# IR Banner Bootcamp

**WiFi: Natchez Guest**
**Code: NCC2016G**

Eric Atchison
Director of System Analysis, Research & Enrollment Management
Mississippi Institutions of Higher Learning

# Mississippi Public Universities

- Fall 2017 Students *(preliminary)*:      81,350 (−1.6%)

- AY2016−17 Students:      95,857 (+0.4%)
  Non−Resident Enrollment:      30.2% (+1.4%)

- AY 2015−16 Degrees:      17,102 (+1.7%)

- FY 2016 Research Dollars:      $422.0 (+1.3%)
  (in millions)

- Fall 2016 Employees:      28,616* (+3.1%)
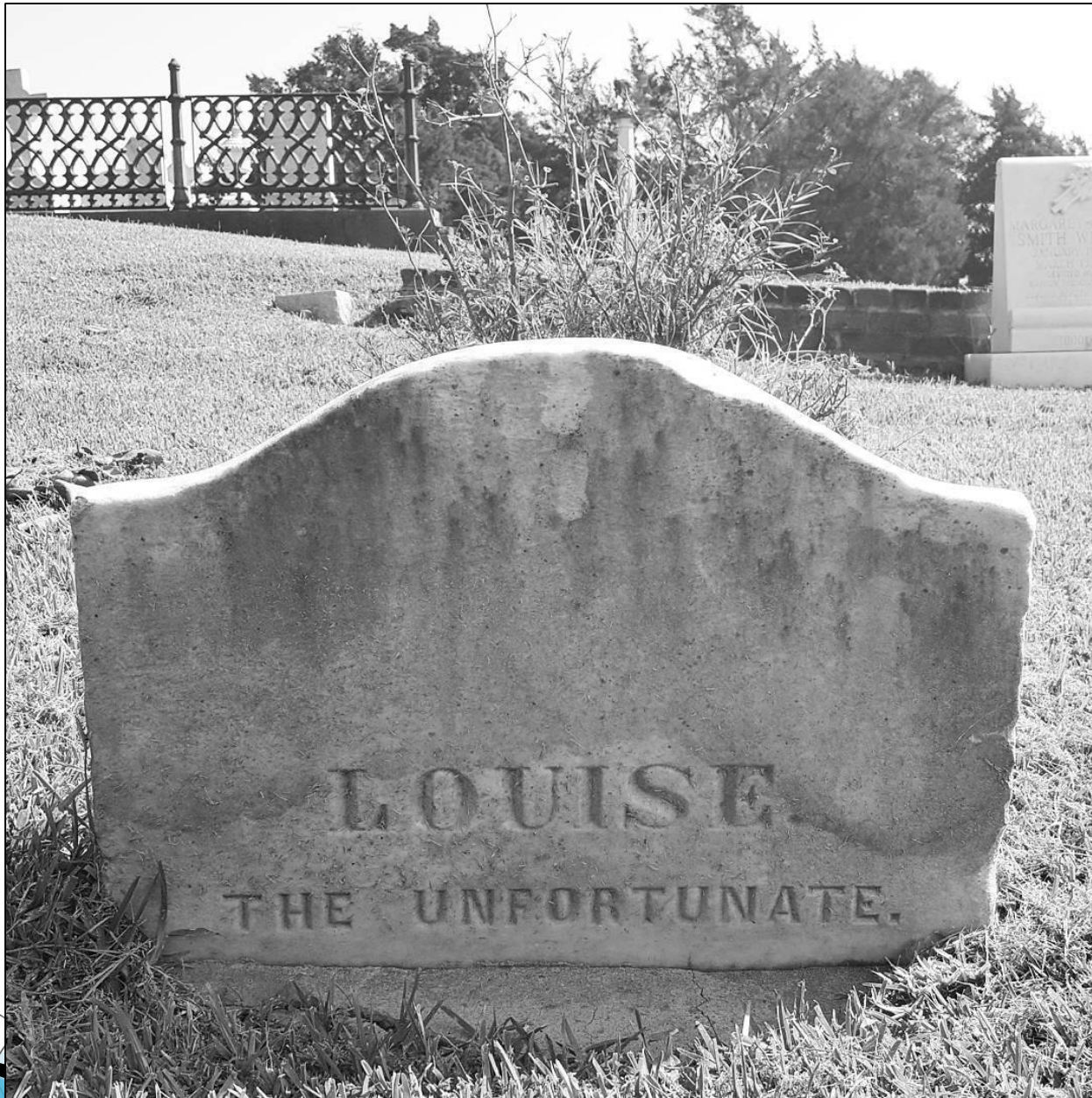  *Includes UMMC (36%) and MSU−Ag & Extension

- Strategic Research Staff:      2.5 FTE*
  *I'm the 0.5 (Enrollment management reports to Academic Affairs)

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# Background

- Bootcamp themed sessions at MBUG

# Banner

- Transactional
- Business
- Not Static

- What do you struggle with?
- What's been the best success in the past year?

