



Business Intelligence Competency Center
INFORMATION TECHNOLOGY

Business Intelligence Advisory Committee

September 11, 2018



Agenda

- Introductions - Andrea Pluckebaum
- FI & HCM Update - Tonya Yoder & Susie Geswein
- Data Governance - Official Seal, Graduate School Reporting, & Data Cookbook -Sarah Bauer
- Professional Development Subcommittee Update - David Robledo
- Strategic Priorities Update - Aaron Walz



TRANSFORM PURDUE

Reporting

Tonya Yoder & Susie Geswein



TRANSFORM PURDUE

FI (Finance)

WHATS HAPPENED?

Report Writing

- All Essential Month End & Go-Live complete
- Showcases held August 14th and 17th
- Metadata fields and reports updated in BI, Data Cookbook entry is progressing
- GM is reporting 100% complete for all reports
- Non GM the below are the stats by # and %

Not including GM

As of 9/5/16 by Count

Overall	Not Started	In Development	In Validation	Complete	Eliminated	Total
Go-Live	0	7	3	12	10	32
Month End	1	6	4	26	13	50
Quarter End	2	12	1	3	8	26
Mid Year End	3	8	0	2	2	15
Year End	4	2	0	0	0	6
Total	10	35	8	43	33	129

As of 9/5/16 by %

Overall	Not Started	In Development	In Validation	Complete*	Eliminated	Total
Go-Live	0.0%	21.9%	9.4%	37.5%	31.3%	100.0%
Month End	2.0%	12.0%	8.0%	52.0%	26.0%	100.0%
Quarter End	7.7%	46.2%	3.8%	11.5%	30.8%	100.0%
Mid Year End	20.0%	53.3%	0.0%	13.3%	13.3%	100.0%
Year End	66.7%	33.3%	0.0%	0.0%	0.0%	100.0%
Total	7.8%	27.1%	6.2%	33.3%	25.6%	100.0%

UPDATED STANDARD REPORTS

Released in July/August 2018

- Statement of Financial Activity
- Transaction Listing (including Scheduled view)
- Parked Documents
- Account Balance Listing
- Statement of Payroll Charges
- Master Data Report
- Concur Reports
- Recurring and Non-Recurring Transfers
- Commitment Item Hierarchy
- Open PO/Commitment Report
- Cost Share Report
- Animal Transactions for Grants and Sponsored Programs
- Grant Attribute Type Active Report
- Questionable Transaction Report
- Sponsored Program Reporting Units: Academic & DP
- Awarded Proposals and Submitted Proposals
- Grants on NTP
- Grants Overdrafts
- Expired/Expiring Accounts with Any Balance
- Overdraft
- Cost Distribution Verification with Account Balance

UPDATED STANDARD REPORTS

Coming Soon

- Account Balance Listing – Scheduled View
- Spend by Vendor
- Asset Summary
- Financial Portfolio (Balance Sheet, Income Statement, Reconciliation Balance to Cash)

MAJOR CHANGES TO FINACE DATA

- The following stars will *not* be populated *after* August 29, 2018:
 - **Financial Balances Star**
 - **Controlling Star**
- Three new balance stars have been created, eliminating the need for the **Source** field:
 - **Financial Accounting Balances Star** (*Note: The field **MTD General Ledger Account Balance** in the **Financial Account Balances Fact** table now contains period 0 FI carryforward amounts; be careful to not duplicate carryforward amounts by including both this field and the **Carry Forward Balance** field*)
 - **Funds Management Balances Star**
 - **Grants Management Balances Star**

MAJOR CHANGES TO FINACE DATA

- The following folders within dimension were created/updated:
 - **Cost Center Hierarchy** has been created
 - Created new sub folder **Archive-CC Hierarchy** for the *old* hierarchy (Major Area, Department, etc.)
 - **Grouping** folder includes fields for grouping the dimension (e.g., Category 1, Funded Program Type), *excluding* the Cost Center Hierarchy
- [Data Field Crosswalk](#) displays modified data fields
 - Also posted on **Resource** page within Cognos

WHATS NEXT

- Continued Reporting Writing
- Faculty Allocations Dashboard – new dataset
- Department Head Dashboard – new dataset
- Seamless/Mendix datasets
- And HCM . . .



