Information Technology Institutional Research

Special Interest Group

April 10, 2019

UNIVERSITY of ROCHESTER

Agenda

- Opening
- Update From Last IT/IR SIG – March 13
- UR Student Workday Reports Identified
- Data Warehouse Portal
- Q&A
- Next Steps

Update From Last IT/IR SIG Meeting

Items From Last Meeting

- ***UR Student Workday Report Security***
  - *Details to be presented at May IT/IR SIG*
- ***UR Student Workday Report Catalog***
  - *To be reviewed today*
- ***UR Student Workday Report Writers***
  - *Actively working with sponsors on details*

UR Student Workday Reports

UR Student Workday Report Catalog

- Categories
  - Advising
  - Student Finance
  - Student Records
  - Other

Category - Advising

- Advising – Subcategories
  - General Reports
  - Grading/GPA
  - Other

Advise List

Advisee GPA Report

Advisee Missing Grades

Cohort Memberships

Transfer Credit

Link to full catalog

Category – Student Finance

- **Student Finance – Subcategories**
  - Transactional Reports
  - Statements and Billing
  - Diagnostic Reports
  - Credit Balance Reports
  - Other

Charge Items, Waivers, Refunds

Student Payment Options

Student Charges by FAO

Credit Balance Report

Accounts Receivable

Link to full catalog

Category – Student Records

- Student Records – Subcategories
  - Enrollment
  - Courses
  - Admissions
  - Grading/Academic Standing
  - Degrees/Majors
  - Program of Study
  - Other

Enrollment

Prerequisites Met

Freshman Audit Report

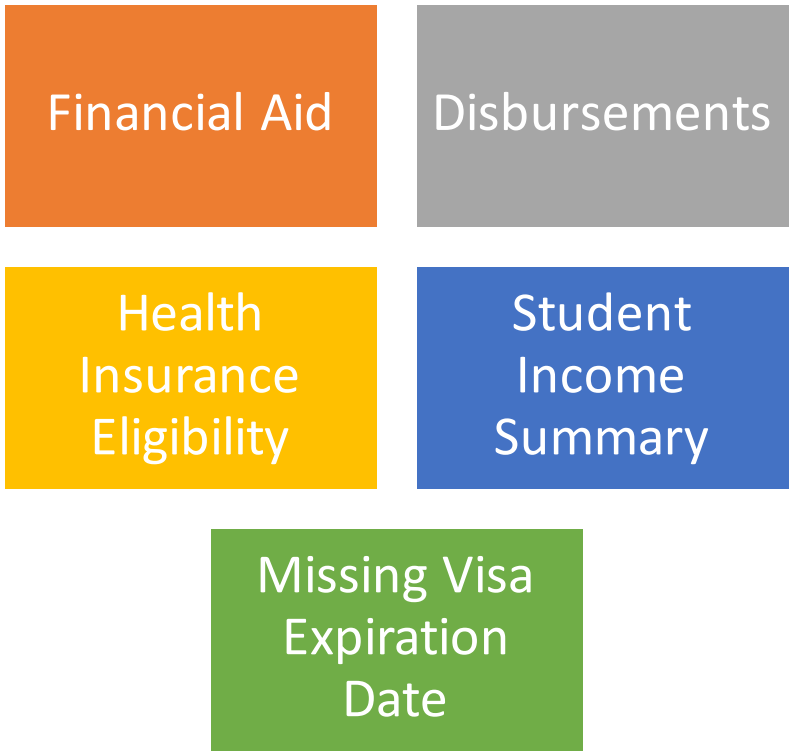
Academic Standing

Degree Verification

Link to full catalog

Category – Other

- **Other – Subcategories**
  - Financial Aid
  - University Health Services
  - Dining Services
  - International Services Office

