



# Information Technology Institutional Research

Special Interest Group  
February 21, 2018



# Agenda

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- ▶ 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

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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

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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

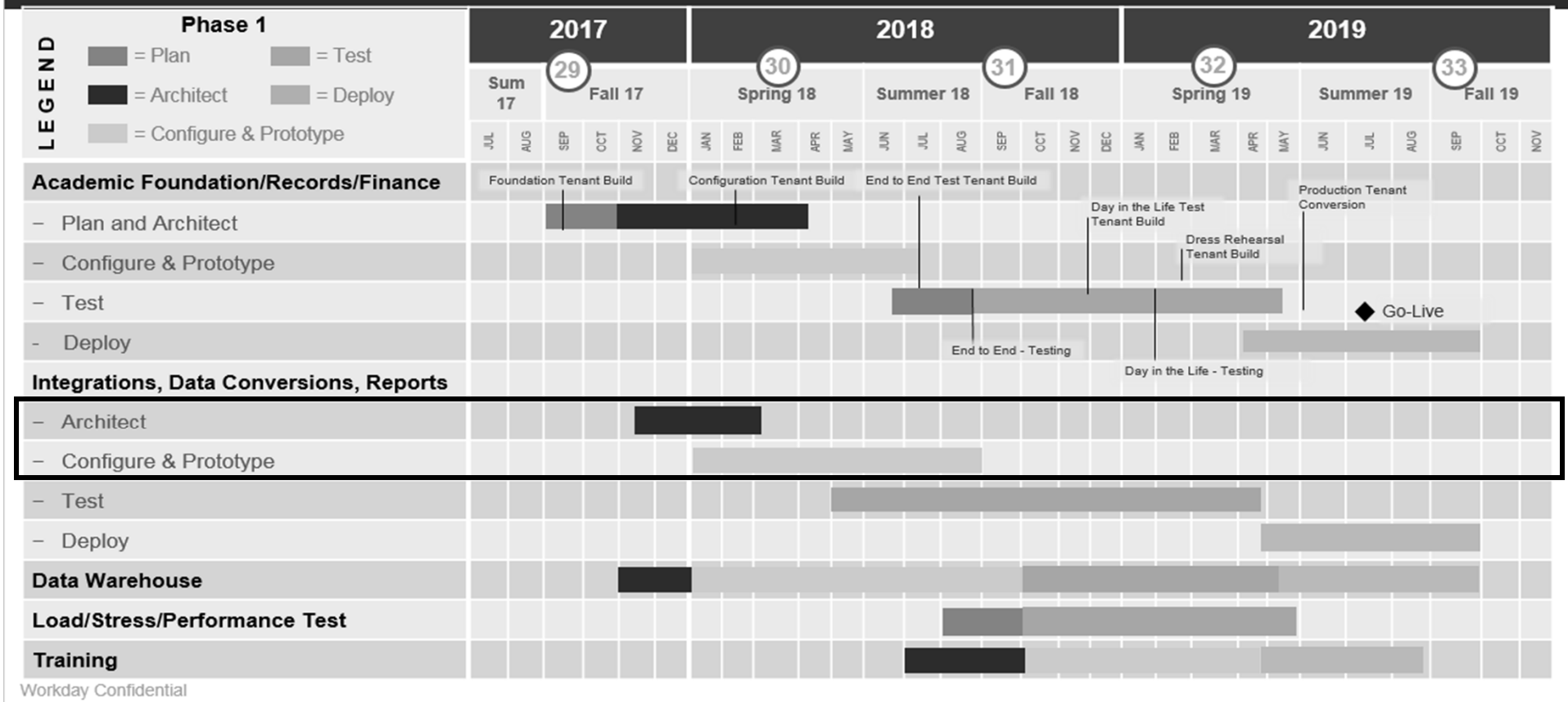
# Special Interest Groups

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

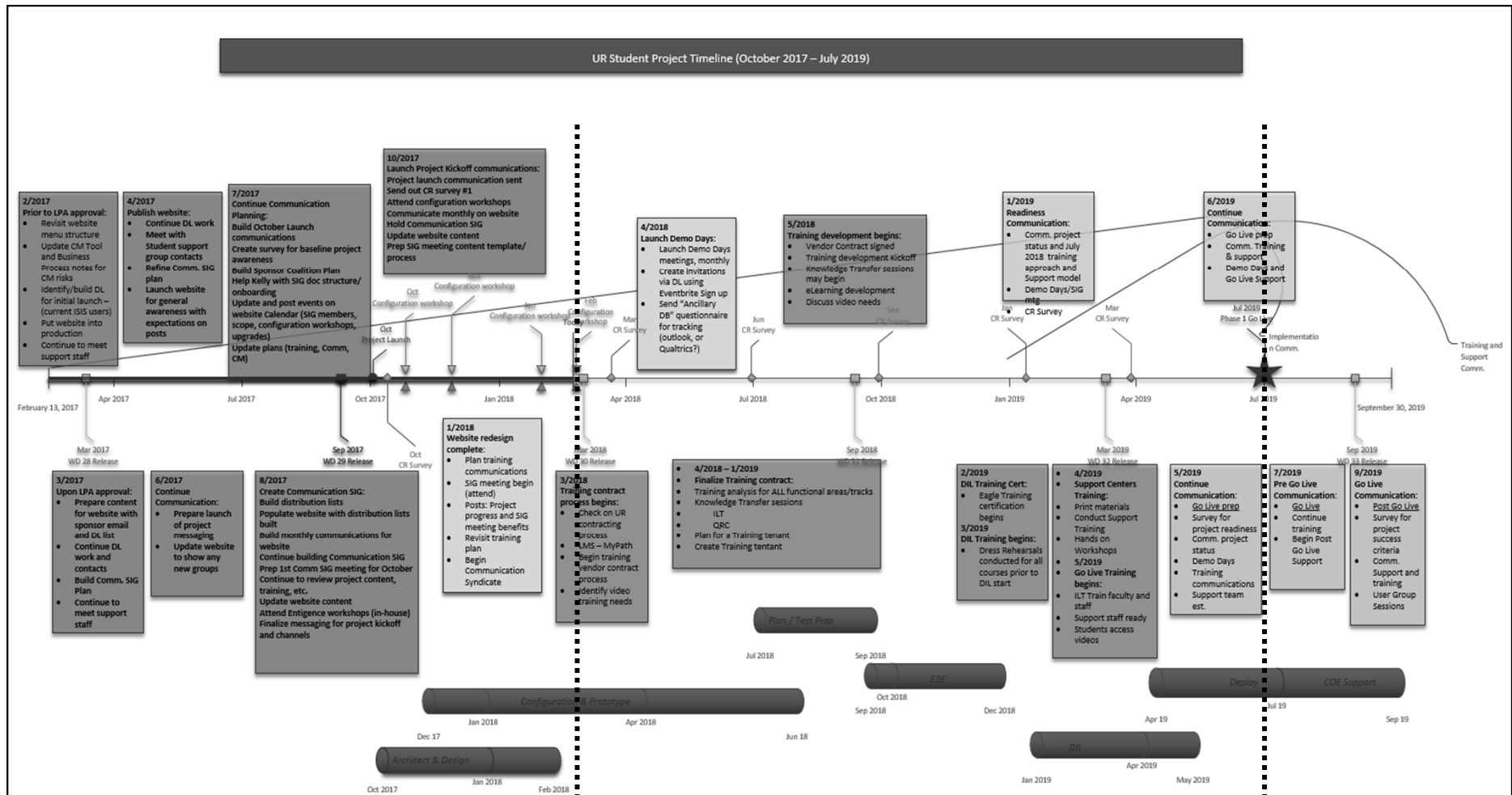
# Project Overview – Phase 1 Timeline

## Deployment Milestones



# CM, Communications & Training

## Change Management, Communications and Training approach



# Project Website and Tools

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

The screenshot shows the top navigation bar of the University of Rochester website. Below the navigation bar is the University of Rochester logo. The main navigation menu includes links for 'About Us', 'Academics', 'Admissions', 'Arts', 'Athletics', 'Global', 'Libraries', 'Medicine', 'Research', 'Student Life', 'Working Here', and 'Giving'. The 'UR Student' menu is expanded, showing 'UR Student', 'News', 'SIG', 'Faculty', 'Staff', 'Students', 'FAQ', 'Calendar', and 'Contact'. The 'UR Student Project' section is highlighted, with a sub-menu for 'SIG'. The main content area features a 'Welcome to UR Student!' section and a 'Glossary Search' box.

