



# Agenda

- Introductions - Andrea Pluckebaum
- Hot Seat Survey Results - Andrea Pluckebaum
- Data Governance/Cookbook Update - Sarah Bauer
- Strategic Priority Restructuring - Aaron Walz
- SAP Transformation - Aaron Walz
- Cognos Phase 2 Update - Kelsie Newberry
- Questions

# Hot Seat Survey Results (12/12/17)

- Q1 - Perceptions - How do you view the differences between Data Governance and Business Intelligence?
- Q2 - Data Governance Scope - What do you think the scope of Data Governance is?
- Q3 - Reporting Issues - What is the most challenging data reporting issue for your area? (HR, FI, Student, EAM, Other?) (Not Cognos 11 related!) - Feel free to submit more than one response.
- Q4 - Data Quality Issues - What do you think is the most challenging data quality issue (HR, FI, Student, EAM, Other?) - Feel free to submit more than one response.
- Q5 - Priority - Based on your responses to the data reporting challenge and/or data quality questions, what do you see as the priority? What should we work on first? Please submit two; one for the data reporting question, one for the data quality question.

# Perceptions

## How do you view the differences between **Data Governance** and **Business Intelligence**? (5 Comments with the most votes)

- Data Governance is about metadata, data quality, standard definitions, etc. Business Intelligence is the processes and tools for getting information into the hands of decision makers and staff.
- Business Intelligence is a set of tools while Data Governance are a set of standards.
- Governance is the integrity of the data itself. BI is making the data available for reporting in a usable format.
- Data Governance is about the master data, data quality, and the way we use our data. Business intelligence is about the structure and tools in which we access the data
- Bi is about the tools and infrastructure system. DG should be focused on use of data which involves proper use, interpretation, documentation and quality.

# Data Governance Scope

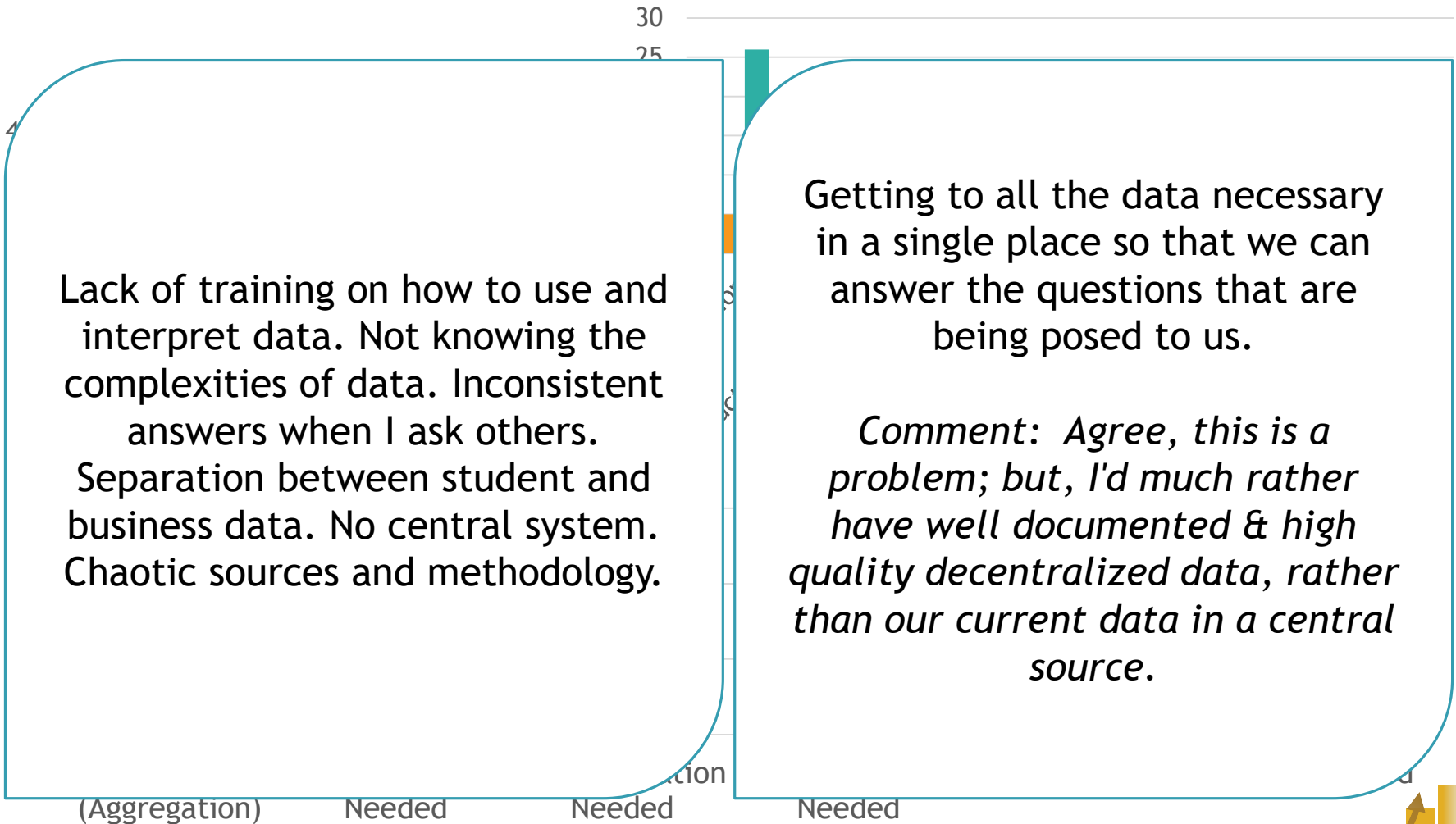
## What do you think the scope of Data Governance is? (5 Comments with the most votes)

