



experience: **LIAISON** 

SEATTLE | FEBRUARY 15-16, 2023

Admissions by Liaison: A Powerful, World-Class CRM That Transforms Data Integrations

Kate Owen-Killgrove and Yamiley Saintvil, Ed.D. | February 16, 2023 | 3:45 p.m.

experience:LIAISON 

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Presenters



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PEPPERDINE | GRAZIADIO
BUSINESS SCHOOL

- Pepperdine University in Malibu, CA
- 10,030 total undergraduate and graduate enrollment
- 6,368 graduate students
- 6 MBA options (Full-Time, Professional, and Executive)
- 6 specialized Master's programs
- 1 Doctor of Business Administration Program
- Approx. 3,100 applications per academic/fiscal year (Fall, Spring, Summer)

Institutional Needs and Objectives



- User-friendly, intuitive application
- Aesthetically, modern platform
- Accommodate high percentage of international applicants
- Accommodate 'internal' program applications
- Reduce manual processing
- Launch in approximately five months



Key Players



Campus Project Manager

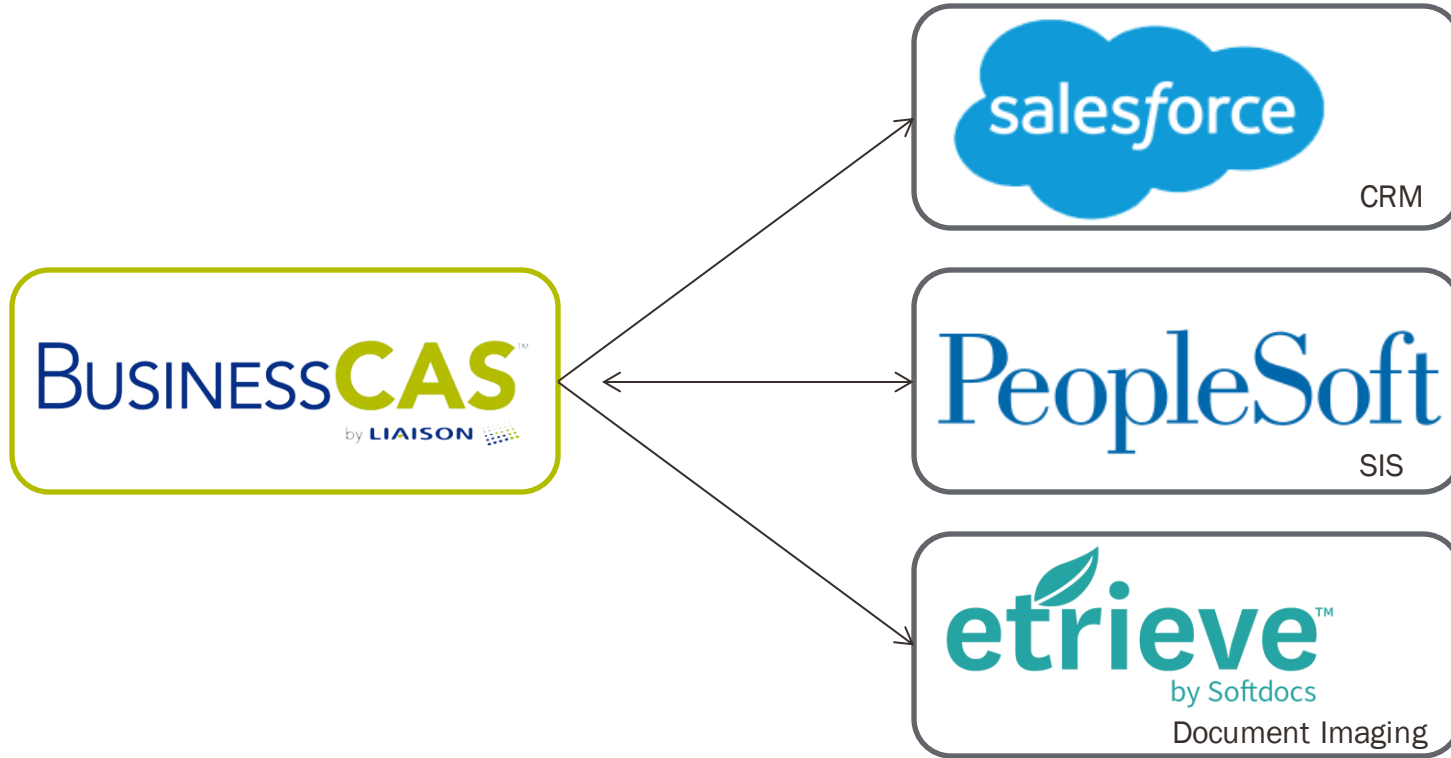
- Buy-in and negotiations with stakeholders including BusinessCAS team
 - Redefine workflows, policies, and practices
- Project Management
 - Timeline
 - Define scope and milestones
 - Decision points
- Define team roles and responsibilities
- Develop resource guides and facilitate trainings
- Lead change management

Liaison Technical Expert

- Experienced with CAS applications, Admissions by Liaison, WebAdMIT
- Collate required data for PeopleSoft and determine the best approach
- Define and build all requirements in Admissions by Liaison

Outcome - System Integrations

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PeopleSoft Integration – All the Puzzle Pieces



- Approx. 40 required fields for seamless integration
- Approx. 200 fields to eliminate staff entry
- Translation tables
- JavaScript for dynamic questions
 - Example – Religion - if blank, value is 'Undeclared'
- API for student ID
- Application exports include 287 columns containing application data

Translation Tables

- Convert strings of text to a single code, a different text value, or numeric values
- Available for use in Exports or on Application Properties via Javascript

Name

Military Status

Input Type

Text

Output Type

Text

Category

Choose category

Default Output

Translations

Input	Output	
Not a Member of the Military	X	
Input	Output	
Other	1	
Input	Output	
Military Dependent	E	
Input	Output	
Member of Reserve or National Guard	Y	
Input	Output	
Veteran	4	
Input	Output	
On Active Duty	Y	

Application Properties



≡ CWID	cwid	Standard / String
≡ Self-Reported CWID	selfreport_CWID	Calculated / String
≡ Site	site	Calculated / String
≡ DEG	deg	Calculated / String
≡ Admit Term	admit_term	Calculated / String
≡ Expected Graduation Term	exp_grad_term	Calculated / String
≡ DPTH	dpth	Calculated / String
≡ Academic Subplan	acad_subplan	Calculated / String
≡ Academic Program	academic_program	Calculated / String
≡ Academic Career	academic_career	Calculated / String
≡ Academic Load	academic_load	Calculated / String
≡ Corporate Partner	co_pa	Calculated / String
≡ CITZ	citz	Calculated / String
≡ Passport Country	passport_country	Calculated / String
≡ VISA	visa	Calculated / String
≡ CITST	citst	Calculated / String
≡ VISA_WRPMT_NBR	visa_wrkpmnt_nbr	Calculated / String
≡ VISA_WRPMT_STATUS	visa_wrkpmnt_status	Calculated / String
≡ Referral Detail	referral_detail	Calculated / String
≡ ZP_REFRL_SRCE	zp_refrl_srce	Calculated / String

- As many as you need
- Javascript or manual entry
- Viewable on Application Grid, Applicant Summary, and in Exports

Javascript – Application Properties



Ability to pull data from multiple questions into a single field

Label	Key	Data Type
Referral Detail	referral_detail	String

Expression

[Functions](#) [Field Dictionary](#) **JavaScript ()**

```
1 {
2   // This is the partial question property string to match on when scanning custom forms
3   let qString='cq_were_you_referred_by_a_pepperdine_alumni';
4   // This is the value that will be returned if no answer is found.
5   let defaultResponse=' '; // You will not need to change anything below.
6   let returnVal=defaultResponse;
7   let returnArr = []; Object.getOwnPropertyNames(forms).filter(function(name) {return name.includes('cas')}).forEach(
8     function(formName) {
9       let localqs = Object.getOwnPropertyNames(forms[formName]).filter(function(prop) {return prop.includes(qString)});
10      returnArr.push(forms[formName][localqs]);
11    });
12   returnArr.filter(function(val) {if (val) {returnVal = val}}); return returnVal;
13 }
```

Javascript – Application Properties



Return a code or value for only specific question responses

Label	Key
Passport Country	passport_country

Expression
<pre>1 { 2 let cit; 3 4 if (forms 5 && forms.casImport_org_form_299008 6 && forms.casImport_org_form_299008.cq_citizenship_status_8220383085759340000){ 7 8 cit = forms.casImport_org_form_299008.cq_citizenship_status_8220383085759340000; 9 } 10 11 switch (cit){ 12 case "U.S. Citizen": 13 return ""; 14 break; 15 16 case "U.S. Dual Citizen": 17 return ""; 18 break; 19 20 case "U.S. Permanent Resident": 21 return "USA"; 22 break; 23 24 case "U.S. Refugee/Asylee": 25 return "USA"; 26 break; 27 28 case "Non-U.S. Citizen": 29 return "USA"; 30 break; 31 32 case "U.S. Citizen or U.S. National": 33 return ""; 34 break; 35 } 36 }</pre>

Label	Key	Data Type
VISA	visa	String

Expression
<pre>1 { 2 if (forms 3 && forms.casImport_org_form_299008 4 && forms.casImport_org_form_299008.cq_select_intended_visa_type_if_you_are_in_the_us_and_do_not_currently_have_a_vis_7675964 5 6 return forms.casImport_org_form_299008.cq_select_intended_visa_type_if_you_are_in_the_us_and_do_not_currently_have_a_vis_76759 7) 8 else if (forms 9 && forms.casImport_org_form_299008 10 && forms.casImport_org_form_299008.cq_citizenship_status_8220383085759340000 == "U.S. Permanent Resident"){ 11 12 return "U.S. Permanent Resident"; 13 } 14 else if (forms 15 && forms.casImport_org_form_299008 16 && forms.casImport_org_form_299008.cq_citizenship_status_8220383085759340000 == "U.S. Refugee/Asylee"){ 17 return "U.S. Refugee/Asylee"; 18 } 19 else { 20 return ""; 21 } 22 }</pre>

Javascript – Application Properties



Concatenate two fields

Label

Admit Term

Key

admit_term

Data Type



String

Expression

Functions

Fields

```
1 program.properties.program_start_term + ' ' + program.properties.program_academic_year
```

Javascript – Application Properties

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Calculate new dates

Label	Key	Data Type
Expected Graduation Term	exp_grad_term	String

Expression
 Σ Functions ▾

```

1 {
2   var date = parseInt(program.properties.program_academic_year)
3
4   return (program.properties.program_start_term + ' ' + (date + 3));
5 }

```

Add a translation table to a calculated property

```

13  ≡ EXP_GRAD_TERM
    exp_grad_term  Translate using Expected Grad Term table

```

Inside the Export



Apply translation tables to fields in the Export

≡ DEG	
deg	Translate using DEG table

≡ SPPRG	
acad_subplan	Translate using Academic Sub Plan table

Add placeholders or static values

≡ Academic Load		F
Placeholder		

≡ SAL		Column Value
Placeholder		

Inside the Export



- Strip special characters
- Truncate at a specific character count

Label

PREV_LNAME

Expression

Functions Field Dictionary

```
1 {  
2   if ((forms) &&  
3     (forms.biographic_information) &&  
4     (forms.biographic_information.alternate_name_value) &&  
5     (forms.biographic_information.alternate_name_value.family)) {  
6     return (forms.biographic_information.alternate_name_value.family.replace(/[W_]+/g, " ").substring(0, 30));  
7   } else {  
8     return "";  
9   }  
10 }
```


Bidirectional Data



Edit Application Properties

CAS ID	1604144119
CAS Date Submitted	03/02/2022
CAS Date Last Updated	03/04/2022
CAS Application Status	Complete
CAS Application ID	11118882
CAS On Hold	No
Date Last Imported	03/30/2022
Unique Application ID	1604144119264422
CWID	100934143
Self-Reported CWID	
Site	PMAL
DEG	MSGLOBBUS
Admit Term	Fall 2022
Expected Graduation Term	Fall 2025

- Utilized the API functionality to push data from PeopleSoft into Admissions by Liaison
- Populating school ID number in order to push updated data into existing records and match documents

PeopleSoft Integration



Challenges

- Sequence of schools attended
- Information received for transcripts
- International student classifications and related translation values

PeopleSoft Integration – Final Workflow



Export received from BusinessCAS

- 1) Creates a student record in PeopleSoft
- 2) Generates CWID (and sends CWID to BusinessCAS)
- 3) Updates the student's application checklist
- 4) Adds documents to student's electronic file by document type
- 5) When new information is received for an existing applicant,
steps 3 & 4 repeat

Overall Integration Outcomes



- Reduced turnaround time from approximately 14 days to 1 day
- Developed an efficient workflow resulting in
 - Minimized front-end bottleneck during peak seasons
 - Increased staff productivity
- Improved student application experience
- Reallocated staff time to student engagement
- Saved money – eliminated the need for overtime

Post-Go Live Maintenance



Regular/On-going

- New school codes

Annually

- Application properties
- Translation tables
- Letters of recommendation

Rare

- Campus sites
- Country codes
- Race ethnicity
- Gender

PeopleSoft Integration – Post Go-Live



- Troubleshooting and continued refinement of exports
 - Field limits
 - Special characters
 - Use of commas
- Re-engage stakeholders for feedback
- Identify updates for future cycle rollovers
- Identify future phases for institutional action, if necessary

Questions



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Thank You



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