Data & Reporting Team (DART) Minutes, 04-26-18
Bizzell 339

OU Regents Data Governance Committee: Susannah Livingood, Associate Provost & Director, Institutional Research & Reporting. Susannah made a presentation (attached) on R-DGC and fielded questions. The Data Governance Coordinating Committee (DGCC) has been dissolved after its charter expired. The first meeting of the R-DGC is today, and the group is getting organized and one of its first tasks will be to define and formalize various roles within the university (i.e. Data Owners, Data Stewards, etc.).

Update on New Data Architecture for Reporting: Jeff Wall, Managing Director, Data Services and Business Intelligence, IT This presentation was postponed to a future DART meeting due to a last-minute conflict, and the data architecture slide is attached for reference.

DART Subteam Updates

- **Community Support** (David Wilkins). Pointers to Cognos support aids that were included on the Cognos 10.2.2 landing (sign-on) page are not possible on the Cognos Analytics landing page. To make those aids more visible within Cognos, these support aids have been added to the Cognos Folder Structure in the Reports—University of Oklahoma>Help and Support subfolders. A pointer to the Cognos SharePoint site may be able to be added to the Cognos Analytics landing page—IT is investigating that possibility. Recent enhancements have been made to Cognos SharePoint, and in almost all Cognos communications Cognos is now referred to as Cognos Analytics or simply Cognos instead of Cognos 11.

- **Data Dictionary** (David Wilkins) This subteam has created 158 column data dictionary entries for objects for which entries had been created, but new columns subsequently added which were lacking data definitions. Once those 158 new entries have been pushed to PROD, the Cognos Community will be e-mailed a summary of recent enhancements for column and table data dictionary entries. This subteam will likely create data dictionary entries for Admission Application next. This subteam also viewed an iData Data Cookbook webinar as possible replacement of metadata web app and to allow for cross-campus collaboration and workflow. Data Cookbook has been enhanced with data lineage and with source system descriptions (like Banner, PeopleSoft, etc.) to catalog which source systems have data defined to Data Cookbook in a data repository. Data Cookbook allows both business and technical definitions. At first look, Matt Wesley thought it may be good tool to house data definitions (business and technical) for the Data Mart. SAS, which we own, contains some similar capabilities, and this subteam will explore capabilities that exist in SAS.

- **Data Review** (Patti Otto) This team has been somewhat dormant due to delays in the Data Request Review Group (DRRG). DRRG Chair Aaron Biggs said the delays have been caused by uncertainty in governance for the past several months with the dissolving of the DGCC and the

pending creation of the R-DGC. Aaron said API requests for which a similar prior approved use case already exists are being processed without delay.

- **Data Quality & Training** (Brendan Klein) This subteam has added a new data quality issue to pursue: the updating of Manager ID in PeopleSoft so that departmental hierarchies can be established and reported and other analysis can be performed. This group also received an update from SPCC and IT on the progress of the Preferred Name project, which is an item of interest to this subteam.

- **Policy & Recommendations** (David Wilkins) This group has been in somewhat of a holding pattern with the transition from DGCC to R-DGC and is currently uncertain of future activities pending direction of R-DGC. Three items created by this subteam have been given to the R-DGC to aid that new body in its work. They are: 1) [Standing IT- and Data-Related Committees OU Norman Campus](), 2) Existing IT- and Data-Related Policy Matrix Draft, and 3) Existing IT- and Data-Related Policy Summaries Draft.

- **Reporting Tool Training** (Susie Irwin) There have been two recent Cognos Office Hours sessions, with another scheduled for May 3. Susie conducted a Cognos Report Writing training on 4/25. Susie has offered personal assistance to others. Susie will also be conducting a Cognos author training for Financial Aid, per request of Kathi Robinett.

Other Issues? None mentioned

Next meeting: June 28, 2018

OU Regents
Data Governance Committee

Update for DART
4/26/18 Meeting

Data Governance Efforts to Date

- Three executive sponsors (Early, Harper, Hathaway) authorized a pilot project to assess data governance at OU

- Data Governance Coordinating Committee
  - established in August 2015 for a two year period

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DGCC Functions

- DGCC <u>did</u>:
  - Assess the data governance landscape, identify challenges and opportunities

- DGCC <u>did not</u>:
  - Establish data governance ***policies***, such as appropriate use

Coordinating Efforts

- Formalizing governance structures

$$ODS \quad \rightarrow \quad DART$$

$$OCRC \quad \rightarrow \quad SSPC$$

$$DRRG$$

Examples of Current Governance Concerns

- US Department of Education finding on OU Daily/SharePoint "data breach"

- More stringent restrictions on financial aid data access

- Proliferation of integration requests
  - Where will data reside (cloud)?
  - What assurances of security, access restrictions, safeguards against inappropriate use <u>after</u> integration?

