



UR STUDENT

# Information Technology Institutional Research

Special Interest Group

September 25, 2018



UNIVERSITY of  
ROCHESTER

# Agenda

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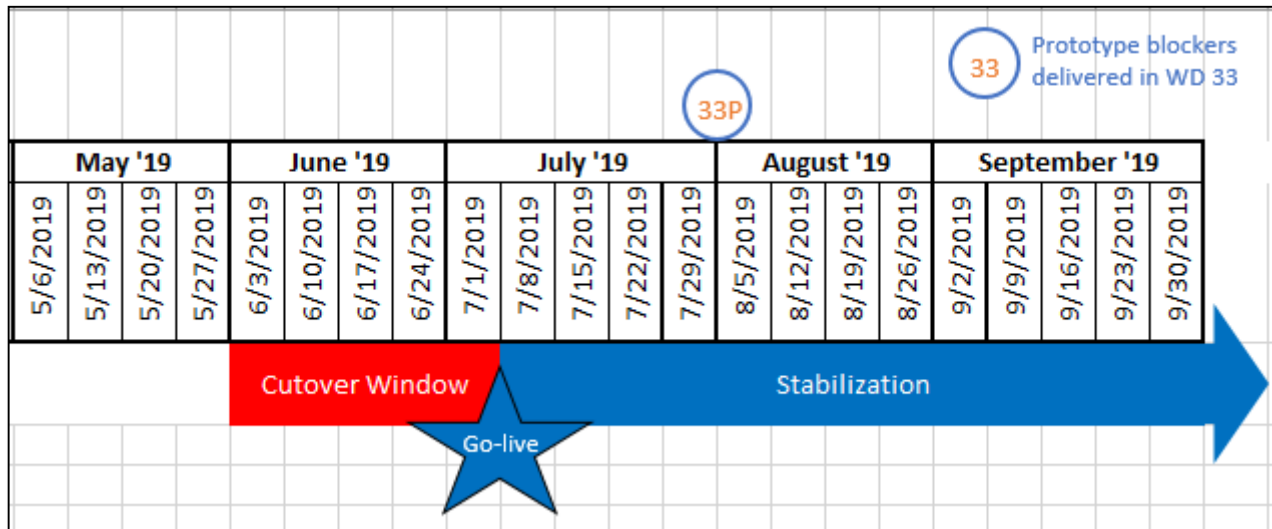
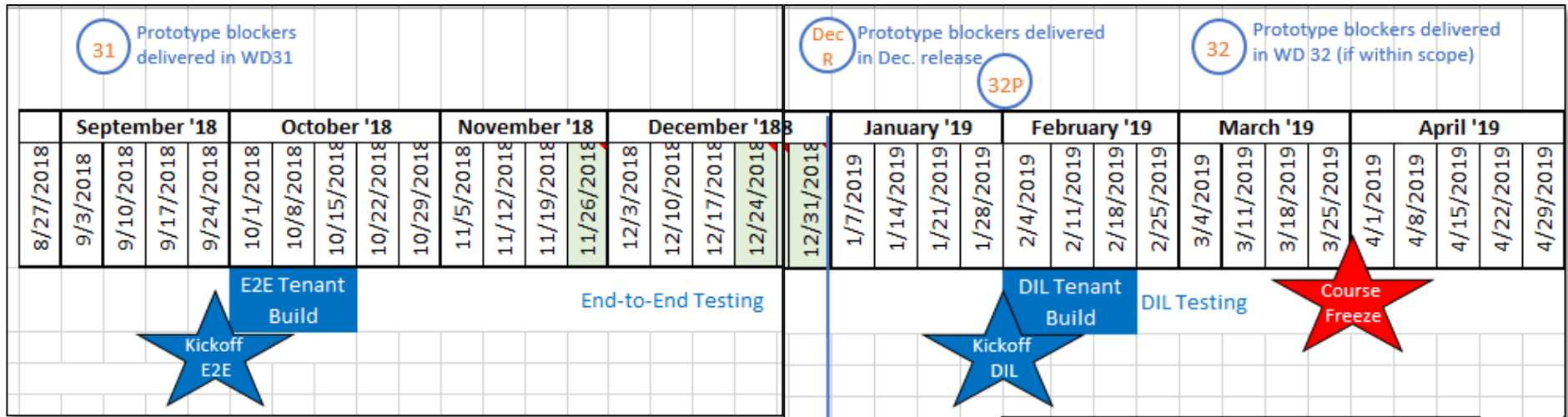
- ▶ Opening
- ▶ Project Status Recap
- ▶ What is Security?
- ▶ Change Management Activities
- ▶ Q&A / Next Steps

# Project Status Recap

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- 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

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# What Is Security?

