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2004-2005 Performance Evaluation

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NOTE: Documentation and written materials referenced below are not attached but are available in the Institutional Research Department, or on the Internet.

A. 2004-2005 General Goals:

1. Provide excellent service to internal and external clients.
Measure: Coordinate efforts of information resources to provide timely and accurate data.
Measure: Provide both aggregated and raw data for use by IR, the university community, and external agencies.
Measure: Implement new ways of meeting the needs for reports, data, and analyses.

Goal met.
You continually worked toward process improvements. You successfully provided timely and accurate data in support of decision making and information needs of the university community. See specific details related to this general goal under the 2004-05 Specific Goals and Objectives.

2. Keep supervisor adequately informed of issues in area and seek feedback as appropriate.
Measure: Keep supervisor informed and up-to-date on all projects and initiatives via email and in person.
Measure: Regularly communicate with supervisor to gain historical perspectives on projects.
Measure: Regularly inform supervisor of workload and deadlines.

Goal met.
You kept me informed of all initiatives, projects, and workloads.

B. 2004-2005 Specific Goals and Objectives:

1. Manage data appropriately to serve the needs of the institution.

Measure: Facilitate knowledge management by designing and maintaining an I.R. "knowledgebase," an information system that ties together various information resources to improve the efficiency and accuracy of processes and reporting.
   a) Develop, secure, and maintain an I.R. intranet server.
   b) Design and maintain a data mart of PeopleSoft and legacy snapshot data for consistent and accurate reporting of current and historical data.
   c) Implement a searchable e-mail repository of all I.R. e-mail.
   d) Implement a searchable catalog of survey instruments and related data.
   e) Implement an operational calendar to coordinate data collection and reporting, to analyze and forecast staff workloads, and to improve responsiveness to ad hoc requests.
   f) Write, organize, and maintain the documentation of information resources, processes, etc.

Goal met.
Examples:

The IR knowledgebase will continually be in development. Contributions to its development are a responsibility of all staff members in the department. In support of the IR knowledgebase, you managed the server for the department. You established a searchable tool for survey instruments (see item 3 below for more details). You established a tool (a WIKI) for IR staff to test storing documentation centrally, important to increasing efficiencies in the department. You worked extensively on data mart development to house snapshot data (see item 2 below for more details).

2. Develop and utilize the PeopleSoft student information system.

Measure: Participate in the development and utilization of the PeopleSoft information system and use of legacy data.
Measure: Develop reports and extracts using various PeopleSoft and pc-based tools.
Measure: Improve business processes that contribute to maintenance of accurate and consistent data in the PeopleSoft student information system.
Measure: Define common standards and procedures for extracting and reporting data.
Measure: Implement data warehousing/data mart solutions.
Measure: Implement tools such as ODBC for database access.
Measure: Resolve reporting issues among administrative units.
Measure: Resolve data integrity issues.
Measure: Develop systematic procedures for auditing data.
Measure: Prepare documentation on processes.
Measure: Implement new modules in PeopleSoft
Measure: Resolve security issues.

Goal met.
Examples:

IR Data Mart (DMIR):
In Fall 2004, you successfully updated the IR data mart with census data for the first time. You worked closely with Student Records staff to verify the results against existing reports and reconcile discrepancies. The IR data mart is now the official source for reporting census enrollment.

You set up a Web site with documentation related to DMIR. The "DMIR Setup" and "Data Problems" pages document the initial process of setup DMIR, including the data problems identified in the initial testing. The "Processes" page documents the steps required to update the data mart, while the "Modifying DMIR" page documents various ways of modifying the data mart (e.g. adding a new data field, adding a lookup, etc.).
Documentation: http://only.scu.edu/ir/instrsch/scuonly/DMIR/index.htm

You are developing training for updating DMIR so that any IR staff member will be able to update the data mart in your absence.

RDS/Cognos:
You assisted IT in configuring, managing, and troubleshooting RDS. You helped system managers to understand the implications of using implicit joins versus explicit joins in Cognos ReportNet. You created documents to explain testing process and results, and presented the findings to the group.
Documentation: http://www.scu.edu/services/reporting/Testing/table_joins.htm, http://only.scu.edu/ir/instrsch/scuonly/DMIR/join_tests.htm

IT is now working with Financial Aid to develop an historical data mart, and you have served as a consultant to the project. You provided them with documentation.

