

Information Technology Institutional Research

Special Interest Group

January 30, 2018

Agenda

- ▶ Introductions
- ▶ People, Teams, and Special Interest Groups
- ▶ Background and Vision
- ▶ Guiding Principles, Values, and Expectations
- ▶ Project Overview: Scope, Timing, and Objectives
- ▶ Where We Are / Where We Are Going
- ▶ Project Milestones
- ▶ Data Warehouse Conversion
- ▶ Q&A / Next Steps

Information Technology SIG

Babette Barnes (IT Team Lead)	University IT / EA
Nick Arcieri*	School of Medicine & Dentistry
Steve Clary	Simon School
Charles Desouza	AS&E Information Technology
Dave Garcia*	Warner School
Brian Harrington	School of Nursing
Joe Parker	University IT
Richard Pink	University IT
Helen Smith	Eastman School of Music
Steven Wormsley	School of Medicine and Dentistry

**individuals who are member of the IT and IR SIGs.*

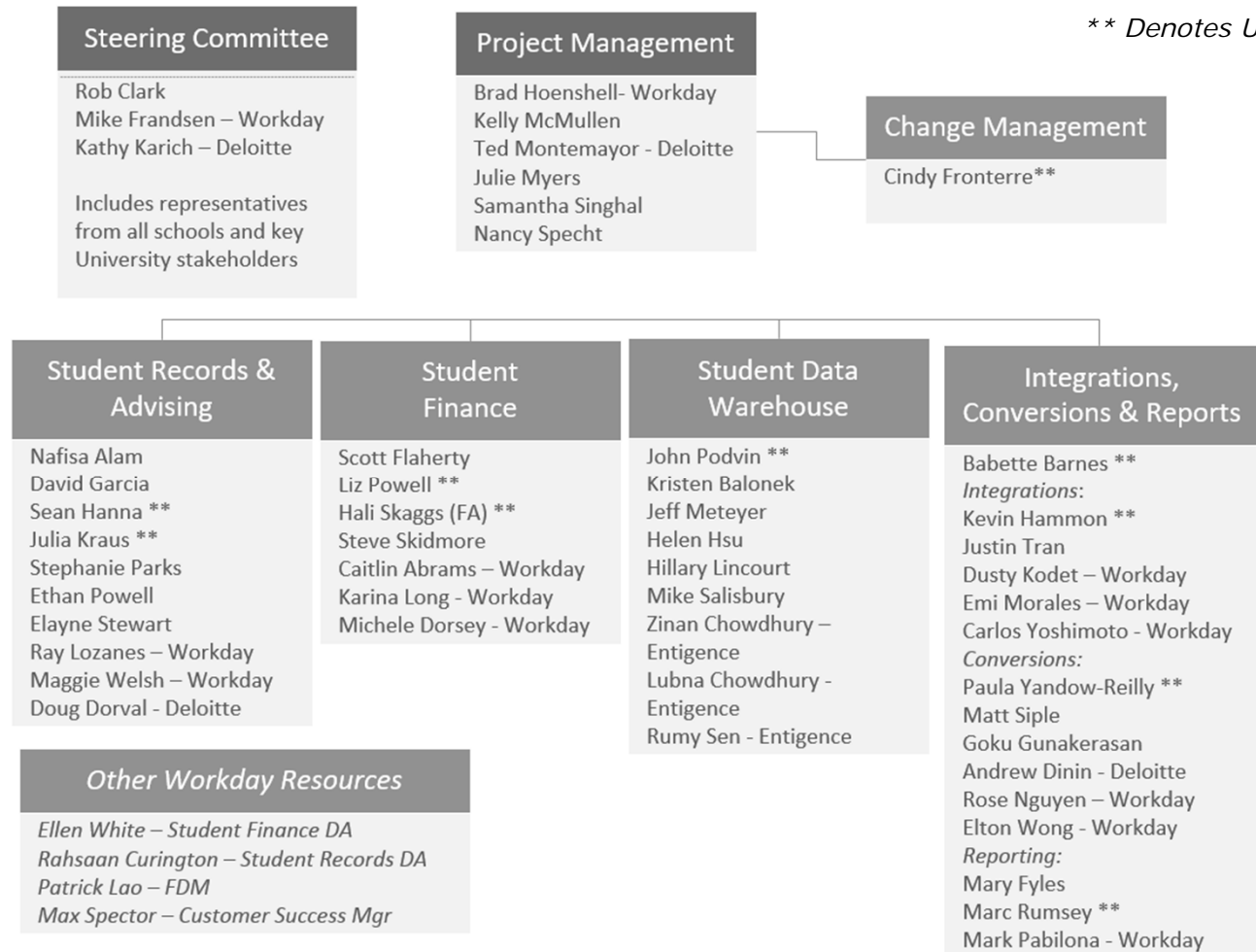
Institutional Research SIG

John Podvin (IR Team Lead)	Provost's Office of Institutional Research
Nick Arcieri*	School of Medicine & Dentistry
Gretchen Briscoe	AS&E Graduate Studies
Andrea Chamberlain	School of Nursing
Krista Darling	Simon School
Vincenzo Falciano	Provost's Office of Institutional Research
Dave Garcia*	Warner School
John Hain	Eastman School of Music
Linda Lipani	Eastman Institute Oral Health
Sharon McCullough	School of Medicine & Dentistry
Tracy Pezzimenti	School of Medicine & Dentistry
Thisie Schisler-Do	AS&E Institutional Research
Kim Starken	Warner School
Tammy Terrana	School of Nursing
Allie Duffney	School of Nursing
Zach Warren	Provost's Office of Institutional Research

Special Interest Groups

- Information Technology
- Institutional Research
- Records and Registration
- Academic Advising
- Student Finance

Program Overview – Team



Special Interest Groups planned across all functional areas to include key stakeholders from student administration, faculty, and the student body.

Background

