Information Technology Institutional Research

Special Interest Group

September 25, 2018

UNIVERSITY of ROCHESTER

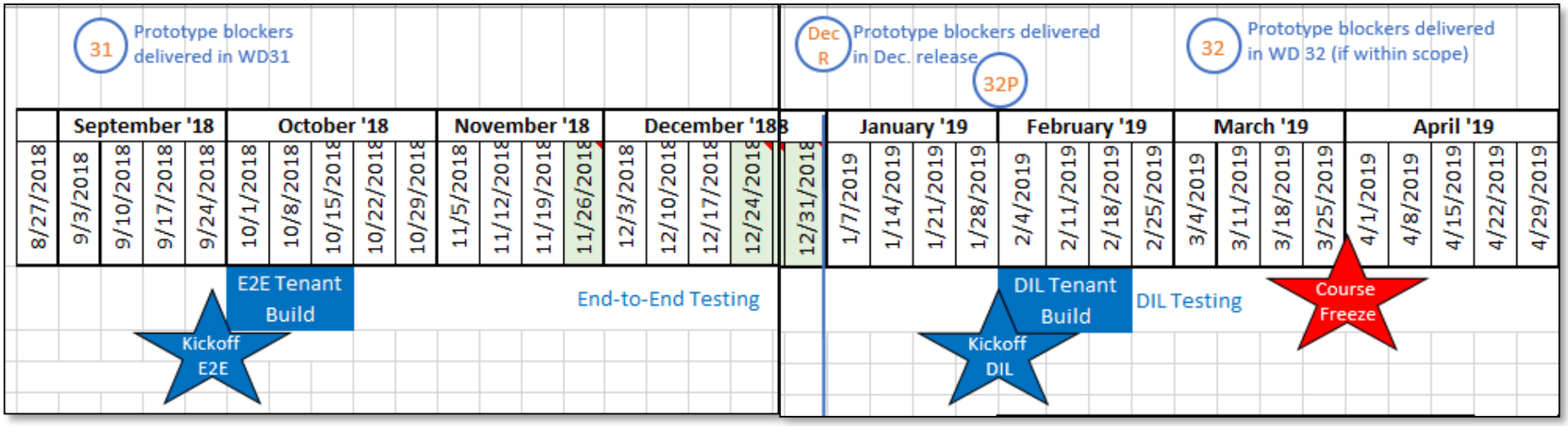
Agenda

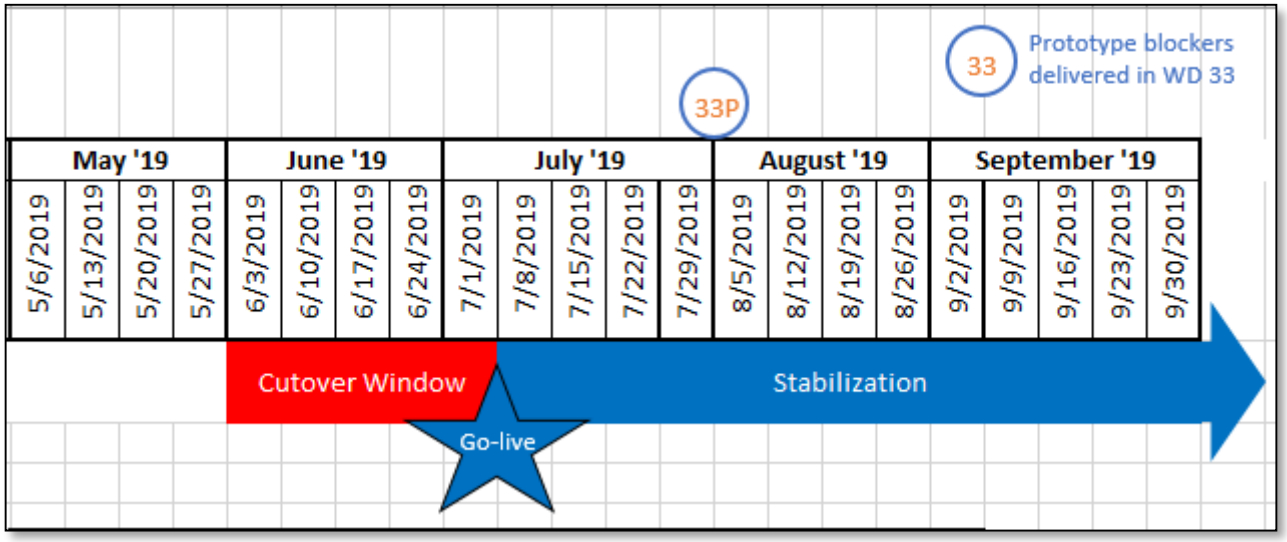
- Opening
- Project Status Recap
- What is Security?
- Change Management Activities
- Q&A / Next Steps

