Calling Campaign Assist

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Introduction:

Let me give you a quick overview of using this app for Calling Campaigns. Briefly speaking, this is a Python based command line application that uses the Pandas library and a lot of personalized object oriented interface code so that it works with almost all kinds of excel files generated by Slate queries. The main purpose of this application is to:

- Automate filtering through Excel Files
- Split and Combine Excel Files together
- Be a better tool for assisting the GAs in Calling Campaigns
- And optimize the Calling Campaign process at the Office of Graduate Admissions to reduce manual data handling tasks.

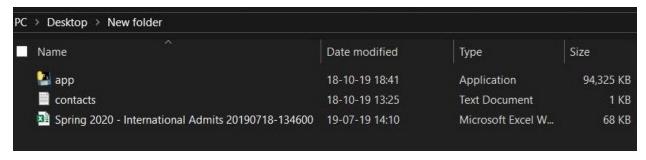
The 'behind the scenes' part of the application consists of 5 feature programs that are independent of each other and serve their own purpose. The five feature programs in the application are:

- International Student Data Filters
- Domestic Student Data Filters
- Split Excel Data File
- Combine Excel Files
- Calling Campaign Assist for GAs

I will walk you through each of the feature programs along with some application snapshots to help you use the application effectively.

Folder Structure:

In order to access the Excel files using the application, make sure you place the app executable and the Excel files to work with in the same folder. You can either have all the excel files and the app executable on desktop or you can place them in a single folder. The bottomline is that all Excel files and the app executable should be placed in the same directory. Your file structure should look like this:



Let the contacts file be there for now, the fun of it comes later on. Now that you have everything set up, let's get to using the application.

*Some Points to Remember:

- This application works only with number inputs and you have to enter the corresponding command number to execute a certain task.
- When you are asked to enter an input file name make sure you type in the exact name of the file. You need not enter the file extension '.xlsx' anytime whenever you are asked to name a file.
- You can only run one feature program at a time until the app closes and you have to restart to use a different feature program.
- This application has very low risks associated with data loss since for every feature program it provides you with the option to save a new excel file therefore minimizing the risk of losing original data.

Welcome Screen:

On opening the app executable, the program will run in a small window providing you with all the instructions you need along the way. Your welcome screen should look like this:

Now let me walk you through each of the feature functions individually.

1 - International Student Data Filters:

Options-1	Commands-1	Options-2	Commands-2
rollment Options Filter	111	Enrollment Status Filter	222
Bin Filter	333	Citizenship Filter	444
Decline Filter	555	School Filter	666
Defer Filter	777	Reporting Classification Filter	888
On Campus Filter	999	I-20 Filter	909

Before I walk you through the workflow, let me provide you with a brief representation of different filters supported for international student data. The different types of filters that you can use are:

• Enrollment Options Filter - Allows you to filter through Masters/Graduate Certificate and PhD applications.

• Enrollment Status Filter - Allows you to filter through Full-Time, Part-Time application data.

• Bin Filter - Allows you to filter through bin and access admits or conditional admits application.

Citizenship Filter countries	- Allows you to and	filter through app Non	olications of stude Chinese	ents from Chinese countries.
	For Non-	-China Citizenship inese Citizenship I	Info press: 1	***********
Decline Filter -	Provides you w	ith the option c	of removing decli	ned applications.
	To exclud	de Declined Applica	ations press: 1	**********
School Filter	- Allows you	to filter by	school - SO	B, SES, SSE.
	То g То g То g	get SOB Application get SES Application get SSE Application	ns press: 1 ns press: 2 ns press: 3	********
Defer Filter - Prov term.	vides you with the	option of includir	ng deferred applica	ations to a specific
		ed applications to	a specific term pre	**************************************
Enter the term: For	rmat - Fall 2019			
Reporting Classi classification.	ification Filter -	Gets you applic	ations with inter	national reporting
	****** REP(For Internation	onal Reporting Clas	ssification press: :	**************************************