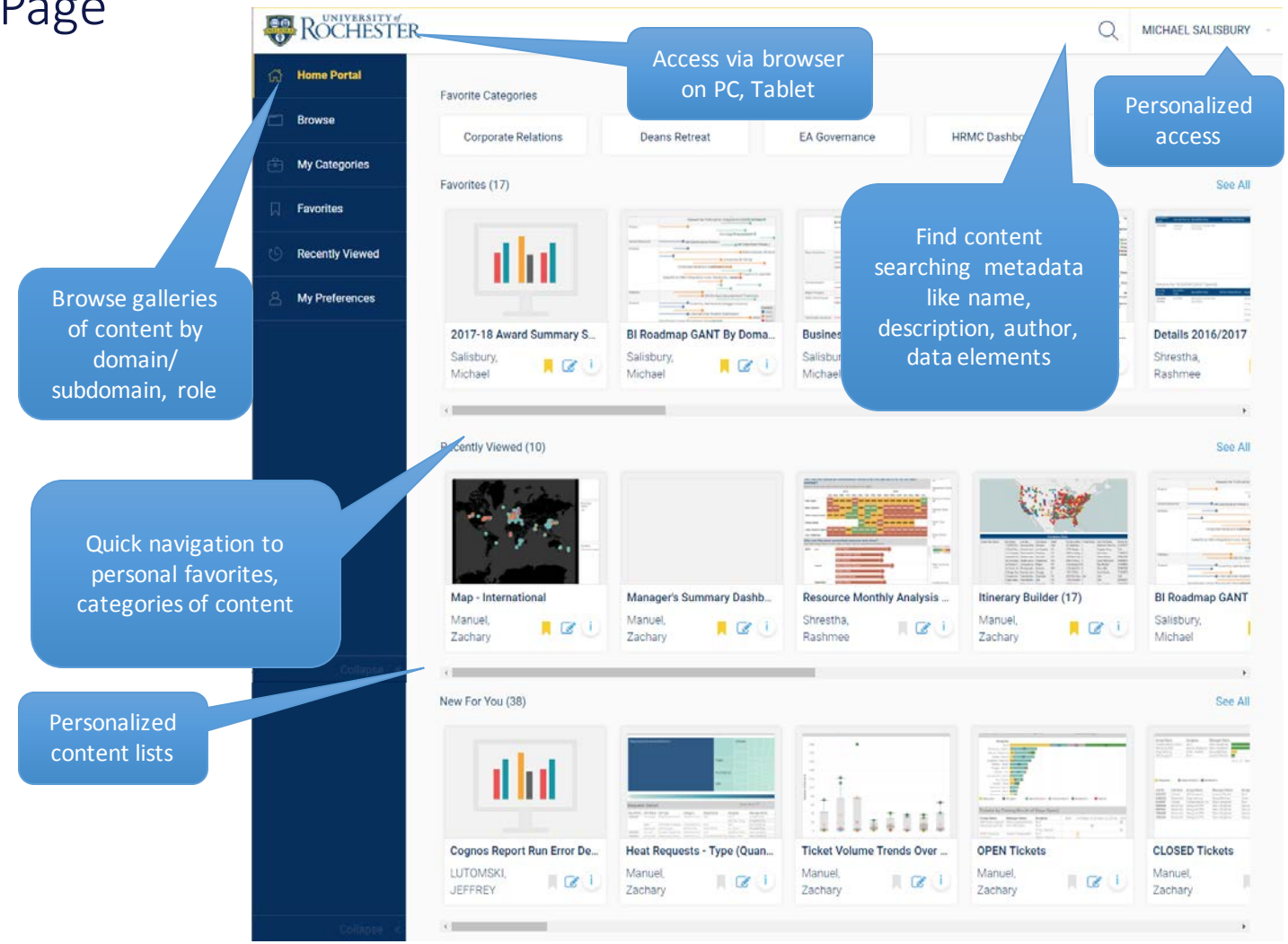


Link to full catalog

UR Data Analytics Portal

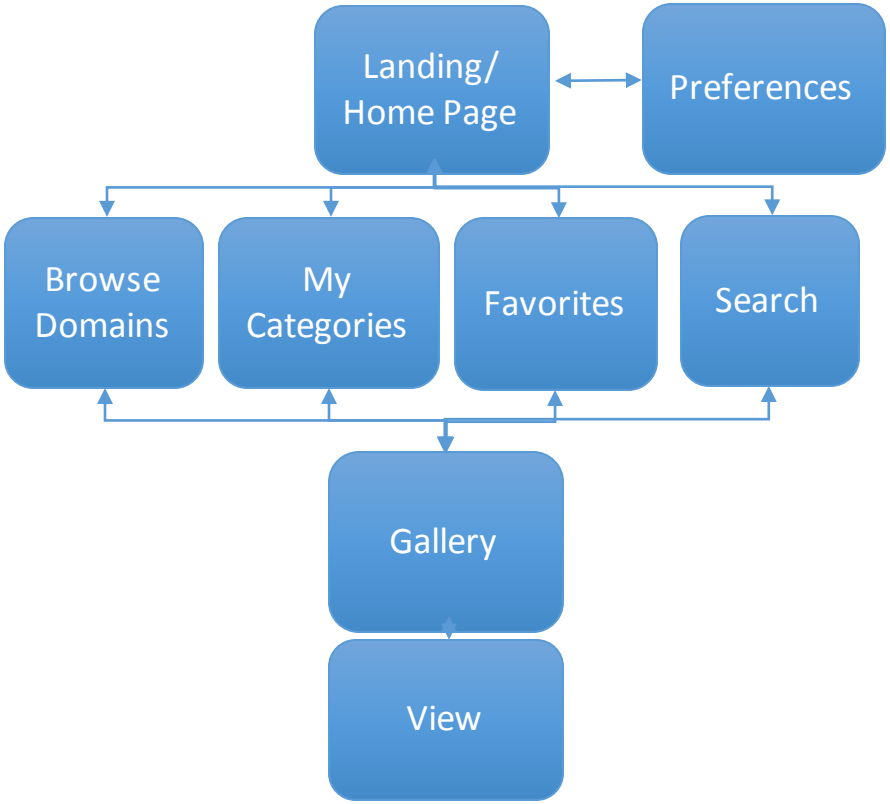
Overview for Dashboard and Report Authors

Portal Home Page



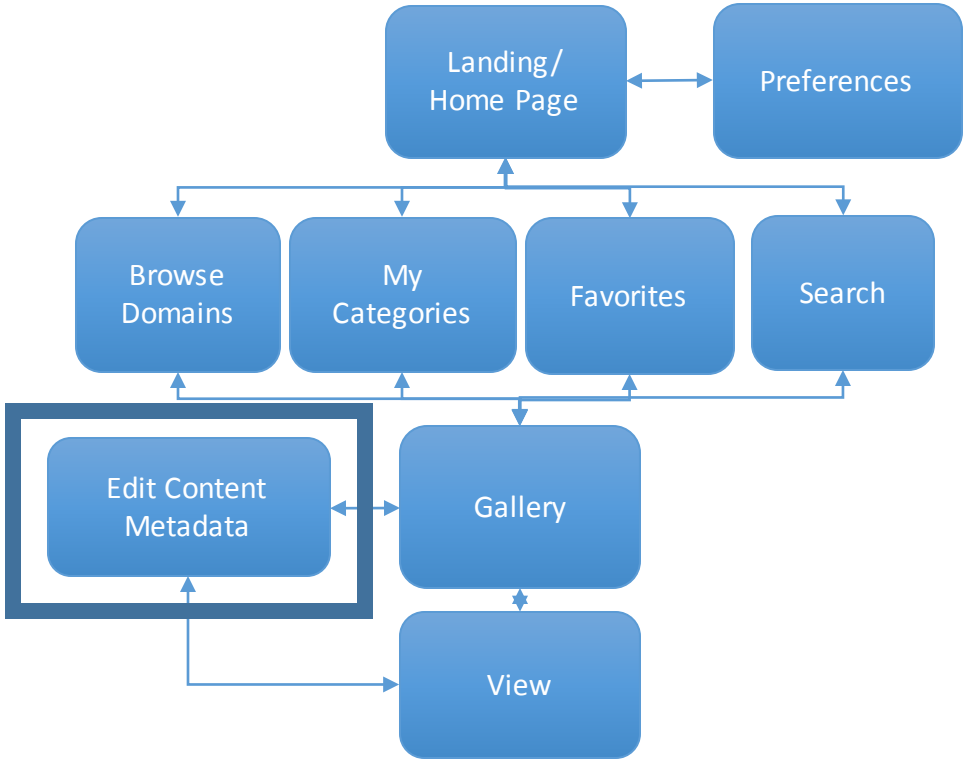
Portal Consumer Site Map

- **Home Page** – Quick access to navigation features and personalized content
- **Preferences** – Personalize home page and preferred content categories
- **Browse** – Review lists of content organized by domain and subdomain
- **My Categories** - Review lists of content organized by categories
- **Search** – Find relevant content matching on content metadata like title, description, author, data terms
- **Gallery** – Review lists of relevant content, refining lists using sort and filters
- **View** – Interact with a dashboard/report and review associated content and data term descriptions