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Identity



Authentication



Authorization

# Configurable Security



User Groups



Configurable  
Security



*What can users see and do for  
which targets?"*

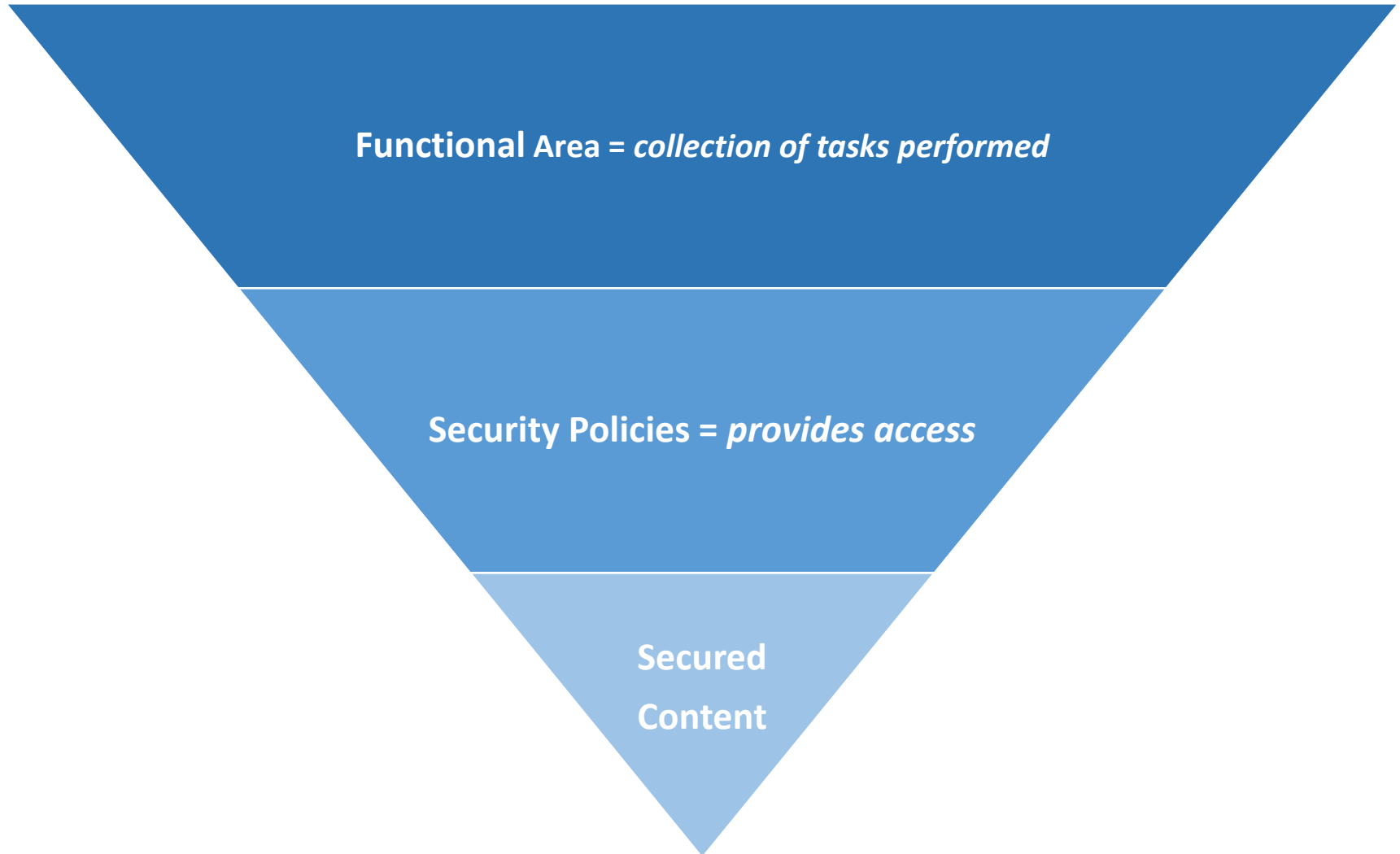


Secured Content



# Secured Content Hierarchy

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# Secured Content: Domain

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- 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

