UNIVERSITY OF WISCONSIN
PLATTEVILLE

About
The **University of Wisconsin-Platteville** is a comprehensive, four-year public institution of higher education founded in 1866. At UW-Platteville, students will find the advantages of a large university— challenging academics, opportunities for undergraduate research, state-of-the-art labs and facilities, renowned faculty, and notable alumni—combined with the benefits of a small, supportive, and safe environment.

The Sierra-Cedar team was a true partner in helping us implement Salesforce. Their Salesforce expertise and project guidance allowed the Highway Technician Certification Program to streamline and automate many manual processes. These efficiencies have created new standard operating procedures for our daily tasks and set a foundation for future process innovation.

Jodi Pluemer
Director, HTCP

Corporate Headquarters:
Platteville, Wisconsin
www.uwplatt.edu

Industry:
Higher Education

Technology:
Salesforce Sales Cloud

About Sierra-Cedar
Sierra-Cedar delivers industry-focused client success by providing consulting, technical, and managed services for the deployment, management, and optimization of next-generation applications and technology.
www.Sierra-Cedar.com

Background
The University of Wisconsin-Platteville (UW-Platteville) works in conjunction with the State of Wisconsin to administer Wisconsin's Highway Technician Certification Program (HTCP). HTCP certifies highway technicians through a variety of course modalities and works with companies statewide to provide a certified workforce. UW-Platteville engaged Sierra-Cedar to help redefine and streamline processes for course registrations, enrollments, and certification tracking.

Challenges
UW-Platteville's HTCP process was manual and difficult to manage. Maintaining accurate records, tracking certifications, and reporting on program effectiveness required considerable manual work and was a challenge for the HTCP team.

Solution
The joint Sierra-Cedar and UW-Platteville's HTCP team kicked off the Salesforce.com implementation project by gathering requirements and investigating how to rebuild HTCP's manual tracking system within Salesforce.com and bring UW-Platteville's HTCP into a single unified system.

- **HEDA –** Sierra-Cedar consultants leveraged Salesforce.org's Higher Education Data Architecture to configure hierarchical courses, course offerings, course enrollments, and business affiliation structures in Salesforce. The team added other requirements, like instructor contracts and earned certifications to the baseline HEDA structure.

- **Custom Visualforce Registration –** The project team used Custom Visualforce and Apex to create a registration form. Highway technicians are now able to access the registration form via the HTCP website and register for several courses at once using a custom shopping cart feature. Office managers are able to register groups of technicians using a single transaction. The project team developed custom logic to limit course offerings that technicians are eligible for based on past certification data stored in Salesforce. The team also implemented an integration with a payment processing system so that credit card payments can be made during the registration process.

- **Document Generation –** The project team used RS Documents to generate merged documents for items such as instructor contracts, certificates, and custom payment transaction receipts. Receipts are now automatically generated when payments are processed via the registration form.