

DATA GOVERNANCE INFO SESSION:

Post-Fin Org organizational structure and
data hierarchies

Aug. 3, 2023



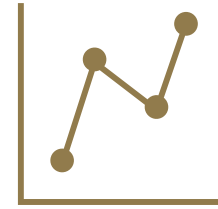
AGENDA

- > Welcome
- > Meet the new data hierarchies:
 - **Institutional Organization Structure**—(Erin Guthrie / Janet Crawford)
 - **Human Resources**—(Rachel Gatlin)
 - **Finance**—(Jessica Bertram/Dinah Millikin)
 - **Research**—(Rick Fenger)
 - **Academic**—(Helen Garrett's delegate: Erin Guthrie)
 - **Advancement**—(Michael Visaya)
 - **Property & Space Mgmt**—(Steve Tatge)
- > Q&A



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IOS DATA HIERARCHY



- > **Purpose:** A new hierarchical data source that reflects the institution's high-level organizational structure for primary use in management reporting, data analysis and enables a standard and consistent way to integrate data across systems and domains.
- > **When to use it:** When reporting at the institution, campus, or major organization level, particularly when reporting cross-domain information.
- > **Where to find it:** The IOS Hierarchy can be found in the Core Data Hierarchy Management (CDHM) tool and within the AnalyticInteg database in the EDW. Mappings from additional hierarchies to the IOS structure will be viewable in CDHM and plans to add to select enterprise data sources is in progress.



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IOS DATA HIERARCHY



- > **Plans to develop it further:** Outreach to units and continual adjustments will be made to ensure the IOS maintains a close link to the official organizational hierarchy (as specified in APS 1.1).
- > **Status of mappings:** IOS project team is currently validating mappings across hierarchies to identify and address any misalignment.
- > **To learn more contact:** Institutional Data & Analysis, uwir@uw.edu



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HR DATA HIERARCHY



- > **Purpose:** The HR Hierarchy provides an HR reporting structure for data analysis and for the reporting of institutional HR personnel attributes and relationships.
- > **When to use it:** Currently used for central institutional HR reporting, additional purposes to still be explored.
- > **Where to find it:** The HR Hierarchy can be found as an Organizational Assignment on each position (filled and vacant positions) in Workday. The same Organizational Assignment can be found on the position's Supervisory Organization.



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HR DATA HIERARCHY



- > **Plans to develop it further:** Maintenance and auditing is regularly performed by the HRIS team and will continue.
- > **Status of mapping to IOS:** Initial mapping of data to the IOS is done and the IOS Team is currently validating.
- > **To learn more contact:** Human Resources Information Services, hris@uw.edu



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FINANCE DATA HIERARCHY



Cost Center Hierarchy

- > **Purpose:** For reporting the University finances by different levels / subsets of the organization.
- > **When to use it:** When reporting UW finances for a slice of the organization
- > **Where to find it:** In Workday
- > **Plans to develop it further (e.g., cadence for changes/updates):** Dictated by FDM change management
- > **Status of mapping to IOS:** Mapped, but with some identified gaps
- > **To learn more contact:** Finance Data Domain Council, uw_datagov_fddc@uw.edu



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RESEARCH DATA HIERARCHY



- > **Purpose:** Replace the FINORG hierarchy with the CCH as a starting point. FINORG was the backbone of our existing BI Portal solutions
 - Previous reporting - Counts & Amounts for Proposals, Awards and Expenditures for all levels of the institution including data needs at the previous 8-10 digits of the FINORG. Supporting roll-ups to Dept, College, Campus
- > **When to use it:** Generally, when you are looking see research admin data for the institution
- > **Where to find it:** A copy of the CCH from WDAY is in CDHM but it has not been published for broader consumption yet. Available via API.