Project Status Recap

- Ending of Configuration and Prototype Phase
- Preparing for E2E testing
- Workday Releases 31 (September) and 31.5 in December
- Plan to test DIL on March – May 2019

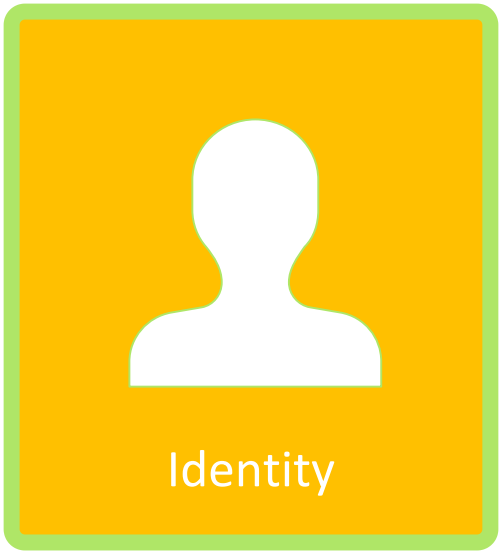
Project Overview – Phase 1 Timeline

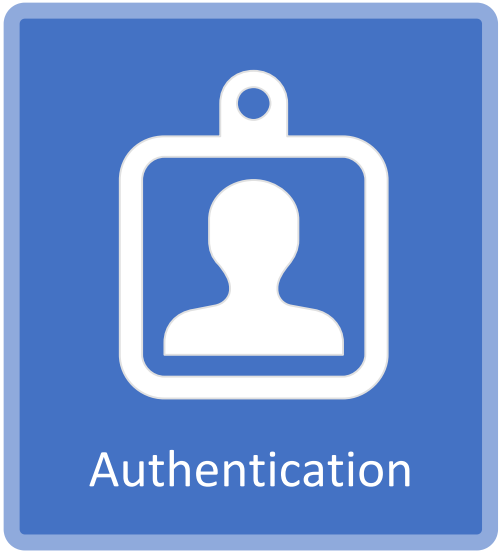


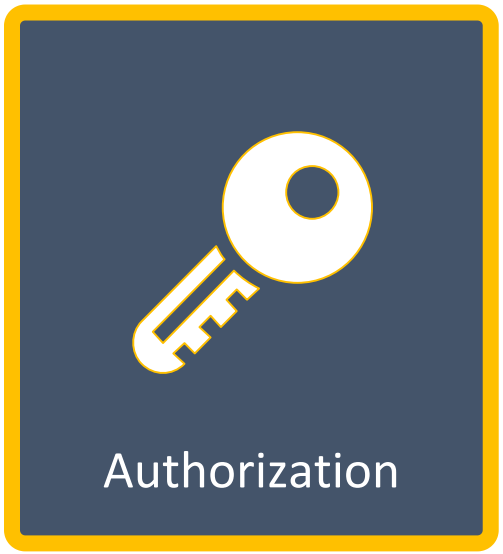


UR Student Security

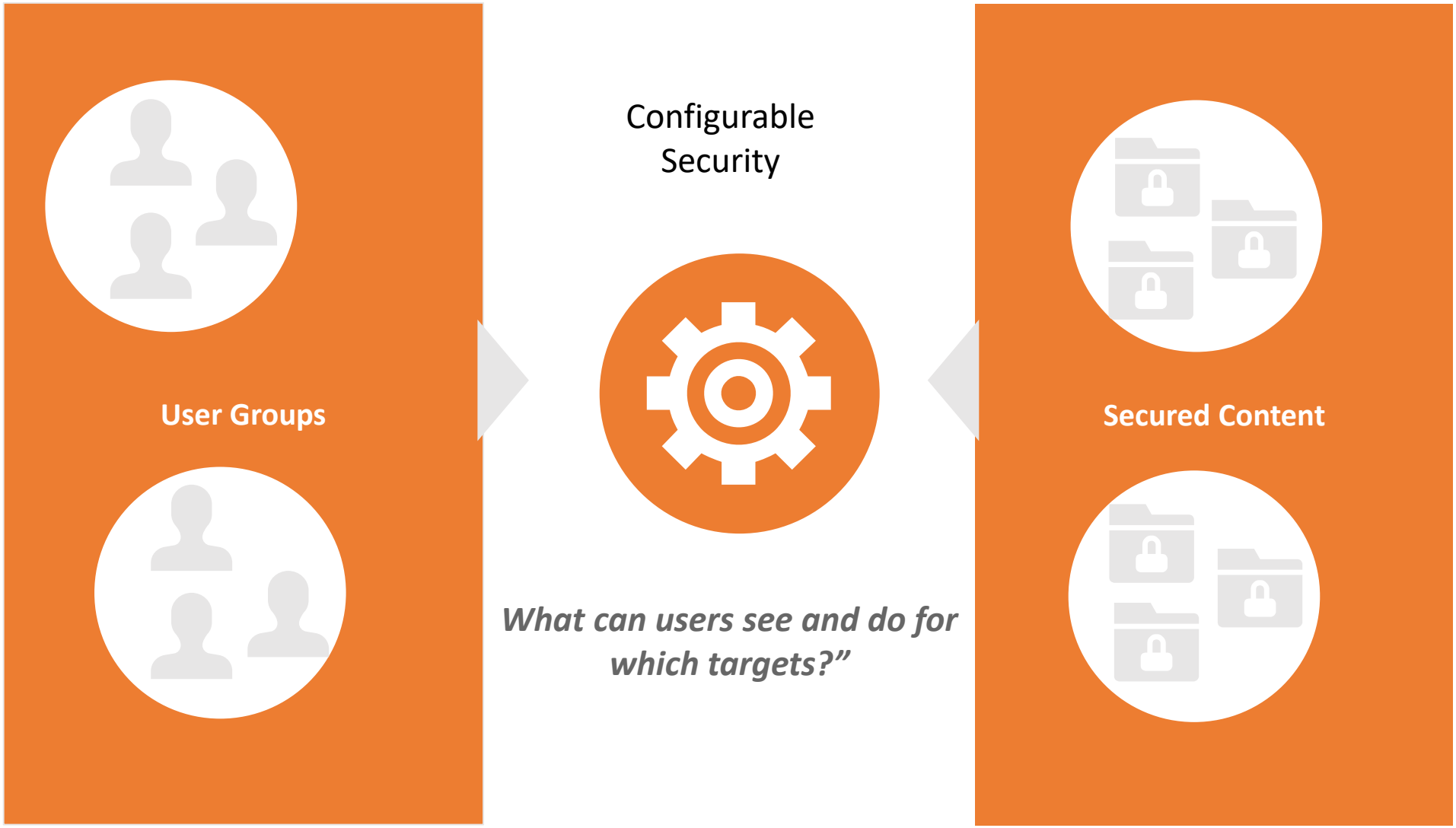
What Is Security?