Portal Author Site Map

- **Edit Content Metadata** – Manage content metadata such as descriptions, domains, categories, data terms
- **Home Page**
- **Preferences**
- **Browse**
- **My Categories**
- **Search**
- **Gallery**
- **View**



Needs – Dashboard and Report Authors

- Need to publish my content to my user community without editing a web page or SharePoint site
- "I want to share key metrics across the institutional user community"
- "I want senior leadership users to see specific dashboards and not a lot of 'clutter'
- "I want to provide context and key metrics definitions for my dashboards

- Portal navigation to dashboards and reports utilizes content metadata managed within the portal by the authors
- The portal enables content authors to easily populate metadata attributes for their content
- Authors can tag content with contextual metadata such as domain/subdomain, categories, roles and author-defined tags
- Authors can link contextual help and data definitions created in UR Data Glossary

Portal Metadata Terminology

- **Domain/Subdomain** – Functional areas defined by UR data governance process. Content is assigned by authors to one or more domains/subdomains.
- **Categories** – Author-defined tags used to associate content to specific processes or initiatives. Content can belong to one or more categories. Users can select categories of content to view in their user preferences.
- **Role –** Job functions/position(s) associated to a user that are used by an author to associate with content. Users can select their role(s) in their user preferences.
- **Tags –** Author-defined keyword tags associated with content that can be searched.

What about SECURITY?

Users can only see content links and view content for reports and dashboards they can view in Cognos and Tableau. Users can only see categories and domains/subdomains for which content they are allowed to view is available.

Demonstration

Publishing Content in Tableau

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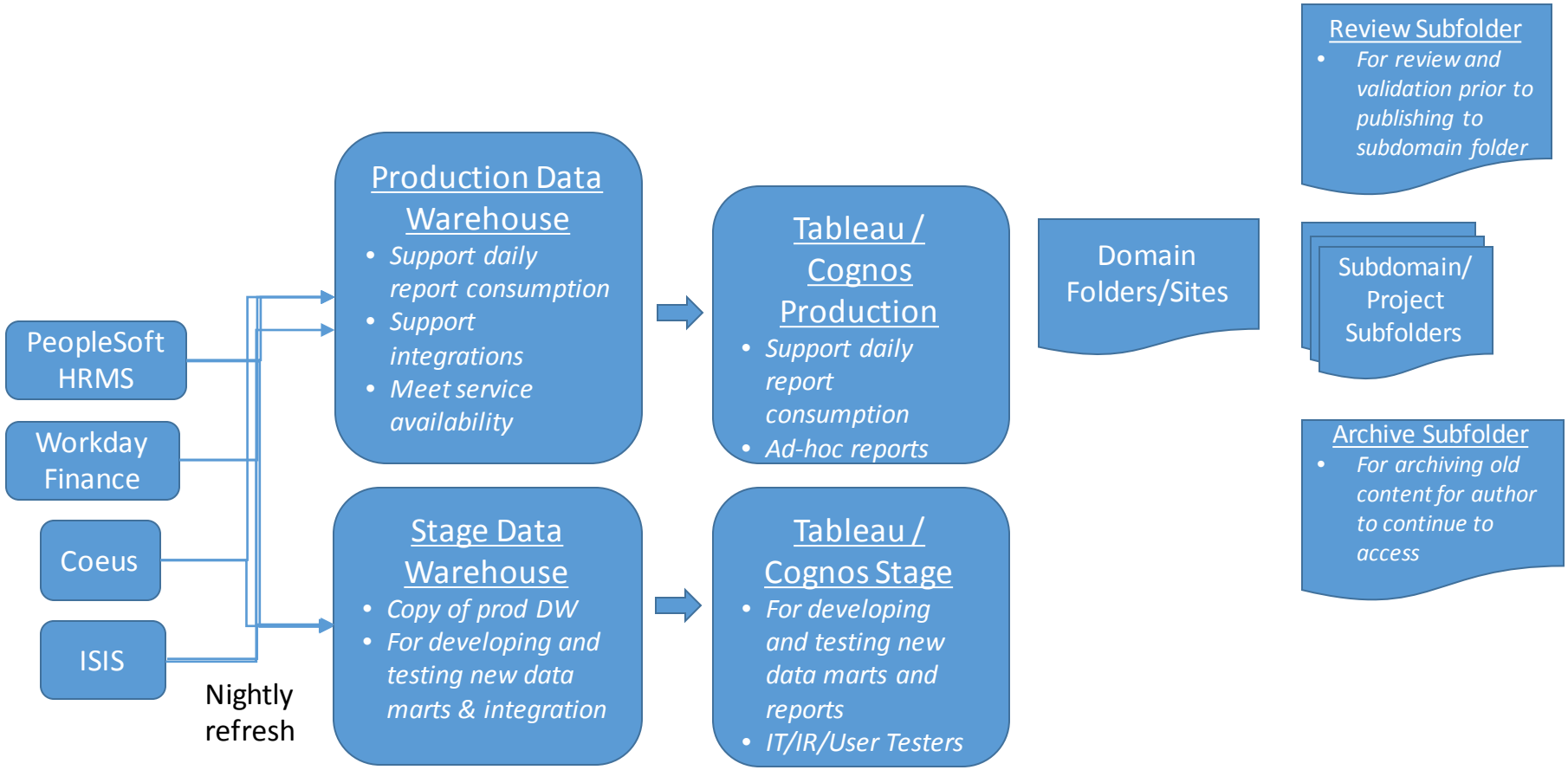
Key Dashboard and Report Content Publishing Requirements

