



The top section of the banner features a photograph of a white sign with the Macewan University logo and name, set against a background of green trees and a blue sky. To the right of the photograph is a red square containing the HEUG Canada logo, which consists of a white maple leaf above the text 'HEUG' and 'CANADA'.

DATA COOKBOOK; A DATA GOVERNANCE INITIATIVE

SESSION 6000
Tuesday, November 13
3:00 pm – 4:00 pm

CANADA ALLIANCE 12-14 NOVEMBER 2018

PRESENTERS

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CANADA ALLIANCE 12-14 NOVEMBER 2018

OVERVIEW

1. MODEL - Resources and Organization
2. INITIATIVE – Data Cookbook
3. GROWTH – Leadership Support
4. GOVERNANCE – Outcomes and Lessons Learned
5. CONCLUDING THOUGHTS – Questions
6. APPENDIX – Supporting Documentation

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GOVERNANCE MODEL

RESOURCES AND
ORGANIZATION

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WHAT IS DATA GOVERNANCE?

Data Governance is a **data management concept** concerning the capability that enables an organization to ensure that high **data quality** exists throughout the complete lifecycle of the data. ([Wikipedia](#))

Data Governance is a **collection of practices and processes** which help to ensure the formal management of **data assets** within an organization. ([Dataversity](#))

Data Governance is the **exercise of authority and control** (planning, monitoring, and enforcement) over the management of **data assets**." ([DAMA International](#))

Data Governance is a **system of decision rights and accountabilities** for **information-related processes**, executed according to agreed-upon models which describe who can take what actions with what information, and when, under what circumstances, using what methods." ([Data Governance Institute](#))

WHY DATA GOVERNANCE?

PeopleSoft projects and shared data

Cross functional team meeting

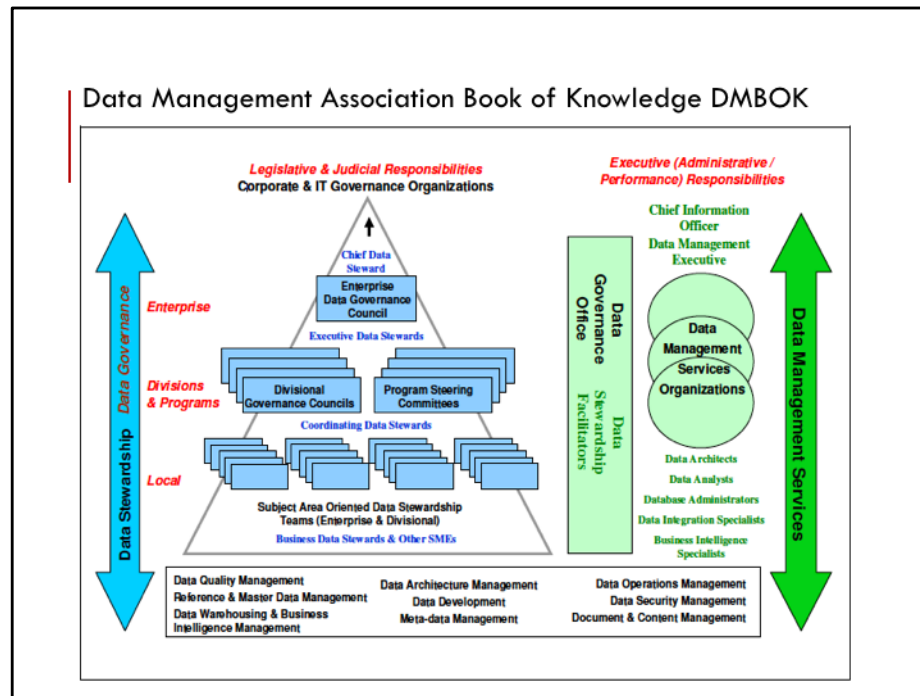
BI data validation and cleansing

New warehouse build

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New warehouse build – naming conventions and help text

Cross functional team meeting to do item – started list of issues to address, met with colleagues to plan and realized we were starting to address governance issues



Needed a plan

DMBOK – made sense to our group – IT driven with interest from business areas - IT professionals and Business area roles

DGI Data Governance Institute and other web resources

EIM – Enterprise Information Management

DATA GOVERNANCE WORKING GROUP (DAWG)

Director - HR Systems & Reporting	Director - ERP Business Support
Director - Financial Services	Senior Manager - Campus Solutions
Executive Director - Expenses, Procurement and Contact Services	Director - IT App Services & PMO
Associate Registrar - Information Systems and Scheduling	Senior Manager – Business Intelligence (CHAIR)
Director - Student Financial Aid	Senior Manager – HCM and Finance
Associate VP - Planning & Analysis and Registrar	

Assess data governance models and make recommendations.
Determine primary goals and mandate for data governance.

