Information Technology Institutional Research

Special Interest Group

June 26, 2018
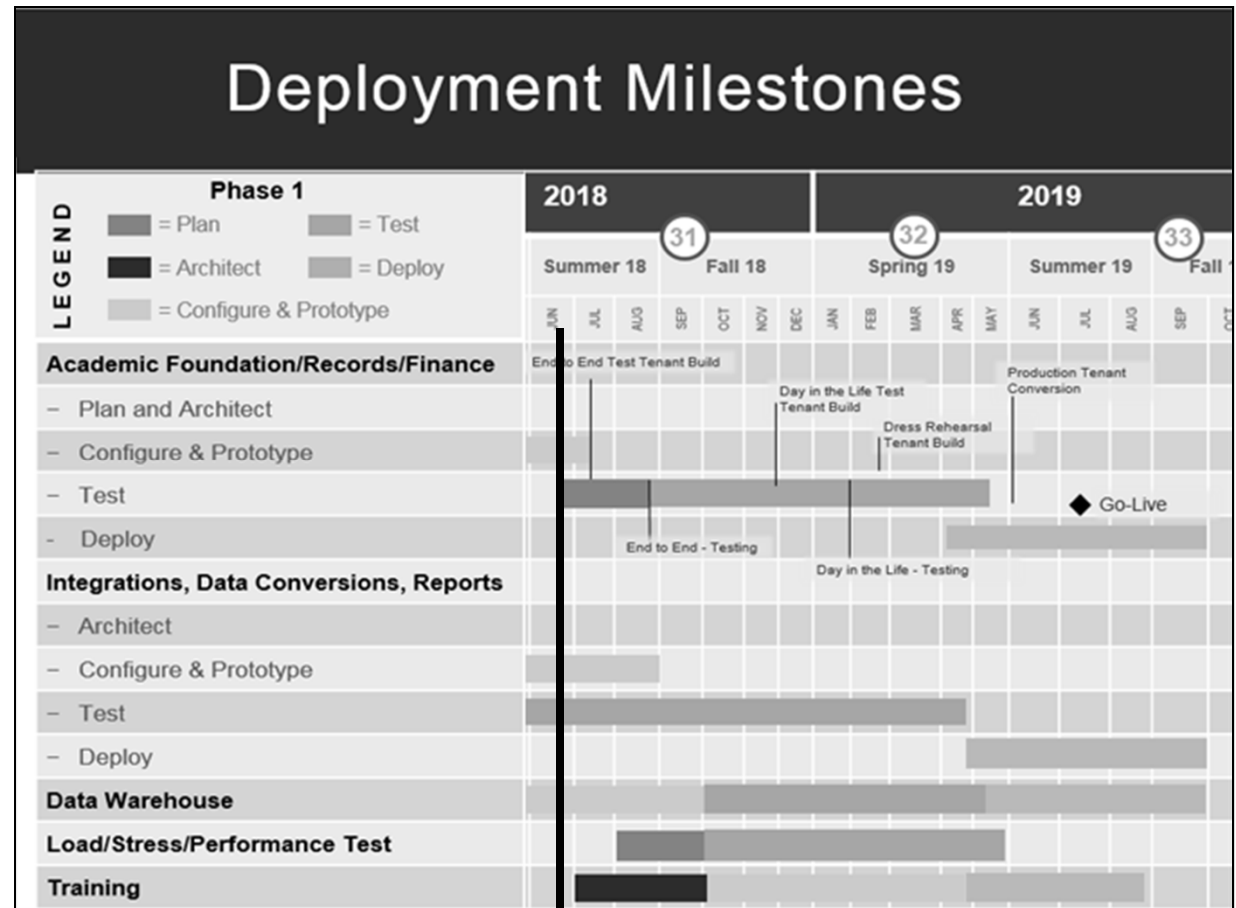
Agenda

▶	Opening
▶	Project Updates
▶	UR Data Warehouse Reporting and Analytics
▶	Q&A
▶	Next Steps

UR Student IT/IR Updates

1. Timeline

2. Workday partnership strengthens

3. Additional Resources

4. Old Data Warehouse and old reports

We are here

full timeline in appendix

What is URS Data Warehouse Reporting and Analytics?