Welcome to UR Student!

- The new UR Student system will replace our antiquated legacy Integrated Student Information System (ISIS) in place since the 1980s.
- UR Student (Workday) will manage University of Rochester student finance, records and registration, admissions, financial aid and reporting activities.



Vision

The University of Rochester envisions reliable, high quality student information systems and processes that will:

- Be **flexible and extendable**, accommodating current priorities and requirements, and have the ability to easily evolve with changing and as yet unforeseen academic and administrative realities, such as new forms of assessment and outcome tracking.
- Provide **robust data capture and reporting capabilities, and verified, complete data** to allow the University and our schools to better understand and support progress toward strategic goals, and the progress of our students toward their academic goals.
- Provide a **single integrated source for core student data and services**, and easier, real-time, integration with ancillary and third-party systems.
- Create a **personalized system** that provides users with the information and services they need, when and where they need it.
- Result in **configurable, reliable and automated processes** for students, faculty and staff to achieve better outcomes with less effort.

Guiding Principals

- We will adopt **common business practices** wherever possible to support a consistent experience. We will differ only where absolutely required.
- We will **structure data** to improve our collective reporting and analytic capabilities.
- We will **automate activity** and processes to enable staff to improve service for all stakeholders.
- We value **integrated systems** and processes over disparate systems and processes.
- We will adapt business and academic practices as necessary to implement an **effective solution**.