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Initial buy in and interest

Met 4 times over a year – conceptual high level

DAWG Mandate – support from ERP and academic governance bodies

Group split – strategy versus action

Floundered for a bit

Data Assets and Issues							
Item	Added by	Added on	Scope	Priority	Rank	Systems Affected	
1 Buildings and Locations	DAWG	2017-03-23	Enterprise			FSM, CS, HCM, BI, FM	
2 Academic Organizations/Departments	DAWG	2017-03-23	Enterprise			FSM, CS, HCM, BI	
3 External Organizations/Schools	DAWG	2017-03-23	Shared			CS, HCM	
4 Persons of Interest	DAWG	2017-03-23	Enterprise				
5 Affiliations	DAWG	2017-03-23	Enterprise				
6 Phone Numbers	DAWG	2017-03-23	Enterprise				
7 Job Codes	DAWG	2017-03-23	Local			HCM	
8 Definition of FT and PT Students	DAWG	2017-09-25	Enterprise			CS, FMS	
9 Headcount	DAWG	2017-09-25	Local			CS	
10 Email addresses	DAWG	2017-09-25	Enterprise			CS	
11 HR Home Departments	DAWG	2017-09-25	Local			HCM	
12 Academic Program Titles	DAWG	2017-09-25	Enterprise			CS	
13 Deceased Date	DAWG	2017-09-25	Enterprise			HCM, CS, IDM	
14 GPAs	L Dreger	2017-09-26	Shared			CS	
15 Addresses	DAWG	2017-09-26	Enterprise			HCM, CS	

DATA ASSET AND ISSUE LOG

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2		
3	Data Asset or Issue	Grade Point Averages (GPA)
4	Scope	Shared
	Description	<p>There are multiple GPA's used in the system and reporting but no central documentation (other than policy) for how they are calculated or where they are used. GPA types:</p> <p>Admissions - used by BI in Automated Admissions Evaluation dashboard; SAB for adjudication - are they the same formula?</p> <p>Cumulative - printed on the transcript</p> <p>Academic Standing - used in determining Dean's List, 1st Class Standing, Probation, Required to Withdraw, Distinction</p> <p>Term - printed on the transcript</p> <p>Graduation - used to determine eligibility to graduate</p>
5		
6	Business Area	Office of the University Registrar
	Business Process	<p>Admissions - calculated by EMS based on selected HS courses or recalculated using additional information outside PS</p> <p>Cumulative - calculated by PS based on course work by academic level</p> <p>Academic Standing -</p> <p>Term - calculated by PS based on course work within a term</p> <p>Graduation - calculated for the transcript based on course work used to satisfy program of study</p>
7		
8	Business Steward	Identify primary contact
9	System Affected	CS
10	Integrations	
11	Volume	

DATA ASSET AND ISSUE LOG

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DATA STEWARDS WORKING GROUP

Manager, HR Systems	Functional Analyst, Student Financial Aid
Functional Analyst, Human Resources	BI Analysts, CIO Office
Manager, Finance Admin Services	Team Lead, School of Cont. Education
Functional Analyst, Finance Services	IT Service Transition Analyst
Functional Analyst, Expenses Procurement and Contract Services	Change Mgmt. and Data Governance Coordinator – Registrar's Office
Functional Analyst, Faculty Relations	Business Analyst, Human Resources/Finance
Admissions Consultant – Registrar's Office	Business Analyst, Campus Solutions
Reporting Specialists – Institutional Analysis and Planning	Manager of Marketing, Office of Communications and Marketing
Research Analyst – Institutional Analysis and Planning	DAWG Chair

Identify and document the university's data assets
 Provide input to data governance structure.
 Provide mentorship and education regarding data governance developments.
 Develop mechanism for staff and faculty to contribute to issues and ideas.

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Expanded to Stewards group

Not sure if all will be or are stewards but a working group for now

Closer to the day to day activities – populate the log, update add new items



GOVERNANCE INITIATIVE | DATA
COOKBOOK

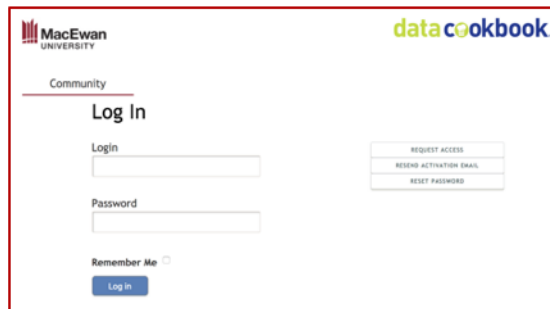
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BUSINESS GLOSSARY

