Data & Reporting Team (DART) Minutes, 12-13-18

Minutes from last meeting: Previously approved via OneDrive

Data Governance: Interim Data Governance Policy: Susannah Livingood, Chair—Norman Campus Data Governance Committee (N-DGC), and Associate Provost & Director, Institutional Research & Reporting

Susannah had previously shared the draft policy with ITC, and it had been circulated via e-mail previously to DART. Based on immediate feedback, Susannah said the draft document will undergo three changes to:

1. Remove harsh language regarding consequences for policy violation. The policy is not intended to be a 'gotcha' but rather a framework for governance.
2. Improve and define the definition of 'Shadow System.' There have been many questions about what constitutes a Shadow System, and how departments would have difficulty functioning without them given that current data structures make Shadow System use more necessary. Susannah said that the N-DGC is interested in those systems which duplicate function, process, or software compared to the functionality offered by the source system for any data in question.
3. Make clear that current business practices will continue but will be documented and reviewed. The final policy will be enforced going forward after the approval process is complete.

There were questions about the sample data access request form at end of the interim policy. Susannah mentioned that it was just a sample and will undergo revision. Jeff Wall said IT wanted to be in lockstep with the policy.

Shelly Rolland asked what if a system had functionality but it was not used and that functionality was done outside of that source system instead. For instance, auxiliary and service units have their own systems for financials. There were also questions about using data granted under a previous data request for new purposes—would that require a new data access request? Susannah a new request may be required, but she can't answer definitely until implementation guidelines have been set. She acknowledged that was a potential pain point and said any implementation would need to be mindful of balancing governance concerns with business needs.

Susannah said that if data is being kept within that same Data Owner area (i.e. Admissions, HR) no access form is needed. But if data is being sent outside of that area, whether to a third party or another office or department, some kind of documentation would be necessary.

The Purchasing/RFP processes should operate within the governance framework, especially for hardware/software.

There was also a discussion of the four roles defined by the N-DGC: Data Owners (ERP-level), Data Stewards (can take some actions on behalf of Data Owner), Data Managers (project level), and Data Users.

Susannah mentioned that General Data Protection Regulation (GDPR) is influencing the governance discussion and policy at OU.

Susannah said implementation of the policy will require people, and that should not be a side part of a job, but FTEs should be allocated.

It's possible that DART may be dissolved and reintegrated into the new governance structure.

Jeff mentioned that policy education will be crucial.

Academic Technology Expo, 2019, January 10 & 11, 2019

- David Wilkins presented a slide show (attached) for the ten Administrative Staff tracks offered at ATE 2019 (up from five last year). There are seven fifty-minute presentations and two twenty-minute presentations. David mentioned that a poll will be taken after the Power BI presentation by Lindsey Johnston to gauge interest in a PowerBI user group. Jeff mentioned including HSC and will give David an HSC contact.
- David encouraged DART members to register for ATE and said the scheduling app will be released soon so that attendees can schedule sessions.
- Watch e-mail for latest updates

DART Subteam Updates

- **Community Support** (David Wilkins) Added a Policy page to the DART website. Made enhancements to Cognos SharePoint and Cognos Resources & Support document to add pointers to IT/Data policies. Also added pointers inside the Cognos Help folder. E-mailed a notice of these enhancements to DART members and Cognos licensees. Discussed possible communications channel for ESFS/SPCC decisions that may affect hardcoding in Academic General Reports. Sent that thought on to Chris Kennedy. Have not heard back.
- **Data Dictionary** (David Wilkins) This subteam has been defining columns in Admissions tables and will be sending those and Financial Aid metadata to IT soon to push into the Oracle web app soon. There appears to be a SPCC/IT backlog as two prior requests to push updated Metadata to the Oracle tables (so consumers can review them via the website) have not been completed. David will contact Kevin Boydstun to ensure these requests are entered into an upcoming IT sprint.
- **Data Review** (Patti Otto) This group has been dormant due to changes in governance structure.
- **Data Quality & Training** (David Wilkins) This group on hold due to governance changes. If resurrected, new leadership will be sought. Some issues being dealt with in the HR Data Group (military status, Reports to ID, Citizenship, obsolete staff ranks, etc.) With governance in flux at the moment, this group is continuing to add data quality issues/concerns to a master list. Once governance is working more smoothly, it's hoped some of those can be addressed.
- **Policy & Recommendations** (David Wilkins) This group has been in a holding pattern with the advent of the N-DGC and is currently uncertain of future activities pending direction of N-DGC.
- **Reporting Tool Training** (Susie Irwin) Susie has conducted Cognos author and consumer trainings, conducted departmental trainings, and held Cognos Office Hours. She will offer a New Cognos Author training in January, 2019.