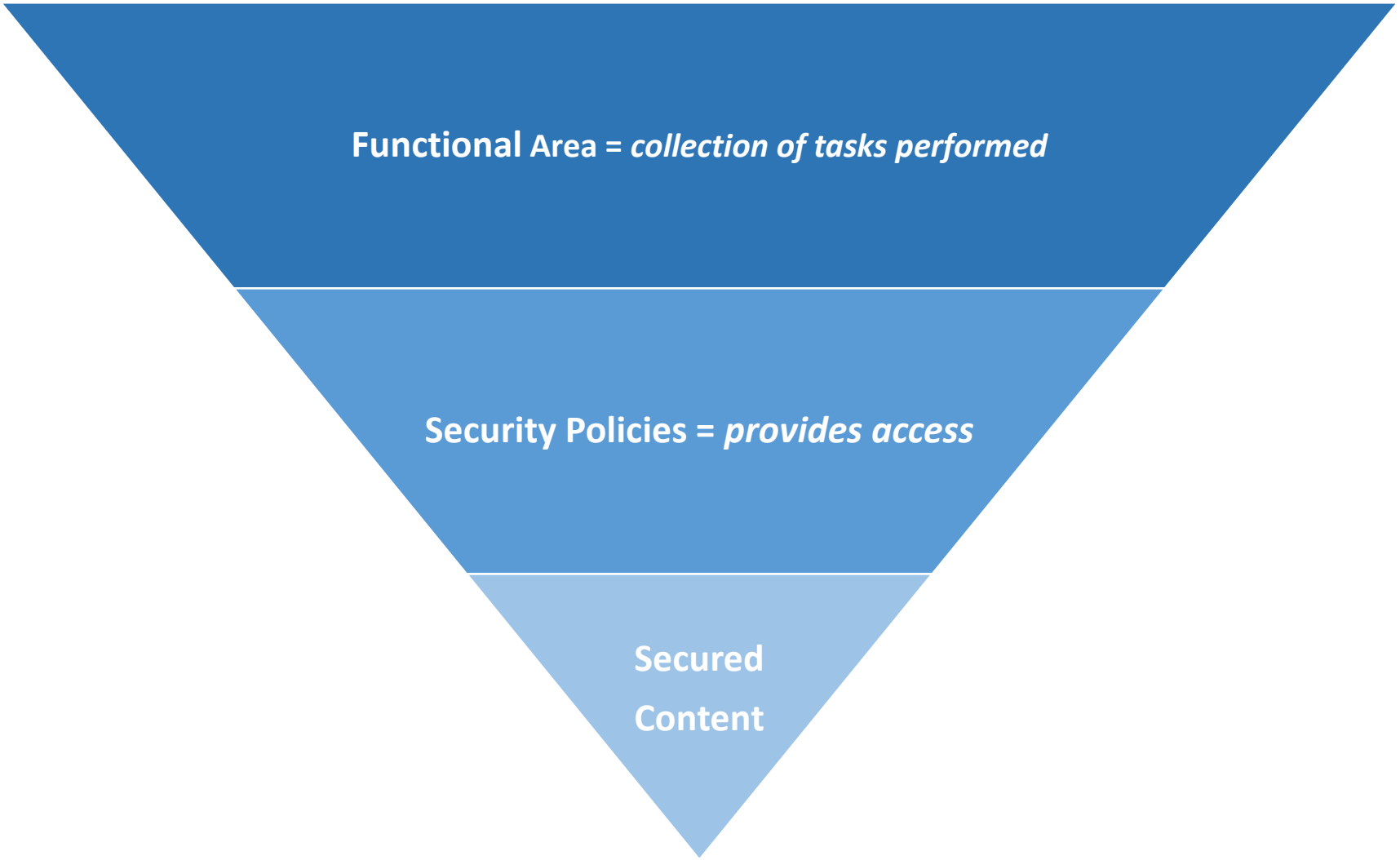




Configurable Security



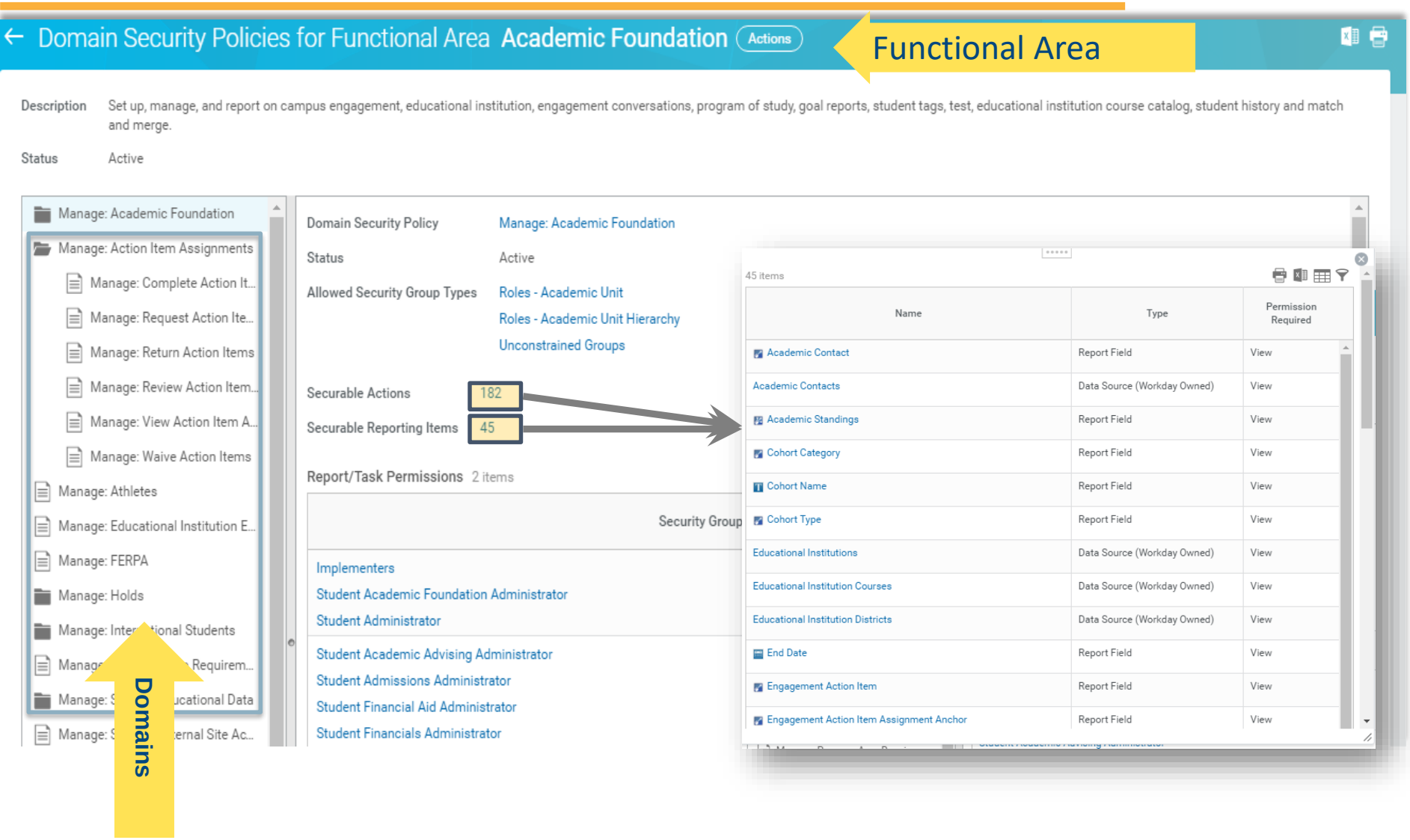
Secured Content Hierarchy



Secured Content: Domain

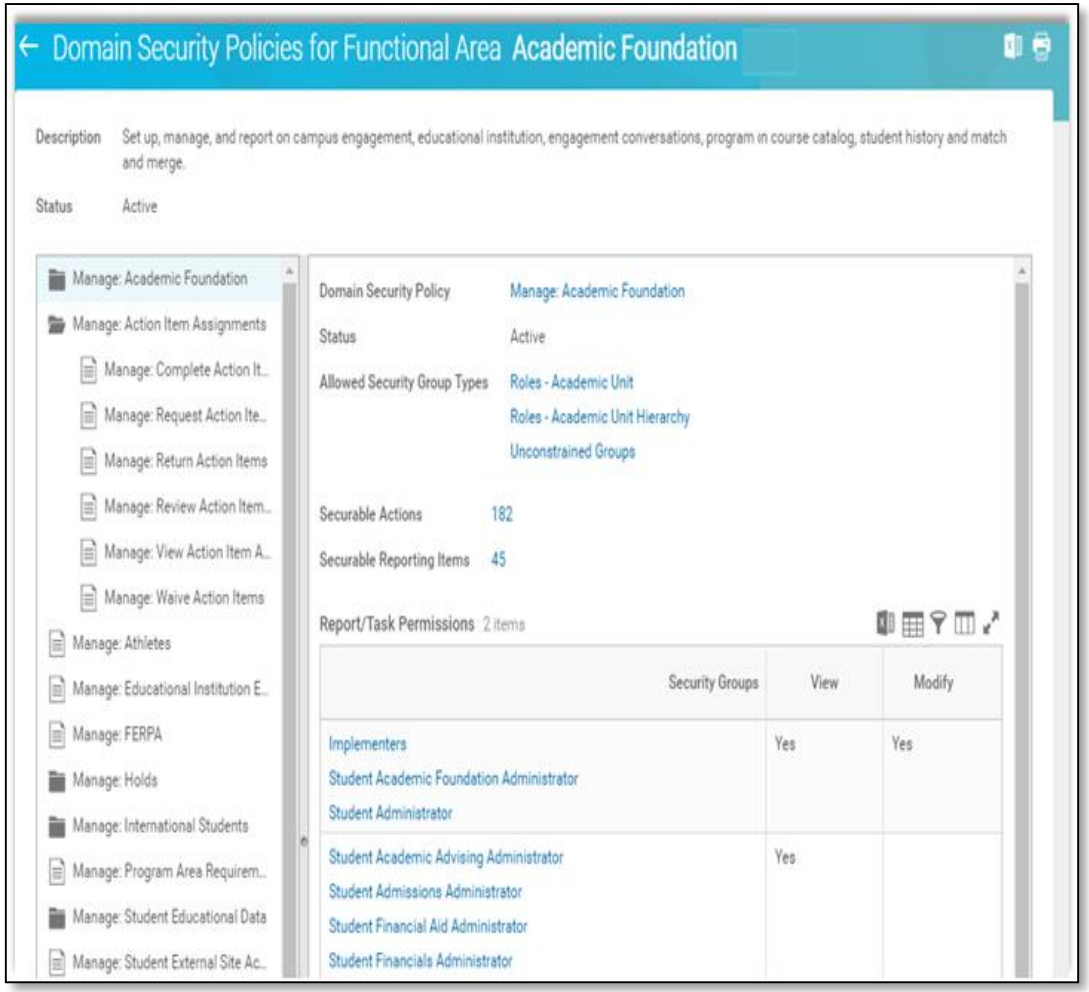
- Each domain secures access to one or more functionally similar items
- Fields, reports, non-BP tasks, data sources, etc.
- A domain may secure as few as one item or over 100 items
- All items in a domain are secured together and cannot be secured individually
- Workday determines what content is secured by delivered domains
- Business leadership determines which users can access each domain