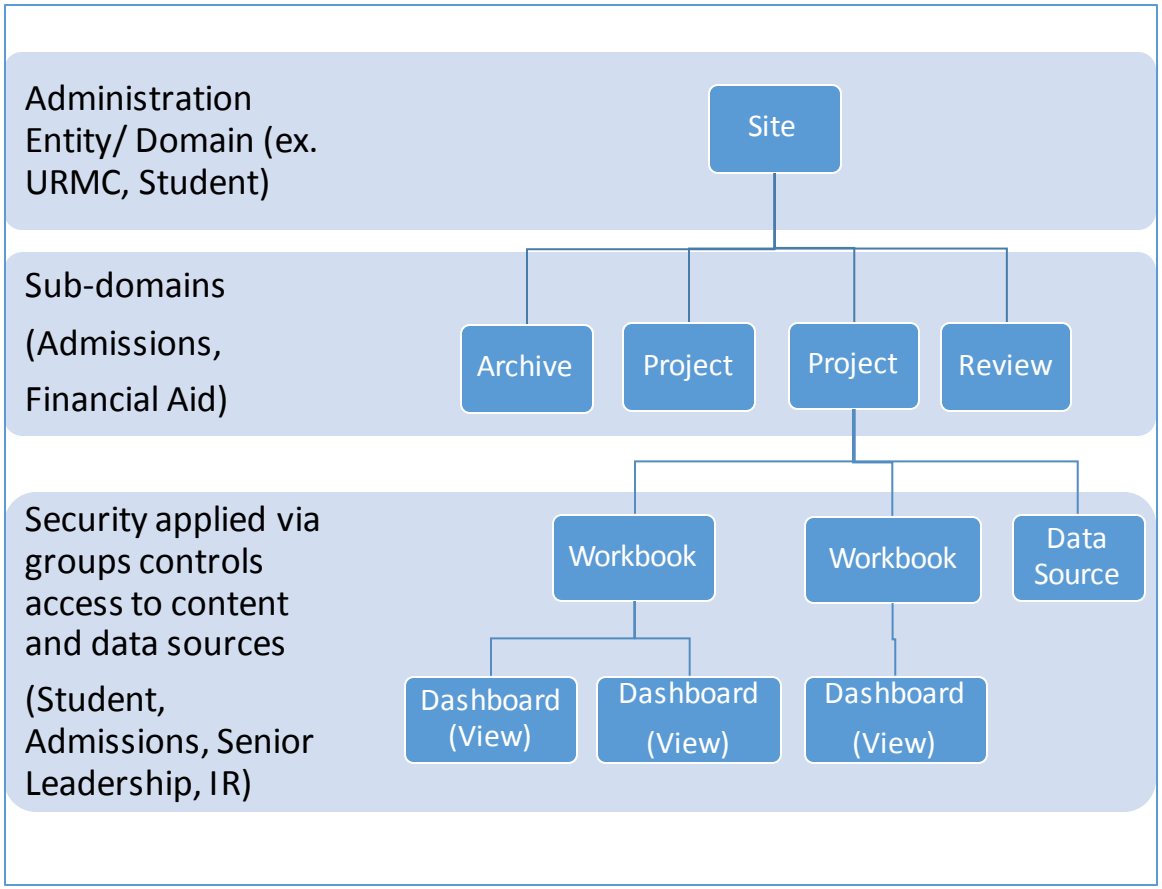
- I want senior leadership users to see specific dashboards and not a lot of extra report and dashboard 'clutter'
- I want to retire older versions of my dashboards and reports without deleting them completely
- I want to make changes to my dashboard or report using production data or add a new data source without worrying about "breaking" existing version
- I want to preview my dashboard or report with a specific user before making it generally available
- I want to easily publish my dashboard or report to the same audience as other dashboards that are already published
- I want to provide contextual help to my dashboard/report consumers as they view my content such as navigation instructions, key questions addressed, data sourcing and data latency
- I want to reference UR institutional data definitions for data being displayed on my dashboard/report