- Launch in conjunction with UR Student Rollout in July 2019
- Scope of data will include active students in Workday as well as all historical data (similar to current DW)
- Data will be refreshed nightly from Workday
- Point-in-time data snapshots back to 2007 available for longitudinal analysis by academic calendar milestones (ex. census dates)
- Consolidated student data views across Admissions (Slate/Hobsons), Financial Aid (PowerFaids), and Student

What is URS Data Warehouse Reporting and Analytics?

- Consolidated faculty data views across Instructional Workload, Faculty Roster (HR), Research (Coeus)

- 50+ new Tableau Dashboards and Cognos Reports

- Existing student data warehouse will be available for legacy report conversion and historical data validation

- Personalized access to new and legacy reports provided through BI portal web application

- Tableau and Cognos reporting and analytics tools will continue to be available to report authors and analysts

Analytics available in UR Student DW

Subject Area	Description
Student Term Enrollment	Address questions around current, historical and census enrolled headcounts, as well as term to term retention and academic progress and outcomes.
Student Course Registration	Address questions around course taking behaviors and trends, course demand and , course drop/withdraw rates, performance metrics such as pass/failure rates, course GPA
Course Instructor	Intended to support faculty counts and instructor workload metrics. Will be combined with advising and faculty research and activity data within the data warehouse
Student Financial Transactions	Focus is on student financials transactions, charges, payments. Enable year-over-year trends and comparisons.
Advising	Intended to answer questions around advisor interactions with students and advising workload.
Student Degree Audit	Address questions around student degree completion and degree requirements needed.
Student Academic Outcomes	Address questions around cohort multi-year retention and graduation rates, time to degree

Examples of Dashboards and Reports

- **Undergraduate Retention & Graduation Rates:**
  - https://tableau.dw.its.rochester.edu/t/stu/views/RetentionandGraduationRates3_2_16A_0/Tables?iframeSizedToWindow=true&:embed=y&:showAppBanner=false&:display_count=no&:showVizHome=no

- **Program of Study Flows (Sankey Diagram):**
  - https://tableau.dw.its.rochester.edu/t/stu/views/Sankey8_3Ver2Depts_0/CohortDivisionFlows?iframeSizedToWindow=true&:embed=y&:showAppBanner=false&:display_count=no&:showVizHome=no

- **Course Taking Behavior:**
  - https://tableau.dw.its.rochester.edu/t/stu/views/CourseTaking/CourseTaking?iframeSizedToWindow=true&:embed=y&:showAppBanner=false&:display_count=no&:showVizHome=no

Student Term Enrollment and Academic Outcomes

Measures

Enrollments

- Enrolled headcounts
- Census Enrolled headcounts
- Registered headcount

Academic Progress and Outcomes

- Retention Headcounts/Rates
- Program Retention Headcounts/Rates
- Graduation Headcounts/Rates
- Time to Degree
- Term/Cumulative GPA

Filter, Sort, Group By

Multiple Dimensions

Student Attributes
- Cohort/Class Year
- Academic Term/Year
- Student Level/Class
- Full/Part Time
- Academic Standing

- Academic Unit (School/Dept)
- Programs of Study/Primary POS (major)
- Admitted Academic Program
- Outcome Academic Program
- Degree/Edu. Credential/ Conferral Date
- Advisor

- Demographics
- Geographic Region
- Citizenship/Visa
- Education Abroad participation
- Previous Education
- Test Score Ranges/GPA Ranges
- Financial Aid Recipient

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Student Course Registration

Measures

Multiple Dimensions

Course Registrations

- Course Registered headcounts
- Course Withdraw headcounts
- Course Withdraw rates
- Course Drop headcounts
- Course Drop rates