Other issues/upcoming activities

Next meeting: February 28th, 2019, 8:30-10:00, BL 339

<u>Special Guest: Ron Fellhauer, Executive Director, Security & Risk Management / CISO</u>. Ron will talk about the wild world of data and security policies, current OU IT/Data and security policies, and those that are in the pipeline.

AcademicTech.ou.edu—10 Admin Staff Presentations

Academic Technology Expo

JOIN US FOR THE 2019 ACADEMIC TECH EXPO

You are invited to the 8th Annual Academic Tech Expo, a free two-day conference open to all University faculty, staff, and instructors. This conference promotes inter-disciplinary collaboration as a means of increasing faculty impact and offers four tracks–Teaching, Innovation, Research, and Administrative Staff–that enable attendees to customize their experience.

CONFERENCE OVERVIEW

The Academic Technology Expo is one of our most popular events of the year–you won't want to miss it!

REGISTER FOR OU'S 8TH ANNUAL ATE

We'd love for you to join us on January 10th and 11th 2019 for the 8th Annual Academic Technology Expo at the University of Oklahoma. Best of all, it's a FREE event for all OU faculty, staff, and instructors!

REGISTER HERE

ATE IS NOW DIGITAL!

Click here to access the mobile app and to view the 2019 schedule.

FACULTY TECH GUIDES

- Faculty Toolkit
- IT Services
- Research IT

CONNECT WITH US

Thursday, January 10, 2019

- **Event: iHub for Staff**
- **Location: OU Innovation Hub (South Campus)**
- **Time: 10:30-11:30**
- **Topic: Power BI—Lessons Learned & Q&A**
- *Lunch following*
- *Remember to register [here](.).*

Administrative Staff Tracks, ATE 2019 (@ OMU)

		FRIDAY, JANUARY 11, 2019	
ROOM:	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM	Data Governance on the Norman Campus: an Evolving Conversation--*Susannah Livingood*		
10:00 AM	Transparency in Graduate Data Using Power BI--*Lindsey Johnston*		
11:00 AM	Home in Time for Dinner: How to be More Efficient with Tools We Already Have--*Justin S Wollenberg*		
NOON	*LUNCH* Maggie	*LUNCH* Maggie	*LUNCH* Maggie
1:30 PM	An E-Learning Tool with Accessibility in Mind--*Jessica Anderson*		Communicating with International students in Higher Education--*Heather Arnett*
2:30 PM	How To Use Asset Panda for Asset Tracking and Continuity Planning--*Derek Mehl*	Sorting Scholarship Applications Using Technique for Order of Preference by Similarity to Ideal Solution (TOPSIS)--*Matthew Grover*	Data Governance. Meet Data Security.--*Sharon Nichols*
3:00 PM		An Analysis on Investing in the Complete Withdrawal Process--*Justin S Wollenberg*	

Administrative Staff Tracks, ATE 2019 (@ OMU)

ROOM:	3rd Fl--Associates Room	FRIDAY, JANUARY 11, 2019	2nd Fl--Heritage Room
		3rd Fl--Regents Room	
9:00 AM	Data Governance on the Norman Campus: an Evolving Conversation-- *Susannah Livingood*		
10:00 AM			
11:00 AM			
NOON	**This presentation will review what's being done to establish a robust data governance structure at OU-Norman Campus. This will include a summary of what has been accomplished over the past three years, current activities, and future plans. Due to the in-progress nature of the data governance discussion, this is an opportunity both to find out what's currently being discussed but also to provide input into the process.**		
1:30 PM			
2:30 PM			
3:00 PM			

Administrative Staff Tracks, ATE 2019 (@ OMU)

		FRIDAY, JANUARY 11, 2019	
ROOM:	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM			
10:00 AM	Transparency in Graduate Data Using Power BI--*Lindsey Johnston*		
11:00 AM	In order to provide prospective and current students with easily accessible data including admission yield, demographics, and time to degree, the Graduate College at OU created a public-facing dashboard using Power BI. This presentation will demo the dashboard and discuss how it was created using Power BI, a resource available to faculty and staff through Office 365. We will also discuss and demonstrate how to create quality static data visualizations for PDFs and PowerPoint using this tool.		
NOON			
1:30 PM			
2:30 PM			
3:00 PM			

Administrative Staff Tracks, ATE 2019 (@ OMU)

FRIDAY, JANUARY 11, 2019

ROOM:	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM			
10:00 AM			
11:00 AM	Home in Time for Dinner: How to be More Efficient with Tools We Already Have--*Justin S Wollenberg*		
NOON			
1:30 PM			
2:30 PM			
3:00 PM			

Many campus staff, especially in student services, use some combination of Excel, Cognos, and Laserfiche. How can we leverage these tools to be more efficient in our work? Come see how time consuming tasks formerly done by hand are now done at scale in Arts & Sciences. Customized data items in Cognos reports allocate student information to the respective advisers and departments. Excel macros format and parse data, and a Laserfiche query easily identifies records for batches of students.

