



Research and
Institutional Effectiveness

Texas State Reporting Then and Now: Lessons Learned

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Outline

- Introduction
- The Transformation
 - Data Quality
 - Proactivity
 - Communications
 - Automation
 - Timeliness
- Summary and Conclusion



About Lone Star College

- Northwest Houston
- 6 main campuses + System Office
- 6 centers
- Meteoric growth 2008-2012
- @90k students and still growing



The Caveat

- Every college is different
 - Corporate cultures
 - Organizational structures
 - Technologies
 - Personnel
 - Fiscal resources



Objectives

- Share lessons learned
- Open discussion
- Invite further discussion and collaboration



Background: ERP

- Enterprise Resource Planning Tools
 - Prior to 1995: APT
 - 1995 through 2010: Datatel Colleague
 - 2011- present: PeopleSoft
 - More than \$30 million
 - 18-month migration effort



Background: TSR Tools

- Datatel maintained state reports for all clients
- PeopleSoft Reports
 - Custom-developed
 - Initial reports delivered mid spring 2011
 - Developer left project end of 2011
 - Consultants delivered “final” reports spring 2013
 - IT maintains and updates



Background: TSR Team

- State reporter (PT)
- State reporter (FT)
- State reporter (FT) + assistant (PT)
- State reporter (FT) + assistant (PT)
- State reporter (FT) + assistant (FT) + assistant (PT)
- State reporter (PT) + analyst (FT) + assistant (FT) + business area partnerships



The Transformation

- Data Quality
- Proactivity
- Communications
- Automation
- Timeliness



Data Quality: Then

- Organization: Loose federation of colleges sharing a single student records application
- Each campus had its own twist on implementing business processes
- Student record system and reporting process diverged as time progressed



Data Quality: Then

- TSR team passed around (IT, IR, Student Records)
- When TSR reported to records and registration (i.e., data and process owners)
 - Directed colleges in making corrections
 - Decisions made around run time of the reports whether to rerun reports or make manual corrections



Data Quality: Then

- Reports took days to process
 - Each report had multiple processes to populate pertinent information before the reports ran
 - Each report run would take all day to process
 - Report turn around time made data quality control extremely difficult



Data Quality: Now

- TSR team does not own data
 - TSR team communicates data needs
 - TSR team doesn't report data that are not in the ERP



Data Quality: Now

- Business area owners have stewardship over their records
 - Police business process
 - Monitor and clean up bad records
- Campuses communicate better with their students



Data Quality: Now

- Reports run reasonably quickly
 - Data changes can be checked and acknowledged
 - Reported data and ERP data match better
- Reports process at CB reasonably quickly



Proactivity: Then

- Reports ran a week before due dates
 - Worked on errors from the CB edits only
 - Due to time and number of errors reports were either re-ran after colleges made corrections
- Cleanup began with first report run



Proactivity: Then

- TSR team ran queries
 - Knowledge of reporting needs was centralized
 - Campuses and business areas waited for TSR notification to address data problems
- Flawed and inconsistent business processes were common



Proactivity: Now

- Audit queries
 - Delivered weekly to stakeholders
 - Available on demand
- TSR Team runs reports early and often



Proactivity: Now

- Flawed business processes identified early and corrected quickly
- TSR Team reaches out to business owners and administration



Communications: Then

- Stakeholder meeting not consistently held
- Printed Campus TSR manual was produced (often outdated before it left the printer)
- Emails directing how/why came from TSR team



Communications: Now

- Stakeholder meetings
 - Continuing Education → Quarterly
 - Credit → Three times per year
- SharePoint
- Emphasize business area ownership and accountability



Communications: Now

- TSR deadlines communicated regularly
- Data cleanup assignments have aggressive due dates
- Cost of bad data communicated



Automation: Then

- Reports had to be purged before re-running
- Run time was 1 – 2 full days
- Flat files generated by campus
- Manual manipulations performed in system
- Queries were run by TSR team



Automation: Then

- Datatel developed and maintained TSR for all Texas customers
- Development was an inter-institutional collaborative effort
- Common understanding of reporting requirements
- IT had a resource dedicated to TSR



Automation: Now

- Reports are set up in PeopleSoft and left to run
- Run time is between 15 minutes and 2 hours
- Manual manipulation still performed in Excel
- Flat files generated automatically
- Stakeholders receive automated e-mail messages when apparent data discrepancies appear



Automation: Now

- Reports were initially patterned after other Texas PeopleSoft schools
- Little or no inter-institution communication among PeopleSoft state reporting groups
- No centralized report maintenance or development
- IT development resources focused on “Enterprise Applications”



Timeliness: Then

- Initial submission by due date in CB Reporting and Procedures Manual
- Certification target date: One month after original submission
- “Fundable” reports prioritized
- “Non-Fundable” reports marginalized



Timeliness: Now

- Initial submission date: 1st day possible
- Certification target date: CB initial submission date
- Ownership and accountability—Leaves and furloughs cancelled



Summary

- Data quality, proactivity, communications, and automation with an emphasis on timeliness and accountability have are key to improving reporting effectiveness
- LSCS has moved from bottom quartile in certification timeliness to the top decile
- LSCS reports are more accurate than ever



Conclusion

- Changes in how CB data are used have driven business process changes
- CB reporting is a team effort between the TSR Team, IT, and business area owners
- Texas PeopleSoft schools need to collaborate better regarding TSR



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Questions



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