TRANSFORM PURDUE

HCM (Human Capital Management)

TIMELINE

Testing

- Project Testing
 - Sit 5 Testing – 8/2018 to 9/2018
 - UAT Testing – Begins 10/1/2018
 - Goal is to have all Go Live reports complete (non BI)
 - Go Live – 1/1/2019
- Report Testing
 - BI Validation – 9/2018 to 10/2018
 - SuccessFactors – ongoing
 - ECP - ongoing

REPORTS

Go Live

- Focus on Operational & Internal Control reports
 - Statement of Payroll Charges – Includes Export Version
 - Salary Listing
 - Faculty Contract
 - Cost Distribution Verification with Account Balance
 - Expired Expiring I9
 - GM Aims
- One Executive Report
 - FTE & Headcount by Job Family

REPORTS

IPEDS

- Mid Year – 6/2019
- Current report will work through 1/2019

TOOLS

Three Tools

- SuccessFactors
 - ECP – Query Manager 4
 - Boiler Insight
-
- Decision on what tool to use based on data availability, user, and need for live data

MAJOR CHANGES TO HCM DATA

- In process of assessing the following stars
 - Employee Quotas Star – continue to populate?
 - Employee Leaves Star – continue to populate?
 - Time Star – new star

WHO DO I CONTACT?

Data or Reporting Tool Questions / Issues

Data Questions/Issues:

Data-related questions/issues should first be directed to your supervisor. If needed, send via email to itap@purdue.edu.

Note: In order for the ticket to be properly assigned, please enter the following as the first sentence of the email: ASSIGNEES=TREAS_REPORTING

Reporting Tool Questions/Issues:

Send reporting tool (e.g., Cognos) questions/issues to BICC@purdue.edu.

WHO DO I CONTACT?

Requesting Enhancements

Step 1: Access the [Report Requests SharePoint site](#)

Step 2: Click **All Report Request** to see if the request has already been submitted by another employee

(Note: Filter on **Report Name** to narrow down the list of requests)

Step 3: Click **Submit a Request** to submit a new enhancement request

Step 4: In the **Request Type** field, select *Change/Enhancement to Existing Standard Report*

Step 5: Complete the form and click **Submit**

ANY
QUESTIONS?





Data Governance Update

Office of Institutional Research, Assessment & Effectiveness

BI-Advisory
September 2018



We are a data community
We ALL do 'data governance'

- Official Seal
- Graduate Student Reporting
- Data Cookbook

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

DATA GOVERNANCE



Official Seal List

In Progress:

Enrollment
Retention and Graduation Rates
Admissions
Degrees Awarded
Time-to-Degree

Testimonials



Kristina Wong Davis

Vice Provost for Enrollment Management

"Data is such an important tool for decision-makers across the institution. It is essential that we all have a common understanding of what those various data elements are in order to appropriately analyze and interpret. The Purdue Data Cookbook will be a fundamental resource in building an understanding of our institutional data."

Articles

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 available and Phase 2 has begun**
 - 140 approved definitions
 - 315 people with accounts
 - Phase 2 - March - July 2018
 - Use your Purdue career account to create an account
<https://purdue.datacookbook.com>
- **Data Quality Projects**
 - Official Seal for certified Purdue Data - task force
 - STEM and ICE indicator fields in Cognos student data
 - Graduate Student improved data reporting assessment project

For questions please contact: DataGovernance@purdue.edu

Official Seal - Data Certification

PurdueTODAY

April 30, 2018 Current web edition

Faculty and Staff News


Purdue starts data certification program for key reports and dashboards

Purdue will begin putting a seal of approval on more than three dozen reports and dashboards integral to high-level discussions and decision-making. The seal certifies the report data as vetted and approved, with any shortcomings clearly identified.