Student Course Performance

- Course GPA/Grades
- Credits Attempted/Earned
- Pass/Fail Rates

Filter, Sort, Group By

Course Attributes

- Course Attributes
- Instructor
- Academic Unit
- Cross Listings
- Location/Room
- Capacity
- Course/Section
- Course Schedule
- Registration Status
- Registration Date
- Withdraw Date
- Drop Date

Student Attributes

- Cohort/Class Year
- Academic Term/Year
- Student Level/Class
- Full/Part Time
- Academic Unit
- Academic Unit (School/Dept)
- Admitted Academic Program
- Outcome Academic Program
- Demographics
- Geographic Region
- Education Abroad participation
- Citizenship/Visa
- School Last Attended
- Test Score Ranges/ GPA Ranges
- Financial Aid Recipient
- Advisor

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UR Student Reporting and Analytics Tools

		Executives	Managers	Staff	Knowledge Workers
		•Mix of tactical and strategic decision-making •Summary data oriented, w/mostly standard reports •Ease of use is very important •Limited usage	•More tactical decision making •Generate standard reports and answer ad-hoc requests •Ease of use is important •Above average usage	•Tactical decision-making •Mostly standard reports •Detail data oriented, focused on their needs •Ease of use is very important •Average usage	•Transactional detail and summary data oriented •Ease of use is important when creating reports •Significant daily usage •Need analysis calculations/functions •Wants to reduce # of reports and report requests •Needs to integrate ad-hoc data sources
Report & Dashboard Consumer	BI Portal	X	X	X	
	Cognos Bursted Reports	X	X	X	
	Workday Reports	X	X	X	
Ad-hoc Reports and Analysis	Cognos Workspace Advanced		X	X	X
	Tableau Web Author		X		X
Dashboard & Report Authoring	Tableau Desktop				X
	Cognos Report Studio				X
	Workday Report Writer				X

Examples of Dashboards and Reports

Q&A
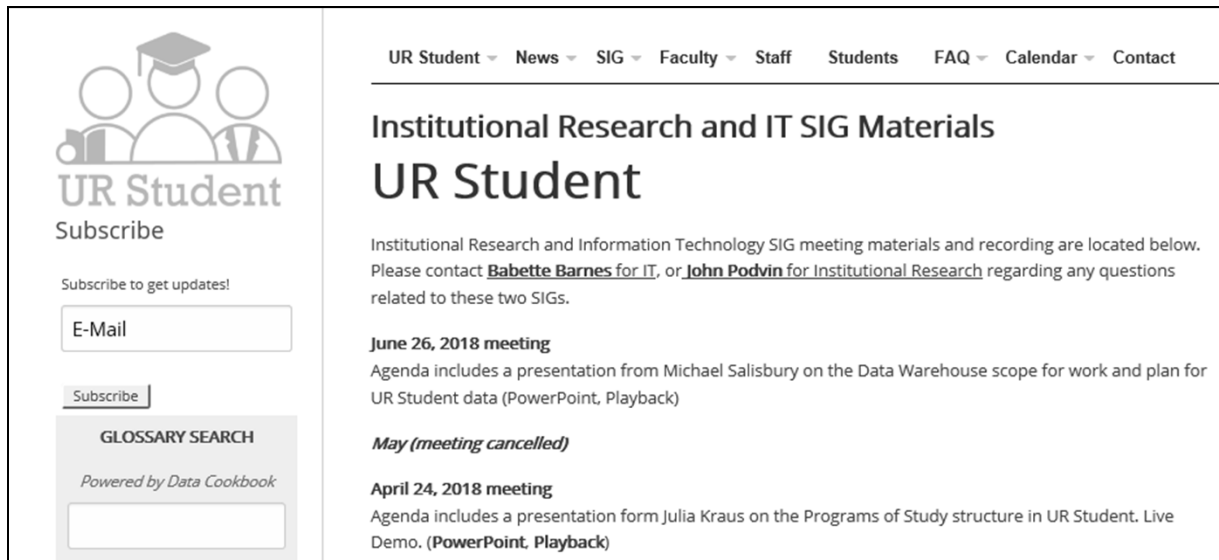
- Looking for participation in UR Student DW Focus Groups
  - Dashboard and report priorities, requirements and design
  - Organized by subject area
  - Time commitment would be 2-3 web meetings/month
  - Contact John or Mike if you are interested