Administrative Staff Tracks, ATE 2019 (@ OMU)

ROOM:	3rd Fl--Associates Room	FRIDAY, JANUARY 11, 2019	
		3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM			
10:00 AM			
11:00 AM			
NOON		After working to create over twenty learning interaction components and customized themes, CPM successfully enhanced and implemented the Adapt authoring tool. Recently, usage expanded beyond CPM to OU-HR. Both departments found greater efficiencies creating and revising SCORM objects utilizing an authoring tool that inherently produces 508 compliant content. The presentation will be a brief discussion of the issues HR and CPM were experiencing, improvements to workflow, and demo of the tool.	
1:30 PM	An E-Learning Tool with Accessibility in Mind--*Jessica Anderson*		
2:30 PM			
3:00 PM			

Administrative Staff Tracks, ATE 2019 (@ OMU)

FRIDAY, JANUARY 11, 2019

ROOM:	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM			
10:00 AM			
11:00 AM			
NOON		This session will show you how the Gallogly College of Engineering team built and implemented Asset Panda reports to track both equipment (computers, cell phones, printers, etc.)and human (office location, pictures, emergency contact information, etc.) assets. You will learn how to build reports to be utilized in your emergency contingency planning as well as reports to track your equipment assets.	
1:30 PM			
2:30 PM	How To Use Asset Panda for Asset Tracking and Continuity Planning--*Derek Mehl*		
3:00 PM			

Administrative Staff Tracks, ATE 2019 (@ OMU)

	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
		FRIDAY, JANUARY 11, 2019	
ROOM:	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM			
10:00 AM		With the rising costs of higher education and the increase in scholarship applications, an efficient and fair method for ranking students must be investigated. The technique for order preference to ideal solution (TOPSIS) was investigated for two scholarships in the Gallogly College of Engineering at the University of Oklahoma. The results were forwarded to decision makers and investigated. TOPSIS was found to be an effective means for ranking students based on multiple criteria.	
11:00 AM			
NOON			
1:30 PM			
2:30 PM		Sorting Scholarship Applications Using Technique for Order of Preference by Similarity to Ideal Solution (TOPSIS)--*Matthew Grover*	
3:00 PM			

Administrative Staff Tracks, ATE 2019 (@ OMU)

FRIDAY, JANUARY 11, 2019

ROOM:	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM			
10:00 AM			
11:00 AM		**Is a rigorous complete withdrawal process an effective method for helping students graduate? This presentation reviews the correlation between complete withdrawals and graduation certifications. Additionally, alternative points of intervention in students' academic careers are analyzed that may have a greater impact on graduation.**	
NOON			
1:30 PM			
2:30 PM			
3:00 PM		An Analysis on Investing in the Complete Withdrawal Process--Justin S Wollenberg	

Administrative Staff Tracks, ATE 2019 (@ OMU)

		FRIDAY, JANUARY 11, 2019	
ROOM:	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM			
10:00 AM			
11:00 AM	With the internationalization that has occurred across campuses nationwide, staff and faculty are expected to interact with students from a broad array of cultural backgrounds. By learning basic skills of intercultural communication and key resources for the integration of useful technology, staff and faculty can be better equipped to be successful on campus when interacting with culturally diverse groups. This presentation will attempt to cover aspects of technology integration and intercultural communication to aid in fostering positive experiences with international students in the classroom and for staff working in support services.		
NOON			*LUNCH* Maggie
1:30 PM			Communicating with International students in Higher Education--*Heather Arnett*
2:30 PM			
3:00 PM			

Administrative Staff Tracks, ATE 2019 (@ OMU)

FRIDAY, JANUARY 11, 2019

ROOM:	3rd Fl--Associates Room	3rd Fl--Regents Room	2nd Fl--Heritage Room
9:00 AM			
10:00 AM			
11:00 AM	**With institutions collecting an ever-increasing volume of data, the risk of a data breach or falling foul of a regulator is also increasing. Data security, privacy and protection is fast becoming a "must have" requirement within many institutions. Institutions are starting to realize there are potentially great synergies in having a much closer understanding of their data from both a governance and security viewpoint. We'll take a look at the latest IT policies being drafted and approved at OU.**		
NOON			*LUNCH* Maggie
1:30 PM			
2:30 PM			Data Governance. Meet Data Security.--*Sharon Nichols*
3:00 PM			