REPORTER

NC State University's solution for tracking, managing, reporting and measuring external outreach, internal training and non-credit activities

http://reporter.ncsu.edu
http://go.ncsu.edu/reporter

https://support.reporter.ncsu.edu

COE Executive Committee Meeting
9.27.16

Need Statement, Purpose and Justification for REPORTER

- NC State needs an <u>enterprise level solution</u> for tracking non-credit activity (both internal and external)
  - NC State reaches 600,000 participants through outreach, extension, continuing education and engagement activities and programs
  - PLUS, approx. 8,000 employees for professional development and required training
    - New Employee Orientation
    - Environmental Health and Safety
    - Financial and Regulatory Compliance-related activities:
      - Payment Card Industry (PCI)
      - Conflict of Interest (COI) training
      - Uniform Guidance Certification Training for Principal Investigators training
- No off-the-shelf solution satisfies the requirements for the magnitude and diversity of non-credit programs and activities (including required training)
- Mendix$^®$ provides a cost effective platform for constructing a custom solution which addresses the diverse campus needs <u>and</u> provides enterprise level non-credit activity tracking, billing, and reporting

http://www.mendix.com

REPORTER Organization

- Working Under the University's IT Governance Model

  – Steering Team Drives Priorities, Functionality, Scope

- Decentralized Support Model

  – 2 Training Coordinator Positions

    - Outreach & Engagement

    - Required Training

  – Course Administrators in Departments

  – Client/Program Business Services in Departments

- REPORTER Business Services Support (AOE Division)

REPORTER Key Functionality	Details
Wolfware / Moodle Integration	*Course registrations for internal and external participants *Course results back to REPORTER after completion of course
HR, SIS & Financials Integration	*Loading Employees, Students and Financial Setup information *Detailed financial revenue information to General Ledger
Excel Data Exports, Data Mart & Real Time Reporting	*Data integration to SAS reporting tools and real-time reporting from the application
Prerequisite Support	*Setup, Enforcement and Workflow Support
Internal, External and Affiliate User Registrations	*Unity logins for NC State Faculty, Staff and Students *Account signup and maintenance for external participants
Compliance and Required Training Tracking, Enforcement and Reporting	*"Tag" people to courses they are required to take *Track course taken dates and required refresh intervals for compliance training *Emails to supervisors and participants when refresh windows are approaching
Inclusive Course Catalog	*All courses in REPORTER are available to be shown in one Course Catalog
Non-Credit Transcript	*All registrations and activities are shown on common Non-Credit Transcript
Dashboard Based on Roles	*Landing Dashboard based on user roles for Participants, Instructors, Course Admins, Financial Managers, Affiliate Managers
Drop, Transfer & Refund Support and Workflows	*Workflow to Course Admins/Financial Managers for Drops, Refunds and Transfers
WordPress Event Page Creation	*Manage your own WordPress event page: https://events.reporter.ncsu.edu/<eventname>

Current State of REPORTER

Currently Live	Onboarding in Progress
Industry Expansion Solutions (IES)	Institutional Equity & Diversity (OIED)
Environmental Health & Public Safety	OIT Security & Compliance
Controller's Office	Institute for Transportation Research & Education (ITRE)
The Graduate School	Crop & Soil Sciences
Athletics	Purchasing / Financial Systems Training
Research Administration (ORIED)	Enrollment Management (EMAS)
Natural Resources (Forestry)	

Currently Engaged for Possible Onboarding

Biological & Agricultural Engineering	Shelton Leadership Center
Human Resources	Textiles
JC Arboretum	College of Veterinary Medicine
Academic & Student Affairs (DASA)	The Science House

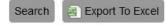# IES in REPORTER

NC STAT

Industry Expansion Solu

- 90 Course Profiles - open enrollment/online
  - 15 online
- 201 Instances
- 356 Registrations since 3/21/2016; plus 59 drops/expired
  - 131 Discounts Applied
  - $123,277 Registration Fees & Sponsorships
  - $104,480 Receipts
  - $ 5,314 Refunds
- Goals
  - By 12/8/2016 all open enrollment and online registration of IES courses conducted through REPORTER
  - By 3/31/2017 all revenue data from REPORTER integrated with our CRM (Salesforce)

Real Time Tracking & Financial Activity

Financial Reports

REPORTER Next Steps

- Cost Recovery Models Under Consideration

  – Under development, targeting January 2017 implementation

  – Fee-Based Courses and Programs, minimal charge targeting $2.00 or less per registration

  – Other Non-Credit uses - to be determined

- REPORTER Merchant ID

- Continuation of Department Onboarding

- University and GA Standard Report Creation

- Functionality Improvements and Enhancements

How Can REPORTER Support Your College and Faculty?

- Does your organization need a solution that could provide a more efficient and automated operation for your business practices and meet PCI compliance?

- Does your organization need support and resources for PCI compliant credit card registrations and business processes for non-credit activities, or internal training, or conferences and events?

- Does your organization need a system that would provide the reports that are regularly required from UNC General Administration (UNC GA), or Southern Association of Colleges & Schools (SACS), or Carnegie, or others related to non-credit activities?

- *Get the word out* to faculty to let them know about REPORTER

Call to Action For You to Consider

- Register for an Event in REPORTER

  – Uniform Guidance Certification Training for Principal Investigators - [Registration Link]

- Check out mfgCON in REPORTER - [Course Catalog View]

Q & A

For more information about REPORTER and onboarding:
support.reporter.ncsu.edu

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Thank you