Information Technology Institutional Research

Special Interest Group

February 21, 2018

UNIVERSITY of ROCHESTER

Agenda

- Opening
- Project Updates – Where we are
- Change Management, Communications & Training
- Reporting Update
- Reporting Strategy
- Review Inventory of Reports

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.*

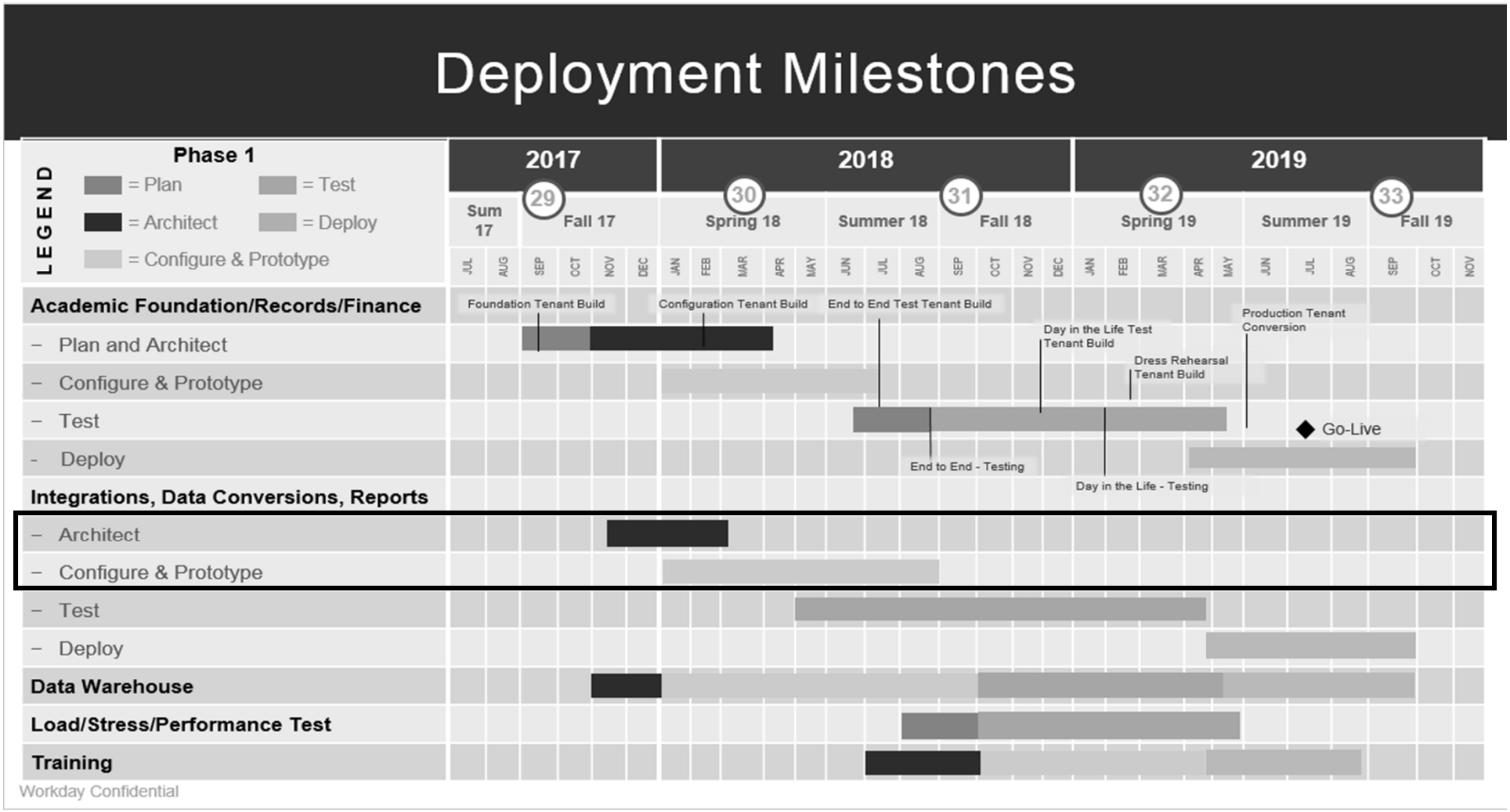
Institutional Research SIG

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

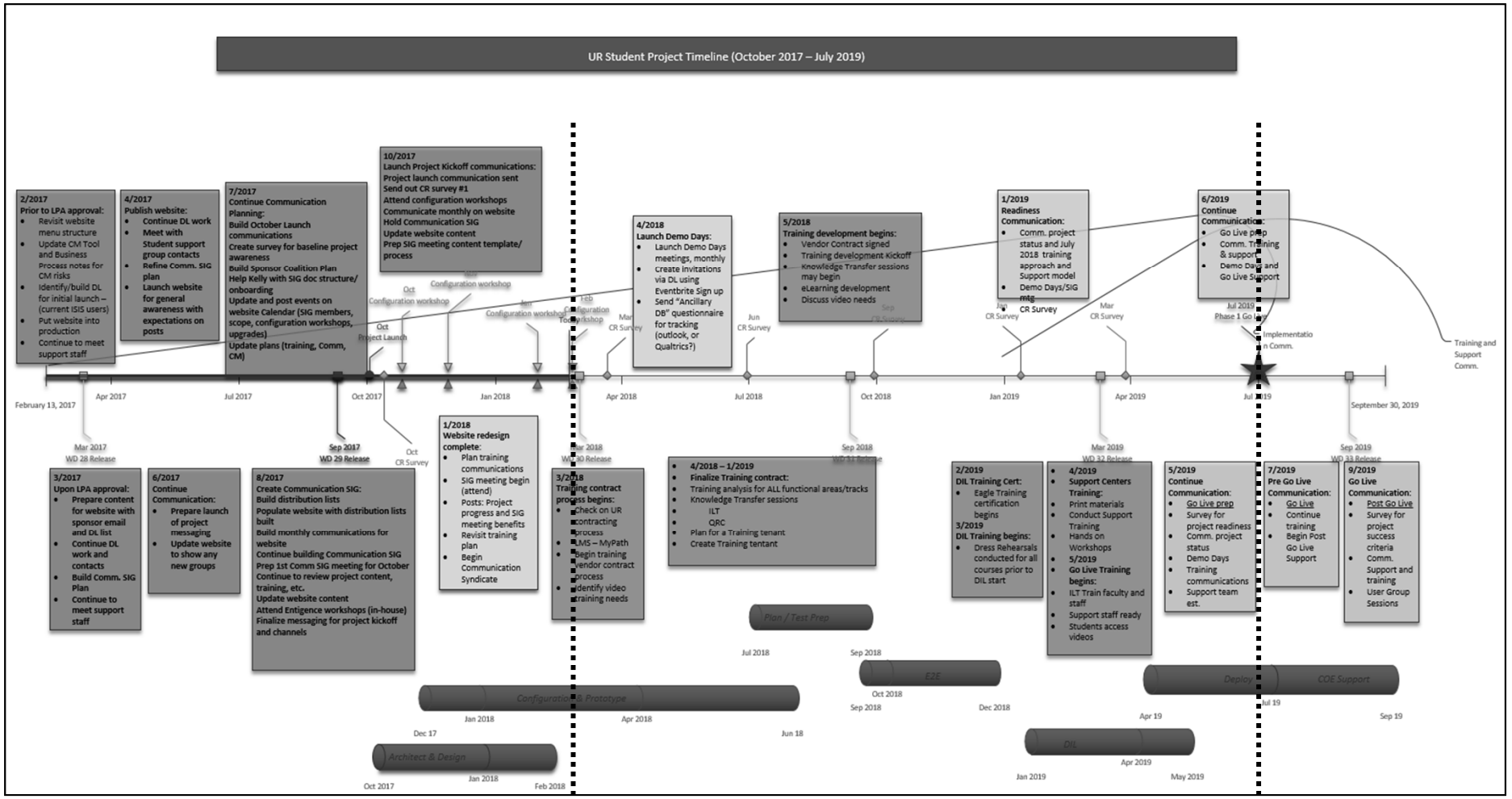
Project Overview – Phase 1 Timeline



Workday Confidential

CM, Communications & Training

- Change Management, Communications and Training approach



Project Website and Tools

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

Interact with the Project Team

- Email

  urstudent@ur.rochester.edu
- Contact Us (website)
- Collaborative Tools
  - Box
  - Outlook Groups
  - ?

Communication Expectations

Internal

- Provide regular updates on your progress to those who are effected
- Provide immediate alerts to changes in business requirements