Description Set up, manage, and report on campus engagement, educational institution, engagement conversations, program of study, goal reports, student tags, test, educational institution course catalog, student history and match and merge.

Status Active

Manage: Academic Foundation

- Manage: Action Item Assignments
- Manage: Complete Action It...
- Manage: Request Action It...
- Manage: Return Action Items
- Manage: Review Action Item...
- Manage: View Action Item A...
- Manage: Waive Action Items
- Manage: Athletes
- Manage: Educational Institution E...
- Manage: FERPA
- Manage: Holds
- Manage: International Students
- Manage: ... Requirement...
- Manage: S... Educational Data
- Manage: S... Internal Site Ac...

Domain Security Policy **Manage: Academic Foundation**

Status Active

Allowed Security Group Types **Roles - Academic Unit**  
**Roles - Academic Unit Hierarchy**  
**Unconstrained Groups**

Securable Actions **182**

Securable Reporting Items **45**

Report/Task Permissions 2 items

Security Group
<b>Implementers</b>
Student Academic Foundation Administrator
Student Administrator
Student Academic Advising Administrator
Student Admissions Administrator
Student Financial Aid Administrator
Student Financials Administrator

45 items

Name	Type	Permission Required
Academic Contact	Report Field	View
Academic Contacts	Data Source (Workday Owned)	View
Academic Standings	Report Field	View
Cohort Category	Report Field	View
Cohort Name	Report Field	View
Cohort Type	Report Field	View
Educational Institutions	Data Source (Workday Owned)	View
Educational Institution Courses	Data Source (Workday Owned)	View
Educational Institution Districts	Data Source (Workday Owned)	View
End Date	Report Field	View
Engagement Action Item	Report Field	View
Engagement Action Item Assignment Anchor	Report Field	View

Domains

182

45

# 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

← Domain Security Policies for Functional Area Academic Foundation

Description Set up, manage, and report on campus engagement, educational institution, engagement conversations, program in course catalog, student history and match and merge.

Status Active

Domain Security Policy Manage: Academic Foundation

Status Active

Allowed Security Group Types Roles - Academic Unit  
Roles - Academic Unit Hierarchy  
Unconstrained Groups