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DGCC Findings

- Confusion about roles and responsibilities
- Lack of resources dedicated to governance
- Incomplete representation
- Recommendation:

    OU Regents should assign official responsibility for data governance and data management to a group empowered to make enforceable policy

OU Regents Agenda Item

- Drafted by:
  - Legal Counsel
  - Chair of DGCC
  - Chief Information Officer
- Approved at the December 12, 2017 OU Regents meeting

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R-DGC Membership

- Five voting members, appointed by VPs as specified in the agenda item

- Additional members determined by data areas named in the agenda item; non-voting (unless also a VP representative, indicated in *italics*)

R-DGC Voting Members

- Administration & Finance: Terri Pinkston
- ESFS: Chris Kennedy
- IT: Eddie Huebsch
- Legal Counsel: Heather Hendricks
- Provost: Susannah Livingood

- Business/Financial: Julie Jungman

- Clinical Operations: Will Wayne

- Compliance: Sandra Nettleton

- Human Resources: Marcy Fleming (HR) and Michelle Boydstun (Payroll)

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- Institutional Research & Reporting: *Susannah Livingood*

- Legal Counsel: *Heather Hendricks*

- Student: *Chris Kennedy*

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R-DGC Next Steps

- First meeting is April 26, 2018

- To be determined:
  - Leadership/charter
  - Meeting frequency

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Keeping Campus Informed

- R-DGC will revise and maintain the current website:

  www.ou.edu/datagovernance

- Once the group has established a plan of action, we'll come back to this (and other groups) with updates

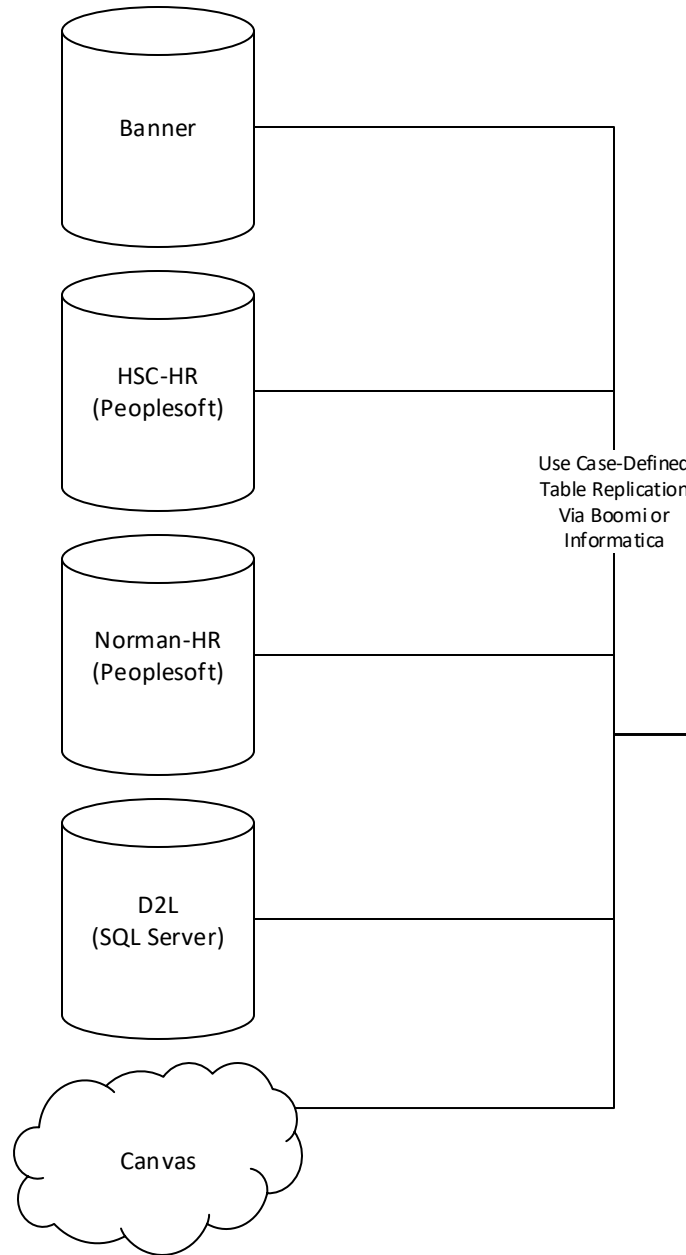The University of Oklahoma

Data Services: From Source to Report

Source Systems
(On Prem and Cloud)

Current list of Approved Sources (adding more over time)

Sources:
- Banner
- HSC-HR (Peoplesoft)
- Norman-HR (Peoplesoft)
- D2L (SQL Server)
- Canvas

Use Case-Defined Table Replication Via Boomi or Informatica

Data Repository

Replicated source tables, no translation or massaging. Does include loading metadata to streamline Mart creation