Next Steps

- Next IT/IR SIG meeting on Tuesday, July 31ST

- Previous Recorded IT/IT SIG Meetings on UR Student website
  - http://www.rochester.edu/urstudent/special-interest-groups-sig/institutional-research-and-information-technology-sig-materials/

Next <u>Demo Days</u> held July 17th and 18th on Student Engagements

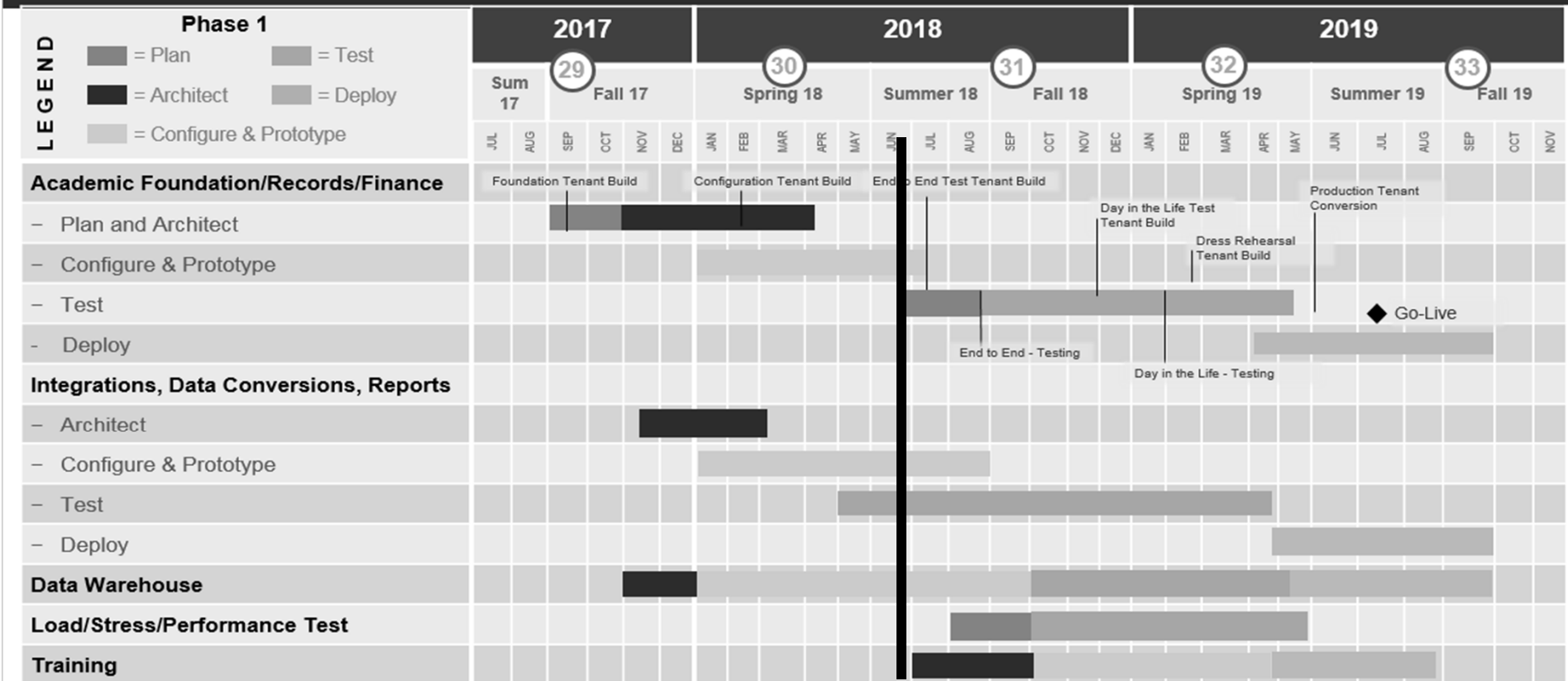**UR STUDENT**

UNIVERSITY *of* ROCHESTER

UR Student

Appendix

Appendix Includes:
- Program Overview Timeline
- UR Student Terminology
- Special Interest Groups (SIG)
- UR Student Communications and website