Data log not sustainable

CIO provided funding for implementation project

Institutional Analysis & Planning provides funds for annual subscription



The screenshot shows the login interface for the 'datacookbook' application at MacEwan University. The page has a header with the MacEwan University logo on the left and the 'datacookbook' logo on the right. Below the header, there is a 'Community' section with a 'Log In' heading. The login form includes a 'Login' label above a text input field, a 'Password' label above another text input field, and a 'Remember Me' checkbox. A blue 'Log in' button is positioned below the password field. To the right of the main form, there is a vertical stack of three links: 'REQUEST ACCESS', 'RESEND ACTIVATION EMAIL', and 'RESET PASSWORD'.

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Cookbook on radar for years

DATA COOKBOOK PROJECT TEAM

Manager, HR Systems	Functional Analyst, Student Financial Aid
Functional Analyst, Human Resources	BI Analysts, CIO Office
Manager, Finance Admin Services	Team Lead, School of Cont. Education
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Reporting Specialists – Institutional Analysis and Planning	Manager of Marketing, Office of Communications and Marketing
Research Analyst – Institutional Analysis and Planning	DAWG Chair

Weekly meetings April to October 2018

Project managed by DAWG Chair

Training and mentoring provided by iData consultant

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Primarily non IT
Marketing participation

DEFINITION

Year of Study (YOS)

Synonyms: Academic Level (PeopleSoft)

Common business terms

Reference PeopleSoft

Drafting Version 1

Edit

Functional Definition: **Definitions within definitions**

Year of Study is a measurement of a students' progress towards completing a ministry approved [Credential](#). It does not refer to how long the student has been in a program. For non-ministry approved programs students are considered as Year 1.

Depending on the normal program length, there are four possible values:

- IC1 - Year 1
- IC2 - Year 2
- IC3 - Year 3
- IC4 - Year 4

List values

A degree program is generally 4 years; applied degree programs are 3- or 4- years; diploma programs are 2- or 3-years (no students will be reported in Year 4); and, a certificate or university transfer program is generally a 1-year program (all students in these programs will be in Year 1). In addition, for some programs, students will enter into later years (e.g. Year 3).

Business rules

In 2015 the university revised the YOS calculation to better align with government reporting requirements. The calculation of YOS is based on the credits taken by the student, including [transfer credit](#), compared against the [program load](#) for the [Academic Program/Plan](#) in which the student is enrolled. Additionally, some programs have restrictions on the applicability of credits or advance the calculation based on previous credentials.

Add context

Internal

A students' year must be where they best fit for processes such as [Enrolment Appointments](#) and applying for financial aid. To achieve this a 7 credit adjustment is added to the credits taken so a student one or two courses short of the next year will be determined to be that year. Certificate and most diploma program students are NOT adjusted.

In PeopleSoft, Year of Study is referred to as [Academic Level](#) and three variations are provided. MacEwan uses the YOS value displayed in Academic Level - Projected.

- **Academic Level - Projected:** Sum of completed credits + in-progress credits + Transfer Credit (including Other Credit) exclusive of current and future terms
- **Academic Level - Start of Term:** Sum of completed credits + Transfer Credit (including Other Credit) exclusive of current term
- **Academic Level - End of Term:** Sum of completed credits + Transfer Credit (including Other Credit) including current term

These YOS values are updated when there are any changes to a student's enrollment record (e.g. a course add, drop, swap, normal maintenance change, course grading).

Reference official sources

External

For government reporting (e.g. Learner Enrolment Reporting System), no credit adjustment is applied. This YOS calculation is available from Institutional Analysis and Planning.

FUNCTIONAL AREAS

Admissions	Records & Enrolment
Student Financial Aid	Human Resources
Finance	Unassigned
XFunctional	eCV / Faculty Relations

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Used to organize definitions and provide governance structure
Data Manager and functional user group