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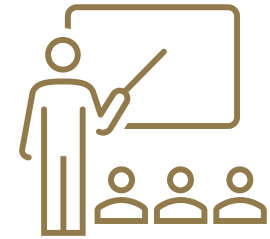
RESEARCH DATA HIERARCHY



- > **Plans to develop it further:** As we remediate our pre-WDAY data solutions we expect changes, updates and tweaks to the CCH resulting in a true "research" hierarchy
- > **Status of mapping to IOS:** Work in progress
- > **RRH:** Research Routing Hierarchy (RRH) - 5 levels, to division level to support SAGE routing and approvals. **In CDHM prod now. Relates to the CDHM update**
- > **To learn more contact:** Richard Fenger, Research Data Domain Council Chair, rfenger@uw.edu

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ACADEMIC DATA HIERARCHY

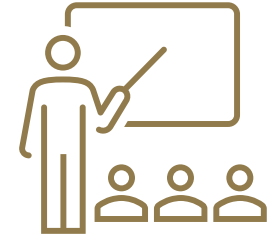


- > **Purpose:** To communicate the university's academic structure of campus, college, and departments. Most often used in BI Portal SSRS reports and within academic units for reporting and analysis.
- > **When to use it:** To support academic reporting and analysis at the campus, college, department level. Note: additional tables have been developed to replace FinOrg mappings to curriculum, major, and degree information with the IOS level four equivalent.
- > **Where to find it:** Once finalized the system of record will be Quali (Curriculum Management System) with mappings in the Core Data Hierarchy Management tool (CDHM).



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ACADEMIC DATA HIERARCHY



- > **Plans to develop it further:** Initial discussions for plans to solidify the curriculum management (CM) system as the source record for academic structures are underway. Review and updates are ongoing and continuous.
- > **Status of Mapping to IOS:** Department codes from the CM System have been mapped to IOS and are currently being validated. Additionally, three new tables have been created in AIDB to replace existing financial organization code mappings to curriculum, degree, and major abbreviations.
- > **To learn more contact:** Helen B Garrett, Academic Data Domain Council Chair, helenbg@uw.edu



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ADVANCEMENT DATA HIERARCHY



- > **Purpose:** To represent the structure by which Advancement organizes, executes, and analyzes engagement and fundraising efforts with UW alumni and stakeholders.
- > **When to use it:** The Advancement *Hierarchy of Things* is used in a variety of ways, including but not limited to...
 - Cross-walking like-for-like metadata concepts across multiple systems
 - Developing and organizing content, segments, and engagement opportunities
 - Reporting outcomes. Conducting correlation and predictive analytics.
- > **Where to find it:** Within the Advancement CRM (Tandem), as well as within our data warehouse, ETL, and reporting systems.



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ADVANCEMENT DATA HIERARCHY



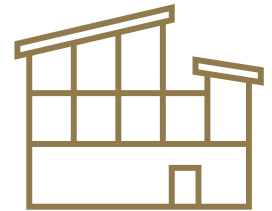
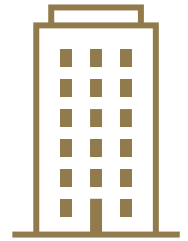
- > **Plans to develop it further:** The Hierarchy of Things has already been in production for several years but is constantly evolving as university systems and structures evolve.
- > **Status of mapping to IOS:** Initial mapping is complete, but more testing and iterative development will take place following the launch of the Tandem CRM and Workday Finance.
- > **To learn more contact:** advdata@uw.edu



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PROPERTY AND SPACE MGMT DATA HIERARCHY

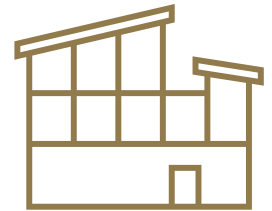
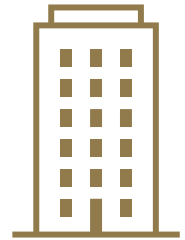
- > **Purpose:** The Property & Space Management data hierarchy will provide mapping for location, facility/building, building/floor, and building interior space assignments and allocations for reporting.
- > **When to use it:** To support Property & Space reporting and analysis at the site/campus, building, floor, and interior space level.
- > **Where to find it:** TBD, current draft on SP, IOS Mapping Exercise spreadsheet.