IT & IR SIG Values

- Respect for all opinions
 - We have different levels of technical expertise.
 - Different pressures, priorities and pain-points.
- Successful partnering with stakeholders
 - Each schools has unique requirements.
 - “One size fits all” won’t work in all cases.
- Be accountable for our own work
 - Identify risks and roadblocks
 - Say something sooner rather than later

Expectations & Collaboration

- Provide other teams with inputs in a timely fashion
- Identify and explain necessary requirements on current business processes
- Suggest process improvements where applicable
- Provide input to the benefit of the design as a whole
- Participate in testing activities providing status and feedback
- Identify risks as soon as possible
- Remember think globally and full transparency

Project Overview – Phase 1 Scope

Phase 1

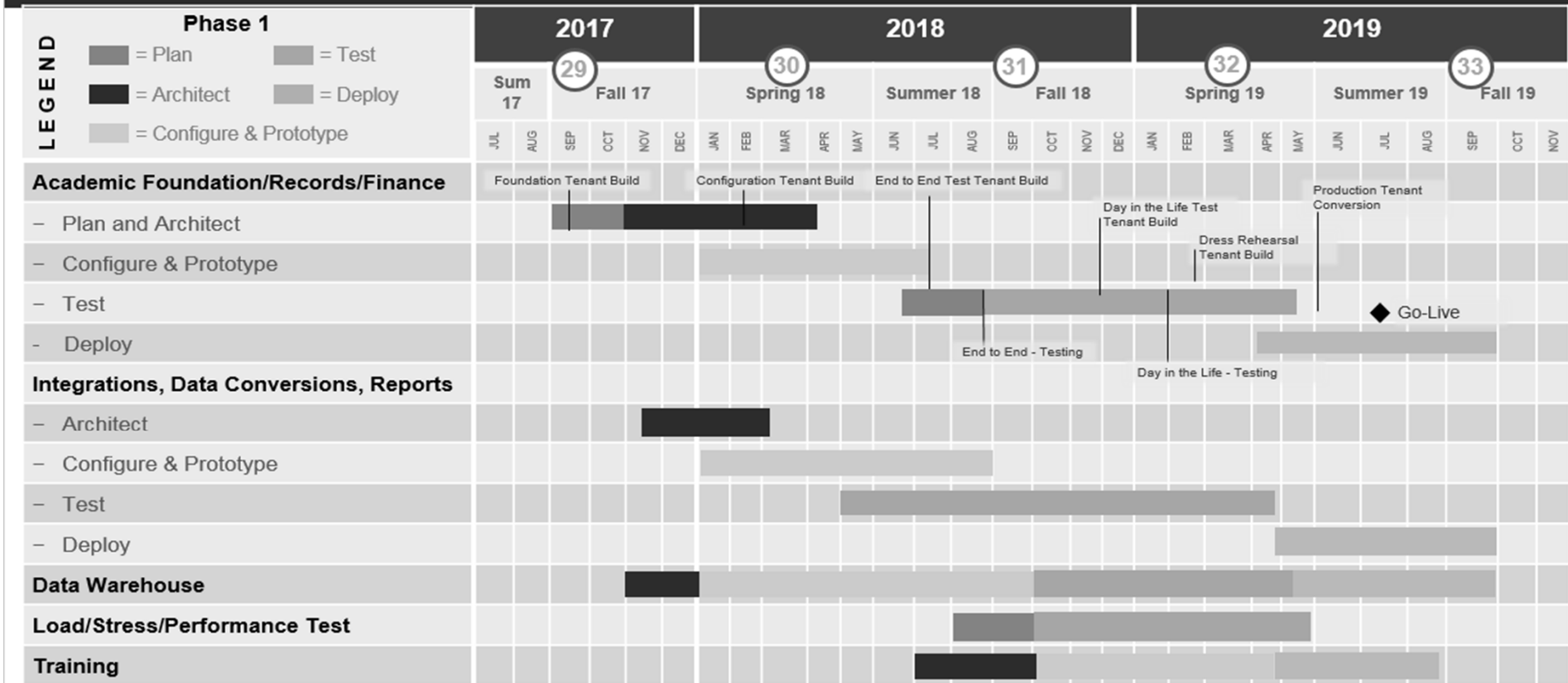
- Academic Foundation/Core
- Engagement
- Student Finance
- Student Records and Registration
- Curriculum Management
- Academic Advising
- Data Warehouse for Student Finance, Student Records and Academic Advising