WORKFLOWS

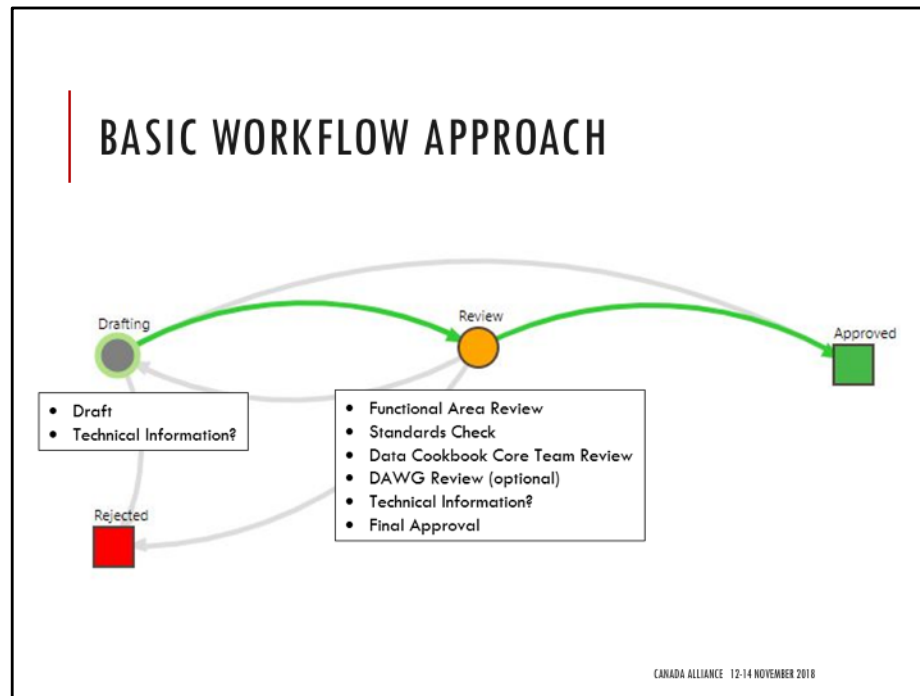
Mechanism to approve definitions within a functional area:

- As simple as possible
- Role of data manager
- Workflow questions
- Consistent approach

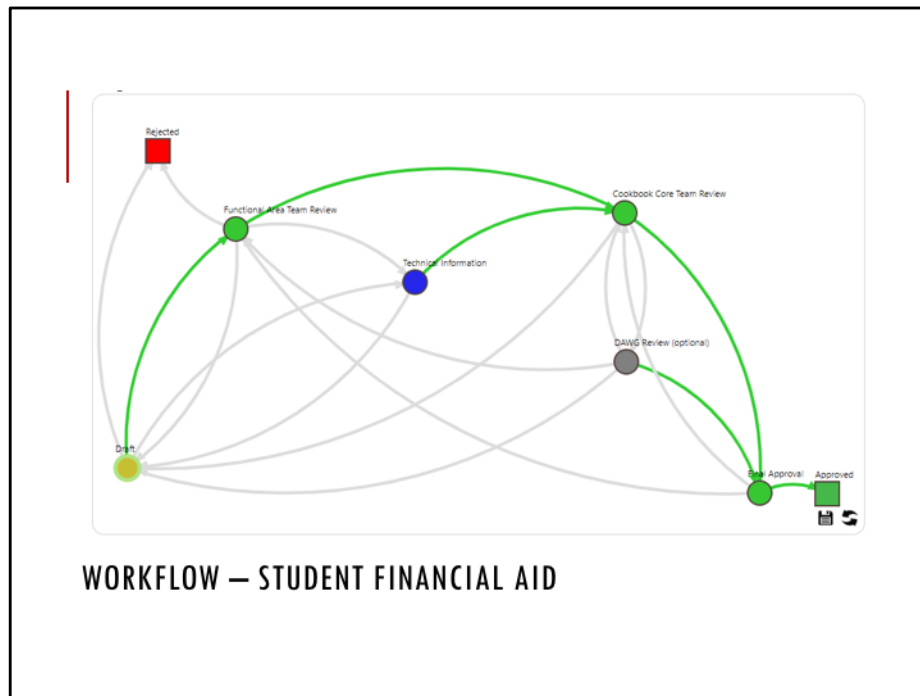
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KARINA

- Keep as simple as possible while still including everyone who needs to be included
- Thought data managers for each functional area would manage all definitions within their area and do final approval – turned out not to be the case for many of us
- Workflow design questions – Who has control of the process?
 - *Who decides what and when?
 - *What if there are disagreements within the group?
 - *At each step, questions drilled down even further (example ConEd)
- Consistent approach
 - *Same people involved in same stages as much as possible
 - *Consistent naming and setup for stages and transition actions

