Data Governance Coordinating Committee
Meeting Notes

December 6, 2016

Present: Susannah Livingood, Carl Grant, Chris Kennedy, Terri Pinkston, Tim Marley,
                 Joey Albin
Absent: Dan Shuart, Erin Wolfe

1. Review of prior meeting notes

   Meeting notes were approved with two minor corrections.

2. DRRG item(s) needing evaluation

   Chris provided copies of DRRG Request #11, PeopleSoft Data to OUPRD PS Schema
   (attached). This request was formally written up in accordance with new documentation
   and validation procedures. It is submitted to DGCC as a notification item: users will be
   within the HR department only, and analyses to be conducted will be for internal use, not
   external or cross-departmental reporting.

3. DART Update

   David Wilkins provided a written summary of DART's activities to date, along with future
   plans (attached). Carl asked if the DGCC has any process to collect metrics; if so, they
   should be sharing them with DGCC. Susannah will pass this request along to DART for
   future action.

4. Data dictionary or business rules - focus for DGCC?

   Susannah shared some insights from a recent presentation, talking about the difference
   between metadata (typically for data tables) and business rules (more often
   enterprise-wide). She suggested DGCC should focus on business rules going forward.
   There was discussion about how that information would be gathered and validated, as
   well as where it would be stored. The group decided to give this as an action item to
   DART: have the appropriate working group research possible software solutions that
   might help facilitate the process and storage.

5. Metrics review

    Susannah looked back through the meeting notes and didn't find any definite plans for metrics; the last discussion took place before there was anything to collect metrics on. Carl suggested it was time for DGCC to look at this again, to put in place a plan for what we're going to collect data on as key performance indicators. Carl will draft something for discussion at a future meeting.

6. Other items

    No other items were discussed.

Executive Summary
Request 11 – People Soft Data to OUPRD PS Schema
Updated 10/26/2016

Under the direction of University leadership, HR is building the capacity to develop analytics for benefits, retirement, and employment data of the OU workforce using Tableau.

Request 11 will provide for delivery of the source HR PS tables directly to the OUPRD PS schema for the purpose of reporting and analytics via Tableau. Data access will only be granted to specific users who currently have access to these tables in PeopleSoft.

User Stories

- o As HR, we want to visualize turnover data, retirement eligibility, insurance participation, etc.
- o As University leadership, we'd like to develop the capacity to do analytics on benefits, retirement, and employment data using Tableau.

Sample Application

Workforce turnover data, retirement eligibility, and insurance participation will be consumed by the analytics tool Tableau for the development of visual analytics for department/user consumption and interaction:

1. Data Scientist will connect to OUPRD PS Schema via Tableau to develop analytics as requested.
2. Specific end users in HR and Leadership with approved access will view visuals as developed by the Data Scientist.

Delivery and Timeline

- o **Delivery Method:** Based on technical resource recommendations
- o **Timeline:** 11/30/2016**
- o **Project Execution:** Submit to PGB for resource allocation upon DGCC approval.
    - o **Project Acceptance:**

Data Validation Checklist

Request 11 – People Soft Data to OUPRD PS Schema

Updated 10/26/2016

Category 1: HR

- o Method: Meeting in person
- o Time stamp: 11/09/2016
- o Attendees/participants: JP Morgan, Terri Pinkston, Marcy Fleming, Glenn Hansen
- o Data Spec presented: v1.0
- o Session Notes: HR users with previously granted permissions would be accessing the data they already have access to using a different method/system. This does not grant non HR/HR Specified users access to these tables.
- o Validation Decision: Package was validated for use cases defined in exec summary
- o Data Classification: HR
- o Category Specific Items:
  - o Any requests to add Non HR tables to the PS Schema in OUPRD would require committee approval.
  - o Any request to grant Non HR/HR specified users access to these tables would require committee approval.

Process Notes
Request 11 – People Soft Data to OUPRD PS Schema
Updated 11/09/2016

Validation Planning

- o Consulted: Marcy Fleming, Glenn Hansen, Kevin Boydstun, Terri Pinkston

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Validation Notes
Attendees: JP Morgan, Terri Pinkston, Marcy Fleming, Glenn Hansen
Date: 11/09/2016

- o Caveats:
    - o Any requests to add Non HR tables to the PS Schema in OUPRD would require committee approval.
    - o Any request to grant Non HR/HR specified users access to these tables would require committee approval.