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PROPERTY AND SPACE MGMT DATA HIERARCHY

- > **Plans to develop it further:** Next step is for DG Council to approve details for levels 1-4 mapping. This will be followed by defining level 5-6 Property & Space specific data hierarchy.
- > **Status of mapping to IOS:** Initial high level 1-4 mapping pending DG Council August meeting to approve for adoption, to be followed by detailed level 1-4 mapping and adoption.
- > **To learn more contact:** Steve Tatge, Property and Space Management Data Domain Council Chair, statge@uw.edu



IOS Mapping Project Status and Next Steps

Current

- IOS table structure available in CDHM Test and Prod, and AnalyticInteg
- IOS to Academic curriculum, major, and degree mapping tables will be available in AnalyticInteg
- Analysis of alignment across hierarchy mappings is underway for the Finance, HR, and Academic domains.
- New HR hierarchy in CDHM Test

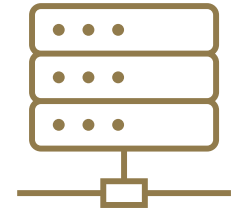
Outstanding

- As they come in, drafts of mappings will be loaded into CDHM and analyzed across domains
- IOS table structure with mappings available for enterprise use
- Change control/change management DRAFT processes defined and shared with DG for review

Note: An IOS webpage is being drafted which will provide current updates, links, and who to contact regarding various hierarchies



Core Data Hierarchy Management (CDHM) Tool Status



- > **Go-live:** Made it!
 - **RRH:** Support of Research Reporting Hierarchy (RRH) Day1
 - > A 5 level hierarchy mapped from the CCH. Specific hierarchy to support Research's SAGE system for routings and approvals
 - > Established Steward and Ownership/Approval roles
 - > Managed changes for the CCH to the RRH at go-live, 15 or so changes. 7 impactful.
- > **Post go-live bug release:** 5-6 bugs. QA now, testing soon
- > **Full prod tech turnover:** 9/15. From GapApp group to Paul Schurr's area. Interim landing place until permanent home is decided
- > **Biz prod turnover:** WIP. Documentation for turnover, prod support and onboarding
- > **CDHM test:** IOS and HR too.
- > **Coming soon:** Assessment for future phases to finish initial requirements and progress the system for our evolving needs...

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QUESTIONS SUBMITTED VIA REGISTRATION FORM

- > **What hierarchies would best represent schools/college, departments and units?**
 - All data hierarchies represent schools/colleges, departments and units from different lenses. You may use different data hierarchies to view, analyze data for different purposes.
 - For example, OPB reporting...
 - > For external reporting, OPB will use the IOS data hierarchy that crosses data systems and data domains.
 - > For reporting on faculty salaries and teaching load reporting, OPB will use IOS to join departmental data for faculty salaries, and student credit hours.
 - For example, Human Resources will use the HR data hierarchy for reporting on...
 - > A department's personnel relationships
 - > Institutional HR reporting to external agencies
 - > To define an employee's department for grouping and data analysis
 - > To define departments for internal HR systems and functions such as UWHIRES, demographic dashboards, Board of Regents, Executive Office and EEOAA reporting
- > **Which worktag would we use to figure out that hierarchy?**
 - In Workday Finance, Cost Center
 - In Workday HCM, Human Resources Hierarchy

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QUESTIONS SUBMITTED VIA REGISTRATION FORM

- > **How does it work, and what happens if you change any of the components?**
 - The different data hierarchies can be updated as needed and are independent of one another.
 - When changes are made in one domain they will be communicated to other data domains so they can adjust their data hierarchy if/as needed.
 - The IOS structure has been built off of the highest level organization structures of the University. Academic department changes are governed by the Board of Regents and a new Administrative Policy for similar changes in administrative units has been submitted to the Rules Office for approval and posting. The IOS may be updated based on approvals flowing from these governing change processes.
- > **Please provide mapping across all the hierarchies including IOS**
 - Mappings of 4 of 6 identified data domain hierarchies is under development or published in CDHM.
 - Once current validation efforts across domain mappings is completed, the CDHM tool will house all mappings.
 - Coming soon, more information on where to go to view and use the mappings.

