



Finance and Admin Newsletter

March 2017

Issue 8

DECISION SYSTEM SUPPORT BUSINESS INTELLIGENCE (BI)

FEATURED GROUP

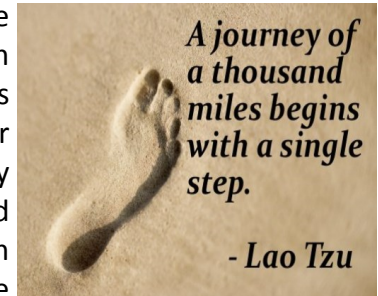
In today's data driven environment, Business Intelligence (BI) tools are recognized for their unique ability to speed information research and reporting times while reducing the costs and complexity of more traditional methods.

In 2014, the South Dakota Board of Regents began their BI journey to select and implement a single reporting solution across all universities. After evaluating several comprehensive reporting solutions, the SDBOR made the decision to purchase IBM's Cognos Business Intelligence solution.

To-date we have implemented Colleague ODS, upgraded Banner ODS, and developed/deployed Cognos frameworks to support both ODS environments. In addition, we have implemented the Student Success Analytics module and continue to expand those dimensions to support on-going analytical needs. Those systems are being widely utilized by the universities for reporting and we continue to refine to better serve the needs of the universities.

Launching new technology is both challenging and exciting! As we gain more familiarity and expand our use of Cognos, we look to leverage more visualization capabilities. The next exciting step we will take on our BI journey will be to roll out dashboards using Cognos Analytics. A dashboard can be used to show a significant amount of data in a single integrated view. From an organizational

perspective, a dashboard can provide real-time results, measure against key performance indicators (KPIs) and monitor progress towards internal goals. The key strength of dashboards is to provide visual information that allows you to see what you are doing right and highlight areas that may need to be improved. Information is key and dashboards can help our universities quickly make informed decisions that can dramatically influence day-to-day operations.



Banner Student Investigation Continues

Demonstrations involving campus Financial Aid were held with Ellucian February 23-24, 2017. Additional demonstrations for the remaining eight module groups will be held March 7-9, 2017, in Sioux Falls. These demonstrations will provide an opportunity for the campuses to better understand the Banner Student system, have questions answered, and share expectations.





Current Projects

The **Banner Technology Committee** is currently working on implementing system changes to production, resolving items within SNAP/Banner and next will be the Spring 2017 Banner Application Upgrades.

Cognos Business Intelligence Brief

ODS Performance Improvements

The latest release of Colleague ODS frameworks was released to TEST on February 20th and is currently being reviewed by the universities. The next version of Banner LIVE frameworks will be deployed mid-March. Requests for new tables, columns or functionality should be sent to the SDBOR-DSS@sdbor.edu

If you have other questions or suggestions, please e-mail us at SDBOR-DSS@sdbor.edu.

Colleague ODS Refresh Schedule

Full ODS Refresh	9:00 p.m. – midnight	(daily)
Financial Aid Refresh	midnight – 1:00 a.m.	(daily)

Per the **Enrollment Services Center**, effective for the 2017-18 academic year, the Department of Education implemented a major procedural change. The crux of this change pertains to when and how students complete the FAFSA. Until now, the FAFSA which students could not submit until January 1st called for tax/income information attached to the immediate prior year. But moving forward, the FAFSA will ask for tax/income data from the *prior-prior* year (that is the year before last). This transition facilitates earlier submission of FAFSAs with the opening date being shifted back three months. Consequently, ESC has revamped procedures in order to accommodate these significant changes. Linda Shumaker (our financial aid verification expert) began testing in October. By December, she was importing 2017-18 FAFSA records. This presents a sharp contrast to the historical precedent of approximately March 1st. To date, 27,000+ FAFSA records have already been loaded to Colleague. The February 2017 status equates to that of May 2016. Clearly, the landscape of financial aid verification will look very different!

The **SDBOR libraries and RIS office** continue to make progress on the implementation of the ExLibris Alma and Primo integrated library system. The go-live date for the system is June 30, 2017.

A survey regarding use of the commodity code mapping feature was sent out to SDezBuy users via Survey Monkey in February. As of February 21st, 280 responses have been received. The survey ends February 22. The **Purchasing Module** group will use the information from the survey to gauge the success of the mapping feature and to determine if additional training is needed.

SmartProcure is an online subscription service that provides buyers with the ability to research orders from other colleges, universities and government agencies to determine best pricing for equipment and supplies. USD is piloting this program over the next year to determine if the service has value and should be expanded to additional buyers within BOR institutions. Linda Van De Rostyne will use the program over the next 12 months for the purchase of computer hardware, software and audio/video products. The **Purchasing Module** will meet again on March 15, 2017.