Project Overview – Phase 1 Timeline

We are here

UR Student Terminology

- **Academic Level Refers to Division.**
  - This includes division 1, 2 or 3 in SIS (UG, Grad, Med). There are many more levels in UR Student to assist with administration of programs

- **Academic Periods**
  - Refers to Term/Semester/Quarter. These are dynamic dates

- **Academic Units**
  - Refers to Schools/Colleges/Departments

- **Cohorts**
  - Cohorts are valuable when the purpose is to INTERACT with and/or TRANSACT on groups of students (otherwise a custom report may be a good choice). They are based on the Academic Record and recorded by academic period
    - Multi-Lifecycle Students will have multiple academic records in UR Student (this allows us to calculate different GPA's for undergraduate v. graduate academic career at UR)

- **Credential**
  - Degree

- **Dashboard**
  - A collection of reports tailored to the user or role

UR Student Terminology

- **Eligibility Rules**
  - System based guardrails to enforce policies

- **Enrollment**
  - Registration

- **Faceted Search**
  - A search where the end user has the ability to identify particular criteria for a population .

- **Onboarding**
  - A targeted communications for new and returning students to ensure that tasks and other necessary documentation is completed (FERPA, Financial Responsibility Agreement, etc.)

- **Programs of Study**
  - Includes Certificates, Majors, Minors, Cluster

- **Tenant**
  - An instance or system environment of UR Student (Workday) where project design and testing work is done. There are several tenants the project team uses for Conversions, Configuration, Integrations. etc.. This will combine into a production build for go live.

UR Student Interface Terminology

- **Home (University of Rochester Logo)**
  - Will always navigate you back to the landing page
- **Inbox (Envelope)**
  - Contains all activity that is required of you
- **Notifications (Bell)**
  - Displays notifications regarding business processes and rule-based alerts
- **Profile Page (Cloud or Your Photo)**
  - Opens all sections available from the Home page. You can configure your personal setting here as well.
- **Ellipses (Twinkie, Related Action)**
  - Displays the related actions menu for an object (available only if the user has permission to perform additional actions on that object)
- **Search Bar (Magnifying Glass)**
  - Can type three letters of a given word (or the whole word) to receive a response from the system
- **Applications (Picture Icons in the middle of the page)**
  - Workday calls these widgets and they can take you to functional areas, reports, or dashboards
- **Categories (within the search function)**
  - Are the different areas within Workday such as Banking, Payroll, People, Reporting, Student, etc.
- **Student Profile**
  - Includes the student's personal information, registration, billing, financial aid, contact information, etc. in one convenient place
- **Functional Areas**
  - Tabs on the student profile for Academics, Student Financials, Financial Aid, etc.
- **Workday App (for Mobile)**
  - Can be downloaded from the App Store to use on a Droid, iPhone, or iPad

University Involvement

The project team includes membership from all schools with our Special Interest Groups (SIGs). Participation of SIG members is integral to the success of the program; membership is intended to be part-time.

SIG Members Contributions to include:

- Input into common business practices
- Input into system configuration
- Business requirements' definition
- Identification of necessary data for conversion
- Validation of converted data
- Creation of test cases
- Execution of user testing
- Serving as a project champion

Advising SIG

Faculty SIG

Student Records & Registration SIG

Student Finance SIG

Institutional Research & Reporting SIG

Information Technology SIG

Prepare for UR Student Changes

The UR Student implementation will affect all Faculty, Students and related Staff

- Project Website (http://www.rochester.edu/urstudent/)
  - News – Stay in the know on project announcements and system demonstrations, Subscribe for updates
  - Subscribe to receive up to the minute news