Domain Security Policies by Functional Areas



Content: Domain

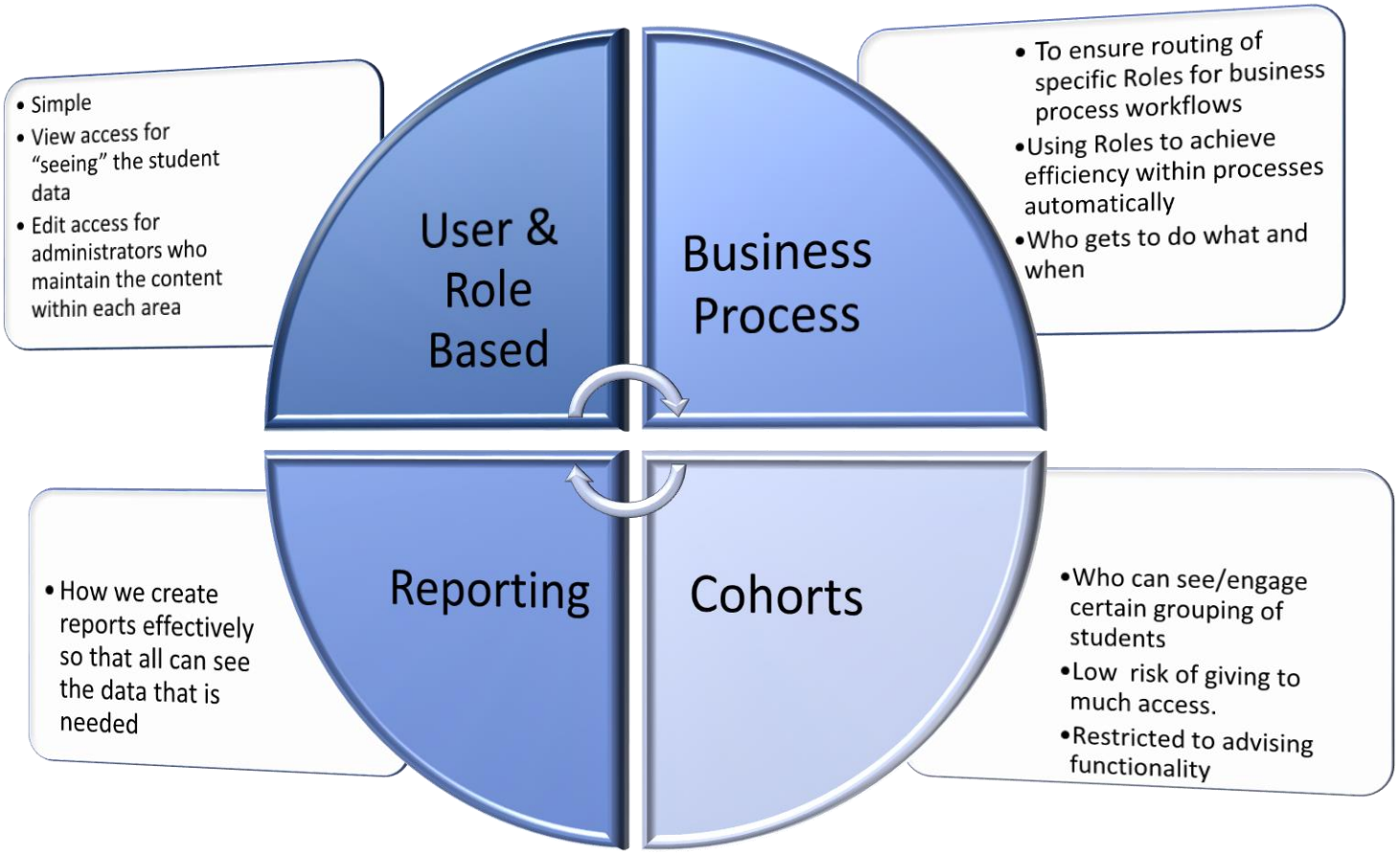
- Permissions are granted as View only or View and Modify
- If the domain contains web services, permissions are granted as Get or Get and Put
- Permissions are tied to Security Groups
- Domain security policy permissions can be inherited from parent to child policies