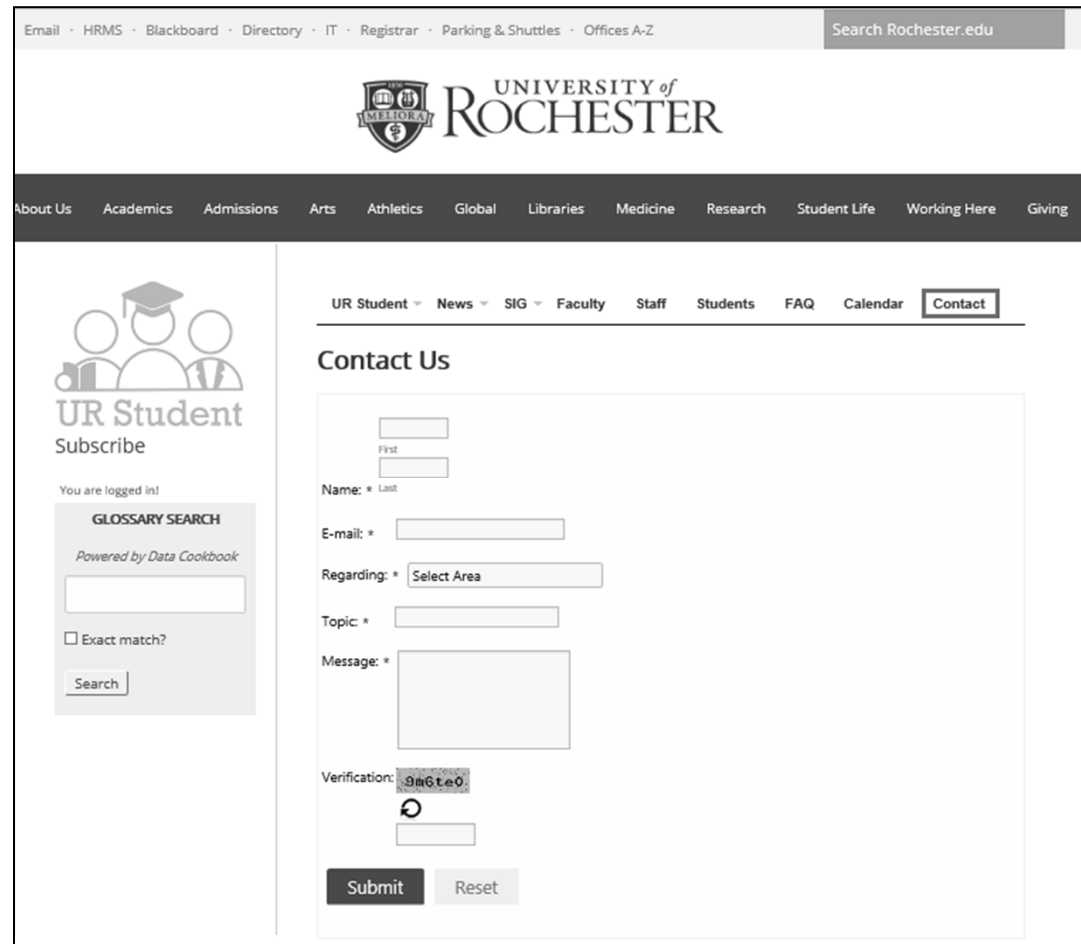
The screenshot shows the 'Information Technology SIG' page. The navigation menu is the same as in the previous screenshot. The main content area features a 'Welcome to UR Student!' section and a table of the Project Team.

Project Team	School / Location
Babette Barnes (IT Team Lead)	University IT / EA
Mary Fyles	University IT / EA
Goku Gunasekaran	University IT / EA
Kevin Hammon (Integrations Team Lead)	University IT / EA
Marc Rumsey (Reporting Team Lead)	University IT / EA
Matthew Siple	University IT / EA



# Interact with the Project Team

- Email
  - [urstudent@ur.rochester.edu](mailto:urstudent@ur.rochester.edu)
- Contact Us (website)
- Collaborative Tools
  - Box
  - Outlook Groups
  - ?



The screenshot shows the University of Rochester website's navigation and contact sections. At the top, there is a search bar for 'Rochester.edu' and a list of links: Email, HRMS, Blackboard, Directory, IT, Registrar, Parking & Shuttles, and Offices A-Z. The main header features the University of Rochester logo and the name 'UNIVERSITY of ROCHESTER'. Below this is a dark navigation bar with links for About Us, Academics, Admissions, Arts, Athletics, Global, Libraries, Medicine, Research, Student Life, Working Here, and Giving. A secondary navigation bar includes links for UR Student, News, SIG, Faculty, Staff, Students, FAQ, Calendar, and a highlighted 'Contact' button. The 'Contact Us' form is located on the right side of the page. It includes input fields for First and Last name, E-mail, and a 'Regarding' dropdown menu set to 'Select Area'. There is also a 'Topic' field and a larger 'Message' text area. A verification code '5m6te0' is displayed with a refresh button. At the bottom of the form are 'Submit' and 'Reset' buttons. On the left side of the page, there is a 'UR Student Subscribe' section with an icon of three people and a graduation cap. Below it is a 'GLOSSARY SEARCH' box powered by Data Cookbook, featuring a search input field, an 'Exact match?' checkbox, and a 'Search' button.

