

# Using Confluence to Stay Organized & Improve Productivity



DR. ERIN MULLIGAN-NGUYEN / WHITNEY KESSINGER / LIZA FARRELL  
TEXAS A&M UNIVERSITY – CORPUS CHRISTI

# Texas A&M University – Corpus Christi

- "The Island University"
- Established in 1947
- Research II Institution
- Hispanic-Serving Institution (HSI)
- 6 colleges and 1 school
- Fall 2024 Enrollment: 11,266
- Offers bachelor's, master's, and doctoral degrees



# PAIRS – TAMUCC (Planning, Analytics, Institutional Research, & Strategic Initiatives)

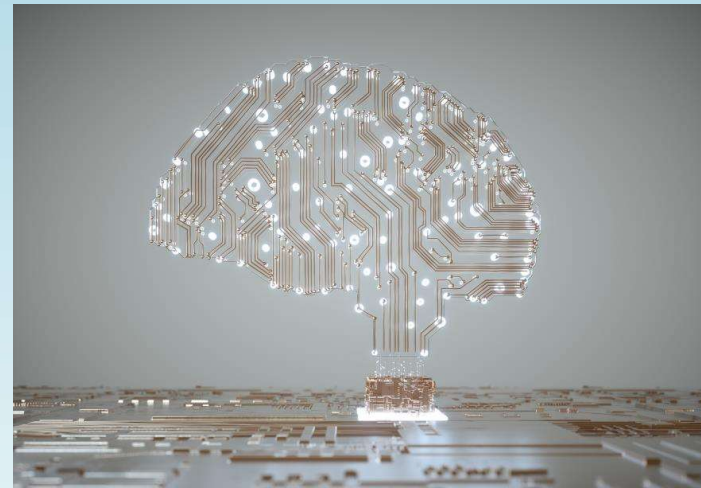
- Three different areas
  - Planning & Institutional Research
  - Analytics
  - Strategic Initiatives



# PAIRS – TAMUCC

## Area of Planning & Institutional Research

- COMPLIANCE REPORTING
  - IPEDS
  - THECB CBM Reports
  - Program Reviews
  - SACSCOC
  - Program Accreditations (e.g. CACREP, AACSB, etc.)
  - Grants (e.g. LSAMP)
  - R&I Surveys (e.g. NSF Facilities, NSF-NIH (GSS))
- EXTERNAL REQUESTS
  - Common Data Set (CDS)
  - Guidebook Surveys (e.g. US News & World Reports)
- UNIVERSITY SURVEYS
  - BCSSE/NSSE
  - Graduating Student Survey
- ADHOC DATA REQUESTS



# The Challenge



# What is Confluence?

- A collaboration tool developed by Atlassian and is available in different hosting options, including cloud and data center.
  - (data center on server [prem]/cloud web)
- Is a collaborative workspace designed to help teams create, share, and manage content efficiently.
- Used for project management, documentation, and team collaboration.

# PIR Uses Confluence for...

- ❖ To maintain a centralized repository of institutional data and reports.
- ❖ To manage research projects and track progress.
- ❖ To facilitate collaboration among team members and other departments.
- ❖ To create a comprehensive knowledge base for institutional research methodologies and best practices.
- ❖ To provide training materials and onboarding resources for new team members.



# Enhancing Team Collaboration with Confluence

Confluence is designed to make team collaboration more efficient and organized, helping you keep all your important information in one place.



## YOU CAN...

- Organize Content with Spaces
- Create and Edit Pages
- Collaborate in Real-Time
- Integrate with Other Tools
- Utilize Templates



**SPACES:** You can create dedicated spaces for different type of data and information (e.g., General, Analytics, Institutional Research, Surveys, Strategic Initiatives).

PAGE TREE

- › General
- › Analytics
- › Institutional Research
- › Surveys
- › Strategic Initiatives

Within those Spaces, you can create pages for specific reports, datasets, and documentation. For example, the “Institutional Research” space hosts pages for “CBM Diagnostics Scripts”, “CBM Reports”, and “IPEDS”.



Under each page initially created, more pages may be added to further organize and include detailed documentation of methodologies, data collection techniques, and analysis methods.