On Campus Filter - at	Gets you application	ns with students	applying for On Can	npus Classes Stevens.
	**************************************	h On Campus Studer	nt Data press: 1	
I-20 Filter - Filters provides you	•	ons with and wi	•	
***********	**************************************	tudents with no I2	20 press: 1	
When you access a	• •	•		_
//////////////////////////////////////	//////////////////////////////////////	/// No I-20 ////	///////////////////////////////////////	///////////////////////////////////////
Transfer Filter Fellowship Filter Deposit Filter	111			
	Enter Command M For Calling To Sav To Return to Ma	Campaign Filters over and Quit enter:	enter: 1500 101	
o Transfer Filt	ter - Provides you v	with the option o	f removing transfer	applications.
	**************************************	ete* Transfer Stude	nt Data press: 1	
Fellowship F received	Filter - Provides you	u with the option	of removing studer	nts who have fellowships.
	**************************************	e* Students with Fel	lowships press: 1	

 Deposit Filter - Allows you to filter through applications with respect to paid or unpaid enrollment deposit.

When you access applications with I-20 issued date you will be provided with the following options:

 Deposit Filter - Similar to the no I-20 issued date, this allows you to filter through applications with paid or unpaid enrollment deposits.

 COA Filter - Allows you to filter through applications to access students who have either submitted or not submitted the Confirmation of Attendance for attending Stevens.

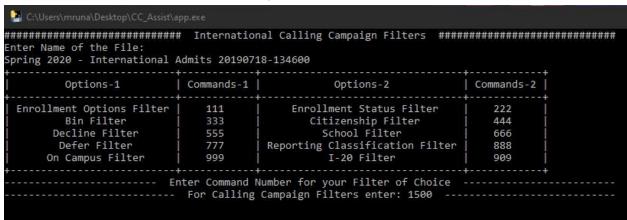
Calling Campaign Filters - These filters allow you to compare the last contact date of an
application with any date and gets you the applications that have last contact date before
or after that specified date. Another option is to get applications with no last contact date.

Note: From this point onwards, I will use the symbol * to indicate that you need to refer the *Some Points to Remember* section.

1.1 - Workflow:

• Step 1: *Enter File Name. Remember no file extensions. Then hit enter.

• Step 2: If the file is valid, you will be taken to the dashboard.



• Step 3: At this point, the Excel file name that you input has been copied as a dataframe object and any filter you choose to apply will dynamically modify the dataframe to give you the output excel file that you want. Each of the commands mentioned in the dashboard will take you to the corresponding filters as mentioned above. It is recommended that you choose Calling Campaign Filters at last since the program will direct you to save the file after applying a single Calling Campaign Filter. So go ahead and
apply
some
filters.

```
C:\Users\mruna\Desktop\CC Assist\app.exe
  On Campus
                                  Full Time
Options-1
                     Commands-1
                                        Options-2
                                                          Commands-2
                                   Enrollment Status Filter
Enrollment Options Filter
      Bin Filter
                                     Citizenship Filter
School Filter
                                                             444
     Decline Filter
                                                             666
     Defer Filter
                                Reporting Classification Filter
                        777
                                                             888
                                        I-20 Filter
    On Campus Filter
                        999
                                                             909
                   Enter Command Number for your Filter of Choice
                   -- For Calling Campaign Filters enter: 1500 -
                   ----- To Save and Quit enter: 101 -----
```

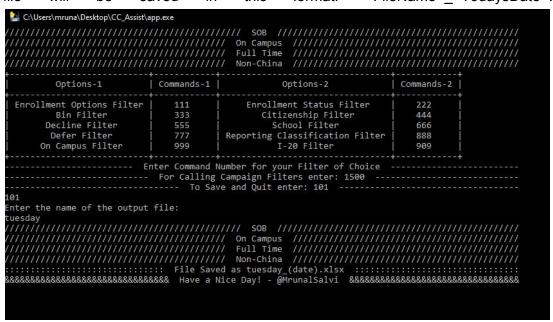
 Step 4: As you keep on applying filters, the queue above the dashboard will keep on updating based on the choices you make so that you don't repeat any filters more than once. If you want to save and quit at any point you can enter 101 or accessing and using any one of the Calling Campaign Filters will also prompt you to save the file.

```
-----101

In Save and Quit enter: 101

In the name of the output file:
```

• Step 5: When you are prompted to name the output file, you can just enter the name without any file extensions or date. When you enter the name of the file, you will get a brief overlook of all the filters applied and the name of the file that has been saved. The file will be saved in this format: <FileName>_<TodaysDate>.xlsx



• The saved file will look something like this in your directory.