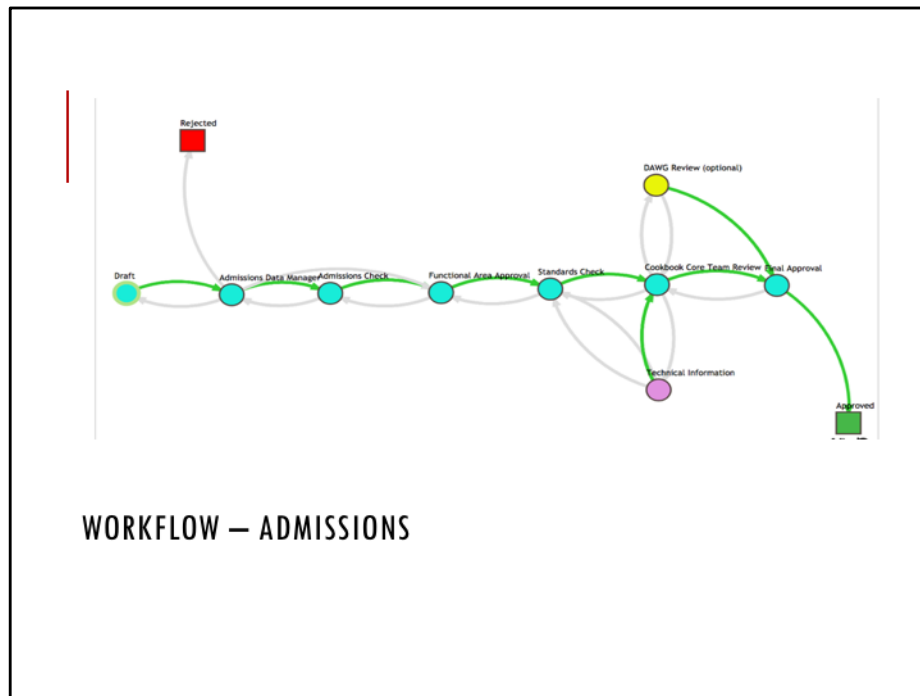


1. Draft
 - Anyone in the university with editing rights
2. Functional Area Review
 - Is this term required?
 - Manager intervention
3. Standards Check
 - Part of Draft/Functional Area Review or separate step
4. DC Core Team Review (subset of Stewards Group)
 - Include for feedback from broader campus community to ensure we cover all relevant areas
5. DAWG Review (optional)
 - All workflows include escalation to higher level (DAWG) in case questions or issues cannot be resolved within the core team
6. Technical Information (not finalized)
7. Final Approval
 - Mostly data managers but can be different for some functional areas (HR)



KARINA

- Fairly small functional area and team
- Weekly team meetings with director of functional area – perfect for approving new definitions
- Data manager drafts definitions and brings to weekly team meeting for director's approval
- Standards check is included in Draft stage (if drafted by data manager) or in Functional Area Team Review stage before presenting at team meeting (if others submitted draft)
- Moves on to Cookbook Core Team Review, then to data manager for Final Approval



Deepinder

Different from Student Financial aid

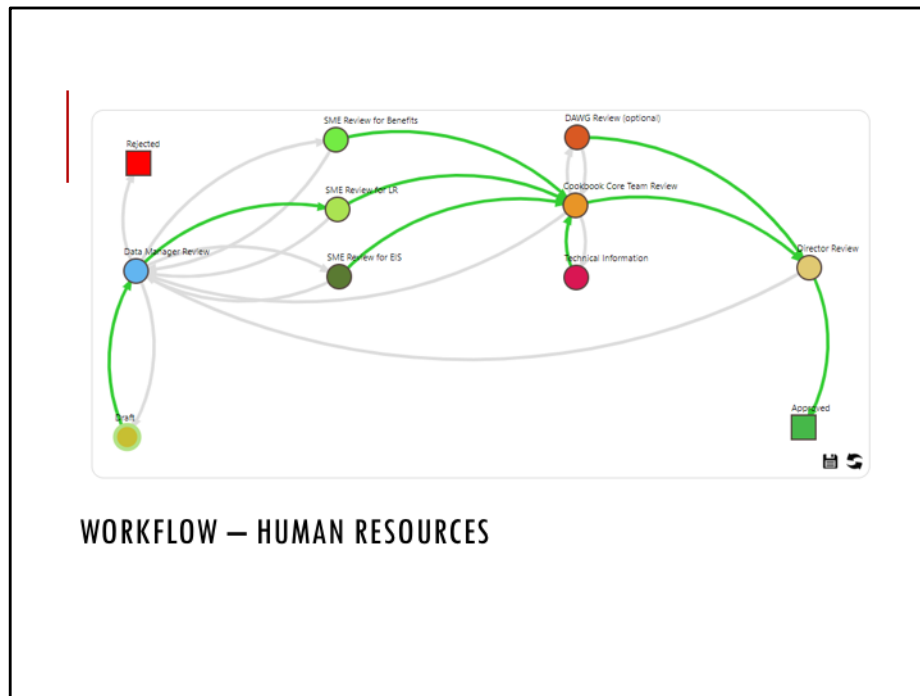
Do not have weekly meetings

Data manager drafts forwards them to the admissions manager who has years of experience and knowledge

Functional area approval is done by the Associate Registrar, Admissions

Then definitions get forwarded to the data manager for standard checks

Then follow the same route as Student Financial Aid workflow



Deepinder

Still do not have weekly meetings, but different from Student Financial aid and Admissions

Data manager screens the definitions and assigns them to different sub functional areas ...