▼ **CBM Reports**

- CBM BOT/EOT PARAMATERS
- › CBM Prelim Audit
- › Dual Enrollment/Credit
- CBM - Error/Correction Email Template
- CBM - General Submission File Process
- › CBM001 - Student Schedule Report (Retire)
- › CBM0C1 - Student Census Report
- › CMB0E1 - Student End of Semester Report
- › CBM002 - Texas Success Initiative Report
- › CBM003 - Course Inventory

Pages under pages: Even more pages may be added to further organize and maintain collaborative work processes, ultimately enhancing their efficiency and effectiveness.

▼ **CBM0C1 - Student Census Report**

- TAMUS Census Reports (1st/12th/20th Class Day)
- CBM0C1 - FTIC Process
- SP22 CBM0C1
- SU22 CBM0C1
- FA22 CBM0C1
- SP23 CBM0C1
- SU23 CBM0C1
- FA23 CBM0C1
- SP24 CBM0C1
- SU24 CBM0C1
- FA24 CBM0C1
- SP25 CBM0C1
- SU25 CBM0C1

# Using Confluence as an Analyst

## PAGE: Spring 2025 CBMoC1

Planning and Institutional Research / Pages / ... / CBMoC1 - Student Census Report / SP25 CBMoC1

### SP25 CBMoC1

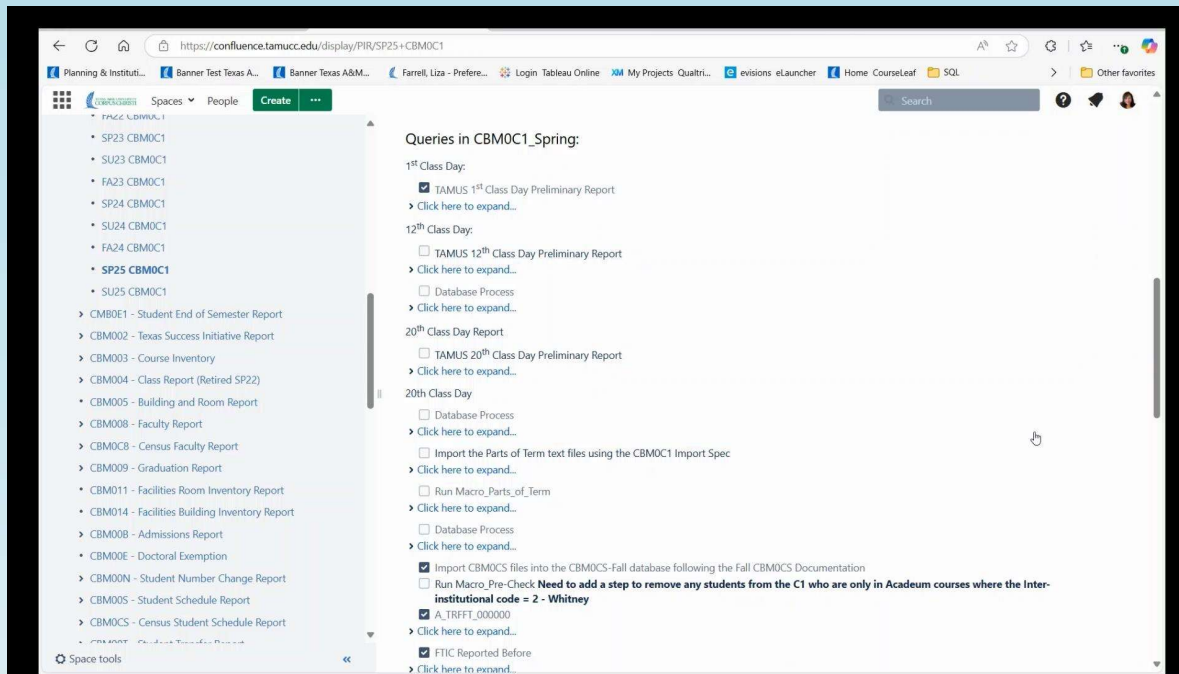
#### Before 1st Prelim Run, 1st, 12th, and 20th Class Days

- Update GTVSDAX for 2025 - After CBM00B is certified in November of previous year
- Run SWPSXRF in Banner to update IMOD/ITYP (SZRSXRF) See File for Instructions (VERY IMPORTANT) - Before 1st Prelim Run
- Run SWPUPDA in Banner to clear CBM003 Updates in CXRF - Before 1st Prelim Run
- Run SWPSXRF in Banner to update IMOD/ITYP (SZRSXRF) See File for Instructions (VERY IMPORTANT) - 1st Class Day - January 21
- Run SWPSXRF in Banner to update IMOD/ITYP (SZRSXRF) See File for Instructions (VERY IMPORTANT) - **BEFORE** 12th Class Day - February 4
- Run SWPSXRF in Banner to update IMOD/ITYP (SZRSXRF) See File for Instructions (VERY IMPORTANT) - **BEFORE** 20th Class Day - February 16
- Run CBM00N in Banner - After 1st Class Day (January 22)
- Run CBM00N in Banner - After 12th Class Day (February 6)
- Run CBM00N in Banner - After 20th Class Day for FADS Cycle & let FA know it has been ran. (February 18)
- Review/Update SIATERM

PIR utilizes Confluence to track processes both in Banner and Access.