DATA REPOSITORY

Informatica ETLs
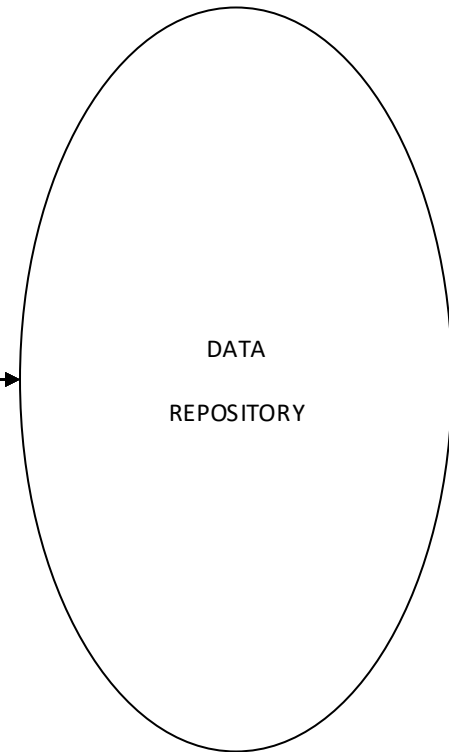
Data Marts
(Report Information)

Custom-built information hubs. Data can be translated, truncated, joined, aggregated, and calculated, then placed in an area where approved users have access. More or less robust versions of the same data might appear in other marts.

Data Services Data Mart
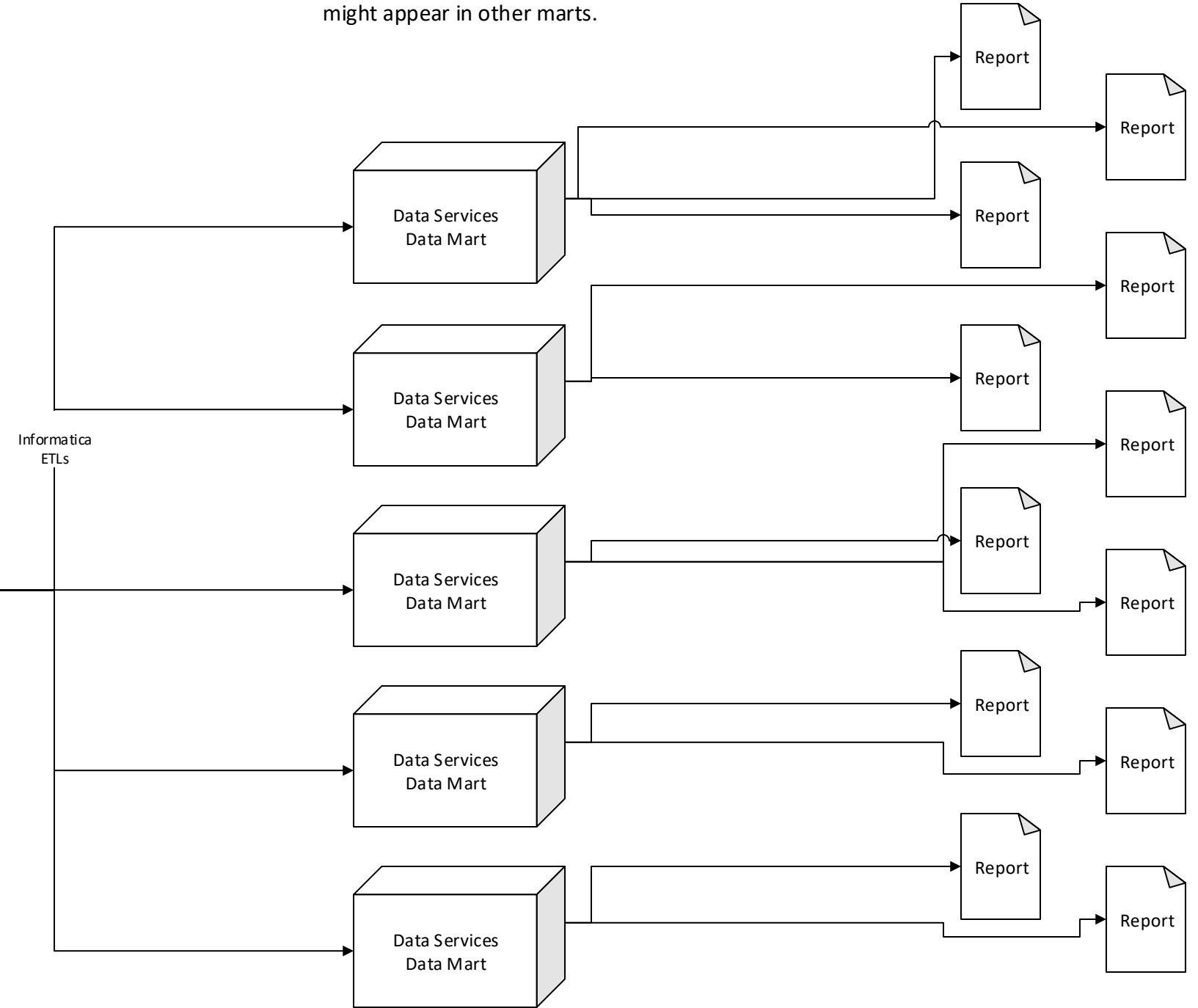
Reports/Dashboards

Marts are built to provide information in a tool-agnostic way. The same mart might be used for reports in Cognos, PowerBI, SAS, Tableau, AWS QuickSight. The user and reporting tool do need access to the mart.

Report