HR data manager checks standards at the cookbook core team as he is part of that group

All definitions go through the HR director for final approval

Lee Dreger to discuss situations where terms and issues are escalated to DAWG

WORKFLOW RECAP

1. Draft
2. Functional Area Review
3. Standards Check
4. Data Cookbook Core Team Review
5. DAWG Review
6. Technical Information
7. Final Approval

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Deepinder

1. Draft

- Anyone in the university with editing rights can create draft and submit it to stage following draft stage

2. Functional Area Review

- Is this term required? - If no, gets rejected. If yes, review for completeness and correctness, then on to next stage
- Manager intervention (different solution for each functional area)

3. Standards Check

- Some areas do it as part of Draft or Functional Area Review, some do it as a separate step

4. Data Cookbook Core Team Review (name likely to change)

- Knew we had to include Cookbook project team (now core team) for feedback from broader campus community to ensure we cover all relevant areas (others might think of uses for a term that we were not aware of)

5. DAWG Review

- All workflows include escalation to higher level (DAWG) in case questions or issues cannot be resolved within the data cookbook core team

- Optional step – not on Happy Path

6. Technical Information

- Not finalized but will be included in all workflows at some point

7. Final Approval

- Step included in all workflows. Most data managers approve their definitions but different for some functional areas (HR).

GO LIVE?

Build and test workflows

Biweekly workshop and content review

Finalize draft definitions

Data Cookbook – consulting services – 4 month review

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Deepinder

We have finished building most of our workflows, but there are some we are still working on.

Our core team meets regularly to go over our drafted definitions; we go through our definitions, discuss, learn new things, make changes, consult with other units, etc.

We have a consultant from Idata who coached and mentored us with cookbook. We have a follow up review meeting with her in 4 months.

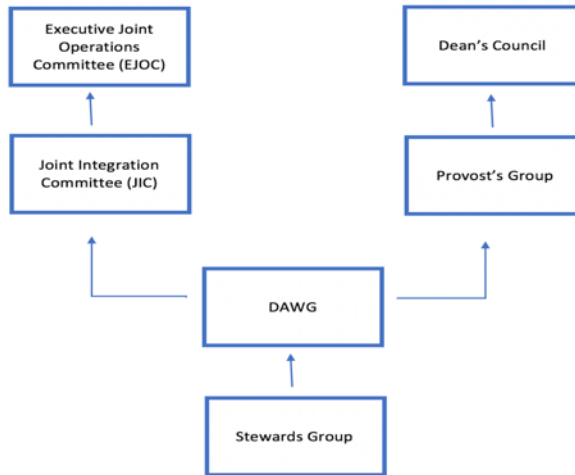


GOVERNANCE GROWTH

**LEADERSHIP
SUPPORT**

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Consultation
Recommendation
Escalation
Stewardship
Sponsorship



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STEWARDSHIP

Academic Organization and Department =

Academic Department and Department

Student ID, Employee ID, EmplID, Applicant ID, MacEwan ID =

Student ID and Employee ID

Course ID, Course, Subject, Catalog Number, Section, Class, =

????

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Consultation
Recommendation
Escalation
Stewardship
Sponsorship

- Creating new vocabulary
- Aligning policy and procedural language
- Collaboration and guidance for ERP projects

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GOVERNANCE INITIATIVE

OUTCOMES and
LESSONS LEARNED

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GLOSSARY PUBLISHED

tableau/public

GALLERY AUTHORS BLOG RESOURCES ACTIVITY SIGN IN

Data Cookbook - Profile

Favorite Download Workbook

data

cookbook

Specification

[view details](#)[compare](#)[request a change](#)

Applicants Aid by Program

Purpose

To monitor amount of aid that has been accepted by our applicants compared to what we have offered. This is monitored to determine how well we are doing in utilizing our budgeted award dollars.

Description

This information will show for the current award year only. It will break down the amount of dollars offered as well as accepted by academic program.

Owner: VP of Enrollment

Data System:

Related Definitions

Active Academic Program

An Academic Program generally is a combination of degree and support that an Active Student is currently seeking to earn. If a student has withdrawn, their academic program will be marked as inactive. A program is also no longer considered active once the student has graduated. Each academic program can have an associated graduation year.

Admission Status

The current status of the student's application for admission to a degree-seeking program for a specific entry term.