Systems Being Replaced

- ISIS
- CDCS
- Darden (Simon)
- SON Database (SON) – *partial*
- Warner Internet (WAIS) - *partial*
- Web Registration (Touchnet)
- Instructor Access
- Advisor Access
- Student Access
- Alumni Access

Project Overview – Phase 1 Timeline

Deployment Milestones



Workday Confidential

Project Milestones

- **January 2018**
 - First joint IT/IR SIG meeting
 - Continue DW configuration & prototype
 - Report Definition and review of existing reports
 - Meetings with partnering systems for interfaces
- **February - May 2018**
 - Finalize list of reports
 - Design and Development activities
- **September 2018**
 - End-to-End testing
- **January 2019**
 - Day-in-the-Life testing
- **July 2019**
 - UR Student go live (Workday application and Data Warehouse)
- **October 2019**
 - First fall census from UR Student Data Warehouse

IT/IR SIG Short Term Objectives

■ Reporting (IR/Workday Reports)

1. Confirm Reporting and data analytics requirements have been identified for all academic and administrative units.
2. Build inventory of standard reports that will need to be built or rebuilt.
3. Determine where new reports should be built
4. Define reports for Advising, Student Records, and Finance

■ Conversions

1. Continue Identification of data needed from each of the sources and automated population of IDS
2. Establish schedule for conversion of data into Workday

■ Integrations

1. Continue Integration Family Meetings.
 - a. Initial interview with partnering systems
2. Start Design, development, and unit testing

Some Reporting History

- **Design Partner Meetings:**
 - IR discussion started at Yale University (Fall 2014).
 - Plan: Do all internal and external reporting within Workday.
- **Need for a data warehouse became evident as the project evolved.**
 - No point in time or census reporting in Workday.
 - Focus was on functionality vs. reporting.
 - Desire to “own” our data.
 - Interaction with other data marts.
- **Developing a DW strategy in partnership with Entigence.**
 - Collected 500+ reports.
 - Roughly 300+ in scope.
 - Distilled down to 50+ parameterized reports.

Where We Are Going: Next Steps

- Review how things have may have changed since last fall.
- Conversions
 - Continue to work with schools on the data needed for Workday
 - Building timeline for conversions is in process
- Integrations
 - Partnering system meetings
 - Starting Design phase of integrations
- Reporting
 - Identify reports needed for IR SIG members and functional areas for Student Records and Finance
 - Prioritization of reports

Agenda Item: Data Warehouse Conversion

- Current DW goes back to 1987.
- How far back should we go when converting ISIS data into the new warehouse?
- In the new DW, is going back 10, ...15, ...20 years sufficient?
 - How frequently are we asked to report further back?
 - How critical are those requests? (President, Provost, Dean, Chair)
 - If we need to go way back, is access to the old DW sufficient?
- Where does longitudinal reporting fall short with 10, 15, 20 years?
 - PhD time to Degree
 - Enrollment trends over the decades
 - Retention trends
- Loading fewer years will make data cleanup and conversion easier, but limits reporting.

Future Agenda Items

■ Potential Agenda Items

- Discuss how decisions are made on whether a report should come from Workday or the Data Warehouse
 - Reporting Priorities
- Overview of Conversions
- Update on project and timeline
- Additional content from SIG members

Expectations: Communication

Internal

- Provide regular updates to the group on your progress
- Provide immediate alerts to changes in business requirements

External

- Be an advocate for the project
- Promote events
- Use the website
- Answer questions you know and provide feedback
 - forward ones you do not for response
- Participate in UR Student training and support activities

Project Interaction Tools

- Website: <http://www.rochester.edu/urstudent/>

The screenshot displays the University of Rochester UR Student website. At the top, there is a navigation bar with links for Email, HRMS, Blackboard, Directory, IT, Registrar, Parking & Shuttles, Offices A-Z, and a search box for Rochester.edu. Below this is the University of Rochester logo and a secondary navigation bar with links for About Us, Academics, Admissions, Arts, Athletics, Global, Libraries, Medicine, Research, Student Life, Working Here, and Giving.

