

**11/6/24**

Trent Brager  
Bryan Helminiak

# **PUTTING THE END USER FIRST**

**Enhancing Efficiency and User  
Experience in the IR/IE Office**

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# AGENDA



(What's the Story) Morning Glory? – Oasis

Introduce St. Thomas & Our Team

Website Project

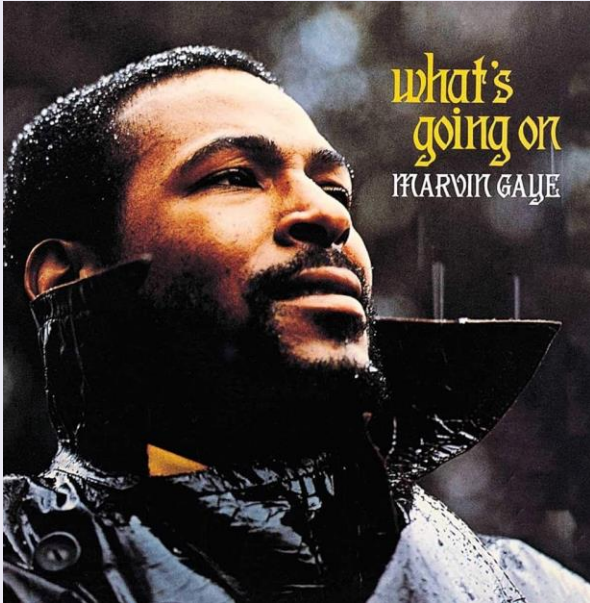
Ticketing Project

Everyday Processes

Key Takeaways

Q&A

# INTRODUCTIONS



What's Going On – Marvin Gaye

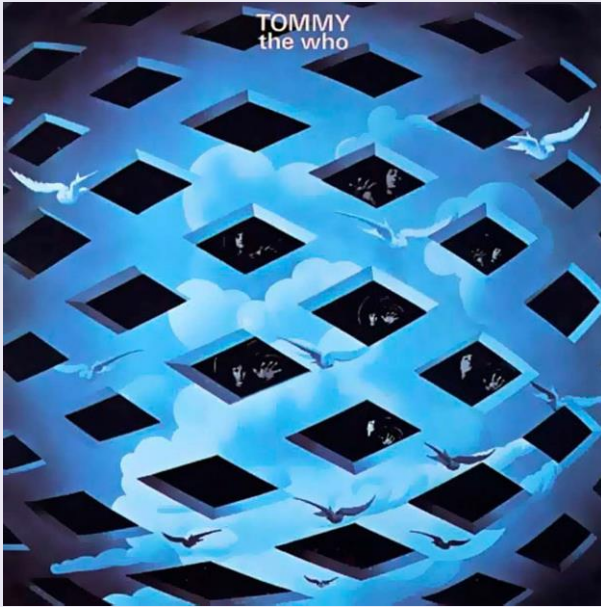
**Bryan Helminiak**  
Data Empowerment Analyst

- Been at St. Thomas for 19 years
- Formerly Associate Director for Housing Operations
- In IDAR for 2 years
- Data Innovators graduate

**Trent Brager**  
Business Intelligence Analyst

- Been at St. Thomas for 7 years
- Formerly Social Sciences/Engineering Librarian
- In IDAR for 2 years
- Data Innovators graduate

