

Request 32 – Salesforce CRM for JRCOE

Updated 9/1/2017

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 be 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 profiles 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.

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 September 5, 2017.
- **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: Graduate College

- Method: Email
- Time stamp: 8/4/2017
- Attendees/participants: Lindsey Johnston, JP Morgan, Aaron Biggs, Randy Hewes
- Data Spec presented: v1.0
- Session Notes: Caveats documented in Supplementary Materials
- Validation Decision: Validated and Approved 8/11/2017
- Caveat: Event_Comment field has been denied per Lindsey Johnston (8/11/2017)

Category 2: General Person

- Method: Email
- Time stamp: 8/4/2017
- Attendees/participants: Chris Kennedy, JP Morgan, Aaron Biggs, Marcus Glenn
- Data Spec presented: v1.0
- Session Notes: Caveats documented in Supplementary Materials
- Validation Decision: Approved Per Chris Kennedy 8/30/2017
- Caveats: Captured in Data Spec
 - Red – Access denied until further justification provided
 - Yellow – Field approved but technical details will need to be completed

Category 3: Financial Aid

- Method: Email
- Time stamp: 9/1/2017
- Attendees/participants: JP Morgan, Aaron Biggs, Millard Latimer, Kathi Robinett
- Data Spec presented: v3.0
- Session Notes: Caveats documented in Supplementary Materials
- Validation Decision: Approved Per Kathi Robinett 9/1/2017

Process Notes

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Category 2: Graduate College (8/11/2017)

Per Lindsey Johnston (8/4/2017) Responses from JRCOE in RED

I have a couple of questions before I review the data specifications:

1. The user stories mention prospective students and applicants, but I don't see any recruitment or admission fields in the data specs. Was this information omitted? **The recruitment and admission fields will not be integrated and will instead be loaded in through a report Lisa built for us in CollegeNet.**
2. What information is needed for the US News and World Report? **Race, gender, GRE scores, number of students enrolled in each program, admissions yield, etc.**
3. If we do approve the fields (or approve with caveats), will the data be filtered so Salesforce only consumes College of ED data? If so, do you know what specific field(s) would be filtered for that? **Yes, prospective and current graduate student data will be filtered to include ONLY College of Ed data.**

Per Lindsey Johnston (8/11/2017)

I reviewed the request with Dean Hewes and we are okay with all of the data fields in the request except:

The EVENT_COMMENT field is used internally by the Graduate College Academic Counselors and may contain sensitive information regarding students and/or faculty.

Graduate College	EVENT_COMMENT	BANNER	Nightly	Read	Any comments regarding a student's milestone
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Also the source for the Graduate College fields is the ODS, not Banner. We have a custom webapp (with some Banner fields imported) that exports to the ODS nightly.