Other Stories

- Purdue Today summer schedule
- This week's 'Thumbs Up' recipients

In the Spotlight



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PURDUE UNIVERSITY Information Technology

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Newsroom / Purdue starts data certification program for key reports and dashboards

NEWSROOM

Purdue starts data certification program for key reports and dashboards

Key reports used by University leaders to make high-level, strategic decisions will soon carry a seal that certifies the report's underlying data and associated calculations, making them the authoritative source for information on a subject.

Gerry McCartney, executive vice president for information technology and chief information officer, says the change, while relatively small, packs a punch.


"The goal is to end situations where we have multiple reports, often with conflicting numbers, from which decision-makers somehow have to glean the necessary information," McCartney says. "Now, we'll have one certified version of each of these key reports that can be used to make informed decisions."

The creation of the seal and the process for certifying reports was spearheaded by the Office of Institutional Research, Assessment and Effectiveness as part of Purdue's data governance initiative. OIRAE also implemented Data Cookbook, an online repository of data definitions, in November in connection with the project.

The seal lets users know that a report is the University's authoritative source for information on the subject, vetted and approved with any shortcomings clearly identified.

Diane Beaudoin, Purdue's chief data officer, says the seal and certification process were developed by a **campus-wide task force of leaders and data owners**. The group identified approximately 40 reports from the student, business and research areas. The official seal task force will begin its vetting process with the reports and dashboards for enrollment and for retention and graduation rates.

Anyone who has data quality comments on either of these reports is welcome to email their concerns to datagovernance@purdue.edu.



Official Seal

- Task Force
 - Data will be vetted, reproducible, clearly defined
 - Definitions and reports/dashboards documented in Data Cookbook
 - Reports have been identified by upper executives (approx. 40)
 - Admissions, Student, Finance, Capital, HR, Research
 - Process and Education subcommittees
- First reports:
 - Enrollment
 - Retention and Graduation Rates
 - Admissions
 - Degrees Awarded
- First Finance report expected mid-October
 - Statement of Financial Activity



Official Seal Task Force Members

- Chair, Diane Beaudoin - OIRAE
- Sarah Bauer - OIRAE
- Richard Frisbie - Education
- Steve Lipps - Enrollment Management
- Kevin Maurer - Student Life
- Jamie Mohler - Graduate School
- David Robledo - Engineering
- Kathy Thomason - Comptroller
- Tonya Yoder - Financial Planning & Analysis
- Stephanie Willis - Research



Graduate Student Reporting Data Governance Project

Goals

- Accurate, trusted graduate student data
- Data well-defined and understood
- Identify pain points, implement solutions

In Progress

- Data Cookbook definitions and specs, graduate student nuances
- Standard Reports, graduate student fields added
- EDW graduate fields added

Assessment Phase - 15 topics

- Pain Point interviews this summer
 - 8 sessions
 - 65 attendees
 - All colleges represented as well as central offices
 - 40-page summary



Graduate Student Reporting - Summer Interview Topics

- Standard Reports via Cognos
- Available Data Definitions
- Timing of Data Freezes
- Identifying Interdisciplinary Grad Program Students
- Distance Education
- Banner Classification Field
- Teacher Education
- CIP Code Review
- Grad School Database Data
- Grad School 5-Year Review
- Identifying Fellowships
- Curriculum Changes Tracking
- Grad Recruitment Data in Slate
- Blending of Student/HR/FI Data
- College/Departmental databases

Next Steps

Continue adding Grad Student info

- Data Cookbook
- Standard reports

Roadmap Creation



Graduate Student Reporting Data Governance

Executive Sponsors

- Linda Mason
- Diane Beaudoin
- Jamie Mohler

Graduate School

- Don Brier
- Jeff Bridgham
- Karis Waibel

OIRAE

- Sarah Bauer
- Ottlie Webb

College Data Managers

- Abby Snodgrass, Agriculture
- Andrea Pluckebaum, Krannert



Data Cookbook



Data Cookbook software

- Part of the bigger Data Governance effort
- Enterprise source of data definitions, standard reports and dashboards
- Source of official certified data definitions and reports/dashboards