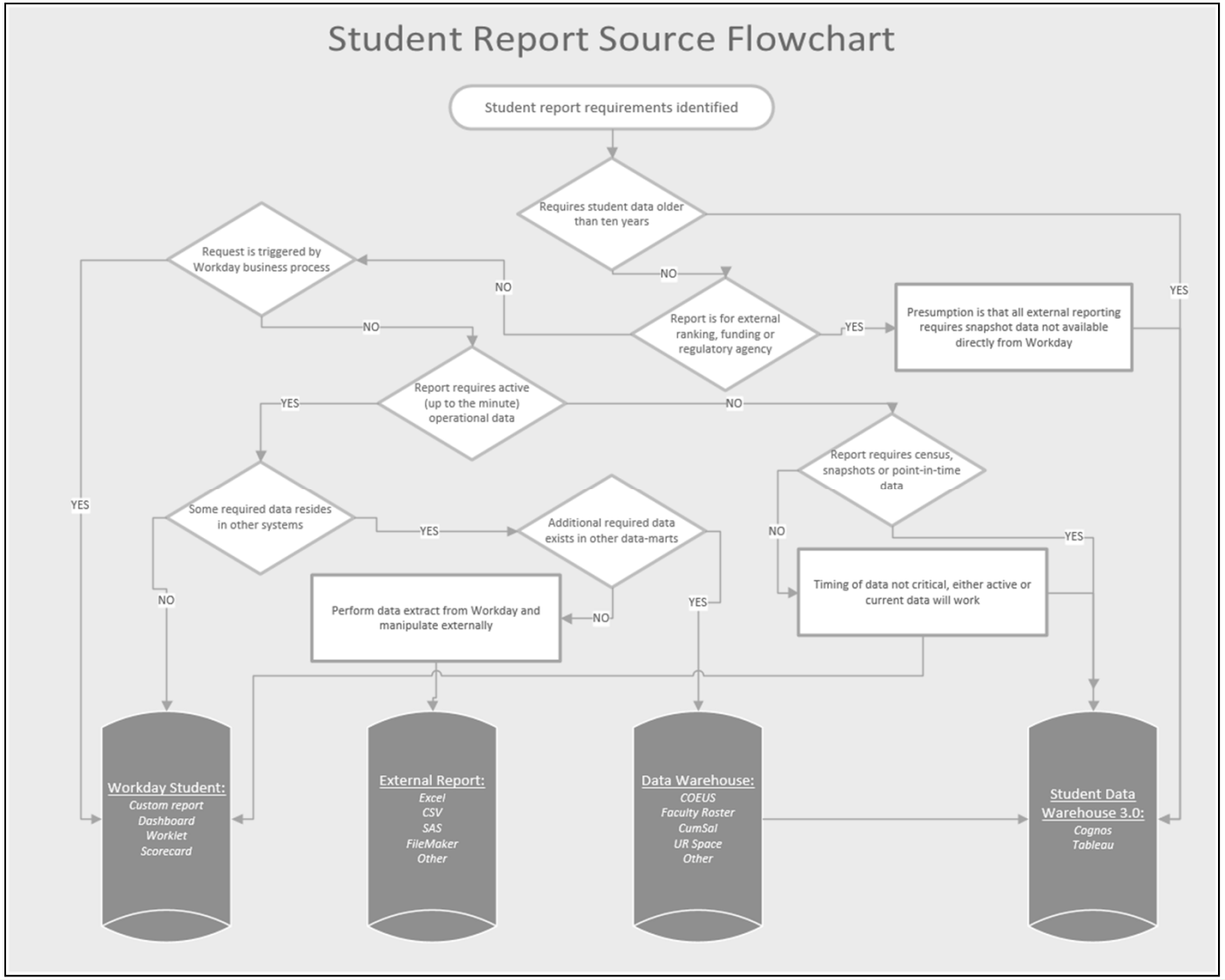
External

- Be an advocate for the project
- Promote public UR Student events
- Promote the website
  - Contact Us for questions/feedback
- Answer questions you know and provide feedback
  - forward ones you do not for response (1-2 day turnaround)
- Help communicate changes that will affect your school
- Participate in UR Student training and support activities

Reporting Update

- Transactional Reporting - Reports Delivered inside of UR Student/Workday
  - Conducted Reporting workshop
  - Delivered versus custom reports
  - Gathering and defining requirements for student records /advising and Finance
- Data Warehouse Reporting - Reports delivered using Cognos or Tableau
  - Working on architecture and STAR schema design
  - Report building timeline(share future)

Reporting Strategy



Inventory of Reports

- Two Types; High level and Detailed

- Summary Sheet (High level)
  - Review document for completeness and make sure the reports are aggregated in a logical way
    - https://rochester.box.com/s/3ai06ev8p594bi4j9z6j1j8s122fs2nu

- Affinity Matrix (Detailed)
    - https://rochester.box.com/s/3ai06ev8p594bi4j9z6j1j8s122fs2nu

- Desired outcome
  - Review the entire listing and identify potential gaps and obsolete reports

- Please send your results to John.podvin@rochester.edu by March 13, 2018

Future Agenda Items

- **Potential Agenda Items**
  - Additional content from SIG members
  - Overview of Conversions
  - Update on project and timeline

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?

Next Steps

- Report feedback due by March 13th
  - Review the entire listing and identify potential gaps and obsolete reports
  - Please send your results to John.podvin@rochester.edu by March 13, 2018
- Next meeting, Tuesday March 27th

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