- Data definitions, metadata, data quality, standards for data usage, etc. Data access is also often included, but that may not be part of what this program at Purdue.
  - Comment: Who holds folks accountable for correct/appropriate use, access, security, etc? How?
- availability, usability, integrity and security.
- Access, use, guidelines, ownership, definitions, integrity.
- Ensure that any broadly accessible reporting or analysis adheres to consistent standards set by data owners across campus
- data definitions should include notes about where field can be validated

# Reporting Issues

**What is the most challenging data reporting issue for your area?  
(HR, FI, Student, EAM, Other?)**

■ Comments Submitted ■ Votes

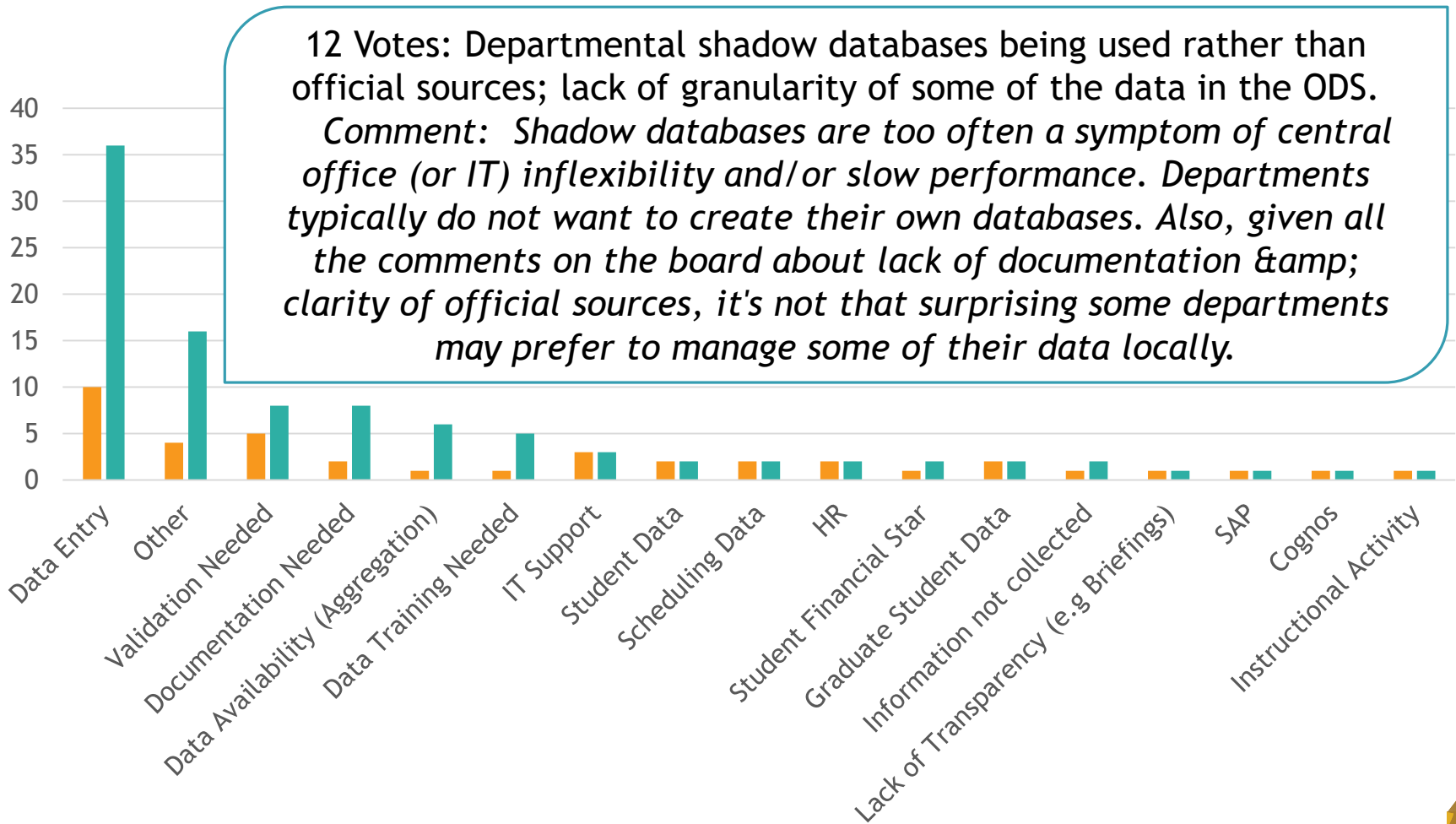


Getting to all the data necessary in a single place so that we can answer the questions that are being posed to us.

*Comment: Agree, this is a problem; but, I'd much rather have well documented & high quality decentralized data, rather than our current data in a central source.*

# Data Quality Issues

**What do you think is the most challenging data quality issue (HR, FI, Student, EAM, Other?) - Feel free to submit more than one response.**