In Progress

- Upgrade to Enterprise version completed in July
- Enhanced report /dashboard documentation functionality
- Spec template for Data Digest dashboards, Student. Coming for FI, HR, other subject areas
- New definitions, new versions of definitions
 - New versions of definitions even better - means they are being used, being refined
 - Graduate student nuances being added
- Evaluating additional functionality for a future release

Value of Data Cookbook

- Enterprise repository of institutional knowledge
- Anyone with a Purdue career account can use, add comments
- Great resource for new and current staff
- Anyone with an account can add a comment to any definition or spec



Create an Account (Purdue career account)

<https://purdue.datacookbook.com>

Or Google 'Purdue Data Cookbook'

Data Cookbook by the Numbers



- Over 350 accounts
- Over 150 approved definitions
 - Many have been revised, so more complete
 - Graduate student nuances being added
- Specs (report/dashboard) underway
 - Enrollment Data Digest dashboard 1st
 - Focus is on more specs (which means more definitions)

College Perspective, System Admin, Functionality Review

Kendal Kosta-Mikel, College of Science Data Manager

Functional Data Owners



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

Data Governance / Data Cookbook



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

datacookbook

Create a Data Cookbook account:

<https://purdue.datacookbook.com>

Also available under OneCampus

Or Google 'Purdue Data Cookbook'

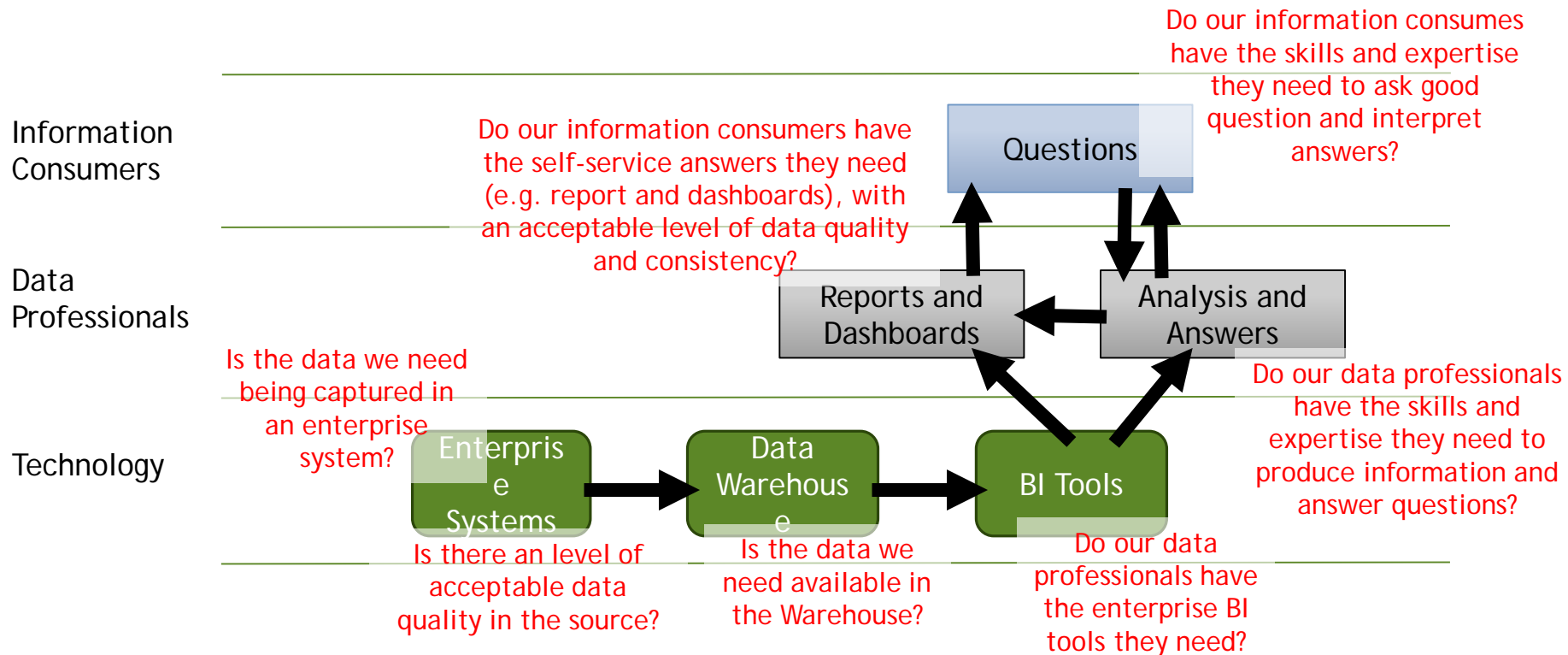
Feedback or questions:

