

Rationale and Plan for Data Improvement

In the spring of 2010, Carl Albert State College (CASC) began an Enterprise Resource Planning (ERP) conversion from Jenzabar EX to Jenzabar PX. CASC software stakeholders decided to begin the conversion due to the vendor's inability to correct fundamental issues plaguing the college's previous ERP system. One of the concerns with CASC's previous ERP solution was the lack of a unifying flow of data between the admissions, registration, and financial aid departments, and the structured policies consistently governing data entry and data processing. Lack of consistent flow, structure, and policy hampered the institution's ability to submit timely reports and to ensure overall reliability.

During the software conversion, the first priority was to ensure the day-to-day functioning of CASC's new ERP system. This required a great deal of time and sacrifice from all departments. The second priority was to work with the college's current support vendor, Educational Systems Products (ESP), to produce accurate and timely reports to the state and federal governments, i.e. UDS, IPEDS. The specific challenges to reporting were the following:

1. Data inaccuracies from the previous ERP system.
2. Data translation/conversion from Jenzabar EX to Jenzabar PX.
3. Data inaccuracies due to lack of experience in the new system among department users and Telecommunications and Information Systems (TIS) staff.
4. Lack of structured policies to provide consistent data entry and data processing within the new system.
5. No central department was given reporting responsibility.

During the conversion process, the federal government began to make significant changes to processing financial aid to students, which had a substantive impact on CASC's financial aid department's conversion; many processes in the new ERP system received extensive modifications which impacted the speed of the conversion process, the data flow, and the college's ability to report promptly.

Also, there was at the time a concerted effort by both the state and federal agencies to enforce stringent reporting requirements on all higher education institutions. Non-negotiable deadlines were communicated to all higher education institutions. If deadlines were not met, the institutions' presidents were required to make personal requests to the Oklahoma State Regents for Higher Education (OSRHE) to receive extensions for submitting the required reports. The focal point then became to meet reporting deadlines despite the significant challenges mentioned previously. Working with each department and CASC's ESP support, TIS resolved the issues as they arose during the process of submitting the college's reports. This proved unsuccessful, and CASC's reports were not submitted by the deadlines set by the state and federal agencies. To prevent any further data inaccuracies, submission delays, and embarrassing presidential requests to postpone CASC's deadlines for submitting the required reports, the following solutions are being set in place:

1. Centralizing the reporting process: All UDS, IPEDS, Noel-Levitz, and Gainful Employment reporting responsibilities have been moved to the TIS department and are currently being evaluated and submitted by the department's report writer Jerri Lowrimore. Subsequent reports such as NSC will be considered at a later date.
2. Mapping all required reporting data fields in CASC's Jenzabar PX system to ensure the proper fields required by the college's reports are being populated by data entry staff.
3. Validating all data fields in CASC's Jenzabar PX system to ensure that no required reporting fields are left blank and that the proper data types are entered.
4. Creating and documenting policies and procedures for required data entry.
5. Developing reports to catch data inaccuracies.

These solutions will be an effective start to deal with CASC's current state and federal reporting challenges. Solution 1 has been implemented, and the college has successfully submitted its fall reports on time while identifying and correcting data inconsistencies. CASC's goal is to minimize substantive effort and time completing the state and federal reports, maximize data accuracy, and unify a consistent and reliable flow of data between each department to ensure an accurate picture of the health and direction of the college.