Current Projects (cont.)

The **System Security Committee** met in December 2016 and discussed topics including DLP, Digital Forensics, Office 365 Architecture, and Advanced Threat Protection. A presentation by Matt Spear from Department of Homeland Security entitled “Cyber Security State of the Union” was also part of the meeting. The next system security meeting will be in May 2017. The AIG Cyber Security Insurance Applications were completed by the campuses in January 2017. For the FY17 security audits, the SIG tool will be used again as in the past. A set of standards will be reviewed in the next few months and provided to the campuses by July 1, 2017, so the campuses know which measurements will be used for the FY18 audit. The System Security Committee is also working on several system policies to be reviewed at the May Technology Affairs Council retreat.

This past fall a work team from all campuses was called together to review building codes used in the various software applications across the system. The need to have a uniform identification system arose last year when identifying insured buildings.

The work team looked at the building smart codes across the Regental system and with a possibly of developing a common numbering system to be used to identify insured buildings or that could be used with other third parties. Changing the coding in Colleague and Banner has a broad impact which is next to impossible to change. These codes are linked to a number of operating tables and is part of the architecture key. Each campus also had the opportunity to explain how they use building numbers or codes in various applications and the assignment of those codes.

Given the current dialogue about Banner Student, it seems prudent to hold on this project and see if we can add building numbers if we move to Banner Student. If that does not happen, we should identify a field where a unique building number can be added and tracked for each building in Colleague.

Thank you to the work team members for their assistance with the project.



Updates on Past Projects

The subcommittees of the **Procurement Group** continue to work on the following goals, we hope to have all completed before the annual purchasing retreat scheduled for July.

- Develop end user survey (previously described under Current Projects)
- Develop Forms in SDezBuy - The committee is working on a Change Order form and determining if an electronic W9 form could be developed with workflow.
- Review commodity code descriptions
- Review purchasing assessment fee & state procedures



Accomplishments

Per the **Procurement Group**, office supplies and custodial supplies were removed from shared services after approval was granted by the steering committee and BAC. Each of the campuses will now handle these orders for their respective campus. This change should have minimal impact.

Upcoming Training

Cognos Business Intelligence Training Opportunities

Banner Cognos Finance/Budgets Reporting

March 21, 22 & 23 (1/2 day)

WHERE: Sioux Falls, SD – University Center, FSC1, Room 108

INSTRUCTORS: John Marsh, ASR Analytics, Kate Connelly, ASR Analytics

HOW TO REGISTER: Email Kimm Sundal at kimm.sundal@sdbor.edu

The intended outcomes of this course are:

- **Day 1 Banner ODS** – report conversion – this training will cover options for conversion of existing Banner ODS Finance & Budget Oracle reports into Cognos.
- **Day 2 Banner Transaction** – users will develop a select series of Finance & Budget reports using the BannerLIVE framework.
- **Day 3 (1/2 day)** will cover advanced topics related to Cognos reporting.

Banner Cognos Finance/Grants Reporting (This will be the last scheduled Banner training)

May 16, 17 & 18 (1/2 day)

WHERE: Sioux Falls, SD – University Center, FSC1, Room 108

INSTRUCTORS: John Marsh, ASR Analytics, Kate Connelly, ASR Analytics


HOW TO REGISTER: Email Kimm Sundal at kimm.sundal@sdbor.edu

The intended outcomes of this course are:

- **Day 1 Banner ODS** – report conversion – this training will cover options for conversion of existing Banner ODS Finance & Grants Oracle reports into Cognos.
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Tips & Tricks

You can change the number of entries you see in each screen in IBM Cognos connection by selecting the MY AREA OPTIONS  icon from your starting menu >> My Preferences and select Number of entries in View List option. Change the default from 15 to 99.

Concerns

When a new vendor is set up in Banner, the vendor record is transferred to SDezBuy to be used for creating purchase requisitions and purchase orders. SDezBuy does not support alias names in the same manner that Banner does. In SDezBuy, an alias name will include “Please use Vendor xxx” in the vendor record. If the end user doesn’t notice the message, they could go through the entire requisition process and in the end, the requisition will be returned to the end user with a message indicating the vendor is invalid. In order to bring attention to the message, we are proposing to add a stop sign to the message as indicated here [Great](#)

[Tapes for Kids PLEASE USE Margaret Young](#)



. The Purchasing Module hopes this will bring attention to the message and save the end user time and frustration. If this proposal is accepted, we hope to begin by using it on any new vendors with an alias and eventually update existing vendor records. The Purchasing group will work with AP and the steering committee on this recommendation.