# UNIVERSITY OF ST. THOMAS



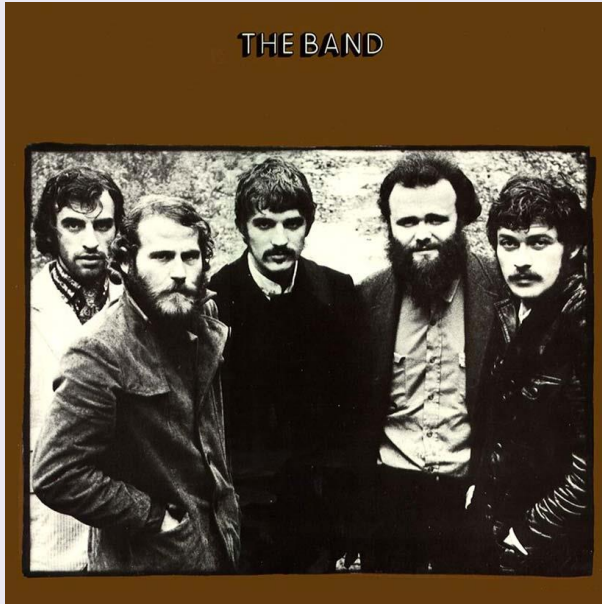
Tommy – The Who

- Private, Catholic, non-profit
- ~6,000 undergraduates, ~3,000 graduates
- Offer degrees from AA to practitioner doctorates
- St. Paul and Minneapolis campuses



# THE IDAR TEAM

## INSTITUTIONAL DATA, ANALYTICS AND REPORTING



The Band – The Band

- 7 team members + 1 undergraduate intern
- In ITS, so we don't report directly to Provost. In division with CRM (Salesforce) and email communications teams
- Don't administer surveys, quantitative exclusively
- Compliance reporting/complete external surveys, otherwise internal reporting-focused
- 100% remote
- Manage Cognos Analytics BI tool, use Salesforce and Banner
- Big projects: data lake development, Data Innovators
- We all take tickets from the queue but specialize in certain areas

# HOW DO YOU PUT THE END USER FIRST?



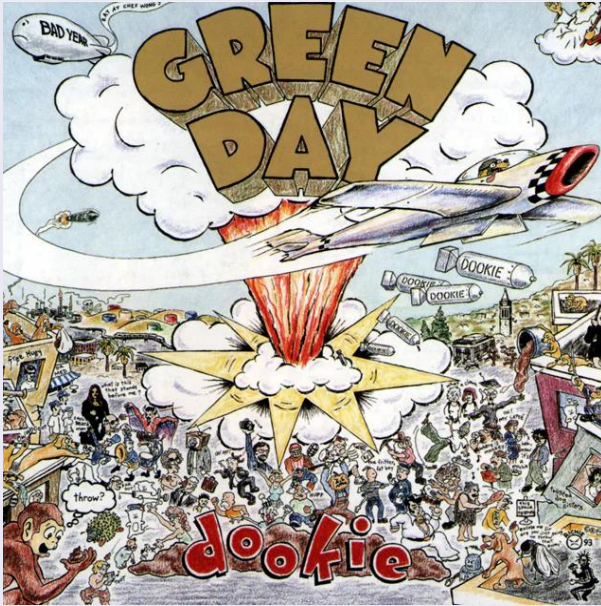
Are You Experienced – The Jimi Hendrix Experience

We're going to talk about two of our end user touchpoints, our internal website and our ticketing system. While we talk through our updates to these, think about the touchpoints used at your institution.

- How do end users find out more about you? Website? Presentation materials? Emails?
- How do end users contact you for requests? Tickets? Forms? Email?

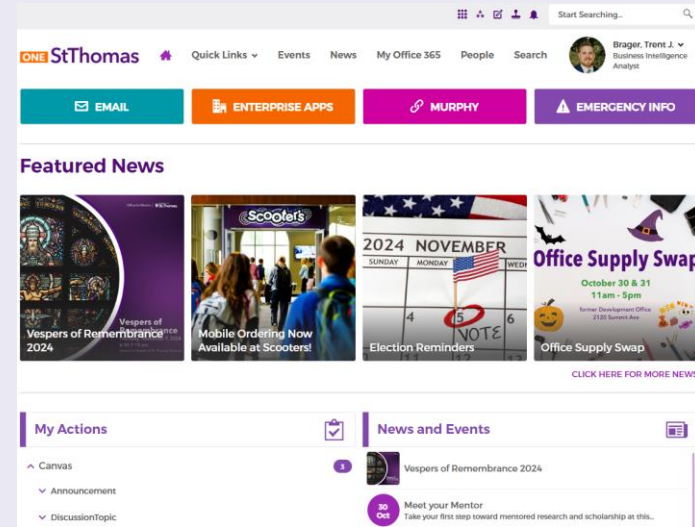


# WEBSITE PROJECT



Dookie – Green Day

## OneStThomas



## Project Onset

- We were put on Updating Website team during Annual Planning
- We're both fairly new (so don't have blinders) and we come from the university outside of IDAR so have a perspective of what it's like as an "end user"

