

University of Minnesota

## **Self-Help Guide**

# **Enterprise Data: Overview to Working with University Data**

This self-help guide provides an overview of enterprise data that enables decision making at the University of Minnesota.

## **Understand and Get Access to University Data**

### **Enterprise Data at the University**

#### **Overview of Data at the University**

Enterprise data is a valuable institutional asset that requires organization and governance in support of institutional decision making and daily operations.

About Enterprise Data

<https://edmr.umn.edu/using-enterprise-data/about-enterprise-data>

Enterprise Data Pillars

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=2708>

Examples of Enterprise Data

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=3385>

### **Enterprise Data Landscape**

The University's enterprise data landscape generally consists of the data's systems of record, data warehouses, reporting, analytics and data modeling tools, and

systems integrations.

Systems of Record

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=7767>

Data Warehouses

<https://tdx.umn.edu/TDClient/31/Portal/KB/ArticleDet?ID=3801>

Reporting and Analytics

<https://edmr.umn.edu/using-enterprise-data/published-reports>

Application and Data Integration

<https://it.umn.edu/services-technologies/office-information-technology>

## **Key Data-Related Policies, Procedures**

### **Sharing Data Policies, Procedures**

Numerous University policies and procedures help protect the University's enterprise data and ensure that it is shared in accordance with local and federal privacy guidelines.

Public Access to University Information Administrative Policy

<https://policy.umn.edu/operations/publicaccess>

Sharing Data with Audiences Internal to the University

<https://policy.umn.edu/it/securedata-proc06>

Sharing Data with Audiences External to the University Procedure

<https://policy.umn.edu/operations/publicaccess-proc03>

### **Enterprise Data Security**

Numerous University policies and procedures help ensure that the University's enterprise data is handled securely.

Information Security Policy

<https://policy.umn.edu/it/securedata>

Data Security Classifications Policy

<https://policy.umn.edu/it/dataclassification>

Examples of Data Security Classifications

<https://policy.umn.edu/it/dataclassification-appa>

# **Data Governance Program**

## **Data Governance Overview**

Data governance plays a critical role in helping the University use data effectively, supporting academic excellence, operational efficiency, and regulatory compliance.

University's Data Governance Program

<https://edmr.umn.edu/data-governance-overview>

Data Governance Groups

<https://edmr.umn.edu/data-governance/governance-groups>

Data Guiding Principles

<https://edmr.umn.edu/data-governance/data-guiding-principles>

Defining Data Terms

<https://edmr.umn.edu/data-governance/data-definitions-process>

## **Understand Enterprise Data**

### **Data Literacy Program**

The University has created a Data Literacy Program to provide introductory, intermediate, and advanced information about enterprise data, reporting, analytics, and systems integrations. The program is self-guided and hosted in Canvas; University faculty and staff can access program components as needed.

Data Literacy Program

<https://z.umn.edu/DataLiteracy>

### **Data Term Glossaries, Dictionaries**

Clearly defined data definitions help ensure that data users can answer questions and make decisions consistently and with clear understanding. Broadly-available term definitions are available in the Idera Term Glossary, and Enterprise Data Warehouse (EDW)-specific data definitions are available in the EDW Data Dictionary.

Idera Term Glossary

<https://z.umn.edu/IderaTermDefinitions>

Idera Term Glossary QuickStart Guide

<https://z.umn.edu/IderaQuickStart>

Enterprise Data Warehouse Data Dictionary

<https://z.umn.edu/EDWDataDictionary>

Legacy Data Warehouse Data Dictionary

<https://z.umn.edu/datadictionary>

## **Get Access to Data**

### **Data Access Principles**

Individual access to the University's enterprise data is granted based on business need, data security classifications, and type of interaction with the data.

Data Guiding Principles

<https://edmr.umn.edu/data-governance/data-guiding-principles>

### **Request Data Access**

Access to data and systems may be granted dynamically (e.g., based on job code) or manually via an [Access Request Form](#) (ARF).

MyU Reporting Center ARF

<https://z.umn.edu/MyUReportingCenterARF>

UM Analytics Author ARF

<https://z.umn.edu/UMAnalyticsARF>

Data Warehouse ARF

<https://tdx.umn.edu/TDClient/31/Portal/Requests/ServiceDet?ID=308>

Common Good API ARF

<https://tdx.umn.edu/TDClient/31/Portal/Requests/ServiceDet?ID=530>

Unizin ARF

<https://tdx.umn.edu/TDClient/31/Portal/Requests/ServiceDet?ID=429>

PeopleSoft and Other Enterprise ARFs

<https://it.umn.edu/services-technologies/self-help-guides/enterprise-access-req...>

# Use Data and Reports

## Self-Service Reports and Analyses

### MyU Reporting Center

Operational reports and analytical dashboards utilizing enterprise data are available for broad use to most University employees. Those reports and dashboards are published on the [MyU Reporting Center](#).

What is the MyU Reporting Center?

<https://edmr.umn.edu/using-enterprise-data/published-reports>

MyU Reporting Center QuickStart Guide

[https://z.umn.edu/MyURC\\_QuickStartGuide](https://z.umn.edu/MyURC_QuickStartGuide)

Which Reports do I have Access to?

<https://it.umn.edu/services-technologies/how-tos/reporting-center-which-reports...>

## Ad Hoc Reporting and Analysis

### Ad Hoc Reporting Tools

Ad hoc reporting tools are available for individuals to create their own reports and dashboards using enterprise and local data when enterprise-delivered content doesn't meet business needs.