datagovernance@purdue.edu

sarah@purdue.edu

Professional
Development
Subcommittee
Update

BI Strategy Framework: Info Supply Chain

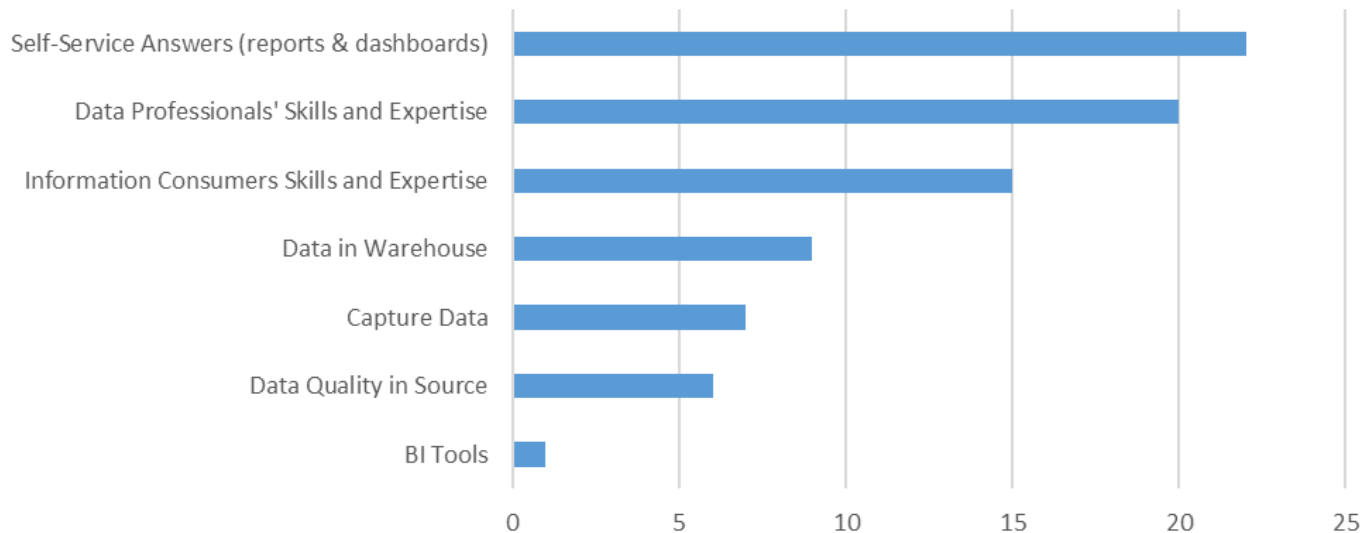


Institutional Priorities

- Financial Reporting for Unit Leaders
- Student Success
- Enrollment Trends
- Data Quality
- Supporting Data Professionals and Staff