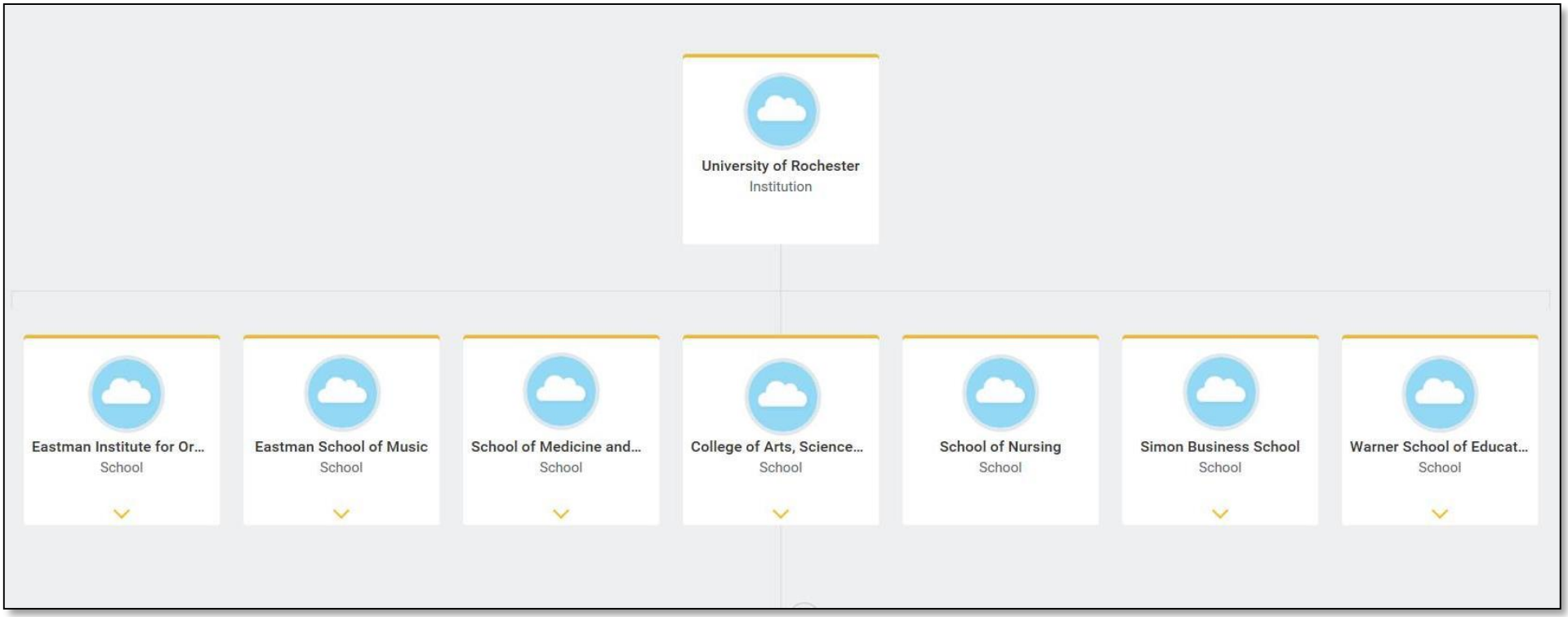
Keep it Simple

- Keep it simple: Start with user-based groups, followed by role-based (constrained) groups.
- Think of your business counterparts and end users.
- Only assign at the lower levels when necessary.
- Leverage the default delivered security whenever possible. More security groups means more maintenance

Security Is Impacted By:



Security and the AU (Academic Unit)