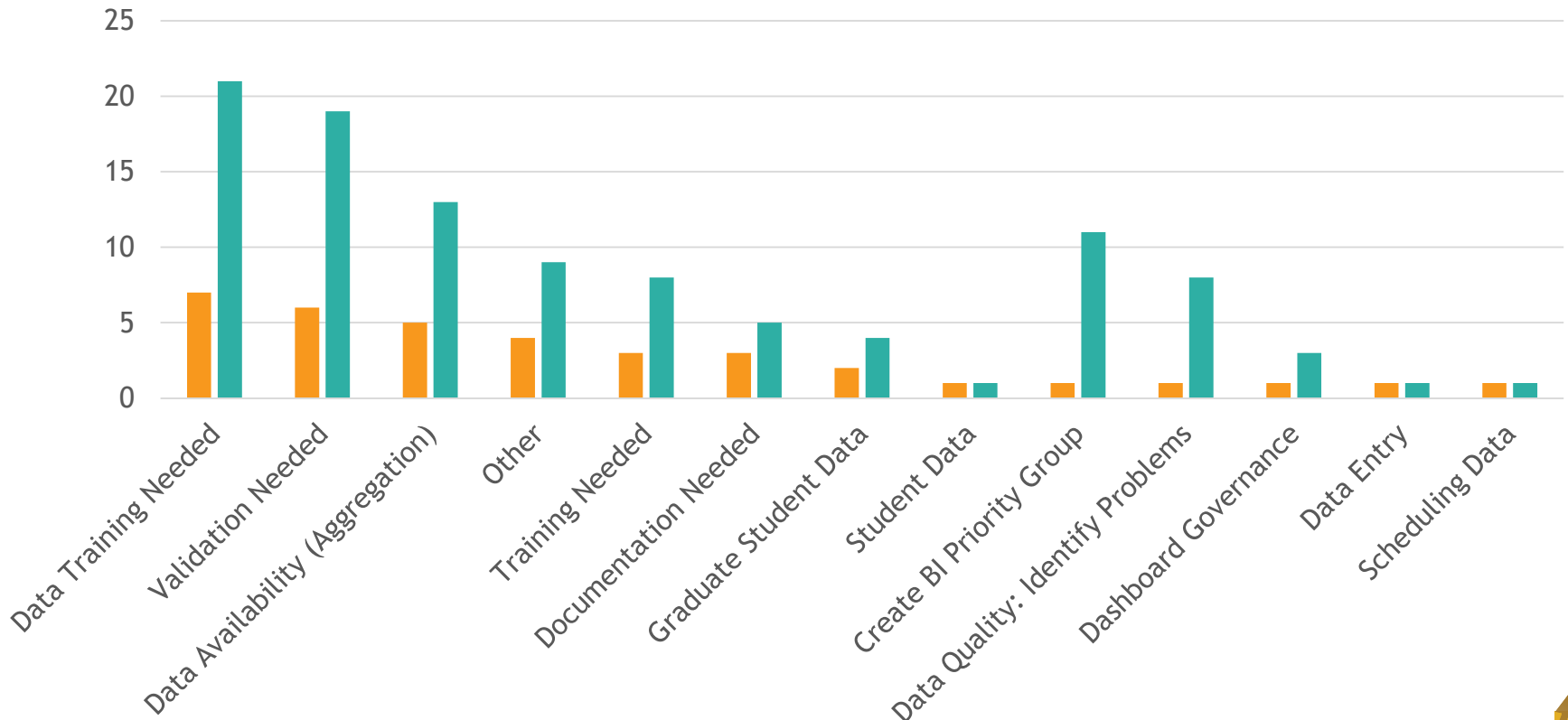


# Priority

**Based on your responses to the data reporting challenge and/or data quality questions, what do you see as the priority? What should we work on first?** Please submit two; one for the data reporting question, one for the data quality question.