This is done to ensure the necessary steps are taken before, during, and after each term.

## PAGE: Spring 2025 CBMoC1



### Queries Process:

Each process is saved in a series of queries that are ran in the corresponding term Access Database.

We currently have specific queries that are ran for each census date.

- 1<sup>st</sup> Class Day
- 12<sup>th</sup> Class Day
- 20<sup>th</sup> Class Day

Because this is a live document, we can adjust or edit processes as they occur.

## PAGE: Spring 2025 CBMoC1 – Database Process Example:

Database Process

▼ [Click here to expand...](#)

- Import CBMoC1 combo 1 file using the CBMoC1 Import Spec
- U\_Update\_Leading\_0s
- CBMoC1\_Delete\_Headers
- D\_AT\_Students
- A\_Gender\_Validation
- A\_Ethnicity\_Validation\_1
- A\_Residency\_Validation
- R\_Gender\_Count\_2
- R\_CLS\_Count\_2
- R\_Ethnicity\_Race\_1
- R\_Ethnicity\_Race\_2
- R\_Ethnicity\_Race\_3
- R\_Ethnicity\_Race\_4
- R\_Ethnicity\_Race\_5
- R\_Ethnicity\_Race\_6
- R\_Ethnicity\_Race\_7
- R\_Ethnicity\_Race\_8
- R\_Ethnicity\_Race\_9 (Gives you the count)
- R\_Residency\_4

### Queries Process:

Each process is saved in a series of queries that are ran in a particular order.

We currently have specific queries that are ran for each semester to ensure data is correct.

We validate some of the following

- Class/Level/Program
- Ethnicity
- Gender
- Residency



# Using Confluence as a Manager

# Onboarding

- Sets expectations for the new employee
- Monitor the progress of access and security

Basic Access-Need to update forms						
Task	Proposed Completion Date	Completed By	Completed Date	Links/Provision	Timeframe	
Sand Dollar ID				<a href="https://universityservices.tamucc.edu/sanddollar/assets/Sanddollar%20ID%20card%20Request%20Form.pdf">https://universityservices.tamucc.edu/sanddollar/assets/Sanddollar%20ID%20card%20Request%20Form.pdf</a>	Hire Date	
DUO	09 May 2022	WK	09 May 2022	<a href="https://guide.duo.com/enrollment">https://guide.duo.com/enrollment</a>	Hire Date	
I-Drive Access	09 May 2022	WK	09 May 2022	Email to IThelp@tamucc.edu	Hire Date	
APA Folder Access	09 May 2022	JZ	09 May 2022	I-Drive Access to APA folder	Hire Date	
Office Calendars	17 May 2022	WK	17 May 2022	How to Share Outlook Calendar	1 week after hire date	
Alternate Work Location	13 May 2022	EMN	12 May 2022	FOR OFFICE USE ONLY (tamucc.edu)	1 week after hire date	
Off Campus Check Out				New Submission (tamucc.edu)	1 week after hire date	

Security Forms-Need to update forms						
Task	Proposed Completion Date	Completed By	Completed Date	Links	Timeframe	
TAMUCC Banner Access Form	One week after hire date	EMN	12 May 2022	<a href="https://laserficheforms.tamucc.edu/Forms/BannerSecurityRequest">https://laserficheforms.tamucc.edu/Forms/BannerSecurityRequest</a>	Hire Date	
TAMUCC Argos Access Form	One week after hire date	EMN	12 May 2022	New Submission (tamucc.edu)	Hire Date	
TAMUCC Data Warehouse Access Form	One week after hire date	EMN	12 May 2022	New Submission (tamucc.edu)	Hire Date	
TAMUS Enterprise Data Warehouse Statement of Responsibility	One week after hire date			<a href="http://assets.system.tamus.edu/bcssupport/SORs/BCSServicesDataWarehouseSOR.pdf">http://assets.system.tamus.edu/bcssupport/SORs/BCSServicesDataWarehouseSOR.pdf</a>	Hire Date	
THECB Access	One week after hire date	EMN	12 May 2022	I:\APA\THECB\VEDC Portal Guides	Hire Date	