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QUESTIONS SUBMITTED VIA REGISTRATION FORM

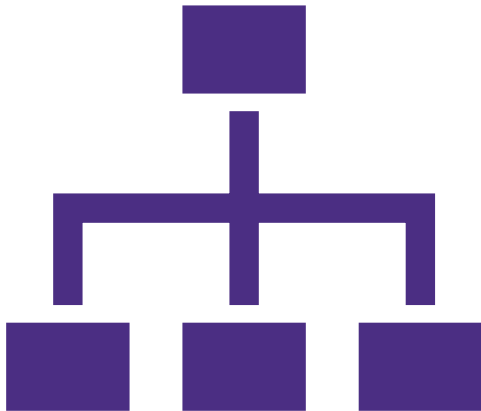
- > **How often would hierarchies change for a cost center/worktag?**
 - This is dependent on department FDM change requests and the FDM change control process
- > **Do we know if there are changes that Workday has in their roadmap for the next few years?**
 - We are not aware of anything on the Workday road map that would affect the IOS mapping to Cost Center.
- > **Do you have plans to share regarding establishing centralized and standardized access authorization and auditing processes for people and systems who want access to UW data?**
 - Access, roles, and related processes, such as authorization or auditing processes are on the DG roadmap along with several other initiatives.
 - Once the current initiatives, such as data hierarchies, are complete, the DG operational committee and steering committee will prioritize the next round of work.
 - To stay informed we encourage you to subscribe to the DG mailing list.

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Q&A

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IOS: Additional Information



- The Institutional Organization Structure or IOS is a central hierarchy that reflects the high-level organizational structure of the major units such as campuses, colleges and schools, etc.
- Is a four-level hierarchy designed to operationalize the “official institutional hierarchy” across data sources and systems and to enable high level management reporting and cross-domain analysis.
- The new IOS hierarchy will replace the use of Financial Organization Codes, where appropriate, and in non-financial institutional reporting where Financial Organization Codes had been used.
- Will be maintained within the Office of Planning & Budgeting (OPB) and will live in the Core Data Hierarchy Management Tool (CDHM) where mappings to other primary hierarchies such as Academic (unit), H and Finance will be made available.



IOS Use Case

- > Analysis to determine **resource allocation** for central funding to **departments** based on **paid faculty FTE** and **teaching loads**.
 - Need to pull information on Faculty (HR), Department Cost Centers (Finance), and credit load activity (Academic).
 - No easy way to join data across domains/systems as “department” is not universal nor standard.
 - IOS, as the core data element that connects the data
 - IOS links departmental information to attribute resource allocation to the department where the faculty costs are incurred, based on instructional loads.

Please feel free to provide additional use cases to UWIR@uw.edu.



IOS Hierarchy and Mappings Example

Atmospheric Sciences (ATMS) – IOS Level 4 Code is mapped to:
 Academic Hierarchy (CM/SDB)
 HR Org Hierarchy
 Cost Center Hierarchy (Finance)

IOS

IOSLevel2Name	IOSLevel3Name	IOSLevel4Name	IOSLevel4Code
UW Seattle	College of the Environment	Atmospheric Sciences (ATMS)	IOS000577

Academic

Campus	School/College	Department Name (Display)	Department Code
Seattle	College of the Environment	Atmospheric Sciences	1067

HR

L3 Entity	L4 Major Org	L5 Major Area	L6 Department	L6 Reference ID
Seattle Campus	College of the Environment	College of the Environment (MA)	ATMS: Department	HROrg000338

Finance

CCH Level 3 Name	CCH Name	Cost Center Name
Seattle Campus (Financial CCH 03)	College of the Environment (Financial CCH 05)	CC100952 CoEnv Atmospheric Sciences (ATMS) - Academic Operations
		CC100953 CoEnv Atmospheric Sciences (ATMS) - Research Administration and S..
		CC100954 CoEnv Atmospheric Sciences (ATMS) - Research and Engagement Acti..
		CC101132 CoEnv Atmospheric Sciences (ATMS) - Computing Services
		CC101133 CoEnv Atmospheric Sciences (ATMS) - Administrative
		CC101134 CoEnv Atmospheric Sciences (ATMS) - Special Operations