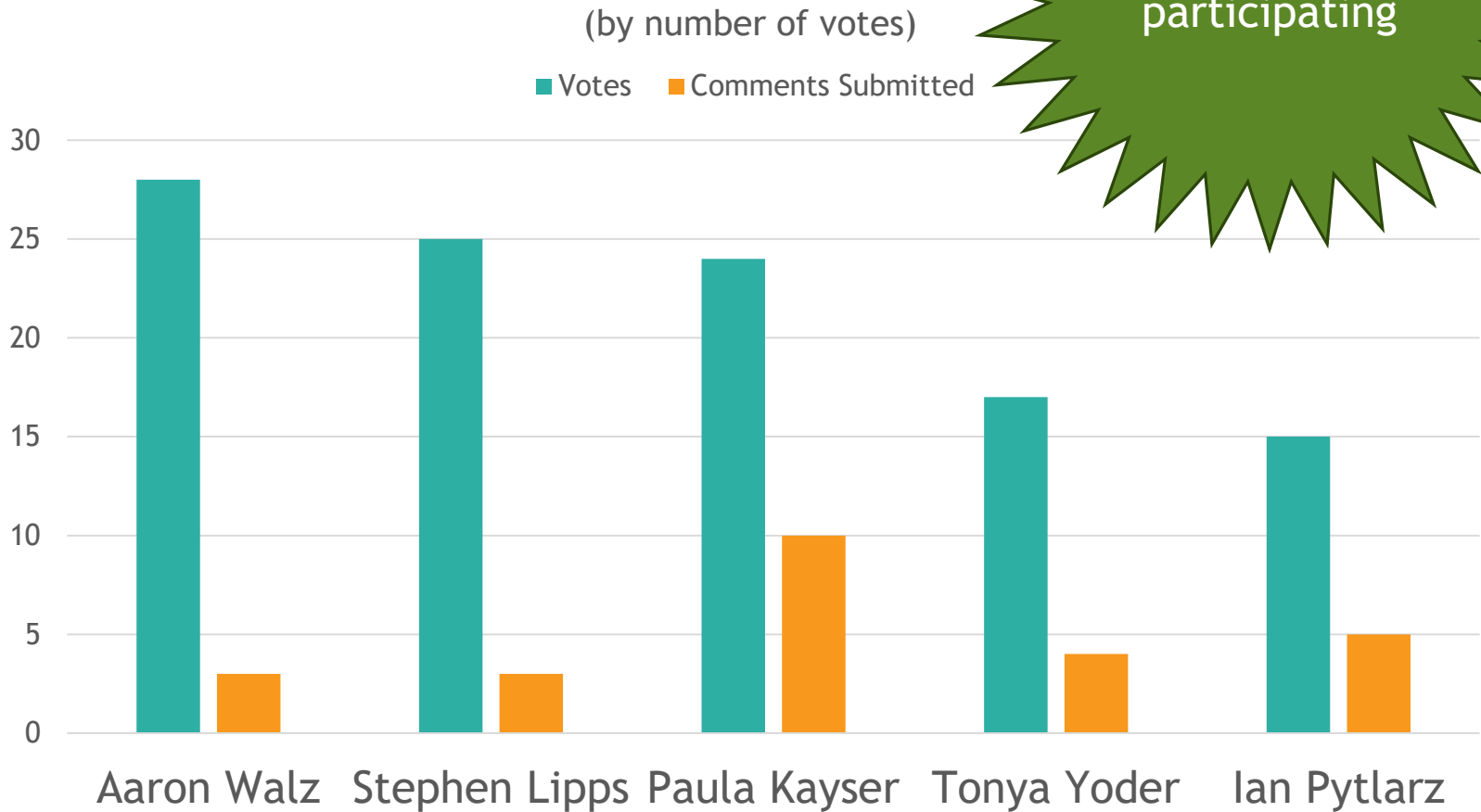
Q5

Comments Submitted Votes





# Top 5 Participants



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# Data Governance Update

Office of Institutional Research, Assessment & Effectiveness

BI- Advisory Committee

March 2018



# Data Governance

- Data an institutional asset
- Quality data for decision-making
- Clear definitions, documentation of reporting business logic (move away from tribal knowledge)
- Effective use of this university asset

<http://www.purdue.edu/oirae/DataGovernance.html>



# DATA GOVERNANCE



## Academic Testimonial



**Kendal Kosta-Mikel**

Strategic Data Manager, College of Science

"Being a part of the implementation team for Data Cookbook has allowed me to share views from the academic college perspective. The Purdue Data Cookbook will be a great orientation resource and a benefit to faculty and staff who are interested in learning more about institutional data."

## Data Governance

Data are an institutional asset. Quality data along with standard, consistent data definitions, business logic and reporting practices allow for efficient operations as well as strategic decision-making. Data governance allows for the most effective use of this valuable, growing asset. It builds relationships among stakeholders by creating a focus across subject areas that allows for new perspective and vision. Strategic decision-making based upon a common understanding of University data is vital for successful institutional initiatives.