■ tuesday_10-19-2019 19-10-19 16:08 Microsoft Excel W... 25 KB

2 - Domestic Student Data Filters

As compared to International Student Data Filters the number of supported filters are very few and are very similar in terms of functionality. Just the Excel file data structure defers for International Student Data and Domestic Student Data which is why there are two different workflows for achieving similar tasks.

The bottom line is that Domestic Student Data Filters also work similar to International Student Data filters and provides you with the same interface to filter through the respective excel files. You can enter the command number to access any specific filter and the queue will be displayed on top of the dashboard as you filter through the excel files.

The Save and Quit functionality is also similar to the International Filter Workflow. You can either choose to Save and Quit at any point by entering 101 or you can choose any one of the Calling Campaign Filters and you will be prompted to save and quit the application.

3 - Split Excel Files in Equal Parts

As the name suggests, this feature function allows you to make equal divisions of your excel file in order to facilitate equal data distribution for associated tasks at the Office of Graduate Admissions. This feature function serves a tiny purpose and it is probably one of the smallest workflows in this application but it does make it elegant and effective to split data related tasks equally.

Since this is a different feature function, it runs independently and you can split all kinds of excel files irrespective of whether they have been generated by Slate or not, or whether they are for International Student Data or Domestic Student Data.

3.1 - Workflow

• Step 1: *Enter File name. Remember no file extensions. Then hit enter.

Step 2: If the file entered is a valid Excel file then you will be prompted to enter the number of chunks you need for that file. For this example let's divide our excel file in 3 different parts.
 *So enter the number 3.

• **Step 3:** Further on you will be asked to input the name of the excel files and each chunk of the excel file will be dynamically created as you name them.

• **Step 4:** The excel files split in equal parts will be saved in the same folder as that of the application.

```
      Image: Second control of the contr
```

4 - Combine Multiple Excel Files

Since working with multiple excel files can be tedious and may create confusion, having the ability to combine those excel files in a single file also gives you a great advantage in effective data management while performing office related tasks.

Similar to Splitting an Excel file in equal parts, this feature function runs independently and you can combine all kinds of excel files irrespective of whether they have been generated by Slate queries or not, or whether they are for International Student Data or Domestic Student Data. Although it is recommended that you do have the same column names across all the excel files that you want to combine so that you get a complete output file without any missing values.

4.1 - Workflow

• Step 1: *Enter the number of Excel files you want to combine. You will be prompted to enter the file names of the Excel files you want to combine. Remember that you need not include file extensions. If the file you entered does not exist the feature function will restart and allow you to enter the number and file names again. Let's try to combine these

3 files together.

🝱 animesh	19-10-19 17:39	Microsoft Excel W	30 KB
🝱 abrar	19-10-19 17:38	Microsoft Excel W	32 KB
mrunal	19-10-19 17:38	Microsoft Excel W	32 KB

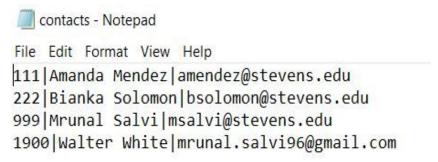
• **Step 2:** Make sure the files are in the same folder or directory as that of the application. When you are prompted to input the file name, enter the file name without the file extension. For the above example you will receive a prompt 3 times to enter the file name.

• **Step 3:** After you are done entering the corresponding file names of the Excel files you want to combine, you will be prompted to enter a name for the output file. Again you need not enter the file extension. The output file will be saved in the same folder with the name that you specified.