You continue to enhance the functionality of the **Reporting Metadata Explorer** to support the management of the reporting environment (see details under "Web Application Development).

Data Auditing and Reporting:
The automated Windows task scheduled process you created last year to extract relevant admissions data and compare the stored SCU Index with a calculated IR Index broke down when IT implemented tighter security on the university's Web servers. So you developed a new process that automatically runs and emails the file using VB script and a local SMTP mail server.
Documentation: See Automated_query_and_upload.txt [updated], smtp_mail_server.txt [updated]

3. Web application development.
Measure: Develop web applications, such as web-based surveys and web distribution of information via email.
Measure: Develop and maintain web application databases (including documenting structure and table relationships)
Measure: Maintain and enhance the department web page and web applications.
Measure: Publish in a timely fashion a variety of data and reports on a quarterly or annual basis

Goal met.
Examples:

Web Surveys:
You began development on a Web application 1) to manage survey documents; 2) to facilitate searching survey instruments; and 3) to analyze and report survey results. Initially, this was rolled out to Enrollment Management Senior Staff to provide them with information to formulate appropriate research questions about key enrollment management issues.
1. **Admin** - http://only.scu.edu/ir/instrsch/scuonly/scusurveys/admin/index.cfm [login required]. This enables the administrator to add a new survey to the database and upload the associated survey instrument. The administrator may also edit or delete existing entries.
2. **Search** - http://only.scu.edu/ir/instrsch/scuonly/scusurveys/scusurveys.cfm. This enables a user to explore the survey instruments in two ways:
    a. **Select a survey** presents the user with a pull down menu of available surveys. The user selects a survey and is presented with links to each year's survey instrument. Clicking on a link opens that year's survey instrument.
    b. **Search all survey questions** enables the user to conduct a simple Boolean search of survey questions. Given one or two words as search criteria, the user is presented with links to each survey instrument that has a question containing the search criteria. . Clicking on a link opens that year's survey instrument.
3. **Reports** – http://only.scu.edu/ir/instrsch/scuonly/scusurveys/reports/index.cfm. Currently this is a simple pull down menu of surveys. The user selects a survey and can see each question on the survey and a breakdown of responses. This will be developed into a much more interactive and customizable so that users may create their own reports, including charts and graphs.
Documentation: In progress.

For a second year, you managed the on line process of conducting the Orientation Survey.

Reporting Metadata Explorer (RME):
http://www.scu.edu/services/reporting/
You set up a reporting portal with a temporary page linking to Cognos ReportNet, the Reporting Metadata Explorer, and the Reporting WebBoard.

You made many enhancements to RME this year. In addition to the data mappings that were available in the first version of RME, report writers need to know how tables are joined in ReportNet. You discovered that table join metadata in ReportNet are kept in an XML file. You wrote a script to parse the XML data, find the table join metadata, and copy/insert it into the RME database on the Web server. Now the RDS administrator is able to update table join metadata using a simple form. Report metadata are also stored in XML files, so you anticipate figuring out how to extract that metadata as well.

You also re-engineered parts of RME to conform to best practices in building Web applications and to allow greater flexibility in presenting data. You did this by removing some code from a few pages and rewriting the code as a stand-alone Web service. By separating the business logic from the presentation, you are able to access the code from any page or application.

You will be presenting your work on the Reporting Metadata Explorer in March at this year's PeopleSoft Higher Education User Group conference in Las Vegas.
Documentation: RME_IA.vsd, RME_database_schema.vsd, RME_data_flow.vsd, see also RME_inline_docs_example.txt for an example of how you use comments in my code to document work.

IR Web Site Development and Maintenance:
You have made many updates to the IR Web site, as noted on the "What's New" page of the site. In addition to updating data on quarterly and annual reports, you added faculty FTE and now present the full-time faculty figures two ways: including and excluding administrators.
Documentation: See http://www.scu.edu/ir/whatsnew.htm

4. PC hardware and software leadership.
Measure: Recommend new software and hardware solutions.
Measure: Manage shared department drive.
Measure: Manage data backup processes.
Measure: Troubleshoot software and network issues.