# WEBSITE ISSUES



Michael Jackson - Bad

- Internal website not updated in years and not user-friendly

A screenshot of the IDAR (Institutional Data, Analytics &amp; Reporting) website homepage. The page has a purple header with navigation links: DATA, IN-DEPTH REPORTS, MAKE A REQUEST, DECISION SUPPORT, and DATA EMPOWERMENT TRAININGS. Below the header is a central graphic featuring a lightbulb made of gears, surrounded by icons for Transparency, Consistency, Partnership, and Bold Innovation. To the right are four purple boxes with icons and text: '2023-2024 Factbook', 'IDAR 2023 Roadmap', 'St. Thomas Data Cookbook', and 'Data Empowerment'. Below this is a section titled '2023-2024 St. Thomas Facts' with the following data: Total Enrollment: 9,146; 51% Female | 28% BIPOC | 77% Full-Time | 15% Non-MN Resident | 5% International; 5,840 : 4-Year Undergraduate Students | 229: 2-Year Undergraduate Students | 3,077 : Graduate Students. At the bottom, there is a 'Fact Breakdown by Groups' section with a list of student groups and expandable buttons (+).



# USER SURVEY



Reach Out – Four Tops

- Sent out survey to specific high-volume users from both the academic and non-academic sides, including Data Innovators graduates and senior administrators
- $25/88 = 28.4\%$  response rate
- Asked about what was missing on the site, what they use the site for, improvements to make. Multiple choice and open response
- Responses informed the updates needed and what to keep

# INTRANET DEVELOPMENT



Help! – The Beatles

- Contacted our intranet manager with questions
- He offered to work with us weekly on developing the new site!
- We said yes immediately and met weekly for ~6 months
- Useful to talk through what we do with a complete outsider
- He created a mind map that eventually turned into our website outline. Helped to organize our thinking of what the end user would use the site for.
- Specific takeaways: challenged our use of terminology (“well, what does that mean?”), using common language; writing for the web, no walls of text; grouping services into buckets

# THE WEBSITE TODAY



Ray of Light - Madonna

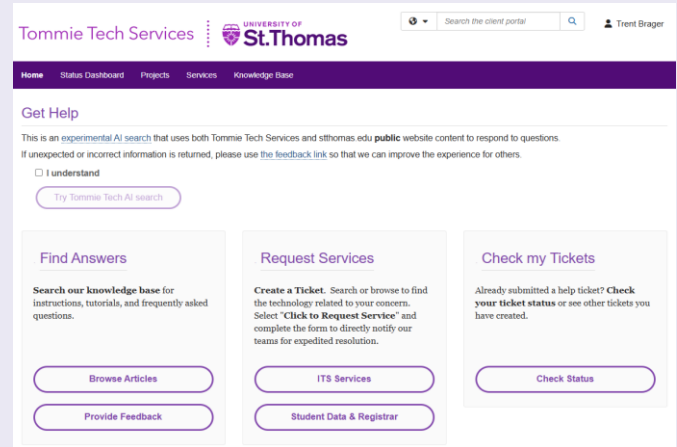
The screenshot displays the website's layout, which is primarily purple and white. At the top, a navigation bar includes links for IDAR HOME, DATA, TRAINING & ACCESS, GOVERNANCE, and DECISION SUPPORT. The main header features the title "Institutional Data, Analytics and Reporting" in white text on a dark purple background with a gear and circuitry graphic. Below this, a section titled "Driving St. Thomas into the future by unlocking the power of our data" provides a mission statement and a list of key questions: "How do I get data to make an informed decision?", "How is data defined at St. Thomas?", and "What are St. Thomas' Data Privacy Principles?". This section includes sub-links for Current reports, Historical reports, and Custom reports. A "2024-2025 Quick Facts" section shows a total enrollment of 9,445, with 51% female and 51% BIPOC. A "Fact Breakdown by Groups" section lists 4-Year Undergraduate Students at 6,063. On the right side, a "Get Data" section offers options to review existing reports or request custom reports, with a link to "CURRENT REPORTS". Below this, a "Data That Already Exists In Reports" section provides a quick way to look at aggregate numbers from various facets of the university community, listing 10th day reports, cohort-specific reports, historical reports (e.g., Enrollment Fall 2020), and a search for reports in the Data Cookbook. A "Reports based on Academic Unit" section allows for viewing reports based on department or access level. Finally, a "Custom Reports/Dashboards Using Simple Criteria" section provides basic information for one-time or continued use. A "Contact" section at the bottom right provides the office location as AQU 319.