# Project Characteristics

- Influence on Process & Product:
  - Internal **vs.** External requestor
  - Full reports **vs.** Descriptive tables **vs.** Short analysis **vs.** Raw data
  - Scheduled **vs.** Ad hoc
  - Annual multi-topic publications (including electronic) **vs.** Focused for smaller audience
  - Fast turn-around **vs.** Very fast turn-around
  - Analysis of existing university data **vs.** Obtaining existing outside data **vs.** Collecting new data for analysis (e.g., student survey)
  - IR office distributes report **vs.** Requestor distributes (partnership)
  - High priority **vs.** Low Priority

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# Factors that Affect Priority

- Urgent **vs.** Important
  - ➢ *Not* the same

- Audience

- Mandatory **vs.** Helpful **vs.** Nice to Know

- Deadlines
  - ➢ "Drop dead" **vs.** Real **vs.** Arbitrary **vs.** None

# Keep in Mind…

▸ All IR projects should support your institution's mission by providing analyses of data that inform its
  ➢ planning
  ➢ policy formation
  ➢ decision making

**Data → Information → Insights**

# Technical Skills & Networking

# Skills & Networking

- Terenzini's Three Organizational Intelligences of IR
  1. Technical & Analytical Intelligence
  2. Issues Intelligence
  3. Contextual Intelligence
- Other Knowledge & Skills
- Building Relationships

# Technical & Analytical Intelligence

▶ Factual Knowledge:
  ➢ Understanding GPA/graduation rates
  ➢ How to calculate various data

▶ Methodology skills:
  ➢ Turning raw data into useable information for institution

▶ Understanding computing and computing software:
  ➢ Excel, SPSS
  ➢ Your student information system
  ➢ Get to know IT staff

# Other Technical Skills

- Data Acquisition
  - Storage
  - Management
- Data Dictionaries
  - Determine if there is one
  - If not, create one (with assistance from stakeholders)
- Difference between transactional data (live and changing data) **vs.** reporting data (frozen data)

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# Issues Intelligence

- Understanding Key Issues in Higher Ed., especially Internal Issues Important to Institution
  - Faculty workload
  - Time to degree
- How Your Institution Functions including Formal and Informal Decision Making Process:
  - Who makes decisions, how are those done?
  - Various committees and who leads them.
  - What does upper admin think of IR?
  - How does IR fit into scope of institution?
    - IR, assessment, strategic planning

# Issues Intelligence

▸ Ability to work through others to accomplish goals:
- ➤ Build relationships first
- ➤ Demonstrate competence
- ➤ Be organized and ready to lead if need be

▸ Knowledge about other departments and key strategies and objectives

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# Contextual Intelligence

- Understanding Culture of Higher Ed., including:
  - Institution's culture and history
  - How did institution get here?
  - Degrees offered, type of institution, etc.
- How Business is Done at Institution:
  - Key players and key processes
  - Who leads, how processes are conducted and by whom
  - Understand all parts of how data are entered from inquiry to graduation
- Respecting the perspectives of all constituencies
  - Talk with stakeholders, get to know people
  - Build positive relationships

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# Contextual Intelligence

- Knowledge of Environment in which College Operates
  - Peers (similar, aspirational, etc.)
- Knowledge of Emerging External Issues
  - Postsecondary Institutional Ratings System
  - Check IR in the Know

# Institutional Place in Higher Education

- Issues of Higher Ed.
  - Accountability
  - Cost
  - ED transparency lists
- Knowledge of Current Legislative Issues (e.g., Gainful Employment
- How to Support and Demonstrate Meeting Institutional Mission
- Supporting Long-term Program Development

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# Build Relationships

- Talk to Various Stakeholders on Campus
  - Get to know them, their jobs, and how they fit into the institutional processes
- Pay especially close attention to those who input data into the student information system
  - Understand who does this and how (data dictionary)
- Build relationships with IT (often own "rights" to access)
- Attend regional conferences
  - Networking—share business cards generously
- Volunteer
  - Committees, proposal reviewer, etc.

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# Relationships

▸ How much time are you working with other offices?
- Academic Deans ▸
- Admissions
- Alumni
- Athletics
- Auxiliary
- Bursar
- Faculty
- Financial Aid

- Finance
- Grants
- Human Resources
- President
- Provost
- Public Relations
- Registrar
- Student Affairs

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# Help Others See you as Competent

- Reach Out
  - Help those who may need assistance with data, research, etc.
  - Build relationships
  - Help others see you as competent and a team player
- Teach "How to Fish" Rather than Giving "Fish"
- Be Sure your Data are Accurate!
- Be flexible!