### Data Governance at Work

- **Data Cookbook is now available**
  - Use your Purdue career account to create an account
  - <https://purdue.datacookbook.com>
- Launch of Graduate School improved data reporting project - November
- Official seal for certified Purdue data - more details in November
- STEM and ICE indicator fields added to Cognos student data - Spring 2018

# Data Governance Projects

- Official Seal Task Force
- Graduate Student Reporting
- STEM / ICE
- Data Cookbook - Phase 2



# Data Cookbook - Background

- Data Cookbook software
  - Part of the bigger Data Governance effort
  - Enterprise source of data definitions, standard reports and dashboards
  - Software developed for higher education
  - Cloud-based, accessible via Purdue Career Account
  - Purchased December 2016
- Phase 1 successful completion - October 2017
  - Created functional areas, definition standards and workflow
  - Training materials
  - Converted the OIRAE Data Dictionary - 270+ definitions

## Functional Data Owners

- Admissions - Steve Lipps
- Alumni/UDO - Greg Kapp
- Finance - Transformation
- Financial Aid - Joel Wenger
- Human Resources - Transformation
- Instructional Activity - Monal Patel
- Physical Facilities - Transformation
- Research - Stephanie Willis
- Space - Kim Rechkemmer
- Student - Kylie Edmond
- Student Life - Kevin Maurer



The value of Data Cookbook - as an enterprise repository of institutional knowledge. And a great resource for new and current staff.



## Phase 2 in progress Now - July

- Enterprise upgrade
  - Spec functionality
  - Evaluate other new functionality for future phases
- Portal pop-out functionality – Cognos/Data Cookbook
- Creation of standards for creating a Spec
- Documentation and training for those creating specs
- EAM functional definitions to support one approved EAM report specification
- Additional functional definitions to support one approved Student report spec
- Infrastructure in place to support the use of an “official seal”
- Communication, education
- Ongoing support model by OIRAE for Data Cookbook

## Project Team - Phase 2

Functional Lead - Sarah Bauer

Project Manager - Rhonda Abbott

- OIRAE - Otlie Web
- **Academic Reps**
  - Kendal Kosta-Mikel, College of Science
  - Abby Snodgrass, College of Agriculture
- Registrar - Kylie Edmond
- Enrollment Management Analysis & Reporting - Steve Lipps
- Enterprise Asset Management (EAM) - Michelle Kidd
- BICC - Kevin Gillenwater, Richard Lucas, Zach Yater, Ryan Bousman
- Transformation team - Tonya Yoder (Susie Geswein, Annalisa Corell)

Sponsors

- Diane Beaudoin- chief data officer
- Rita Clifford - director, IT Enterprise Relationship Management
- Paula Kayser - interim director, BICC

# Data Governance / Data Cookbook



Introductions – Andrea Pluckebaum <https://www.purdue.edu/oirae/DataGovernance.html>  
Hot Seat Survey Results – Andrea Pluckebaum

**data**cookbook

Create a Data Cookbook account:

<https://purdue.datacookbook.com>

Also available under OneCampus

Feedback or questions:

[datagovernance@purdue.edu](mailto:datagovernance@purdue.edu)

[sarah@purdue.edu](mailto:sarah@purdue.edu)

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# BI-SPC Scope

- Define strategy for where to focus our collective efforts
  - Which kinds of projects we should go after in the near to mid term
- Identify specific initiatives where we need to collaborate across central information producers
  - Examples: instructional activity, developing and supporting our information producers, management dashboards, student reports assessment
- Set priorities for BICC development efforts
  - Approve or deny project requests
  - Decide relative priority of approved projects
- Advance data quality
- Assess progress and celebrate successes