# TICKETING PROJECT

**Tommie Tech  
Services (TDX)**



The Downward Spiral – Nine Inch Nails



## Project Onset

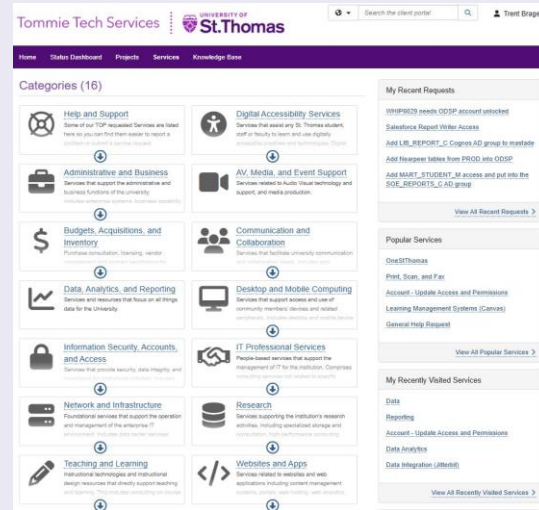
- While working on the website, we discovered a mismatch in how we describe our work on the website and how we have our tickets set up. And the ticketing forms are not optimized for our common requests.

# TICKETING ISSUES



SOS – SZA

- We don't list a shared IDAR email address on our website. We send everyone to TDX so this is often the main point of contact.
- Ticketing system is confusing, even to us





# TICKETING ISSUES



Damaged – Black Flag

## Services (5)

### Data

Request new data fields, new integrations, DE&I data requests, or a Data Consultation.

### Data Analytics

ITS is here to serve you with data analytics. This can include: solving a business problem, data exploration, statistical modeling, predictive modeling, or post-survey results exploration.

### Reporting

Create and update reports, audit data for accuracy, and use data for accreditation.

### Data Empowerment

Request information and training on our Data Cookbook, Salesforce Report Writing, or our Data Policies.

### Validation

Request a team to review and confirm a data stat, calculation, analysis, data fact, or report related to your area for internal or external use.

Tommie Tech Services UNIVERSITY OF St. Thomas

Home Status Dashboard Projects Services Knowledge Base

Service Catalog Data Analytics and Reporting Reporting

Reporting + Show Help - Hide Help

Create and update reports, audit data for accuracy, and use data for accreditation.

Requestor \* Trent Brager

What is the reason for your request? \*

Something is broken or not working as expected

I would like to make a request (e.g., for assistance or access)

Short description of request \*

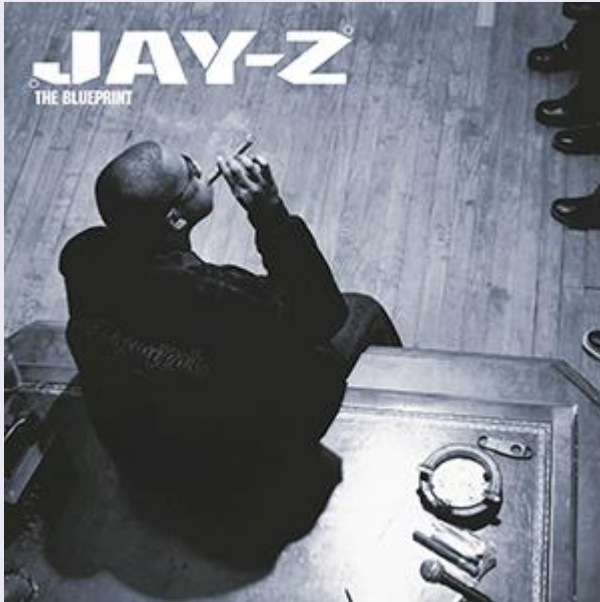
Purpose of Request and Any Additional Details \*

Attachment

How is work impacted today? \*

- Ticket forms are basic and similar for all requests
- We use terminology that is confusing to everyone but us in the Services offered and ticketing forms. What does “Reporting” mean?

