



CHRIS SMITH  
APPLICATION PROGRAMMER III,  
WESTERN ILLINOIS UNIVERSITY

**IBM**Systems  
MAGAZINE

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# Letters Home

Western Illinois University improves school-to-student interaction with more eye-catching financial aid documents

By Jim Utsler ► Photography by Seth Lowe

We get them every day: personalized mailers. “Dear Mr. Jones, We’re pleased to inform you that your credit limit has increased to ...” And then there are the graphics that come with them, like company logos, fancy font types and images of all the cool things you can buy with your new credit limit.

There are, of course, many ways to build these personalized forms, but some methods are haphazard, with some data coming from one source and other data coming from another source, with the merged data going, well, who knows? It’s most likely going in some siloed bin never to be seen again—or perhaps deleted entirely.

Western Illinois University is having none of that. In addition to using CASI Software’s CICS2PDF to create graphic and highly personalized financial aid letters, it’s saving them for future reference, allowing both students and school administrators to get access to them online and print them if they so choose.

As Chris Smith, application programmer III with the university, explains, “We wanted to make sure our employees are seeing the exact same thing

the students are seeing. So we decided to create PDFs and simply store them on the mainframe for easy access. So far, everyone is really happy with this. And if they’re happy, I’m happy.”

## Window Dressing

Established in 1899—and opening its doors in 1902—the school was first known as Western Illinois Normal and Training School. It became Western Illinois State College and, in 1957, Western Illinois University. Its original class of 229 students has since climbed to more than 11,000 who are enrolled in a variety of preprofessional and certificate programs, bachelor and master’s programs, and two doctoral programs.

Supporting many aspects of its operations is the school’s Administrative Information Managements Systems department, of which Smith is a part. An IBM zEnterprise\* 114, which hosts, among other operations, the Student/Alumni Records System (STARS) for students and the Western Illinois University Production (WIUP) system for employees, handles such crucial operations as student services, student records, billing

and receivables, and payroll, depending on the user.

One critical aspect of this is student financial aid, which is one of Smith’s primary focuses. When students fill out the Free Application for Federal Student Aid form, the university notifies them of their eligibility via a financial aid award letter.

Originally, these letters were accessible only online through STARS. Students, whether already enrolled or prospective, would have to log in to the system to view the award letter, which was in simple plain text along with, according to Smith, some sparse “window dressing.”

“Initially,” he continues, “there was a time when the letter was



New freshmen applicants for fall 2015 grew by

**3.3%**

and the number of accepted freshmen went up by nearly

**7%**

## UP CLOSE

**CUSTOMER:** Western Illinois University

**CO-HEADQUARTERS:** Macomb, Illinois

**BUSINESS:** Higher education

**CHALLENGE:** Improving general school awareness

**SOLUTION:** Creating more attractive and flexible financial aid documents

**HARDWARE:** IBM zEnterprise 114

**SOFTWARE:** CASI Software’s CICS2PDF and JES2MAIL

sent out with letterhead, but there was a push away from paper to save money, so a lot of documents went electronic. But this wasn't a very effective means of communicating with students and their parents."

As part of a larger effort to increase enrollment and general school awareness, university administrators, led by the Office of Undergraduate Admissions, decided to look into ways in which they could more aesthetically improve the quality of their correspondences with applicants. This included the financial aid award letter.

"People like getting the letter in the mail rather than having to log in to a system to get the same information," Smith says. "This is particularly true of incoming and prospective freshmen. It allows them and their parents to compare awards from university to university with a simple glance."

In addition to creating a more formal document, the admissions office also wanted the option to print and mail the forms to students and electronically store them in a central repository for future reference. As things were, students—whether prospective, newly enrolled or existing—would be looking at a document on STARS and school administrators on WIUP, and some of the information would be in different places on the forms depending on which system was being used.

### An Interesting Process

The question was how to create these fancier, mailable, storable and PDF-based documents on the mainframe, from which most of the relevant information is gleaned. Many possible solutions were bandied about, including off-the-shelf PC-based tools that might have required spreadsheet



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—Chris Smith, application programmer III, Western Illinois University



mail merges, but none of them was as simple and dynamic as some financial aid administrators might have liked.

"A lot of them didn't know what we could do with the mainframe. To them, it was a monolithic black box that just did stuff. But I explained to them what I had done with another form using CASI software and they were pleasantly surprised. Granted, it wasn't as dynamic a solution as they were looking for, but I told them if dynamic was what they wanted, that's what they'd get," Smith recalls.

With the assistance of CASI, and already being familiar with their products such as JES2MAIL, Smith began using CICS2PDF to develop a mockup of the letter based on information given to him by the financial aid office, with each section of the letter treated as a separate overlay. This approach made it feasible to dynamically determine which information should be included in each individual letter. If, for example, a student wasn't receiving a grant, a grants section wouldn't be included in the final PDF output.



Freshmen who signed up for housing contracts increased by **10.7%** and enrollment deposits increased by more than **13%**

"What's the point, after all, of including a line that might read, 'Grant received: \$0'? It just calls out attention to that fact and might discourage a student from further considering our school," Smith says. "So if any information wasn't pertinent, we'd simply leave that overlay out of the final letter."

Of course, design was also an issue. Smith originally wanted a professional to help with that bit—and he and another designer did consult on it—but he eventually took this on himself, using cues based on other Western Illinois collateral materials.

"We had done some icon work for some of our systems, so I said, 'I'm going to see what I can do with this.' When I took it to the financial aid office for their input, they loved it, and we just decided to run with it," Smith says.

The graphics, letterhead and other design elements became the backdrop on top of which a student's pertinent—and mainframe-based—information would be applied, minus any nonrelevant sections.

"There are essentially three components to the PDF. You need

to have a document structure, what's actually going into the document and then the build itself," Smith notes. "So you're producing PDF overlays and converting them using some of CASI's software into a binary format and then adding our data on top of that. It is an interesting process."

Now, when a student or an administrator requests a document it's updated with the latest information, and everyone gets a view of the same information as a here-and-now snapshot. And because it's platform agnostic, it can then be used for online viewing or printed as a mailer. As an added bonus, a process was developed to FTP select letters to the university's print shop for printing and mailing.

### Core Goals

With Western Illinois University's approach to its CICS2PDF financial aid letters, students are presented with a visually pleasing and highly personalized document, whether they're viewing it online or receiving it in the mail.

And this plays a role in the Office of Undergraduate Admissions' goal of improving school visibility. Although Smith is somewhat hesitant to draw a direct correlation between the creation of these new letters, which went live in February, and the increase in incoming freshmen, he doesn't necessarily discount it.

For example, new freshmen applicants for fall 2015 grew by 3.3 percent and the number of accepted freshmen went up

by nearly 7 percent. Perhaps more crucially, freshmen who signed up for housing contracts increased by 10.7 percent and enrollment deposits increased by more than 13 percent.

"The university has been making a great effort to increase school awareness, including on STARS, where we now have a step-by-step freshmen guide to help them navigate their first year," Smith says. "But I can't help but think that something as simple as the new financial aid letter hasn't also played a part in our core goal." ■

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**Jim Utsler** is a senior writer for *IBM Systems Magazine* and has been covering technology for more than 20 years.

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