# Scope Implications

- We don't *just* focus on prioritizing project requests (typical IT governance), but also set strategy and proactively identified BI projects and initiatives
- We don't attempt to govern internal efforts within central offices or local efforts with the units
- We provide oversight for Management Dashboards: roadmap, standards committee
- We solicit input into both strategy and priorities from the information producers via the BI Advisory Committee

# Membership Approach

- Academic unit leaders and data managers
- Process owners
- OIRAE
- BICC
- Other key stakeholders

# Membership

NAME	TITLE	AREA
Diane Beaudoin	Chief Data Officer	OIRAE
Jeff Bolin	Associate Vice President for Research Centers, Cores, and Research Development Services	EVPRP
Kris Wong Davis	Vice Provost for Enrollment Management	Enrollment Management
Thomas Frooninckx	Managing Director, Purdue Polytechnic Institute	Purdue Polytechnic Institute
Jon Harbor	Executive Director of Digital Education and Associate Vice Provost for Teaching and Learning	Office of the Provost
Eva Nodine/Tonya Yoder	Director of Financial Planning and Analysis	Financial Planning and Analysis
Andrea Pluckebaum	Director of Data Analytics and Program Assessment	Krannert School of Management
David Robledo	Director of Data Analytics and Information	College of Engineering
Aaron Walz	Director, Business Intelligence Competency Center	BI Competency Center



# Focused sub-groups

- BI as a profession: attracting, retaining, positions, equity, professional development, recognition
- Data quality: identifying and prioritizing data quality issues that need attention
- Management Dashboards roadmap: identify and prioritize list of needed dashboards to support unit leaders
- Future areas: TBD
  - Closing the loop: continuous improvement, assessment
  - Engagement

# BI Strategy: March 2016

- Continue to work across all four pillars of our BI Future State vision:
  - **BI community:** training and education are critical and should continue to be a focus, including more advanced training on both the data and tools
  - **Seamless delivery:** continue to focus on the Management Dashboards initiative, and on ensuring high quality content for both standard reports and dashboards
  - **BI tools:** continue to focus on supporting dashboard development in Tableau, and maturing our dashboard design and validation methodologies
  - **Enterprise data:** focus on improving consistency and transparency of standard data sets and dashboards by establishing reliable data validation practices and making the underlying data available in the Data Warehouse environment
- Align our efforts across all these pillars to focus on areas where we are pushing out management information to decision makers via Management Dashboards and the APR data in the Data Digest.
- As we pursue this, focus on people and areas most interested in using data to inform decision-making.

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# Cognos 11.0.9 Upgrade

- Goals
  - Upgrade to release 9 to address current issues/bugs
  - Implement new features of Cognos 11
- Project will include a phased implementation
  - The release will be phase 1
  - New features will be phase 2
- Phase 1 implementation - March 10, 2018
- Phase 2 implementation - April 23, 2018

# Cognos 11.0.9 Upgrade

## Sponsors & Core Team

- Executive Sponsor - Rita Clifford
- Project Sponsors - Aaron Walz & Paula Kayser
- Core Team
  - Melissa Burton - Project Manager
  - Richard Lucas - Technical Lead
  - Scott Culver
  - Ryan Bousman
  - Larrie Stoffer
  - Cheri Rawles
  - Kathy Baker
  - Wendy Kenner
  - Tricia Crowder
  - Kelsie Newberry
  - Zach Yater

# Cognos 11.0.9 Upgrade

## Functional Test Leads

- Enrollment Mgmt - Steve Lipps
- UDO - Jean Austin
- SPS - Julie Jang & Stephanie Willis
- FP&A - Tonya Yoder
- OIRAE - Monal Patel & Sue Wilder
- Data Managers - Sabrina Tanner
- Registrar - June Foster
- Bursar - Josh Newberry

# Questions, Announcements, Updates from the community

- Staffing Changes (notes)
- General Good News?



# Questions, Announcements, Updates from the community

- Staffing Changes (notes)
- General Good News?

# Have a great afternoon!