5 - Calling Campaign Assist for GAs

This feature of the application tries to replace the use of Excel Files and Google Sheets for Calling Campaigns at the Office of Graduate Admissions by displaying only relevant information about the student application. In general terms, the GA assigned with Calling Campaigns does not have to view all the student data which contains 30-40 associated columns and hundreds of rows in an excel file. Since the GAs do have to refer to Slate for additional information it just makes sense to present only the relevant applicant to the GA than displaying all the information.

This feature program also supports tracking the number of calls that the GA makes for an assigned Calling Campaign task for a single day and stores the results of those calls in different data structures such that in the end you get output files corresponding to their call response status. Before I get started on the workflow, let me tell you why do I have the contacts.txt file lying around in the folder. So if you observe the contacts.txt file it should look something like this:



The main purpose of this file is to support sending email updates after the GA is done with his or her Calling Campaign task. I will briefly go over this functionality in the workflow but make sure that the contacts mentioned in the contacts.txt file follow this format: <NumberCode>|<AdvisorOrGAName>|<EmailAddress>

5.1 - Workflow

• **Step 1:** Enter your name and the Excel file name when prompted. Make sure you enter your name right because the output excel files will be generated using your name.

- Step 2: If everything goes well and the file you entered is valid, then you will be able to see specific parts of the student application that you can use to refer on to Slate. As you can see from the above picture, you can see the name of the applicant, slate reference, contact numbers and citizenship info which is enough information to lookup on Slate.
- Step 3: As you call people, you do have to enter the command number depending on how your call goes. Remember that you do have to write yield notes on Slate and this application just tries to distant you from Excel and not Slate. For every student you call and enter the corresponding command number for call status, behind the scenes, four different data structures are being updated based on the students you called, students who did not answer, students who want to decline/withdraw applications and students you did not call.
- **Step 4:** As you keep calling and you move ahead, you will see a brief summary update of your calling campaign at the very top. Pay good attention to these numbers to track your calling campaign tasks and these numbers are what are going to be included in sending email updates.

• **Step 5:** When you are done with your calling campaign tasks, enter 101 to exit the application gracefully. After hitting enter on 101, you will have an option to send email updates to people mentioned in the contacts.txt file. That's why that file is so important. It's not mandatory to send email updates but it is an option.

• **Step 6:** If you decide to send email updates, you will be presented with a table of contact information read from the contacts.txt file. The table comprises of the command number, name and the corresponding email address of the person. The command number is what you input when you want to send email updates to that person.

```
C:\Users\mruna\Desktop\CC_Assist\app.exe
Command | Advisor Name
                           Email
  111
        Amanda Mendez
                      amendez@stevens.edu
  222
        Bianka Solomon
                      bsolomon@stevens.edu
  999
        Mrunal Salvi
                       msalvi@stevens.edu
                   | mrunal.salvi96@gmail.com
  1900
        Walter White
 ----- To Add Receiving Emails Enter the corresponding command number
                       To Send Mail press any number key:
```

• Step 7: As you enter the command numbers for the corresponding person and email address, you will see a list of email addresses being updated dynamically. This list contains the email ids of people that you have chosen and who will be receiving the email updates for calling campaigns. Once you are done adding the emails you can continue to send an email update by entering any number key that is not a command in contacts.

• Step 8: Considering everything went well, a calling campaign summary update will be sent to all the emails that were chosen. Along with that the application creates separate excel files for each type of contact status. The email update looks like:

mrunal - Calling Campaign Summary - 10-19-2019



mrunal - Calling Campaign Summary - 10-19-2019:

Total Called = 29

Answered = 13

Not Answered = 12

Declines = 4

Remaining = 85

Thank You.

Feature Release Plan:

I am planning on releasing software updates in terms of performance improvements and bug fixes every month so that the Office of Graduate Admissions can use the application effectively to reduce manual data handling tasks. Some of the features that can be incorporated in future releases are:

- Added support for more kinds of excel files generated from Slate queries.
- Ability to share output excel files via email.
- Calling Campaign summary visualizations.