Securable Actions 182

Securable Reporting Items 45

Report/Task Permissions 2 items

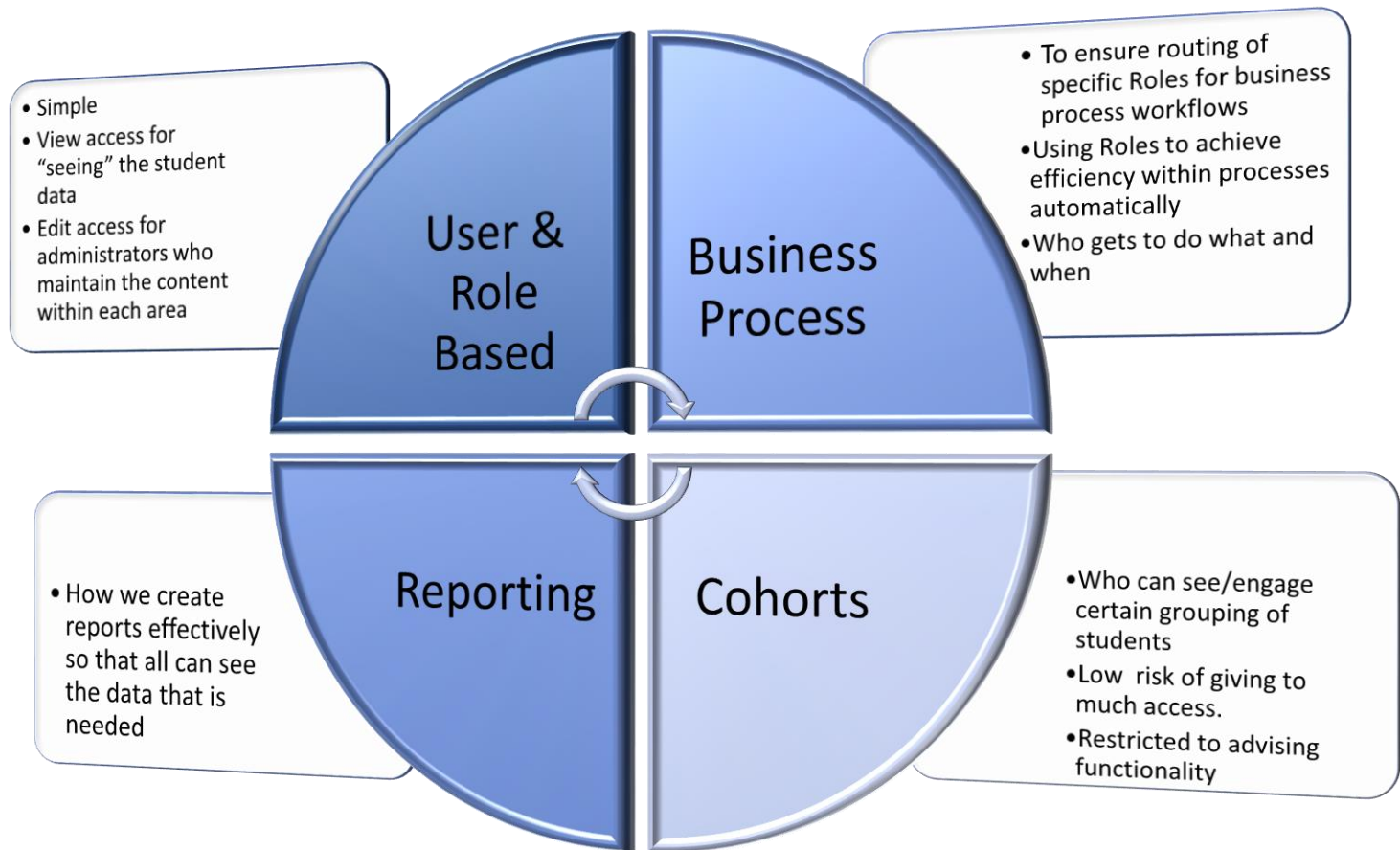
Security Groups	View	Modify
Implementers Student Academic Foundation Administrator Student Administrator	Yes	Yes
Student Academic Advising Administrator Student Admissions Administrator Student Financial Aid Administrator Student Financials Administrator	Yes	