Goal met.
Examples:

Dell Server with Windows Server 2003:
You set up Elroy22, a file server with a RAID array to house IR shared documents and hold the backups of our computers.

Data Backup Process:
You switched to using Windows XP's backup utility to backup our computers to Elroy22.
Documentation: In progress.

5. Job knowledge.
Measure: Continue to develop expertise in information retrieval and analysis
Measure: Continue to attend technical training as appropriate.

Goal met.
Examples:

During the past year you focused learning on areas related to Web applications and data storage and retrieval. You began working with raw XML files (see Reporting Metadata Explorer above) and anticipate using XML more in the coming year. You also studied best practices in Web application development and have begun to utilize these concepts in your work. In particular, you are working toward separating business logic (queries)

from presentation code so that the business logic may be reused in related applications.

In March of 2004 you attended the PeopleSoft HEUG conference in Las Vegas. You attended sessions related to data warehousing and reporting. During one session you saw a demonstration of how one school modified RDS to be an historical data mart. This proved invaluable to your own work in converting RDS. Upon your return you published your session notes on the IR Web site to share what you learned with other staff and administrators.
Documentation: See http://only.scu.edu/ir/instrsch/scuonly/PS_HEUG_2004/conf_notes.html

6. Documentation.
Measure: Maintain up to date documentation on all projects.
Measures: Complete documentation on projects and processes not documented during the 2003-04 review cycle.

Goal met.
Examples:

You continue to maintain accurate and easy-to-follow documentation on the complex processes you have developed and consider this part of any project on which you work.

See documentation examples referenced throughout this evaluation.

7. Other: Work Groups, Committees.

Goal met.
Examples:

PeopleSoft Reporting
You have worked with database administrators and system managers to implement a new reporting environment.

8. Other: Miscellaneous projects.

Goal met.
Examples:

Ad Hoc (Miscellaneous) Requests Summary
You completed 47 miscellaneous requests: 30 solo and 17 shared with other IR staff. Of the 11 shared, your participation ranged from 5% to 85% with an average of 38%. The breakdown by requestor type is as follows:

Requestor	Count
faculty	13
other	4
staff	29
student	1

Among the organizations you helped were the the Art Department, the English Department, Development, the School of Business, the School of Engineering, Undergraduate Admissions, and the University Finance Office.

Some of these requests were fairly easy and involved simply looking up figures from existing reports or writing quick queries of existing local data sources. Examples include:
   o Faculty FTE

- Number of undergraduates in Fall 2004
- Number of undergraduate degrees conferred in 2003-04

Most of these requests were more complex, requiring special queries of PeopleSoft and ISIS databases and exploration of historical data files maintained by IR. Examples include:
- Faculty instructional activity reports for various departments
- Historical enrollments in Art classes and numbers of majors and minors
- Number of students enrolled in both ENGL 2 and ARTH 13

Employee and Supervisor Comments:

Supervisor Comments 3/15/05: You continue to demonstrate strong technical leadership in the department. Your technical solutions are of the highest quality. You continue to keep in mind the goals of the department and overall university goals as you develop projects.

You successfully created a reporting environment outside of the PeopleSoft production environment with minimal direction.

You continue to provide university leadership in use of the RDS reporting tool and in documenting metadata, critical for good reporting.

You continue to identify and resolve issues within the IR department before they become real problems. You recommend and quietly implement solutions before they negatively impact staff efforts, something that is an important part of our successful operation. You continue to be the technology leader of the department, teaching us ways to streamline processes. You have supported complex technical aspects in our department related to server security, remote access security, and data security.

I greatly appreciate your technology leadership role, your positive contributions to the department and the university, and look forward to the upcoming year.

Employee Comments/date:_____

PAY RECOMMENDATIONS:
Qualifies for merit increase.

SIGNATURES:

Employee: Date:

Supervisor: Date:

Second Level Supervisor: Date: