

Information Builders enables agile information solutions with business intelligence (BI) and integration technologies. WebFOCUS – the most widely utilized business intelligence platform – connects to any enterprise system or application and enables simple and intuitive interaction with information.

### Tarleton State University

#### Snapshot

##### Organization

Tarleton State University provides quality programs of undergraduate, graduate, and non-traditional education. The institution supports a student body of more than 9,000.

##### The Challenge

Minimize custom report-development efforts and eliminate cumbersome fixed report output. Enable end users across three campuses to access and analyze enterprise data in a consistent way.

##### The Strategy

Create a visual, Web-based reporting system as a front-end for the ERP applications, providing instant end user access to information from the desktop.

##### The Results

New WebFOCUS-based reporting portal eliminates paper-based reports, frees IT personnel from fielding custom report requests, and strengthens decision-making by providing faster access to information.

##### Information Builders Solution

WebFOCUS, Education, Professional Services.



## Tarleton State University Graduates to Business Intelligence

### University Benefits From Web-Based, Interactive Reporting

Dr. Brad Chilton, interim provost and VP of Academic Affairs at Tarleton State University, has plenty of administrative duties. But the one he loves to talk about most involves the reporting system he and his team created to access information from the school's Banner ERP System. Through the university's popular Texan Facts and Fact Book portals (available on the school's public-facing Web site) users can access historical, public relations, compliance, and a wide variety of administrative reports to assist with academic enrollment, student head count, retention, class lists, and all types of planning and decision-making.

It's a significant step forward for an institution that prides itself on cutting-edge information management.

According to Dr. Chilton, the university's previous reporting system had serious drawbacks. "We were running the same reports and database queries over and over

**“WebFOCUS gave us the flexibility we needed to improve our efficiency.”**

again,” he recalls. “This tied up precious resources that could otherwise be devoted to more important tasks.”

The problem was compounded by a productivity drain on Dr. Chilton’s staff. Lauren Morton and Bonnie Hurford, both database programming managers for the Office of Planning, Evaluation and Institutional Research (OPEIR), were able to write report procedures in a relatively short time, but were then forced to spend several days formatting those reports in Excel. “Sometimes it would take a week to produce and format a report and make sure that all the data had been entered correctly,” says Morton. “We were writing SQL code to pull the data and then formatting it in Excel. We then had to convert the output into PDFs for printing.”

As a result, some semester reports took up to two weeks to produce. Other reports, like enrollment, had to be run each day, further burdening the busy staff.

Tarleton State University looked for a more comprehensive solution to their reporting needs. They narrowed down the options to two vendors, SAS and Information Builders. They liked how WebFOCUS let them reuse SQL code in new programs and applications. Furthermore, WebFOCUS allowed them to produce reports in a variety of outputs from a central data store. Best of all, there was no need to spend long hours formatting reports. As Morton puts it, “WebFOCUS gave us the flexibility we needed to improve our efficiency.”

### **Learning the Ropes**

The university purchased WebFOCUS in March 2006 as part of an Education Bundle that is tailored to the SunGard Higher Education Banner ERP system. Installing and learning the software was easy and straightforward, thanks to some training from Information Builders’ Education department. Information Builders also sent consultants to help develop a dashboard and some of the more complicated reports. By the end of 2006 the system was up and running, with several reports available online through Texan Facts, the university’s primary information portal.

The Fact Book accesses SunGard Higher Education Banner data, as well as data that has been reported to the Texas Higher Education Coordinating Board. The browser-based reporting portal enables users to sort data by any combination of parameters without having to call in for assistance. “The system uses familiar Web conventions like drop-down menus and radio buttons,” says Dr. Chilton. “This frees up a tremendous amount of resources that would otherwise be needed to generate each report.”

For example, it used to take more than a month to create and post the fact book document, and it didn’t give users much flexibility. Now they can create dynamic reports with WebFOCUS and sort the data in any way they want. Information is loaded into a data warehouse every night and is available for reporting every day. This lets them compare specific values from year to year, month to month or any other way that they deem necessary – a handy feature when it comes to managing enrollment. “Running comparison reports is just a matter of a few clicks, a far cry from the days when the entire report had to be generated and converted into the appropriate output format,” says Dr. Chilton.

WebFOCUS integrates with Microsoft Active Directory so the faculty and staff can use their existing

login information to access the reporting system. This determines which dashboards they can access and prohibits students from viewing sensitive data.

With Tarleton State University spread over two main campuses at Stephenville and Central Texas, there is often a need to break down enrollment figures by campus. Now, instead of manually matching up data sets, WebFOCUS lets users make these distinctions on the fly through the Fact Book. "Before we had WebFOCUS we spent a lot of time fulfilling these report requests," says Hurford. "Now users can generate their own enrollment reports without having to ask for our help."

### Finishing With Distinction

Today, WebFOCUS is reaching a broad base of users across both Tarleton campuses; with heavy use from the Registrar's, Admissions, and Scholarship offices and anyone else who needs to access enrollment data.

The interactive reporting environment has transformed information access and delivery, and other universities have started to take notice – especially schools that depend on Banner software. "Banner generates a lot of data, but lacks the robust reporting capabilities found in WebFOCUS," notes Dr. Chilton. "Once you consider all the different permutations, there are thousands of different reports available at the click of a mouse."

Most of these other institutions are drawn to the obvious time savings associated with parameterized reporting. For example, semester reports that used to take up to two weeks to create can now be generated the same day. "Instead of having to create a report and format it in Excel, all I have to do is populate a table," says Morton. "WebFOCUS makes it simple and fast to perform these reporting tasks."

Another example, according to Hurford, is the Fact Book, which used to grow to several hundred pages, all carefully formatted by hand. "It would take the entire office staff up to one full month to get a new edition of the Fact Book out the door. Now all we have to do is make sure the data is in place and WebFOCUS runs the reports for us," continues Morton. "And because these are dynamic reports, the data can be sorted in any way people desire."

In a relatively short time Tarleton State University has become an example of what can be done with the proper tools for managing and distributing information among a large network of users. Hurford and Morton have delivered several presentations at the Texas Association for Institutional Research (TAIR) conference in the hopes of helping other universities enjoy these same benefits.

## Find Out More

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