Report and Dashboard Content Environments



Simplifying the Tableau Security Groups

- Within a site, there will be a security group at the site level
- Sites will have projects that generally map to subdomains
- Security groups will be setup for projects where needed
- Specific security groups will be setup for the following groups:
  - Senior Leadership
  - Deans and their Designates
  - Department Admins and Department Chairs
  - Institutional Research
  - IT Administrators
- Senior Leadership and Deans will be granted access to specific Tableau workbooks rather than the entire site or project content
- User has Tableau site role which provides default permissions to view/create/edit/ administrator capabilities

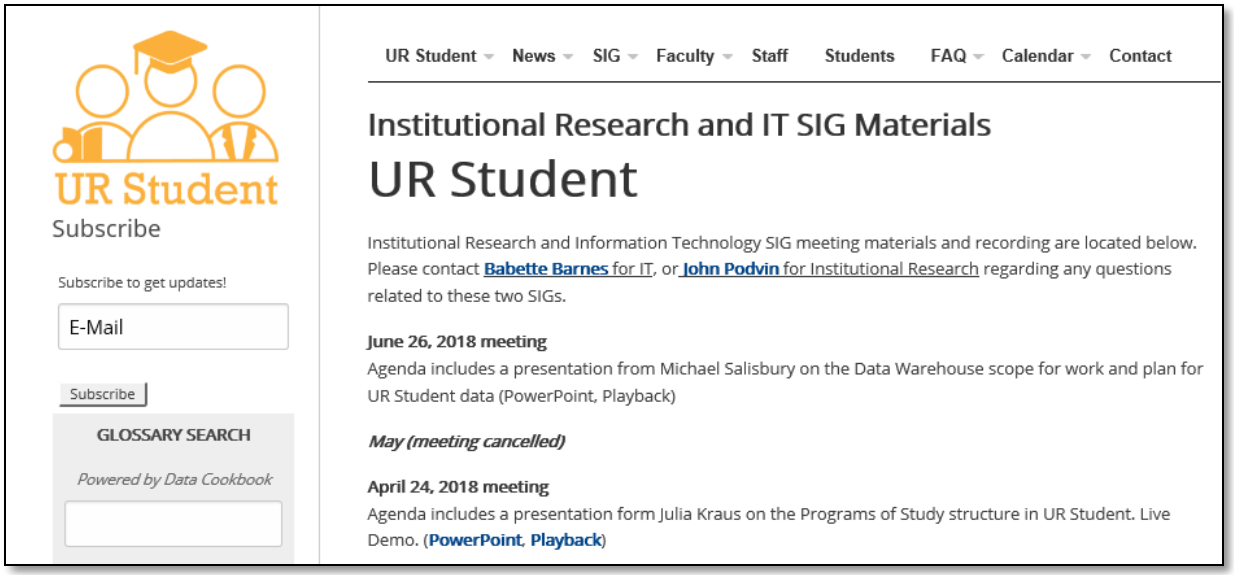


Homework

- Here's how you can help:
  - Provide feedback on current enrollment dashboards:
    - https://forms.gle/7f1TmiP8VaWYAMBAA
    - Looking for general feedback and ideas prior to starting design
    - What would you change? What's missing? What filters would be important?
    - Please be as specific as you can be.
  - Please take some time to review the example dashboards
    - dashboards.rochester.edu
    - UR Student Prototypes category
    - Will this collection of dashboards and reports meet your reporting needs?
    - If the answer is no or maybe, what's missing?

