Agenda

- Status report
- Campus Rollout
- Data Policy
- C&G conversion and the impact on the Research Data Mart
- Approve the implementation of the next data marts
Status of the Data Warehouse Initiative

- **July 2002 – August 2002**
  - Finance Administration started using the warehoused data.
  - The Development of the Dash Boards continued
  - New data elements were added to the warehouse
  - Several presentations took place (Research task force; Center Directors; School of Science)
  - Data Policy was developed
Status of the Data Warehouse Initiative

- September 2002 – October 2002
  - Data Base security implementation was under way.
  - Portal security implementation was under way.
  - Data Warehouse was moved to a new platform.
  - The Financial Data Mart scope was expanded to include the Financial Manager's Home Organization.
Status of the Data Warehouse Initiative

November 2002

– Set of dynamic reports developed and published
– Rollout to the ‘Market Testing Group’ began (Total of 10 Executives have seen the DW functionality)
– Brio training took place (Total of 30 users have been trained in Brio)
– Development of the campus-wide training program commenced.
– The development of the Position Control and the Labor Data Mart under way.
Where are we now …

- Finance is ‘Live’
- Security Policy is implemented
- ‘Market Testing’ Group has access to the Dash Boards and Published Dynamic Reports.
- Campus Rollout is under way
- Position Control and Labor Data Mart is under development.
- Project remains on budget
Campus Rollout

- Assumptions
- Who will have initial access to what
- Roll out strategy
- Status
- Expectations
Campus Rollout Assumptions

• Who will have access to the Financial Data Mart:
  – Cabinet, Deans, Center Directors, Department Chairs, Portfolio Financial Managers, Department Financial Managers, Finance Administration, other interested Fund owners.

• Training is mandatory at all levels.
  – Several levels of training will be offered to campus in Brio tools, Data, and Data Policies.
  – Joint effort between DW Group and Finance

• Portfolio Financial Managers responsibilities:
  – Rollout within Portfolio
  – Training within Portfolio
Initial Tiered Access – Who will have access to what

- Cabinet; Deans; Department Chairs; Center Directors
- Department Financial Managers
- Finance Administration Portfolio Financial Managers

Data in the Warehouse
Information published In Brio documents
Dash Board

Data Policies
Data Warehouse Cascaded Rollout Strategy

1. Finance Administration
2. Portfolio Level (Cabinet, Deans, Portfolio Financial Managers)
3. Department Level (Directors, Center Directors, Department Chairs, Department Financial Managers)
4. Other Fund Owners
Rollout Status

• Finance is ‘Live’
• Presentations (SoS, Research Task Force, Center Directors)
• “Market testing” Group
  – VP for Research
  – VP for Finance
  – VP for Institute Advancement
  – Dean of Engineering
  – Dean of Science
  – Center Director
• Rollout to Portfolio levels are under way:
  – 30 users (17 from Finance & 13 from other Portfolios) have been trained
  – 6 Executives have direct access to the warehouse
  – One-on-one training sessions are underway
Expectations

Creating an Information Revolution

– Changing culture
– Continued top down approach
Barriers

• People’s resistance to a new tool
• Expectations on information availability and usability for decision making are low
• Habit of relying on Central Administration to provide information, or on their own sources (many versions of the ‘truth’)
• People will need to acquire new job skills
• Job expectations will need to change
How to get there ....

Common Vision:
- One version of the truth
- Data Experts across campus and across organizational boundaries

Data Experts: Portfolio Financial Managers or Equivalents will be expected to:
- access data
- create reports
- perform analysis
- enable/train Portfolio end-users
Commitments needed

• Commitment to initial training
  • DW Group
  • Data Owners
  • Data Users

• Commitment to continuous training
  • List serves
  • Refreshers
  • User groups

• Commitment to partner in training and to increase the utilization of the Data Warehouse
Data Security, Privacy and Access Policy

- Can be defined as striking the “right” balance between data security/privacy and data access
- Value of data is increased through widespread access and appropriate use, however, value is severely compromised by misinterpretation, misuse, or abuse
- This policy considers security and privacy paramount
- Key oversight principle:
  - Cabinet members, as individuals, are responsible for overseeing establishment of data management policies, procedures, and accountability for data governed within their portfolio(s), subject to cabinet review and CIO approval
Additional DW Security

- **Portal** security via user id and password
- **Brio documents** secured based on user role and profile
- **Data** secured based on user role and profile
Security levels

- Cabinet; Deans; Department Chairs; Center Directors
- Department Financial Managers
- Finance Administration Portfolio Financial Managers

Dash Board
Information published In Brio documents
Data in the Warehouse

Portal Security
Brio Security
Data Security
Nuts and Bolts of the Data Base Security

- Data Base security applies to all individuals given either direct access to the warehoused data or given permissions to process Brio dynamic reports.

- Financial Managers and the Management of Organization will have access to the warehoused financial data based on the following criterion:
  - All financials posted against that Organization
  - All funds listing that Organization as a home Organization (*in cases of research funds, this defines where the research is brought into*)
  - All funds listing the PIs (or the Financial Manager) associated with that Org as fund financial managers. (*This resolved the Multi-disciplinary issue*)
  - All funds and orgs listing that Org as a predecessor in either one of the above three cases.
  - Administrative role: Individuals might be granted access to additional funds and org based on their needs and their role within Rensselaer.
Proposed **Financial** Data Policy Administration

- Initial group to review and recommend appropriate security levels:
  - Budget Director
  - AVP / Controller
  - DW Manager
- Requests outside the Policy forwarded to VP for Finance and CIO
- Membership will evolve with Data Mart development
Approved next Data Marts

• **Underway:**
  – Position Control and Labor Data Mart *(Approved by the Sponsorship Committee on June 02)*

• **Postponed:**
  – Research Data Mart
Contract and Grants Analysis (CG)

• Analysis of outstanding proposals and awards
  – Success rate

• Linkage to Rensselaer Plan:
  – Expand research enterprise
    • Identify outstanding proposals by school, department, faculty, agency, technical area, etc.

• Feasibility: Moderate
  – Data not in Banner, currently in Access database
  – Plans to move to Banner in near future
Financial Analysis
Research (FR)

• Similar to financial analysis with additional descriptive information on research projects

• Linkage to Rensselaer Plan:
  – Expand research enterprise
    • Track progress on research projects
    • Understand research spending by school, department, faculty, agency, technical area, etc.

• Feasibility: Moderate
  – Most data available in Banner, though lack salary encumbrances
  – Need descriptive attributes from contracts and grants
Reason for Postponing

• Conversion of C&G data to Banner delayed
Where do we go from here ....

- New Opportunities:
  - Endowment
  - Capital Project Tracking
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Scope Driven by Impact and Feasibility

Feasibility

Potential Value

Low

High

Low — Feasibility — High
Recommendation for next opportunity

Enrollment Analysis Data Mart
Why Enrollment Analysis (EA)

- **Student registration**
  - Detailed class registration information for each student

- **Linkage to Rensselaer Plan:**
  - Provide outstanding and distinctive education
    - Improve academic program planning
    - Assess effectiveness of academic programs
    - Track student progress towards goals

- **Feasibility: High**
  - Data available in Banner
  - Same data utilized in DW prototype
  - Requires descriptive faculty data