# THE UPDATE PROCESS



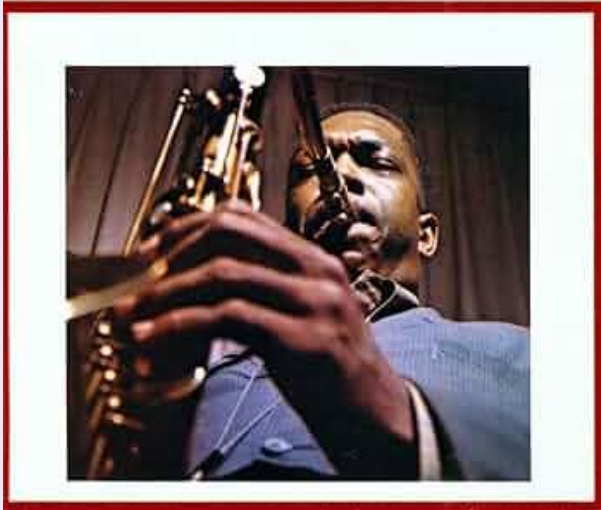
The Blueprint – Jay-Z

	B	C	D
1	ID	Description	Title
2	2198908	create a one-time row-level report	RA Candidate Grade Report
3	2198908	needs access to a specific Cognos folder	Jenna Handel (hand2247) has a Cognos account but doesn't have access to the Institutional Advancement folders
4	21991609	SF access for student emp	XST Salesforce access for Academic Counseling student employee Jordan Ludowese (xst-ludo8931)
5	21992932	create a one-time row-level report	Athletics Pell Grants
6	21996771	enroll new hires in FERPA training	FERPA training - Account Set up for two new University Advancement hires; William Brakke and Diamond Dampier
7	21997038	create a dashboard	FAFSA (packaging, verification, etc.) dashboard for continuing students 24-25
8	22001413	create a one-time row-level report	International Students who do not have their Foreign Language Core Requirement complete or waived
9	22001526	create a one-time row-level report	Under-Enrolled International Students
10	22002338	formatting SQL for Lyris/SFMC	Sql code
11	22006361	create a one-time row-level report; to determine num sections to offer	Data to Inform Course Section Planning
12	22008052	--	Chicago Trek Student Banner Salesforce load request: For documentation only. Task Already Completed by Patrick Sanchez
13	22008411	analysis project	Look into faculty advising workloads & ancillary info
14	22008417	formatting SQL for Lyris/SFMC	Sql code
15	22008521	create a one-time row-level report; to determine num sections to offer	Business Econ majors who still need to take Econ 332, Industrial Organization
16	22011572	incident with current Cognos access	Cognos Access in BI/PROD
17	22011692	update existing Cognos report	Turn on RSVP Status - FR by Major report for Spring 2023
18	22014847	formatting SQL for Lyris/SFMC	Explore best of action to segment a list in Salesforce Marketing Cloud for a Lyris list

- Categorized all of our 2023 tickets into groups (Feb – Jun)
- Created charter, listing phases and a timeline
- Met with TDX managers to ask questions about possibilities
- Developed new main service categories
- Divide and conquer on sketching out the questions for each service category form
- Together, we have a solid outline of forms and functionality
- Currently putting into TDX Sandbox for testing

