
Eastern Illinois University

University Reporting Vision Statement

Prepared by: EISE/Banner Steering Committee
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Introduction and Scope

One of the goals for implementing Banner at Eastern Illinois University is to improve access to institutional data for compiling information and for reporting¹. Toward this end, the Banner Steering Committee has developed a recommended University Reporting Vision Statement. The comprehensive Statement includes scope, definitions, needs, development, certification, and assessment.

The Statement articulates a vision for access to and delivery of information to support the University in the fulfillment of its mission. Consistent with this vision, the University will need to maintain the technology required to accomplish its reporting requirements. Additionally, the University needs to provide management and decision-making aides consistent with a typical Information Maturity Model including:

- Baseline reports
- Custom reports
- Self-service reporting
- Analytical trends (historical trends; forecasting)
- Performance management (data clusters; dashboards)

¹ See Enterprise Information System Enhancement Project Definition (<http://www.eiu.edu/~eise/docs/EIU-ProjectDefinition-GE-v10.0.pdf>, p.5).

The statement includes providing appropriate access for employees to institutional data and appropriate tools and training so they can fulfill their assigned duties and responsibilities. Further the Statement includes providing authenticated access to comprehensively aggregated institutional reports online and by other means as appropriate.

Definitions

A report is defined as organized information from institutional and other data files that is made available as a traditional paper print report or on screen or as a downloadable data file. Both institutional reports and ad hoc reports are encompassed in the Statement.

Institutional reports are certified for use throughout the University and include:

- Operational reports containing information used by a functional unit to help run an automated information system and related processes as well as externally required reports
- Managerial reports used to make routine, periodic, managerial/administrative decisions
- Strategic reports provide information showing general trends, status, key indicators needed by upper administration to make medium- to long-term decisions
- Dashboards provide a view of key indicators used by upper administration

Ad hoc reports are those developed by an individual or group for informal use in the administration and management of a program or functional unit or for completing an assigned duty or responsibility. They include:

- Research reports providing information used by an individual for a specific need related to their responsibilities
- Other testing and investigative special purpose reports

Needs

To achieve its vision for reporting the University needs to:

- Provide appropriate infrastructure for a comprehensive report program repository, a report distribution repository, and so on
 - Set up a shared “library” that can be securely used by numerous staff from the various functional units
 - Understand the necessity of a controlled library environment

- Have controls in place so that reports can be protected from unwanted changes or deletion
- Develop and provide streamlined authentication and access to institutional data, to institutionally supported reporting tools, and to institutional reports based on generic employee classification
- Provide a streamlined process, including an University perspective, for reviewing and, if appropriate, approving individual employee requests for access to institutional data files other than the access provided by generic employee classification (role and responsibility).²

Development

To develop a foundation necessary to achieve its reporting vision, the University needs to:

- Plan for and implement distributed technical support for functional units that are increasingly responsible for reporting
- Provide ongoing training support about reporting for functional units that are increasingly responsible for reporting
- Support functional units writing reports with a common, secure, and understandable set of views of the data to be used for reports
- Provide a core institutional reporting support function in ITS including, but not limited to, printing of mailing labels and so on
- Provide comprehensive guidelines for the formatting of reports that may be certified as institutional reports³
- Establish criteria for reviewing and selecting reporting tools' capacity to produce quality reports

² Presently such requests are addressed through the Banner Data Standards Manual (www.eiu.edu/~eise reference 1.1 p. 9).

³ See <http://www.eiu.edu/~eise/docs/EIU-ReportStandards-GE-v4.0.doc>.

Certification

In a distributed reporting environment, reports may be developed by a variety of means, using various reporting tools by various individuals within the organizational structure. Consequently, it is vitally important to develop and provide a systematic process to efficiently evaluate and determine that reports produce the results intended. Toward this end, the certification process needs to:

- Make reports that are certified to produce the results intended available as institutional reports (provided there is not an institutional interest to the contrary; institutional reports will generally have an institutional perspective)
- Create a mechanism to guarantee that access to shared certified reports
 - Follows EIU standards for formatting
 - Provides accuracy of information
 - Avoids undue server performance problems
 - Follows University guidelines for the securing and distribution of protected and sensitive information
 - Follows standards for naming conventions thus assisting report creators and those reading reports
 - Has an adequate level of documentation so functional units can understand what the report contains and under what conditions the information is acquired

Assessment

To assure the long-term success of reporting, the University will also need to:

- Provide an ongoing process for assessing individual, organizational and institutional reporting needs as an integral part of Banner implementation and as ongoing quality improvement
- Provide for formative and periodic summative evaluation of institutional and ad hoc reporting capabilities.