HR Forms				
Task	Proposed Completion Date	Completed By	Completed Date	Timeframe
I-9	09 May 2022	WK	09 May 2022	Hire Date
W2	09 May 2022	WK	09 May 2022	Hire Date

# Monitoring Audits & Making Updates

Pages / ... / SP25 Prelim Updates 

## 021325

Created by Farrell, Liza, last modified on Feb 13, 2025

**IMPORTANT: Update 01 / 03 / 09 - T-Terms as they appear in SXRF (T-Term/Flex Term) reports.**

Dual Credit Student exported are located: I:\APA\THECB\CBM Reports\CBM0C1\Spring 2025\Dual\_Credit\_Students

All other student related exports are located: I:\APA\THECB\CBM Reports\CBM0C1\Spring 2025\Prelim\_Audit\_Findings

All course related exports are located: I:\APA\THECB\CBM Reports\CBM0CS\Spring 2025\Prelim\_Audit\_Findings

SCRIPT	PTRM	#-UPDATED	NOTES
SXRF T-Term	202409	0	
SXRF Flex Term	202503	0	
Marked FE and are not in FE Ptrm	202501	0	
Courses missing Location & Zip/Country Codes	202501	3	File exported
CRN need CXRF	202501	0	
CRN need CXRF	202502	0	
CRN need CXRF	202503	0	
Spring Duplicate CRNs	202501/02/03	0	
Term Code/PTRM Code/PTRM Weeks Don't Match	202501/02/03	0	
CXRF Missing	202509	0	
AC Courses	202501	1	File exported
AT Courses		9	File exported
Registration Type RB		0	
Withdrawn Students		0	
Dual Credit Students		265	File exported
Dual Credit Courses		15	File exported

## 021325\_FA

Created by Farrell, Liza on Feb 13, 2025

**IMPORTANT: Update 01 / 03 / 09 - T-Terms as they appear in SXRF (T-Term/Flex Term) reports.**

Dual Credit Student exported are located: I:\APA\THECB\CBM Reports\CBM0C1\Fall 2025\Dual\_Credit\_Students

All other student related exports are located: I:\APA\THECB\CBM Reports\CBM0C1\Fall 2025\Prelim\_Audit\_Findings

All course related exports are located: I:\APA\THECB\CBM Reports\CBM0CS\Fall 2025\Prelim\_Audit\_Findings

SCRIPT	PTRM	#-UPDATED	NOTES
SXRF T-Term	202509	151	File Exported
SXRF Flex Term	202511	66	File Exported
Marked FE and are not in FE Ptrm	202509	0	
Courses missing Location & Zip/Country Codes	202509	0	
CRN need CXRF	202509/10/11	80	File Exported
Term Code/PTRM Code/PTRM Weeks Don't Match	202509/11	0	
Fall Duplicate CRNs	202508/09/10/11	0	
CXRF Missing	202509	0	
AC Courses		2	File Exported
AT Courses		12	File Exported
Registration Type RB		0	
Withdrawn Students		0	
Dual Credit Students		0	
Dual Credit Courses		0	

# Continuity in Reporting

## Sets of Queries:

- 12th Day
  - Import the CBM0CS Combo 1 CSV file and name CBM0CS
- 20th Day
  - Run Make CBM0CS\_12<sup>th</sup>\_Day
  - Import the Parts of Term text files using the CBM0CS Import Spec
  - ▶ [Click here to expand...](#)
    - Import CBM0CS combo 1 CSV file using the CBM0CS Import spec.
      - Name CBM0CS\_20th\_Day
    - Run Parts\_of\_Term\_Prep Macro
  - ▶ [Click here to expand...](#)
    - Run Make\_CBM0CS query - This compares the 12th and 20th day tables to create the fall CBM0CS table
    - Run Append\_CBM0CS\_Flex query - Compares the 12th and 20th day tables to append the flex records to the CBM0CS table
    - Import CBM0C8 combo file using the CBM0C8 Import spec and name CBM0C8
    - Run Macro\_Pre-Check
  - ▶ [Click here to expand...](#)
    - U\_Leading\_0s
    - 
    - I MODE Updates
      - ▶ [Click here to expand...](#)
    - RESD\_DistEd - This should only be ran once the RESD field in the CBM0C1 has been updated
  - ▶ [Click here to expand...](#)
    - Dual Credit (TSDS has its own set of steps)
  - ▶ [Click here to expand...](#)