DGCC Approval Notes

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Updated

Data Specification

Request Number - JRCOE Salesforce CRM

v3.1 - Updated: 9/1/2017

Category	Attribute Name	Source (SOR)/API Address	Timing	Read/Write	Description	Notes	Validated By	Approved By
Financial Aid	NATIONAL_MERIT_SCHOLAR_IND	BANNER	Nightly	Read	An indicator for whether or not a student is a National Merit Scholar		Chris Kennedy - 8/30/2017	Kathi Robinett - 9/1/2017
Financial Aid	MCNAIR_IND	BANNER	Nightly	Read	An indicator for whether or not a student is a McNair Scholar			
Graduate College	ACR_CHANGE_DATE	BANNER	Nightly	Read	The date a student's Advisory Conference Report was changed		Validated 8/11/2017 Lindsey Johnston	Approved 8/11/2017 Dean Hewes via Lindsey Johnston
Graduate College	CAMPUS_CODE	BANNER	Nightly	Read	Banner campus code			
Graduate College	CAMPUS_DESC	BANNER	Nightly	Read	Banner Campus Code Description (e.g. Norman, Tulsa, etc.)			
Graduate College	COHORT_CODE	BANNER	Nightly	Read	Value - GCAP (graduate academic probation)			
Graduate College	COLLEGE_CODE	BANNER	Nightly	Read	Banner college code			
Graduate College	COLLEGE_DESC	BANNER	Nightly	Read	Banner college description			
Graduate College	COMMITTEE_CHAIR_IND	BANNER	Nightly	Read	Y/N			
Graduate College	COMMITTEE_COCHAIR_IND	BANNER	Nightly	Read	Y/N			
Graduate College	COMMITTEE_OUTSIDE_IND	BANNER	Nightly	Read	Y/N			
Graduate College	CONCENTRATION_CODE	BANNER	Nightly	Read	Banner concentration code			
Graduate College	CONCENTRATION_DESC	BANNER	Nightly	Read	Banner concentration description			
Graduate College	DEGREE_ACTUAL_TERM_CODE	BANNER	Nightly	Read	Term student received graduate degree OR expected to earn graduate degree			
Graduate College	DEGREE_CODE	BANNER	Nightly	Read	Banner degree code (M.Ed., Ed.D., Ph.D.)			
Graduate College	DEGREE_DEADLINE_TERM_CODE	BANNER	Nightly	Read	Term student is expected to complete graduate degree according to Grad College policies			
Graduate College	DEGREE_DESC	BANNER	Nightly	Read	Description of graduate major (e.g. Adult and Higher Education)			
Graduate College	DEGREE_LEVEL_CODE	BANNER	Nightly	Read	Sample: MA, DR, OT, BA			
Graduate College	DEGREE_STATUS_DESC	BANNER	Nightly	Read	Options are: Active, Inactive, Changed Major, Graduated, Conversion			
Graduate College	DEGREE_TYPE_DESC	BANNER	Nightly	Read	Options are: Doctoral, Thesis, Non-Thesis, Graduate Certificate, Masters Thesis and Exam, Unknown			
Graduate College	DEPARTMENT_CODE	BANNER	Nightly	Read	Banner department code			
Graduate College	DEPARTMENT_DESC	BANNER	Nightly	Read	Banner department description			
Graduate College	DUAL_DEGREE_IND	BANNER	Nightly	Read	Y/N			
Graduate College	EVENT_ACTUAL_DATE	BANNER	Nightly	Read	The date a student completed a program milestone (e.g. filed Advisory Conference, applied for general exam, etc.)			
Graduate College	EVENT_DESC	BANNER	Nightly	Read	The description of the program milestone reached (e.g. files Advisory Conference, applied for general exam, etc.)			
Graduate College	EVENT_RESULT_DESC	BANNER	Nightly	Read	Outcome of the event - Satisfactory, Unsatisfactory, Abeyance, etc.			