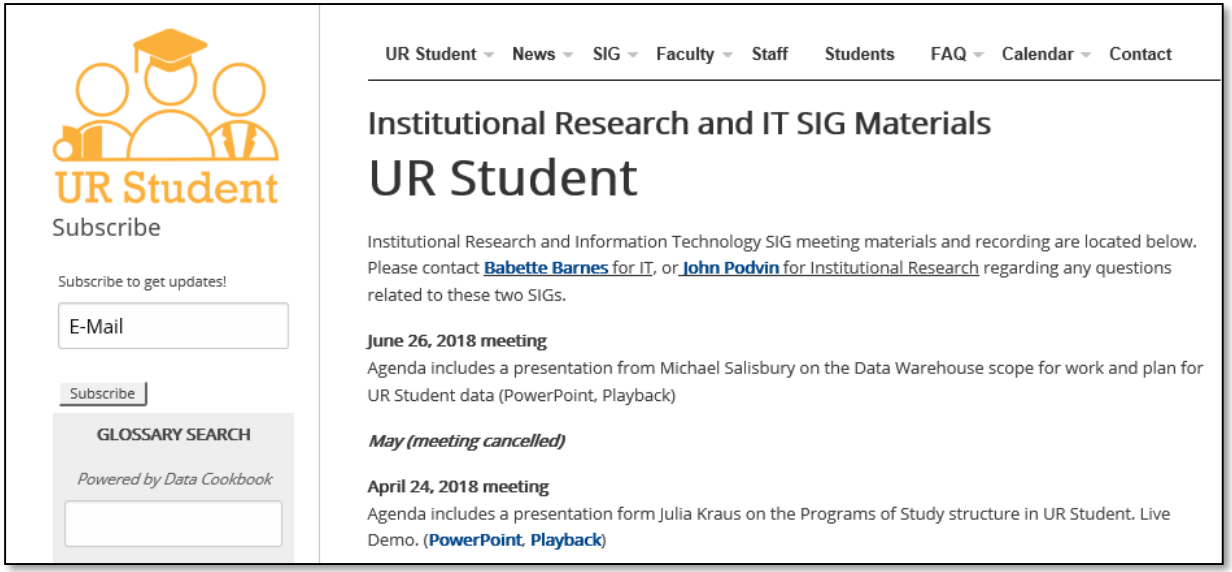


Change Management Activities

- Project Change Management and Communication approach
- Resume community engagement activities
  - Sig meetings return (Records, Faculty, Student Finance, IT/IR)
  - Next Demo Days, November 12th, 14th - announcement to come
  - Community Forum, November 6th - announcement to come
  - Additional University meetings where appropriate
- Preparing for student support
- Engage training team and build timeline

Next Steps

- Next IT/IR SIG meeting on Tuesday, October 30th
- 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/



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UR Student

Appendix

- UR Student Terminology
- Special Interest Groups (SIG)
- UR Student Communications and website

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

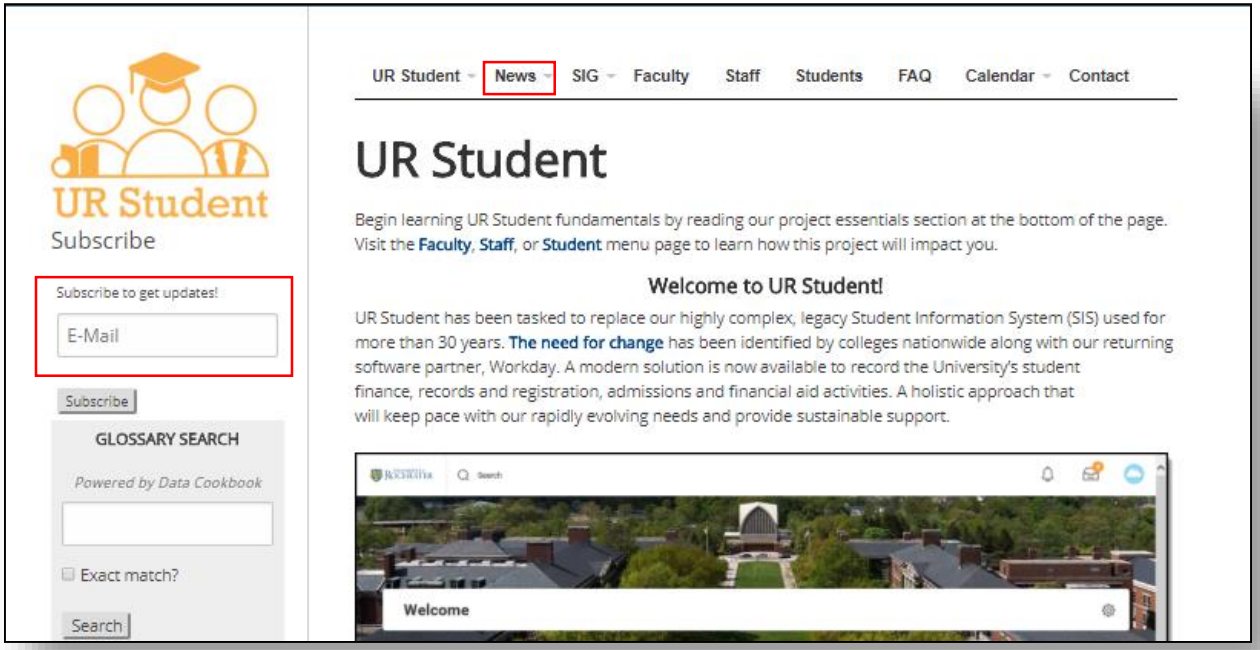
Institutional Research & Reporting SIG

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



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UR Student