_IND	ODSPRD	OUCUSTOM	STUDENT_DEGREE		Read	Graduated here or HSC = 'Y'			
Admissions & Recruitment	HOLD_ADMISSIONS_NORMAN	ODS	OUCUSTOM	PERSON_HOLD		Read	Norman Campus Admission Hold			
Admissions & Recruitment	NATIONAL_MERIT_IND	ODS	OUCUSTOM	STUDENT_TERM		Read	'Y' if the student was ever in the National Merit Scholar program			
Advising	SOONER_ID	iAdvise API			Live	Read				
Advising	NOTE_CONTENT	iAdvise API			Live	Read				
Advising	CREATED_ON_DATE	iAdvise API			Live	Read				
Advising	CREATED_BY_ID	iAdvise API			Live	Read				

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Category	Attribute Name	Source (SOR)	Schema	Location	Timing	Read/Write	Description	Existing API	Notes	Validated By
Advising	UPDATED_ON_DATE	iAdvise API			Live	Read				
Advising	UPDATED_BY_ID	iAdvise API			Live	Read				
Bursar	COHORT_OU_TERM	ODSPRD	OUCUSTOM	STUDENT_OU		Read	IRR Cohort Term -FTFTDS only for prior terms. FTTFOD for current Fall term			Brad Cook 4/11/2017
Bursar	EXCLUSION_IND	ODSPRD	OUCUSTOM	STUDENT_TERM		Read	Exclude from processing- Active Duty or Approved Mission			
Bursar	DECEASED_IND	ODSPRD	OUCUSTOM	PERSON_OU		Read	Student Deceased = 'Y'			
Bursar	HOLD_BURSAR_REGISTRATION	ODSPRD	OUCUSTOM	PERSON_OU		Read	Bursar Registration Hold			
Bursar	HOLD_BURSAR_TRANSCRIPT	ODSPRD	OUCUSTOM	PERSON_OU		Read	Bursar Transcript Hold			
Bursar	HOLD_UNIV_COLLECT_LITIGATION	ODSPRD	OUCUSTOM	PERSON_OU		Read	University Collections in Litigation Hold			
Bursar	HOLD_UNIVERSITY_COLLECTIONS	ODSPRD	OUCUSTOM	PERSON_OU		Read	University Collections Hold			
Bursar	STUDENT_RESIDENCY_DESC	ODSPRD	OUCUSTOM	STUDENT_TERM		Read	Residency status for Tuition purposes			
Bursar	FA_AID_YEAR_UDF201_CODE	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_UDF		Read	Y if the student is in the room and board program			
Bursar	CURRENT_AMOUNT_DUE	ODSPRD	OUCUSTOM	BUR_RECEIVABLE_ACCOUNT		Read	Bursar currently owed today			
Financial Aid	UNMET_FAFSA_NEED_CURR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_APPLICANT_STATUS		Read	Current Aid year Unmet need amount			Validated and Approved Kathi Robinett 4/19/2017
Financial Aid	FAFSA_ON_FILE_CURR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_TRACKING_REQ		Read	Filed a FAFSA current aid year			
Financial Aid	EFC_CURR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_APPLICANT_STATUS>PRIMARY_PELL_GRANT_INDEX_AMT		Read	EFC current aid year			
Financial Aid	COST_OF_ATTENDANCE_CURR_AID_YR	ODS	OUCUSTOM	FA Student Budget Component>TOTAL_BUDGET_AMT or SUM BUDGET_COMPONENT_AMT (BUDGET-TYPE_CODE = 'CAMP')		Read	Cost of attendance current aid year			
Financial Aid	COA_UN_PCT_CURR_AID_YR	calculated	calculated	calculated		Read	Cost of attendance as a percentage of Unmet need			
Financial Aid	MISSING_FINANCIALS_CURR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_TRACKING_REQ (REQ_STATUS_CODE = 'R')		Read	Missing financial information			
Financial Aid	TOT_SCHLSHP_OFFERED_CUR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	Total amount of scholarship \$\$ offered			
Financial Aid	LOANS_CURR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	Loans (status)			
Financial Aid	PARENT_PLUS_CURR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	Parent Plus (status)			
Financial Aid	ACCEPTED_SUB_LOAN_CURR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	accepted subsidized loans			
Financial Aid	ACCEPTED_UNSUB_LOAN_CUR_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	accepted un-subsidized loans			
Financial Aid	UNMET_FAFSA_NEED_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_APPLICANT_STATUS		Read	Next Aid year Unmet need amount			
Financial Aid	FAFSA_ON_FILE_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_APPLICANT_STATUS		Read	Filed a FAFSA next aid year			
Financial Aid	EFC_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_APPLICANT_STATUS>PRIMARY_PELL_GRANT_INDEX_AMT		Read	EFC next aid year			
Financial Aid	COST_OF_ATTENDANCE_NXT_AID_YR	ODS	OUCUSTOM	FA Student Budget Component>TOTAL_BUDGET_AMT or SUM BUDGET_COMPONENT_AMT (BUDGET-TYPE_CODE = 'CAMP')		Read	Cost of attendance next aid year			
Financial Aid	COA_UN_PCT_NXT_AID_YR	calculated	calculated	calculated		Read	Cost of attendance as a percentage of Unmet need			
Financial Aid	MISSING_FINANCIALS_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_TRACKING_REQ		Read	Missing financial information			
Financial Aid	TOT_SCHLSHP_OFFERED_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	Total amount of scholarship \$\$ offered			
Financial Aid	LOANS_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	Loans (status)			
Financial Aid	PARENT_PLUS_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	Parent Plus (status)			
Financial Aid	ACCEPTED_SUB_LOAN_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	accepted subsidized loans			
Financial Aid	ACCEPTED_UNSUB_LOAN_NXT_AID_YR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read	accepted un-subsidized loans			
Financial Aid	FAS_NOTES	ODS	OUCUSTOM	FA_STUDENT_COMMENT	Live	Read				
Financial Aid	LOANS ACCEPTED NXT AID YEAR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read				
Financial Aid	SCHOLARSHIPS NXT AID YEAR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read				
Financial Aid	GRANTS NXT AID YEAR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read				
Financial Aid	TW NXT AID YEAR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read				
Financial Aid	OK_PROMISE	ODS	OUCUSTOM	FA Student Non Aid Year UDF>FA_NON_AID_YEAR_UDF011_VALUE		Read	Value = 'E', 'Y', 'P'			
Financial Aid	SOONER_PROMISE	ODS	OUCUSTOM	FA Student Non Aid Year UDF>FA_NON_AID_YEAR_UDF001_VALUE		Read	value= 'Y','E'			
Financial Aid	DID_NOT_MEET_SAP	ODS	OUCUSTOM	FA Student Satis Aca Prog		Read	SATISFACTORY_ACAD_PROG_CODE Like 'F%'			
Financial Aid	TW NXT AID YEAR	ODS	OUCUSTOM	FA_STUDENT_AID_YEAR_AWARD		Read				

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Student Success	MAPWORKS_NOTES	MAPWORKS				Read				Becky Heeney 4/19/2017
IRR	COHORT_OU_TERM	ODSPRD	OUCUSTOM	STUDENT_OU		Read	IRR Cohort Term -FTFTDS only for prior terms. FTFord for current Fall term			Susannah Livingood 4/13/2017
IRR	FT_PT_AT_COHORT_ORD	ODSPRD	OUCUSTOM	STUDENT_COHORT		Read	This status is set at the students FTFTDS cohort semester at ORD (3rd Week) F=Full-time, P=Part-time			