Overall Themes

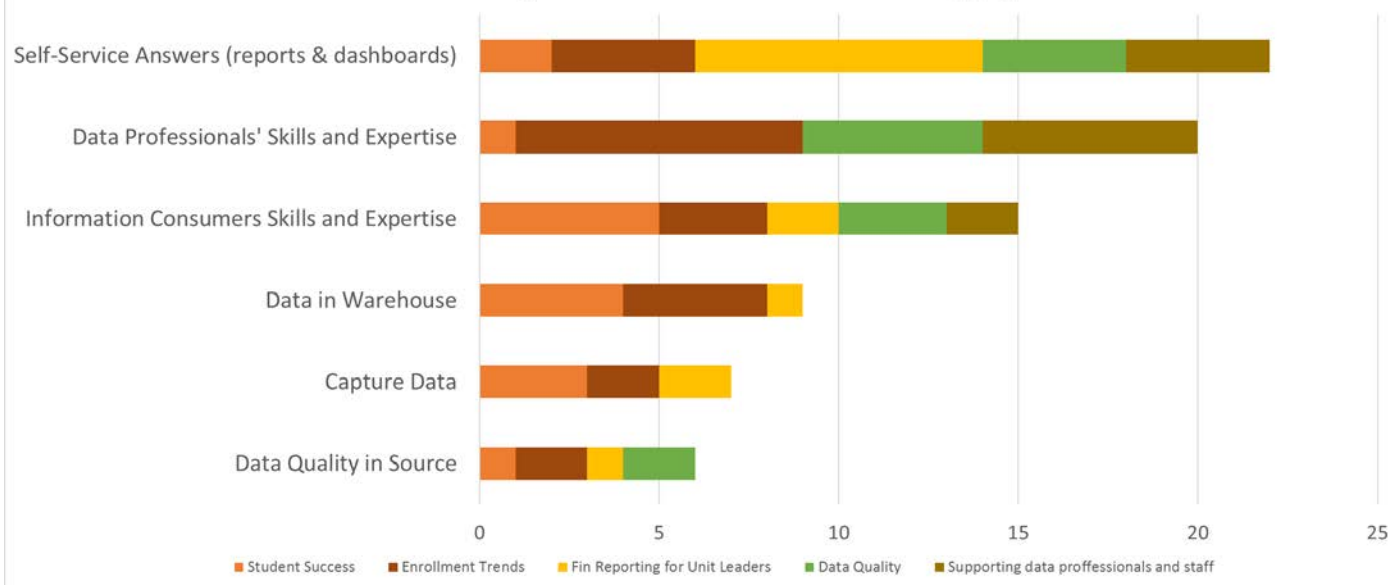
Total Post-it Notes by Location in Information Supply Chain



- Self-Service Answers and skilled DPs are needed across all themes

Overall Themes

Post-it Notes by Location in Information Supply Chain



- Student Success and Enrollment Trends need work across the whole Info Supply Chain

Strategic Directions

- Review and realign governance in the data space
- Improve Purdue's ability to produce high-quality Reports and Dashboards
- Take a focused, cross-functional, holistic approach to tackling key questions that are tough to answer today (e.g. Enrollment Trends, Student Success)
- How can we empower our unit leaders and other info consumers with the skills and expertise they need to ask good questions and interpret answers? (critical, but foundations need to be established first)

Review and realign governance in the data space

- Review existing landscape
 - What groups
 - What each covers
 - How they relate
- Have the groups provide an update to BI-SPC (by end of the year)
- Relationship of Office Seal to other governance groups
 - Ensures that the governance has happened (including data quality issues)
 - Checklist includes 'what are the related reports and dashboards?'
 - How does this evolve? How related to other committees?
- How do we better govern overall design across management dashboards?
- Identify challenges, opportunities, and gaps

Initiatives: in progress

- Empowering data professionals
- Data quality
- Financial reporting for unit leaders

Questions?