Applicants Aid by Program

Offered/Accepted

Active Academic Program

Program	Offered Aid (\$)	Accepted Aid (\$)
BS English	150	50
BS Fine Arts	200	150
BS History	350	200
BS Strategic	100	100
BS Engineering	250	150
BS Math	150	150
BS Nursing	150	150

Legend: Offered Aid (Blue), Accepted Aid (Orange)

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GLOSSARY SEARCH BOX

GLOSSARY SEARCH
Powered by Data Cookbook

☐ Exact match?

Search

SEARCH RESULTS

[control total account](#)
A general ledger account whose balance reflects the total of balances of related subsidiary ledger accounts.

UR Financials

UNIVERSITY OF ROCHESTER

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[Tools](#)
[Forms](#)
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[Projects](#)
[UR Financials Login](#)
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UR Financials Upgraded

Posted on September 8, 2017 by jphibbs

This past weekend, the UR Financials system successfully underwent a scheduled upgrade. Changes made will not impact end users.

Workday's View Award page has a new award user interface. You'll see a new, tabular view and all the essential award information will always be available at the award header. If you have questions regarding the location of specific award information, please contact either your Grant Accountant or Senior Grant Accountant in the Office of Research Accounting & Costing Standards.

If you have questions please email UroFTM@qrochester.edu

Posted in [News](#), [Support](#), [Workday Highlights](#)

UR Financials Gets an Upgrade

Posted on August 29, 2017 by jphibbs

Twice a year, UR Financials has a scheduled upgrade, the next occurring on **Saturday, September 8**. It is expected that this edition will have no end user impacts.

Workday's View Award page will deliver a new award user interface to the View Award page on September 8, 2017. You'll see a new, tabular view and all the essential award

WEBSITE SEARCH

Search

[New to UR Financials?](#) (new-
to-ur-financials-
web-site)
[Request Access](#)
[Training](#)
[Reporting Tools](#)
[UR Login](#)
[FAQs](#)

GLOSSARY SEARCH
Powered by Data Cookbook

☐ Exact match?

Search

SEARCH RESULTS

[control total account](#)
A general ledger account whose balance reflects the total of balances of related subsidiary ledger accounts. Account receivable and accounts payable are the most common examples.



OUR DEFINITION

Data Governance is fundamentally about decisions and data. This includes deciding what the data means, where it should be used, how accurate it needs to be, and what rules it needs to follow.

TDAN.com

Performed by the business people who know and use the data.

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CRITICAL ELEMENTS

Business Glossary: a record of the meaning of the data, so all the variations of it can be distinguished and erroneous comparisons eliminated

Data Quality: the condition of the data and its level of trustworthiness and adherence to policies

Roles & Responsibilities: the organizational structure that determines who takes responsibility for the care and maintenance of the data

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OUTCOMES

Sub-functional areas

- Admissions - Recruitment, Transfer Unit
- Records & Enrolment – Course Catalog, Registration, Scheduling

Review and approval participants expanded from 10 to 25 plus

Data Governance Coordinator position

MacEwan definition and scope

Structure and direction

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Workflow discussions

- Sub-functional areas – separate workflows but one data manager
- Participants involved

FUTURE PLANS

Specifications – additional governance

- PSQueries, Reports, BI Dashboards, Integrations, Extracts,
- Enterprise Information Management
- Report Catalog

Technical definitions

- Data Systems – PeopleSoft, BI, Infosilem, Blackboard, Raisers Edge
- BI trailblazer - technical description standards and data systems development

Data forum / open house

Website / portal link

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Now direction for DAWG – continue with specifications and technical definitions

LESSONS LEARNED

1. Have a plan but let it evolve and shape itself
2. Participation rate may vary
3. Membership may change
4. Consistent leadership
5. No Go Live is not a failure
6. Collaboration is essential
7. Slow is OK
8. Executive and administrative support
9. Just start

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Role of data managers

Finance capacity

Cookbook team added to stewards – process matured IT Service Transition no fit

BI faster than DG but we'll manage

CONCLUDING THOUGHTS

ANY QUESTIONS?