The main content area features a navigation menu with links for UR Student, News, SIGs, Faculty, Staff, Students, FAQs, Calendar, and Contact. The 'SIGs' link is highlighted with a red box, and an arrow points to a detailed view of the 'Institutional Research SIG' page.

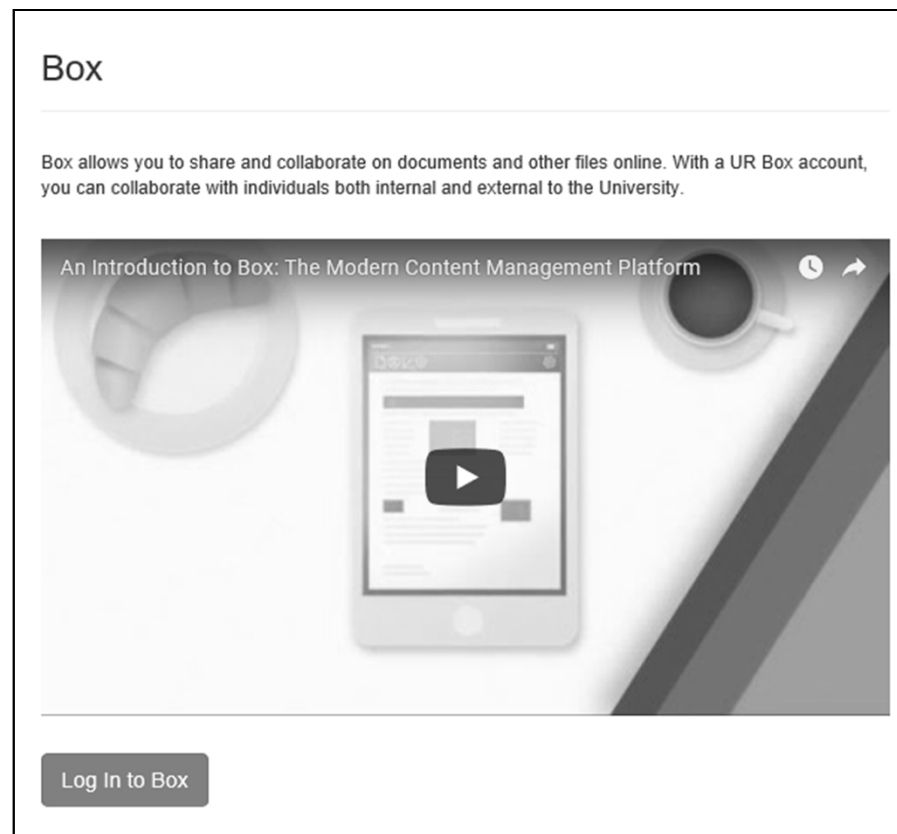
The 'Institutional Research SIG' page includes a 'Project Team' table and a 'Special Interest Group' table. The 'Project Team' table lists members and their schools/locations, while the 'Special Interest Group' table lists members and their schools.

Project Team	School / Location
Kristen Balonek	Provost's Office of Institutional Research
Jeff Meteyer	University IT / EA
Helen Hsu	University IT / EA
John Podvin (Team Lead)	Provost's Office of Institutional Research
Mike Salisbury	University IT / EA

Special Interest Group	School
Nick Arcieri	School of Medicine & Dentistry
Gretchen Briscoe	Arts, Sciences and Engineering
Amy Bruinooge	Simon
Andrea Chamberlain	School of Nursing
Krista Darling	Simon

Project Interaction Tools

- Email, direct or Contact page on website
- Box – for document sharing
 - Details with link to come



Q&A

- Are there topics you think this session should have covered, but didn't?
- Are there specific topics we should devote attention to in the future?
- Are there any other questions or concerns?