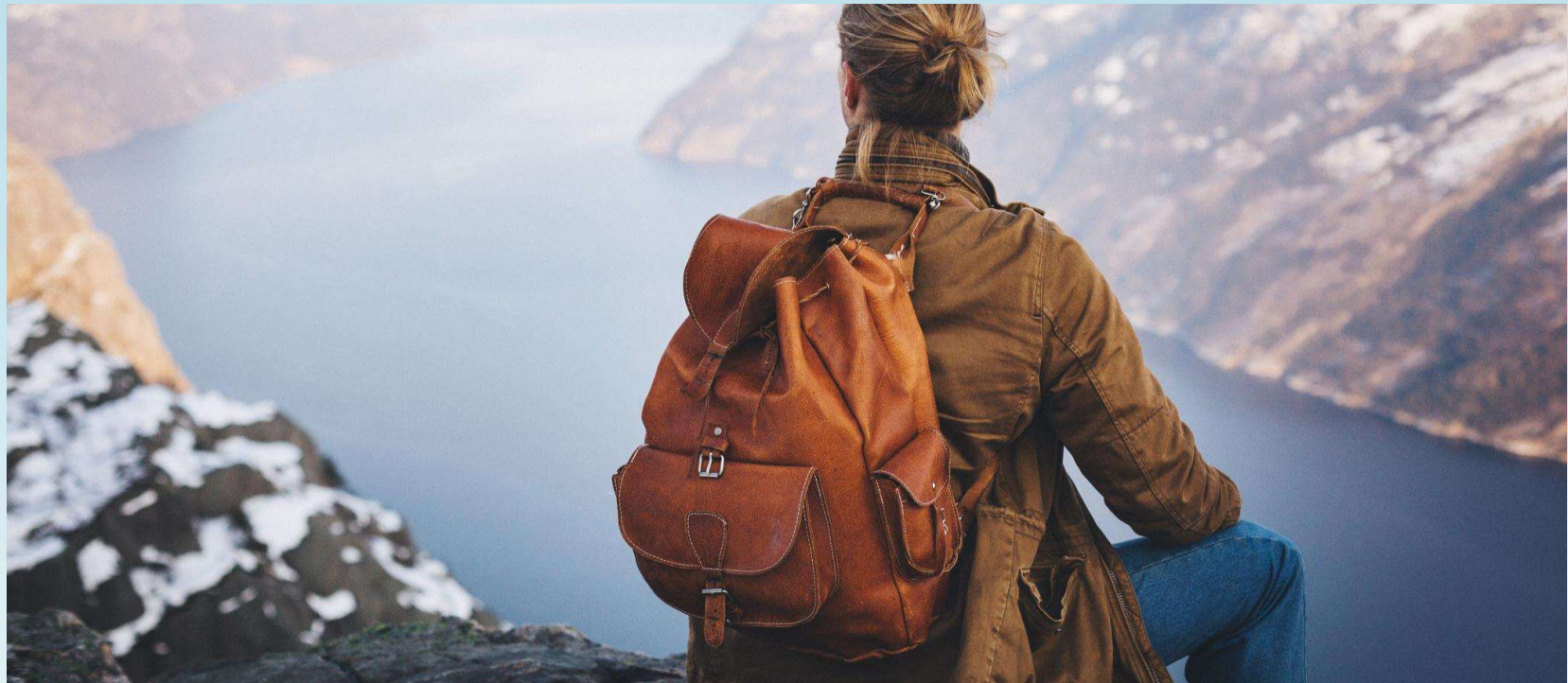
# Easy to Use & Find Information

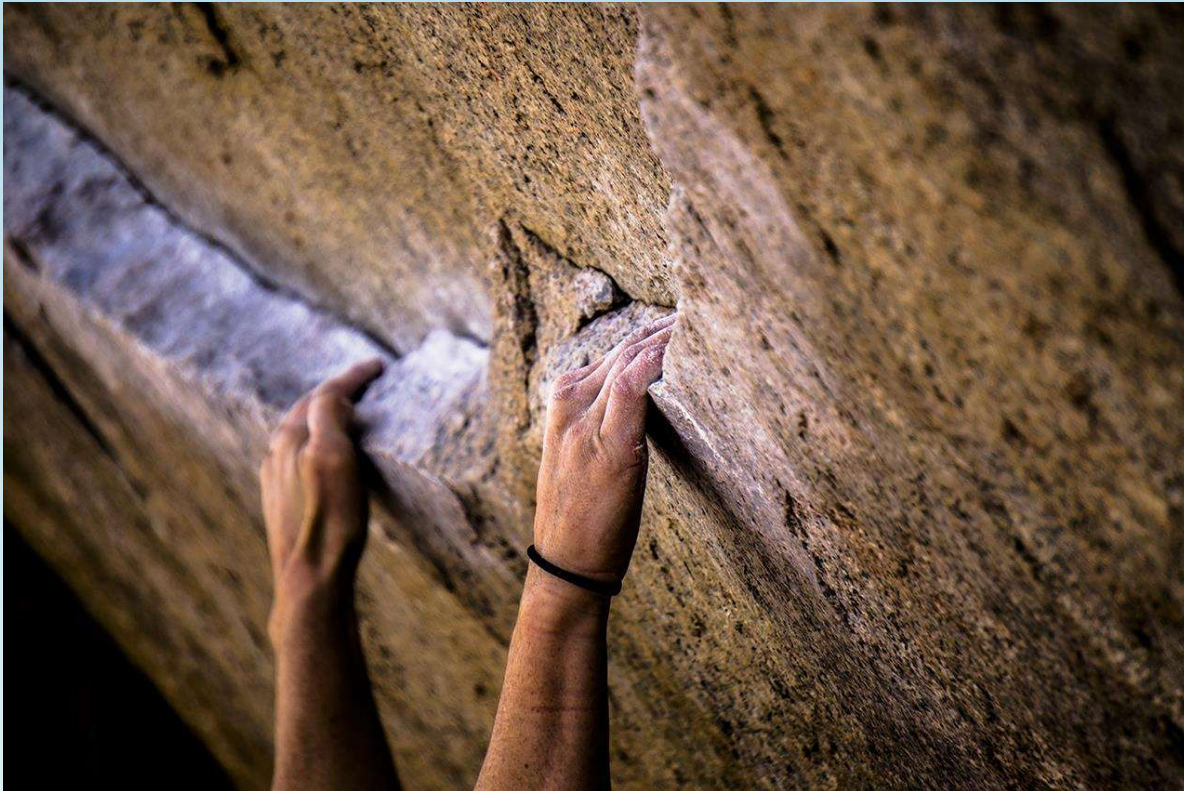


The screenshot shows a web interface for a TAMUCC Wiki page. At the top left is the TAMUCC logo and navigation options: 'Spaces' and 'People'. A green 'Create' button and a three-dot menu are also visible. The left sidebar shows a tree view with 'LBB/LAR' expanded, listing sessions from 2022-2023 to 2024-2025, along with 'LAR Administrator's Statement', 'LAR EST. FY22 & Projections', and 'LAR Output and Explanatory'. The main content area shows the breadcrumb 'Pages / Planning and Institutional Research Home / Institutional Research', the title 'LBB/LAR', and the creation info 'Created by Merchant, Amanda, last modified on Nov 03, 2020'. Below this are two bolded sections: 'LAR - Legislative Appropriations Request: "what we are going to do"' and 'LBB - Legislative Budget Board: "what we did"'. The bottom of the page shows the start of a section titled 'LAR DOCUMENTATION (2022-23)'.

[Planning and Institutional Research Home - Planning and Institutional Research - TAMUCC Wiki](#)

We made the summit....





Currently re-  
pivoting...  
but hanging on



# Q & A



# Contact Information

Erin Mulligan-Nguyen (PhD)  
Associate Vice President  
[Erin.mulligan-nguyen@tamucc.edu](mailto:Erin.mulligan-nguyen@tamucc.edu)

Whitney Kessinger  
Director of Planning & Institutional Research  
[Whitney.kessinger@tamucc.edu](mailto:Whitney.kessinger@tamucc.edu)

Liza Farrell  
Research Analyst  
[Liza.farrell@tamucc.edu](mailto:Liza.farrell@tamucc.edu)



Scan the QR code to  
complete the  
session survey.



Texas Association for Institutional Research

Annual Conference: February 25-28, 2025  
Omni Hotel in Corpus Christi, TX