### Training Prerequisites

Prior to gaining access to ad hoc reporting tools and enterprise data, individuals need to complete the [Sharing Enterprise Data Training course](#). Additional tool-specific and data-specific training may also be required.

### UM Analytics

UM Analytics is an enterprise tool that central units use to build and publish analytical dashboards using data from the Enterprise Data Warehouse (EDW). Individuals can also become a UM Analytics Author in order to create their own ad hoc dashboards using data from the EDW.

UM Analytics for Reporting and Analytics

<https://it.umn.edu/services-technologies/um-analytics>

Become a UM Analytics Author

<https://z.umn.edu/UMAnalyticsARF>

Training: UM Analytics: Creating Basic Analyses and Dashboards

<https://z.umn.edu/UMAnalyticsTraining>

UM Analytics Working Lab

<https://z.umn.edu/UMAWorkingLab>

UM Analytics Application Resources

<https://z.umn.edu/UMAnalyticsResources>

## **Tableau Server**

Departments and units can purchase a Tableau Creator license in order to publish and share visualizations on the University's Tableau Server.

UMN Tableau Server

<https://it.umn.edu/services-technologies/tableau-server>

Request a Tableau Server Site

<https://z.umn.edu/TableauARF>

Tableau Learning and Support Resources

<https://it.umn.edu/services-technologies/resources/tableau-learning-support-res...>

## **PeopleSoft Query**

PeopleSoft is the University's Enterprise Resource Planning (ERP) system, the system of record for finance, human resources, and student business processes. PeopleSoft users can use PeopleSoft Query Viewer and Manager to run queries against this PeopleSoft data.

PeopleSoft Query

<https://edmr.umn.edu/using-enterprise-data/reporting-tools>

## SQL Tools

Standard SQL client tools can be used to directly query systems of record and data warehouses. Oracle SQL Developer is pre-configured and available through University of Minnesota AppsToGo.

Oracle SQL Developer (UMN AppsToGo)

<https://it.umn.edu/services-technologies/how-tos/sql-developer-use-appstogo-run...>

## Data System Integration

### University of Minnesota System Integration

The [OIT Integration Team](#) helps colleges and units connect to governed data for systems integration through the Common Data Layer via Application Programming Interfaces (APIs) or custom integration solutions.

Integrating with UMN Data

<https://sites.google.com/umn.edu/integration-apis/home>

Common Good APIs

<https://sites.google.com/umn.edu/integration-apis/common-good-apis>

Access Common Good APIs

<https://sites.google.com/umn.edu/integration-apis/get-access-to-common-good-apis>

Custom Integration Solutions

<https://sites.google.com/umn.edu/integration-apis/custom-integration-solutions>

## Training and Support

### Training and Resources

#### Data Tool Training and Resources

MyU Reporting Center QuickStart Guide

[https://z.umn.edu/MyURC\\_QuickStartGuide](https://z.umn.edu/MyURC_QuickStartGuide)

UM Analytics: Creating Basic Analyses and Dashboards

<https://z.umn.edu/UMAnalyticsTraining>

UM Analytics: Working Lab

<https://z.umn.edu/UMAWorkingLab>

Tableau Learning and Support Resources

<https://it.umn.edu/services-technologies/resources/tableau-learning-support-res...>

Boomi (for System Integrations)

<https://boomi.com/services/training/>

## **Data-Specific Training and Resources**

Sharing Enterprise Data Training

<https://z.umn.edu/sharingenterprisedata>

Finance Data Training

<https://controller.umn.edu/training>

Human Resources Management System (HRMS) Training

<https://hrms.umn.edu/sign-in?destination=%3F>

Student Records Training

<http://asr.umn.edu/training-and-support>

## **Request Data**

### **Enterprise Data Requests**

Official requests for enterprise data can be submitted to University Data and Institutional Reporting (UDIR) and to the Data Access and Privacy Office for public records.

Submit an Enterprise Data Request

<https://idr.umn.edu/about-idr/contact-us>

Submit a Public Records Request

<https://umn.nextrequest.com/>

## **Support**

### **Information Security Incidents**

Report Information Security Incidents

<http://policy.umn.edu/it/securitybreach-proc02>

## **Enterprise Data Support**

The Enterprise Data Management and Reporting team facilitates the University's data governance program and offers general support to and resources for the University's data community.

Stay informed: Data Community Newsletter

<https://edmr.umn.edu/umn-data-community>

Enterprise Data Management and Reporting (EDMR) Office

<https://edmr.umn.edu/edmr>

## **Data Community Groups**

User and special interest groups managed by various groups and related to data and analytics are available for University employees to join. Many are organized using Google Groups in the Twin Cities Google domain; employees from non-Twin Cities campuses should email [help@umn.edu](mailto:help@umn.edu) to request membership support if they have difficulty joining any of these.

Data Storytelling SIG

<https://groups.google.com/a/umn.edu/g/datastorytellingsig>

Data Warehouse User Group

</experts-communities/data-warehouse-users>

Integrating Data, Enterprise Architecture, and Applications (IDEAA)

<http://z.umn.edu/ideaa>

Tableau Users Group

<https://groups.google.com/u/0/a/umn.edu/g/tableau-sig>

UM Analytics Group

</experts-communities/um-analytics-user-group>

University Analysts Group

</experts-communities/university-analysts-group>

University SQL SIG

<https://groups.google.com/a/umn.edu/g/ps-sql-sig>