# Keep it Simple

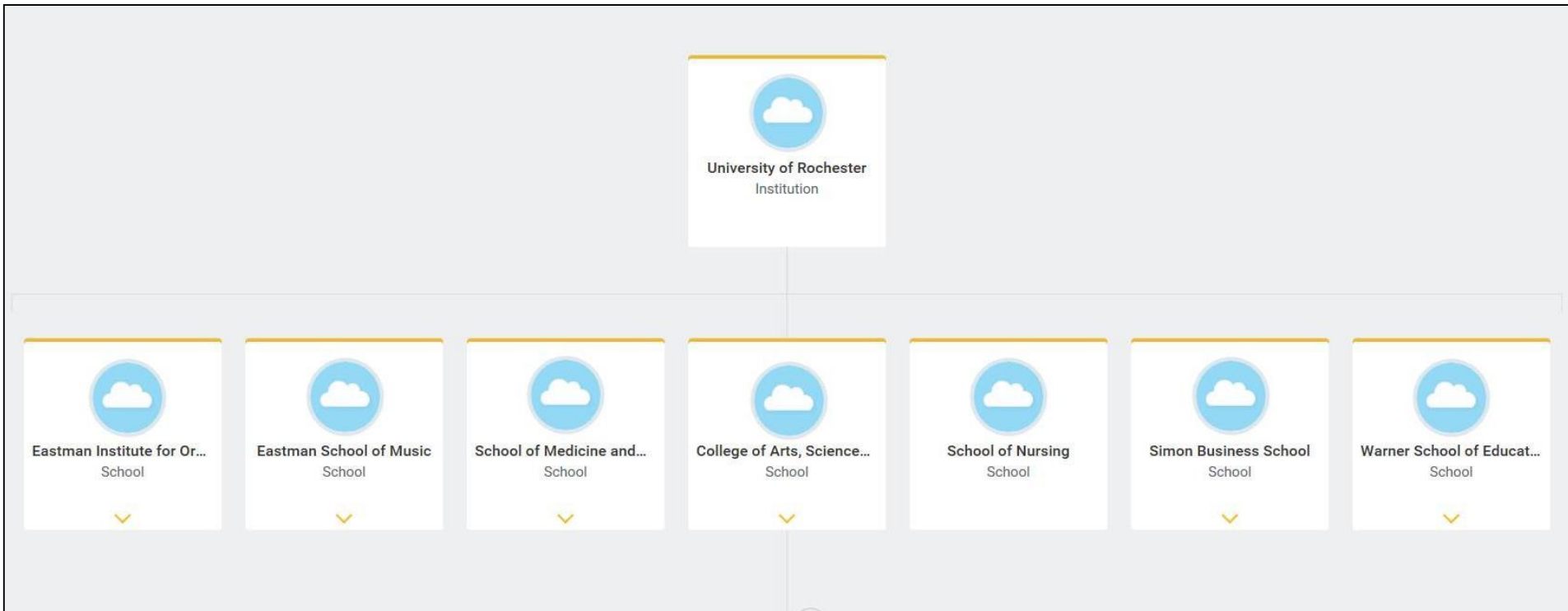
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- Keep it simple: Start with user-based groups, followed by role-based (constrained) groups.
- Think of your business counterparts and end users.
- Only assign at the lower levels when necessary.
- Leverage the default delivered security whenever possible.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

# Security Is Impacted By:



# Security and the AU (Academic Unit)




# Change Management Activities

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- Project Change Management and Communication approach
- Resume community engagement activities
  - Sig meetings return (Records, Faculty, Student Finance, IT/IR)
  - Next Demo Days, November 12<sup>th</sup>, 14<sup>th</sup> - announcement to come
  - Community Forum, November 6<sup>th</sup> - 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 30<sup>th</sup>
- 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/>



The screenshot shows a web page with a navigation menu at the top: UR Student, News, SIG, Faculty, Staff, Students, FAQ, Calendar, and Contact. The main heading is "Institutional Research and IT SIG Materials" followed by "UR Student". Below this, a paragraph states: "Institutional Research and Information Technology SIG meeting materials and recording are located below. Please contact [Babette Barnes](#) for IT, or [John Podvin](#) for Institutional Research regarding any questions related to these two SIGs." There are two meeting announcements: "June 26, 2018 meeting" with an agenda including a presentation from Michael Salisbury on the Data Warehouse scope, and "April 24, 2018 meeting" with an agenda including a presentation from Julia Kraus on the Programs of Study structure. A "May (meeting cancelled)" entry is also present. On the left side, there is a "UR Student" logo with a graduation cap and a "Subscribe" form with an "E-Mail" input field and a "Subscribe" button. Below the form is a "GLOSSARY SEARCH" section with the text "Powered by Data Cookbook" and a search input field.





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UR Student

# Appendix

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

# UR Student Terminology

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- **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

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- **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

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- **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

The screenshot displays the UR Student website interface. At the top, a navigation bar includes links for UR Student, News (highlighted with a red box), SIG, Faculty, Staff, Students, FAQ, Calendar, and Contact. The main heading is "UR Student", followed by introductory text and a "Welcome to UR Student!" section. A sidebar on the left features the UR Student logo, a "Subscribe" button, a form to "Subscribe to get updates!" with an "E-Mail" input field (highlighted with a red box) and a "Subscribe" button, and a "GLOSSARY SEARCH" section powered by Data Cookbook with a search input and "Search" button. A banner image at the bottom shows a campus scene with a "Welcome" overlay.



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