<u>Student Reporting Governance Charter</u>

May 2018 (Revision Summary at end of Document)

Goal

The governing body will enforce best practices in the enterprise reporting environment for the Student information reports. The Student Information reporting environment will support informed decision-making by providing well documented metadata on reports, a standard look and feel to all reports, easy to find organized folder structure and naming convention.

Responsibilities

The Governance Committee shall follow the procedures outlined in the Procedures section of this document.

The committee shall conduct meetings and be responsible for communicating necessary information to the users of the enterprise student reporting environment.

They shall have approval and denial authority over tasks associated with ensuring the goal and procedures outlined in this charter.

They shall elect members in order to ensure broad representation of the reporting community.

The committee is responsible for ongoing maintenance of the Standards Document and appropriate communication regarding changes.

The committee will answer to users via the StudentReportGov@purdue.edu mailbox.

Committee membership

The Governance Committee must consist of one representative from the departments or area who are content providers in the Standard Content area within the Cognos Student Report. This person will be the authoritative source of BI content from that department or a designee of their choosing.

Members on the committee will also consist of representatives from two to three academic colleges who are Data Managers/Directors or equivalent positions. These representatives are chosen by the committee based on experience and strengths conducive to the goals of this charter.

The following committee members represent the broader reporting needs of the campus and thus will ensure those reporting needs are met.

- EMAR (Steve Lipps) - Chair
- OIRAE (Monal Patel)
- DFA (now represented by EMAR)
- Registrar (Ryan Jones)
- Bursar (Joshua Newberry) – Liaison to BI/HR Advisory Committee
- Graduate School (Jeff Bridgham)
- College (Andrea Pluckebaum)
- College (Casey Marks)
- Data Governance (Sarah Bauer)
- BICC (Kelsie Newberry)

Key roles of committee members

It is preferred that a member of the committee also serves on the HR/FI Advisory Committee. This will help maintain a connection between the Student side and Business side reporting environments.

A chair of the committee will be appointed by its membership as a rotating annual appointment, evaluated before the start of an academic year (July). The appointment is based on nominations (which must be accepted by the nominee) and then a voting process. The chair may have consecutive terms. The chair does not have any additional voting power. The chair does have additional responsibilities to ensure smooth functioning of the committee.

Replacement of committee members

It is preferred if the members of the committee continue to serve as long as their job duties allow and align with the goals of the Governance Charter. This is to ensure continuity and stability. In the event a committee member changes their job duties and becomes ineligible to be a Governance committee member, then the following procedures will be followed.

Replacing a central office committee member, will be determined and appointed by the central office.

Replacing a college representative committee member, will involve a nomination of 3-5 alternative qualified college personnel. Each committee member will vote on their choice from the nomination list. This can either be done by secret ballot or an open voting during a Governance committee meeting.

Committee Meetings

The Committee shall hold meetings to conduct the essential responsibilities outlined in this charter. The meetings should be at least once a month, or more often as needed. The committee may approve/deny minor modifications to reports or metadata via email communication. Minor modifications are determined by the chair unless a committee member would rather discuss the modification in more detail at the next scheduled meeting.

Action that requires a committee vote, such as approving or denying changes to the Standard Content, must have a quorum in attendance at the meeting. Committee members are not allowed to send representatives in their place for voting action.

Definition of quorum is two/thirds of members must be present for voting action. If the member cannot be present at the meeting, their recommendations can be shared with the group ahead of time. The group will take the recommendation into consideration when voting.

Operating Procedure

1. The approval of Standard Content changes or additions must meet the standards outlined in the Metadata Standards document. Especially important are the following standards:
   a. When the Data Source field indicates both Student and Business data sources, then communicate to BI/HR Advisory committee of any impact to the Business side reports. This communication is the responsibility of the Governance committee member representing the Bursar's Office.

2. The approval of Standard Content changes or additions must meet all standards in the Report Standards document. Especially important are the following standards:
   a. Report title and column title abbreviations must adhere to approved nomenclature.
   b. Prompt creation must take into consideration whether to query the List of Values (LOV) table or the actual reporting table to populate values in the drop down boxes. The considerations should take into account usability of the prompt page to minimize the possibility of no data returned in the report output.
      For example, academic period prompts, department, major prompts should be customized for report output, and narrowed down for user convenience; such as filters for academic periods to eliminate displaying terms prior to the existence of available data.

      Prompt pages must include a multi-select prompt on campus (including West Lafayette, Technology Statewide sites or Regionals) when data exists for those campuses.

      Prompts should display in a hierarchical order (Academic Period, College, Department, Major, Minor, PUID).
   c. Output format should consider how a general user will use the output. For example, if it is used as a well formatted official report, then output format should be set to PDF. For a report that generates lists of students or courses, the report author should set the output format to Excel.
   d. Output as a List which has an overall sort order – the columns should be sequentially listed from left to right as per the sort order. For example, if the List is sorted by Campus, College, Department, Major; then the output list columns should be in this same order from left to right.

3. Filters and options included within the report must provide a level of granularity or grouping detail that addresses the needs of a broad range of data users throughout the central offices as well as the academic colleges.

4. The report generates accurate data. Matching up to official numbers, or comparable other Validated reports and dashboards in the Management Dashboard or Data Digest webpages.

5. Metrics generated in the report adhere to the Data Dictionary definitions.

6. Address training needs to be updated for changes in reports/folder structure.

7. There is a communication plan in place according to requirements set by the Communications committee. Place the communication in the Resource tab within Cognos.

8. Review security access of the report – AD (Active Directory) group membership.

9. Monitor the StudentReportGov@purdue.edu mailbox. Respond to user emails or forward to appropriate partners when necessary, always ensuring that the user is given feedback in a timely manner.

10. Procedures for conducting a meeting:
    a. Two weeks prior (10 working days) prior to a Governance meeting to evaluate a set of new or modified reports, the report author must place the Cognos report in the Cognos staging folder.
    b. The committee will review and compile their feedback in a shared document.
    c. This document will be shared with the report author, three days prior to the meeting.
    d. The report author will come prepared to the meeting with thoughts on the committee's recommendations.
    e. The conversation around the recommendations is an important process and all parties involved must keep in mind the end goal of the recommendations are to meet user needs and adhere to Standards.
    f. At the end of the meeting, a vote will be cast by all members present.

<u>Resources</u>

Contact email for Governance committee: StudentReportGov@purdue.edu

Sharepoint link: https://sharepoint.purdue.edu/sites/bicc/srgc/SitePages/Home.aspx

Version Edits

September 2016 - Original Version

November 2016 Edits include:

Committee Membership –
  o addition that member will be the authoritative source of BI content from that department
  o addition that member chosen based upon experience and strengths
Replacement of Committee Members
  o replacement of a member determined by the central office
  o replacement of a college representative will involve nominations and voting by the Governance committee

May 2018 Edits include:
  Committee Membership – current member names updated
  Changed voting quorum from 7 out of 10 to two-thirds