

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 enterprise level solution 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 and provides enterprise level non-credit activity tracking, billing, and reporting

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)

NC STATE UNIVERSITY

REPORTER Key Functionality	Details
Wolfware / Moodle Integration	<ul style="list-style-type: none"> *Course registrations for internal and external participants *Course results back to REPORTER after completion of course
HR, SIS & Financials Integration	<ul style="list-style-type: none"> *Loading Employees, Students and Financial Setup information *Detailed financial revenue information to General Ledger
Excel Data Exports, Data Mart & Real Time Reporting	<ul style="list-style-type: none"> *Data integration to SAS reporting tools and real-time reporting from the application
Prerequisite Support	<ul style="list-style-type: none"> *Setup, Enforcement and Workflow Support
Internal, External and Affiliate User Registrations	<ul style="list-style-type: none"> *Unity logins for NC State Faculty, Staff and Students *Account signup and maintenance for external participants
Compliance and Required Training Tracking, Enforcement and Reporting	<ul style="list-style-type: none"> *"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	<ul style="list-style-type: none"> *All courses in REPORTER are available to be shown in one Course Catalog
Non-Credit Transcript	<ul style="list-style-type: none"> *All registrations and activities are shown on common Non-Credit Transcript
Dashboard Based on Roles	<ul style="list-style-type: none"> *Landing Dashboard based on user roles for Participants, Instructors, Course Admins, Financial Managers, Affiliate Managers
Drop, Transfer & Refund Support and Workflows	<ul style="list-style-type: none"> *Workflow to Course Admins/Financial Managers for Drops, Refunds and Transfers
WordPress Event Page Creation	<ul style="list-style-type: none"> *Manage your own WordPress event page: <a href="https://events.reporter.ncsu.edu/<eventname>">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

[My Courses](#)
[My Team](#)
[Finance](#)

[Orders](#)
[Refunds](#)
[Orders Not Paid](#)
[Invalid Orders](#)
[Cancelled Orders](#)
[All Orders](#)



Orders

[Search](#)
[View Details](#)
[Email](#)
[Administrative Payment](#)
[Export To Excel](#)
[Export To CSV](#)
[Download Order Summary](#)

1 to 20

Order Number	Order Creator	Order Total	Amount Paid	Amount Due	Amount Refund	Refund Due	Paymer Type	Admin Pmt?	Order Status	Order Complete Date
100002384	Coyle, John	0.00	0.00	0.00	0.00	0.00		No	Complete	9/22/...
100002379	Pipkin, Cheri Pot...	205.00	0.00	205.00	0.00	0.00		No	InProgress	

Financial Reports

[Revenue](#)
[Registrations](#)
[Transaction Details](#)
[Financials View](#)
[Past Refunds](#)
[Discount Report](#)
[Orders Not Paid](#)
[Cancelled Orders](#)
[Invalid Orders](#)

[Search](#)
[Export To Excel](#)
[Export To CSV](#)

Financial Reports

Financial Reports

- Revenue
- Registrations
- Transaction Details
- Financials View**
- Past Refunds
- Discount Report
- Orders Not Paid
- Cancelled Orders
- Invalid Orders

- Search
- Export To Excel
- Export To CSV
- View Instance Details

Course ID	Course Title	# Instances	Registration Fee	Amount Paid	Amt Refunded	Refunds Due	Cancellation Fees	Discounts	Amount Due	Total Receipts	Net Revenue
IET-mfg-CONSP...	mfgCON ...	4	13,250.00	12,500.00	0.00	0.00	0.00	0.00	750.00	12,500.00	12,500.00
IES-SRS-PPM	Practical ...	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IES-SRS-PFMEA	Process F...	1	395.00	395.00	0.00	0.00	0.00	0.00	0.00	395.00	395.00
IES-SRS-EPS-RCA	Effective ...	1	1,580.00	1,580.00	0.00	0.00	0.00	0.00	0.00	1,580.00	1,580.00
IES-SRS-DFMEA	Design F...	1	1,185.00	1,185.00	0.00	0.00	0.00	0.00	0.00	1,185.00	1,185.00
IES-SAF-RCRA	Hazardou...	6	1,060.00	1,060.00	0.00	0.00	0.00	0.00	0.00	1,060.00	1,060.00
IES-SAF-8-HAZE...	8-Hour H...	4	265.00	265.00	0.00	0.00	0.00	0.00	0.00	265.00	265.00
IES-SAF-8-HAZ	8-Hour H...	5	1,325.00	530.00	0.00	0.00	0.00	0.00	795.00	530.00	530.00
IES-SAF-40-HAZ	40-Hour ...	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IES-SAF-24HAZ...	24-Hour ...	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IES-SAF-24-HAZ	24-Hour ...	3	1,250.00	1,250.00	0.00	0.00	0.00	0.00	0.00	1,250.00	1,250.00

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](#)

mfgCON 2016 - IES-mfg-CON2016 Add to Watchlist



2016 Manufacturing Conference

mfgCON is North Carolina's premier conference for manufacturing innovation, with two full days of presentations and breakout sessions designed for maximum exposure to the newest ideas, and best tools and resources in manufacturing.

To register as a sponsor, [Click Here](#).



Start Date	Title	Online	Available Seats	Restricted
10/18/2016	mfgCON 2016		231	Enroll Now

Q & A

For more information about REPORTER and onboarding:

support.reporter.ncsu.edu

Jack Foster, OIT, jjfoster@ncsu.edu

Wendy Laing, IES, wlaing@ncsu.edu

Jessie Sova, AOE, aasova@ncsu.edu

Thank you