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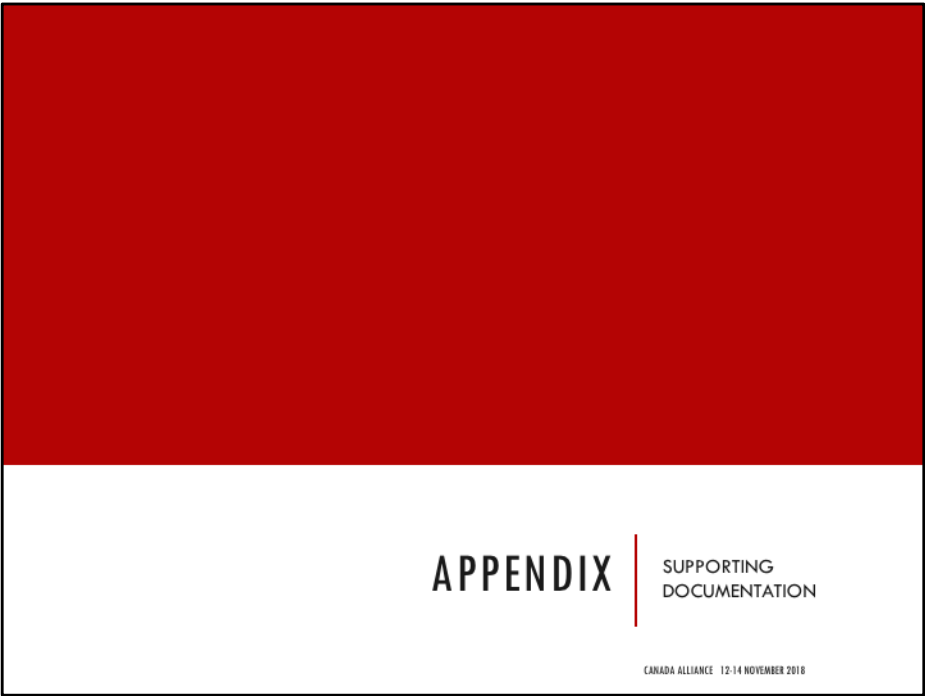


ALL ALLIANCE PRESENTATIONS WILL BE AVAILABLE FOR
DOWNLOAD FROM THE CONFERENCE SITE

THANK YOU!



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DAWG - CONTEXT

Source: Data Governance Institute DGI

The primary goals of a Data Governance Program are to:

1. Enable better decision-making through better data management.
2. To understand and promote the value of data assets.
3. Reduce operational friction when resolving data related issues.
4. Protect the needs of data stakeholders.
5. Train management and staff to adopt common approaches to data issues.
6. Build standard and repeatable processes.
7. Reduce costs and increase effectiveness through coordination of efforts.
8. Ensure transparency of processes.

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DAWG - MANDATE

1. To assess data governance models and make a recommendation to Deans' Council.
 - a) Determine an appropriate cross functional governance body.
 - b) Identify potential Data Stewards.
 - c) Investigate potential non-ERP data governance participants.
2. To identify and document the university's data assets.
3. To identify issues with data assets and suggest processes to address these issues.
4. To implement local data governance practices to help inform an institutional level approach to data governance. Use these solutions to demonstrate the value in having data governance.
5. To provide a means for Data Stewards to provide input into a data governance structure.
6. To develop a preliminary strategic plan for data governance, including short term and long term objectives.
7. Provide mentorship and education regarding data governance developments at MacEwan and develop a mechanism for staff and faculty to contribute issues and ideas.
8. Determine implications for potential policy development.
9. Document current "data governance initiatives" at MacEwan (e.g. LERS).

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DEFINITION STANDARDS

Common business terms - reference PeopleSoft if different - add PeopleSoft field name as synonym

Use business language (**Address** instead of **Street Line 1**)

Use full name and Title Case - add acronyms in () after

Use definitions within definitions

Add business rules

List values – provide list if 10 or less, add attachments or provide URL if long list

Add context - specify if a term or definition can be used in more than one context and describe the circumstances

Reference official sources if there is a direct link

i.e. Policy 1005 Credentials for credential type or MSA Collective Agreement for term employees.

Source of Definition - office or business unit or official document as relevant, including time period

i.e. Office of the University Registrar, MSA Collective Agreement 2017-2019

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DEFINITION

Year of Study (YOS)

Synonyms: Academic Level (PeopleSoft)

Drafting

Version 1

Edit

Functional Definition: ⓘ

Year of Study is a measurement of a students' progress towards completing a ministry approved [Credential](#). It does not refer to how long the student has been in a program. For non-ministry approved programs students are considered as Year 1.

Depending on the normal program length, there are four possible values:

- IC1 - Year 1
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- IC4 - Year 4

A degree program is generally 4 years; applied degree programs are 3- or 4- years; diploma programs are 2- or 3-years (no students will be reported in Year 4); and, a certificate or university transfer program is generally a 1-year program (all students in these programs will be in Year 1). In addition, for some programs, students will enter into later years (e.g. Year 3).

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These YOS values are updated when there are any changes to a student's enrollment record (e.g. a course add, drop, swap, normal maintenance change, course grading).

External

For government reporting (e.g. Learner Enrolment Reporting System), no credit adjustment is applied. This YOS calculation is available from Institutional Analysis and Planning.