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# Be Organized-Positive-Expert

- ## Be Organized
  - Many external (and internal) reports are on a similar timeframe each year
  - Plan for this and communicate this to others so they can be prepared—you will be calling on others for data such as IPEDS, financial aid, etc.

- ## Be Positive
  - A positive attitude can go a long way
  - many people on campus don't feel comfortable with data and statistics—help put them at ease and help them know they can count on your expertise to guide them

- ## Be an Expert
  - Nobody knows the data like IR knows the data

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# Tools & Training

# Common Banner Forms

- EMPLOYEE / INSTRUCTOR:
- NBAJOBS: Employee Jobs
- PEAEMPL: General Employee
- PHILIST: Pay Event List
- PPAIDEN: Employee Identification
- SIAASGN: Faculty Assignment
- SIAASGQ: Faculty Schedule Query
- SIAFDEG: Faculty Degree Information
- SIAINST: Instructor Information
- SIAIQRY: Faculty/Advisor Query

- FINANCE:
- FGIBAVL: Budget Availability Status
- FGITRND: Detail Transaction Activity
- FGIBDST: Organization Budget Status
- TSAAREV: Account Detail Review Form
- TSAEXPT: Exemption Authorization
- TSADETC: Detail Code Control Form

- FINANCIAL AID:
- RFIBUDG: Financial Aid Fund Budget Inquiry
- RFRBASE: Scholarship Fund Base Data
- RHIAFSH: Fund Sequence History
- ROAHOLD: Financial Aid Hold
- RPAARSC: Resource Maintenance
- RPAAWRD: Award Maintenance
- RRAAREQ: Financial Aid Applicant Requirements
- RPIATRM: Aid by Term
- RPIFAWD: Fund Award Inquiry

- SCHEDULE:
- SCACRSE: Basic Course/CIP Information
- SFASLST: Class Roster Query
- SSAMATX: Building/Room Query
- SSASECT: Schedule Query
- SSASECQ: Schedule Section Query Form

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# Common Banner Forms

- STUDENT:
- GOATPAC: Third Party Access
- GUIALTI: Alternate ID Search
- RSIHOUS: Housing Information Inquiry
- RSIHIST: Summary of Academic History
- SAADCRV: Admissions Decision
- SAAADMS: Admissions Application
- SAAEAPS: Electronic Application Process
- SAAETBL: Electronic Application Submitted
- SFAREGQ: Registration Query
- SFAREGS: Student Course Registration
- SFASTCA: Student Course Reg. Date
- SGASADD: Additional Student Attributes
- SGASTDN: General Student

- STUDENT:
- SGASPRT: Athletic Compliance
- SHACRSE: Student Course Transcript
- SHADEGR: Degree and Other Formal Awards
- SHADGMQ: Degree Summary
- SHAGAPP: Graduation Application Info.
- SHAINST: End of Term Academic Standing
- SHATERM: Term Sequence Course History
- SHATRNS: Transfer Course Information
- SHASUBJ: Subject Sequence Course History
- SMAPRLE: Program Definition Rules
- SOACURR: Curriculum Rules
- SOAHOLD: Hold Information
- SOAHSCH: High School Information
- SOATEST: Test Score Information
- SPAIDEN: General Person Identification

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# Common Banner Forms

- VALIDATION TABLES:
- FTVORGN:       Organization Code
- PTVCDES:       Position Class
- PTVDISP:       Faculty Discipline
- PTVESKL:       EEO Skill Code
- STVACTC:       Student Activity Code
- STVADMT:       Admission Type
- STVAPDC:       Admission Application Decision
- STVATTS:       Student Attribute
- STVCAMP:       Campus Code
- STVCIPC:       CIP Code
- STVCITZ:       Citizen Type Code
- STVTERM:       Term Validation
- STVCLAS:       Class Code Validation

- VALIDATION TABLES:
- STVCNTY:       County Code
- STVDEPT:       Department Code
- STVESTS:       Enrollment Status Code
- STVETHN:       Ethnic Code
- STVLEVL:       Level Code
- STVMAJR:       Major, Minor, Concentration Code
- STVNATN:       Nation Code Validation Form
- STVPTRM:       Part of Term Code Validation
- STVSBGI:       Source / Background Institution
- STVRSTS:       Course Registration Status Code
- STVSUBJ:       Subject Validation Table

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# Data Warehouse

- Do you have one?

- How did you set it up?

# Other Tools

- What tools do you use for:
  - Reporting
  - Evaluation
  - Auditing / Validation
  - Other tools within your office

# Other Responsibilities

# Training

- IPEDS workshops
- Online IPEDS tools

- SACS conference

- MAIR / SAIR / SACCR / AIR

Eric Atchison

601-432-6288

eatchison@mississippi.edu