Next Steps

- Next IT/IR SIG meeting on May 8th, 2019
- 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

- Data Warehouse Analytics table
- Data Warehouse Dashboards and Reports links
- UR Student Terminology
- University Participation in UR Student
- UR Student Communications and website

Analytics available in UR Student DW

Subject Area	Description
Student Term Enrollment	Address questions around current, historical and census enrolled headcounts, as well as term to term retention and academic progress and outcomes.
Student Course Registration	Address questions around course taking behaviors and trends, course demand and , course drop/withdraw rates, performance metrics such as pass/failure rates, course GPA
Course Instructor	Intended to support faculty counts and instructor workload metrics. Will be combined with advising and faculty research and activity data within the data warehouse
Student Financial Transactions	Focus is on student financials transactions, charges, payments. Enable year-over-year trends and comparisons.
Advising	Intended to answer questions around advisor interactions with students and advising workload.
Student Degree Audit	Address questions around student degree completion and degree requirements needed.
Student Academic Outcomes	Address questions around cohort multi-year retention and graduation rates, time to degree

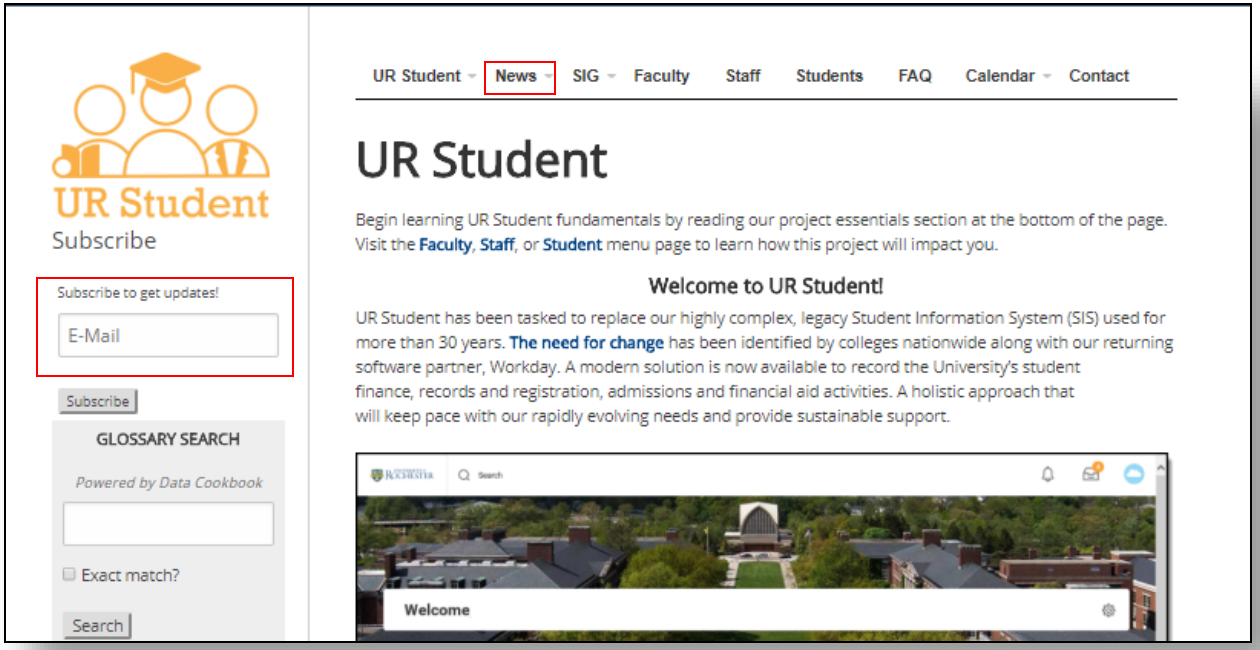
Examples of Dashboards and Reports

- Undergraduate Retention & Graduation Rates:
  - https://tableau.dw.its.rochester.edu/t/stu/views/RetentionandGraduationRates3_2_16A_0/Tables?iframeSizedToWindow=true&:embed=y&:showAppBanner=false&:display_count=no&:showVizHome=no
- Program of Study Flows (Sankey Diagram):
  - https://tableau.dw.its.rochester.edu/t/stu/views/Sankey8_3Ver2Depts_0/CohortDivisionFlows?iframeSizedToWindow=true&:embed=y&:showAppBanner=false&:display_count=no&:showVizHome=no
- Course Taking Behavior:
  - https://tableau.dw.its.rochester.edu/t/stu/views/CourseTaking/CourseTaking?iframeSizedToWindow=true&:embed=y&:showAppBanner=false&:display_count=no&:showVizHome=no

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



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

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UR Student