Data Specification

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v3.1 - Updated: 9/1/2017

Category	Attribute Name	Source (SOR)/API Address	Timing	Read/Write	Description	Notes	Validated By	Approved By
Graduate College	EXAM_ACTUAL_TERM_CODE	BANNER	Nightly	Read	Date student completed or has completed comprehensive or general exam			
Graduate College	EXAM_DEADLINE_TERM_CODE	BANNER	Nightly	Read	Date student is expected to complete comprehensive or general exam			
Graduate College	FACULTY_FIRST_NAME	BANNER	Nightly	Read	First name of a faculty member serving on a student's committee			
Graduate College	FACULTY_LAST_NAME	BANNER	Nightly	Read	Last name of a faculty member serving on a student's committee			
Graduate College	FACULTY_SOONER_ID	BANNER	Nightly	Read	A faculty member's Sooner ID			
Graduate College	GRAD_APP_EFFECTIVE_TERM_CODE	ODS	Nightly	Read	Term for which student has applied to graduate			
Graduate College	GRAD_APP_REC_DATE	ODS	Nightly	Read	Date graduation application was received			
Graduate College	GRADUATED_IND	BANNER	Nightly	Read	Y/N, indicates whether or not a graduate student has graduated - will be needed for UG, too			
Graduate College	MAJOR_CODE	ODS	Nightly	Read	Banner major code			
Graduate College	MAJOR_DESC	ODS	Nightly	Read	Banner major description			
Graduate College	PROGRAM_LEVEL_CODE	BANNER	Nightly	Read	Sample: GR (grad), UG (undergrad)			
Graduate College	THESIS_DISS_TITLE	BANNER	Nightly	Read	Full title of a student's thesis or dissertation			
Graduate College	TIMELINE_STARTED_TERM_CODE	BANNER	Nightly	Read	The term code for the first term in the student's timeline for degree completion			
Graduate College	ADMITTED_PROGRAM	BANNER	Nightly	Read	Admit term for the program in Banner.			
Graduate College	EVENT_COMMENT	BANNER	Nightly	Read	Any comments regarding a student's milestone	Field Denied via Data Steward 8/11 - Field for Internal Use Only		
General Person	ADDRESS_MAIL_CITY	BANNER	Nightly	Read	City of student's mailing address		Chris Kennedy - 8/30/2017 - Caveat that the red is NOT approved, the yellow is either needing clarification, or doesn't exist as requested, so will need to be created.	Chris Kennedy - 8/30/2017 - Caveat that the red is NOT approved, the yellow is either needing clarification, or doesn't exist as requested, so will need to be created.

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Category	Attribute Name	Source (SOR)/API Address	Timing	Read/Write	Description	Notes	Validated By	Approved By
General Person	ADDRESS_MAIL_LINE1	BANNER	Nightly	Read	First line of student's mailing address			
General Person	ADDRESS_MAIL_LINE2	BANNER	Nightly	Read	Second line of student's mailing address			
General Person	ADDRESS_MAIL_LINE3	BANNER	Nightly	Read	Third line of student's mailing address			
General Person	ADDRESS_MAIL_STATE_CODE	BANNER	Nightly	Read	State of student's mailing address			
General Person	ADDRESS_MAIL_ZIP	BANNER	Nightly	Read	Zip code for student's mailing address			
General Person	CELL_PHONE	ODSPRD	Nightly	Read	Current Cell Phone			
General Person	PERSON_UID	ODS	Nightly	Read	PIDM			
General Person	EMAIL_ADDRESS_PREFERRED	ODSPRD	Nightly	Read	The student's preferred email address			
General Person	EMAIL_OU	BANNER	Nightly	Read	OU email address			
General Person	EC1_PHONE_NUMBER	ODSPRD	Nightly	Read	Emergency Phone			
General Person	GENDER_DESC	ODS	Nightly	Read	Description of a student's gender			
General Person	HOME_PHONE	ODSPRD	Nightly	Read	Current Home Phone	Could also be a cell number ...		
General Person	NAME_FIRST	ODS	Nightly	Read	A student's first name			
General Person	NAME_PREFERRED_FIRST	ODS	Nightly	Read	A student's preferred name	With the exposure this is getting on campus, went ahead and added this in as well.		
General Person	NAME_LAST	ODS	Nightly	Read	A student's last name			
General Person	NAME_MIDDLE	ODS	Nightly	Read	A student's middle name			
General Person	CURRENT_AGE	ODS	Nightly	Read	A student's current age			
General Person	SOONER_ID	BANNER	Nightly	Read	Student ID			
General Person	CITIZENSHIP_DESC	BANNER	Nightly	Read	County of citizenship	Do you want their country or their citizenship description? Would guess the latter, since ask for nation later on.		
General Person	IPEDS_CATEGORY_DESC	BANNER	Nightly	Read	Description of IPEDS race	Is this how you want it, or do you want it broken out to see each race?		
General Person			Nightly	Read	Description of the nation a student is from	Birth nation or citizenship nation?		
General Person	BIRTH_DATE	BANNER	Nightly	Read	A student's date of birth	Is this needed when you are already getting age?		