Trellis is committed to supporting the University of Arizona and many of its strategic goals across its five pillars. In January, the program continued to refine its existing products and mature new efforts.

Trellis Advise is seeing high platform usage and the team is working with the advising community to prioritize new features.

Trellis Marketing developed a business unit onboarding strategy and are working with the College of Law, President’s Office, University Communications, and Marketing & Brand Management.

Degree Search & Transfer Portal: The second Minimum Viable Product (MVP2) was released January 23rd. The team is integrating Social2SAML and establishing user accounts to favorite majors.

Trellis Social conducted additional training for channel users. The product is live with 249 social channels and 238 users with access to the system.
| **Trellis Advise** | This project is focused on enhancing the University’s student and advisor experience. The platform is designed to help facilitate interactions and provides users the ability to make calendared appointments, document interactions with students, and communicate with each other by way of email and text messaging. |
| **Trellis Progress** | This project is focused on communication, transparency and interactions between faculty, advisors and students. A close-loop feedback mechanism where point-in-time intervention, suggested actions and/or positive reinforcement can be provided to improve the overall student experience. |
| **Trellis Marketing** | Arizona is implementing a university-wide marketing and communications platform using Salesforce Marketing Cloud. The project seeks to work cooperatively with University partners to create best practices and policies throughout the rollout of the product within the University's decentralized marketing structure. |
| **Degree Search and Transfer Portal** | Arizona is redesigning its web-based degree search functionality and adding more extensive planning functionality for students wishing to transfer their coursework from another institution. |
| **UAccess Student Center Modernization** | Working with a vendor called InFlight, the heavly used UAccess Student Center is currently being redesigned to provide a better experience for Arizona students and guests (parents). Improved navigation, layout, and optimization for mobile devices are included in this effort. |
| **Data Management** | The Trellis Program is committed to detailed work on data management and data governance. MDM is the foundation of the data integration strategy. |
| **Trellis Social** | Trellis Social is our instance of Salesforce Social Studio. It is the platform that social media users across the university will use to publish posts, generate reports, engage in social listening, and funnel content. |
| **Oribus Implementation** | Oribus is a series of Databases and StreamSet pipelines that enable the transfer of data between University data assets such as Student Admin (Peoplesoft) and the Salesforce database. |
| **Integration** | Responsible for the development, construction, and maintenance of services for connecting Salesforce to University data sources, and for providing secure data sources based on Salesforce data. |
| **Communications and Marketing** | Program level and product level communications and marketing support across Trellis implementation efforts and Arizona’s CRM initiative. |
| **Training and Support** | Training opportunities defined for the different stages of a product’s development. A user group can choose the methods that suit their needs. |
Trellis Advise

- Engaging students with appointment reminders
- Saving advisers time with check-in queue management, Case Detail reports, appointment form simplification, and reduction of system email notifications
- Supporting student interactions by showing appointment availability in their chosen time zone

Status: Live (Releasing updates weekly)

3,895 appointment hours and 1,530 drop-in hours from 129 advisers were made available to students in January.

86% of appointments made in January were booked by students through Trellis at an average of 2.5 days prior to the appointment date.
Trellis Progress

- Usability testing with students and faculty to resume in March to continue iteration of EPR solution
- Empowering instructors with advanced class list filtering
- Refining content presented to students to encourage interaction

Status: Live

SSRI is encouraging 16 week course instructors to send progress report through EPR beginning February 24th
Marketing Cloud

- Continued work in Subscription Center and List Loader tools, making key architectural decisions for both

- Developed a Business Unit Onboarding Strategy
  - Employing strategy to test onboarding of two BUs:
    - College of Law
    - President’s Office, Central Communications & Marketing and Brand Management

Currently in testing
Degree Search and Transfer Portal

- MVP 2 went live January 23rd
  - Features: filtering, mini details on major list page
- Currently integrating Social2SAML user accounts and ability for users to favorite majors (MVP 3)
- Planning MVP 4 (transfer course articulation portal) with stakeholders

Approx. 10,000 page views per week with 85% of views being unique
UAccess Student Center Modernization

- Completed all design reviews for optimized pages
- Audit for accessibility is underway
- Go-Live Date is now May 23, 2020

Onboarded 49 campus partners to begin 2nd round testing
Data Management

- **Master Data Management** - Full integration of Peoplesoft with MDM and Salesforce target 2/14

- **Data Platform / Data Lake** - Nearing completion of proof of concept (POC), target 2/10/2020

- **Data Nucleus** - Nearing completion of permission mapping and integration of UAIR InfoSphere into Salesforce.

---

**Data Lake** - Identified 3 Risk Factors for student retention from predictive algorithm using data science tools and data from data lake.
Trellis Social

- Conducted additional “Trellis 1” training for channel users
- Implementing our training plan for campus users

Product is live with 249 social channels and 238 users provisioned.
Oribus Implementation

- Currently collecting data on true latency, the delay from a change in Student to receipt in Salesforce
- Plans are in place and assignments have been distributed for Oribus Move to Production (MTP) on 28 Feb.
- MTP will be supported using in-house monitoring tool, Vigil, which will be operating in production by 16 Feb.
Integration

- Infrastructure improvements are underway and will be completed in mid-February to support Oribus MTP.
- Contract for short-term development consulting will be completed in early February. This will insure Integration assets are developed according to StreamSets’ best practices.
- Support Response process has been designed and the Integration team is now providing user support for all Integration assets.
Communications & Marketing

- Published Trellis Year-1 Program Video + Story
  - Included in “Strategic Plan at Work: Year One”, Executive Office of the President
  - Shared with Office of Strategic Initiatives (OSI) and University Communications for broader reach

- Established regular cadence with the advising community
  - ARC Monthly Newsletter/UPAC listserv
  - Reaching +600 subscribers with new product updates

**Growing Channels**
- Website (10 months)
- Monthly Status Report (9 months)
- Monthly Newsletter (3 months)
- In-App Guidance/Knowledge (3 months)
- General Open Forums (5 in 2019)

**Growing Interest**
- Monthly Newsletter - 192 subscribers*
- Trellis Website - 30,469 unique pageviews**
Training & Support

- Created just-in-time training videos for Trellis Advise
- Created online learning module for advisor onboarding
- Began planning training/support materials for SSE project
- Formalized release notes practices