Data Specification

Request 11 - PeopleSoft Tables to PS Schema in OUPRD

v1.0 - Updated: 11/09/16

Category	Attribute Name	Source (SOR)	Schema	Location	Read/Write	Description	Notes	Validated By
HR	PS_HEALTH_DEPENDNT	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_DEPENDENT_BENEF	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_DEP_BENEF_IND	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PSXLATITEM	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_ADDRESSES	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_BENEF_PLAN_TBL	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_BEN_PROG_PARTIC	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_DEPT_TBL	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_DISABILITY_BEN	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_EMPLOYMENT	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_FSA_BENEFIT	PeopleSoft	PS	OUPRD PS Schema	Read			Marcy Fleming - Requestor; Kevin Boydstun - Technical Resource; Terri Pinkston - Data Owner
HR	PS_HEALTH_BENEFIT	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_JOB	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_JOBCODE_TBL	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_LEAVE_ACCRUAL	PeopleSoft	PS	OUPRD PS Schema	Read			_____
HR	PS_LEAVE_PLAN	PeopleSoft	PS	OUPRD PS Schema	Read			Approved: 11/09/2016
HR	PS_LIFE_ADD_BEN	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_NAMES	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_PERSON	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_PERS_DATA_EFFDT	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_PERS_NID	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_PER_ORG_ASGN	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_POSITION_DATA	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_RTRMNT_PLAN	PeopleSoft	PS	OUPRD PS Schema	Read			
HR	PS_SAVINGS_PLAN	PeopleSoft	PS	OUPRD PS Schema	Read			

DART Update to DGCC, December 6, 2016

DART—Main Group

The DART website is now active at www.ou.edu/dart.

I would like to begin working on process flows, to show how the DART subteams are engaged with other entities on campus, and how they interact among themselves on various projects. This would be to help identify that all processes and roles are covered. An example of how DART subteams might be engaged in a project, using a hypothetic project that adds new data to the reporting data architecture for end-user consumption:

Project Request & Review
- DRRG/DGCC=>Data Review Subteam

Project Execution
- Data Dictionary Subteam (Finalize data definitions, ensure addition to Data Dictionary web app)
- Data Quality & Training Subteam (Train end users/report-writers on new data available)
- Communications Subteam (Make reporting community aware of new data available)
- Community Support Subteam (Assist with user-group meetings, additional documentation/support activities)

The actual diagrams/flows would be of a different format, similar to what DGCC has reviewed in the past.

I intend to migrate from DART activities from my personal OneDrive to the new Sharepoint/Groups sometime this fall.

DART--Subteam Summaries
Communications Subteam: Polishing a communication matrix to ensure all reporting community communications needs are accounted for; have asked Michelle Boydstun and Shelly Rolland for input from the Peoplesoft side; will place on DART website for review by team.
Community Support Subteam: Reaching out to Cognos Licensees and Chairs/Directors to see if reporting needs are being met, and to let them know of data and reports that are available. College of Engineering is being used as a test group. A Cognos User Group meeting will be held in the spring to prepare users for Cognos 11. This group may propose development of additional on-line resources for the OU reporting community.
Data Dictionary Subteam: Completed a 39-slide ODS/Cognos data overview, for student data currently available in Cognos. A final version has been sent to the DART Data Quality and Training Subteam for final review. This document will be publicized to the reporting community and placed on Cognos Sharepoint. This group will take a more in-depth look at The Data Cookbook product in January.
Data Review Subteam: Working on proposal to DGCC to add an injection point for DART Data Review for new data requests from DRRG. The proposed injection point would be after submission to DGGC for review and prior to vote.
Data Quality & Training Subteam: Voted to rename itself to DART Data Quality and Training Subteam, to better reflect the mission and interest in data quality. The new name has been reflected in all DART links. A data quality survey has been developed and sent to Cognos authors. A remediation/response plan will be developed to address any issues that are identified.

Policy & Recommendations Subteam: Compiled a list of IT- and data-related committees/groups on campus and are reaching out to those groups to better understand which committees are, or have been, involved in recommending or approving policies on the Norman and Tulsa campuses. Responses have been received from most of these committees. One possible outcome of this project is development of a webpage to clarify policy-making bodies and policies. Policy overlaps and gaps may also be identified, which may lead to recommendations. This group has also discussed the possibility of having a role in reporting tool evaluation and purchase/renewal recommendations. One possible upcoming reporting tool project would be offering assistance in determining the appropriate number of Cognos licenses to renew during the upcoming renewal periods next May and June.

Reporting Tool Training Subteam: Planning for Cognos 11 upgrade. Cognos Query Studio is being phased out and will not be supported in Cognos 11. Documentation was provided to Cognos users for migrating Query Studio reports to Workspace Advanced reports. A workshop was offered on 11/29/16 to help with converting the reports. More Cognos 11-related activities will take place in spring, in preparation for Go Live next summer. Cognos Office Hours may also be used for some Cognos 11-related activities to ensure all users are comfortable with the new tool.