# Communication Expectations

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## Internal

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

## External

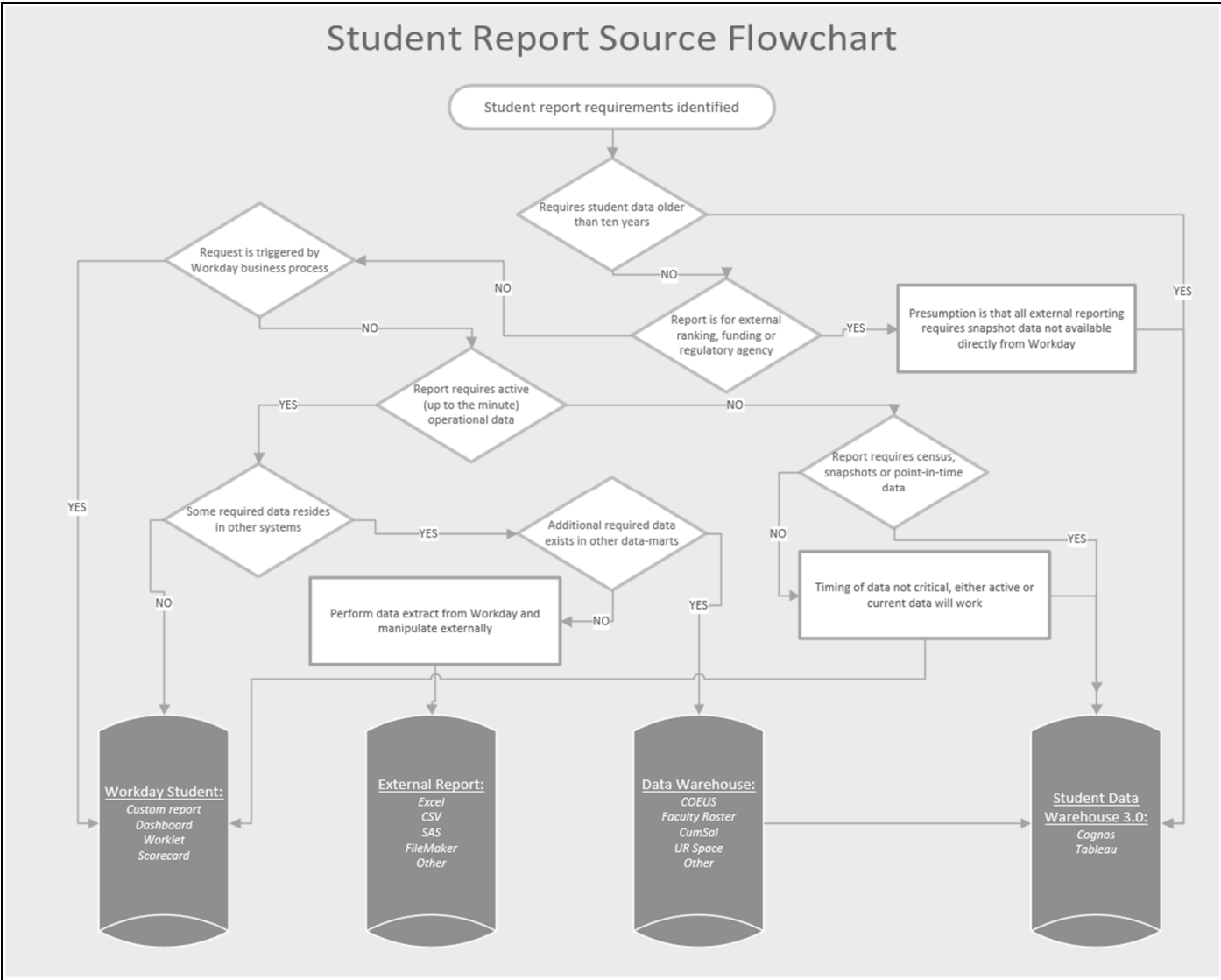
- Be an advocate for the project
- Promote public UR Student events
- Promote the website
  - [Contact Us](#) for questions/feedback
- Answer questions you know and provide feedback
  - forward ones you do not for response (1-2 day turnaround)
- Help communicate changes that will affect your school
-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

# Reporting Update

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- **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

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- 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](mailto:John.podvin@rochester.edu) by March 13, 2018

# Future Agenda Items

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

# Q&A

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- 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

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- Report feedback due by March 13<sup>th</sup>
  - Review the entire listing and identify potential gaps and obsolete reports
  - Please send your results to [John.podvin@rochester.edu](mailto:John.podvin@rochester.edu) by March 13, 2018
- Next meeting, Tuesday March 27<sup>th</sup>





UNIVERSITY *of* ROCHESTER



UR Student