# THE FUTURE

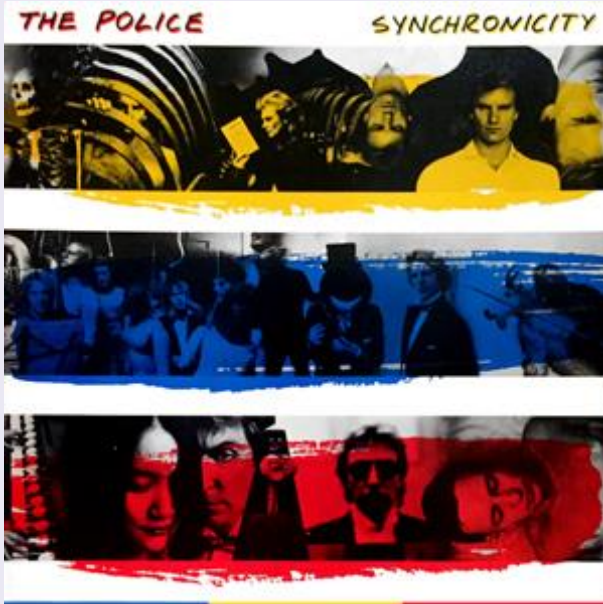
JOHN COLTRANE GIANT STEPS



Giant Steps – John Coltrane

- Meet with those in depts we partner with about ticket workflows
- Continue updates in sandbox environment
- Test (recreate past tickets, have some external requestors give feedback)
- Go live in January, maybe
- Update website links that point to TDX

# EVERYDAY PROCESSES



Synchronicity – The Police

- Taking tickets faster and setting better expectations for users after looking at our process from external user point of view, more empathy/understanding
- Moving toward more self-service – Decision Support and standard reports, creating dashboards with drill down, training programs (Cognos Basics course)
- Moving Cognos to SSO project stemmed from these other projects (wanted to embed dashboards in website but doesn't work without SSO, many access incident tickets due to sign-on issues)

# FUTURE PROJECTS



Forever Changes – Love

- How to prioritize tickets
- Train Tech Desk employees to know what tickets to send to us
- Require ticket requestors to fill out Data Cookbook as part of ticket for adding new data items to our CRM
- Create/use Excel tutorials (filtering)
- Developing webinars on using our services to complete common tasks



# KEY TAKEAWAYS



Bringin' It All Back Home – Bob Dylan

- Get feedback from customers about your services and put yourself in their shoes
- No one really knows what we do
- This is important! Your amazing services aren't that amazing if no one knows how to access or use them
- Think about what jargon you use
- Don't be afraid to ask for help! Lean on other's expertise
- This type of thinking is infectious and you will create more projects

# HOW DO YOU PUT THE END USER FIRST? #2



Something/Anything? – Todd Rundgren

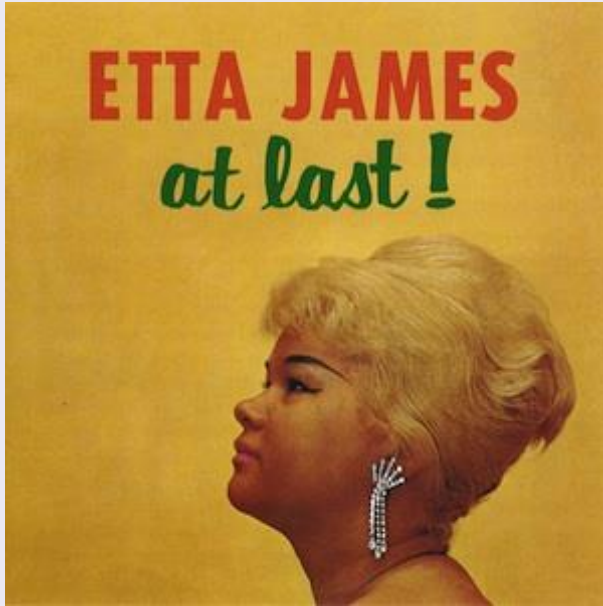
- What did you take away from the presentation?
- What ways does your institution put the end user first or what ideas do you have for implementing an "end user first" mindset?

# Q&A



Who's Next? – The Who

# THANK YOU!



At Last! – Etta James

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Albums selected from [Rolling Stone's 500 Greatest Albums of All Time 2023 list](#)  
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