Introduction to the Cooperative Open Reporting Environment (CORE)

Tuesday, November 7, 2017
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Karren Cholewinski, Executive Assistant – Budget & Fiscal Planning

Business Intelligence Center
...providing user-centered reporting solutions to the university community
core.bic@oregonstate.edu
fa.oregonstate.edu/bic
Today’s Roadmap

1. What is CORE?
2. Data Security & Responsibility
3. CORE Access
4. System Demo
5. Q&A
What is CORE?

DATA INSIGHTS DECISIONS CORE.
Cooperative Open Reporting Environment

For more information visit: fa.oregonstate.edu/bic/core
CORE is a reporting system with hundreds of reports and dashboards covering Student, Finance, HR, Research & more.
CORE pulls data from multiple sources
(most data as of prior day)
OSU recognized as a leader in Higher Education Business Intelligence

A Common Currency
Best Practices for the Data-Driven University

2015 NACUBO Innovation Award

2016 TDWI Best Practices Award
BI & Analytics on a Limited Budget
Data Security & Responsible Access
Data Security & Responsibility

Who has access to CORE?

How do I get access to CORE?

Active Position = CORE Access

What happens if I change jobs?

Are there exceptions?
Principle of Least Privilege

Security Level Matrix
Report data aggregation levels

1. **Aggregate Summary**: High-level Aggregation (student credit hours by school, expense reports by organization)
2. **Transaction Summary**: Medium-level Aggregation (average GPA by major, expense reports by account code)
3. **Transaction Summary Subset**: Medium-level Aggregation with subsets of sensitive data (class rosters, payroll transactions)
4. **Transaction Level Detail**: Detailed Information (student registration, drill-down to expense transactions)
5. **Sensitive Data**: Detailed Information (student scholarships, benefits information)

For more information visit: [fa.oregonstate.edu/bic/core/core-access-and-security-structure](fa.oregonstate.edu/bic/core/core-access-and-security-structure)
Identifying Position Security Levels

Access levels based on data aggregation of BI reports

<table>
<thead>
<tr>
<th>HRIS Position Classification</th>
<th>Security Level</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Finance</td>
<td>HR</td>
</tr>
<tr>
<td>Trades Maintenance worker</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Academic Advisor</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Accountant</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Executive Dean</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>Buyer 2</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Student Worker</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

The higher the security level equals increased access to disaggregated data.

**Rationale:** Requires student schedule but not detail finance or HR information.

**Rationale:** Requires only detail finance information to perform job duties.
Data Access = Responsibility

- **ALWAYS** ensure the security of data
- **NEVER** share username and password
- **DO NOT** use another person’s credentials

[fa.oregonstate.edu/infosec-manual](fa.oregonstate.edu/infosec-manual)
Data Access = Data Security

Thumb drives
Laptop computer or Tablet
Desktop computer
Unsecured server

Excel spreadsheets
Access databases
unsecured web server

For more information visit: fa.oregonstate.edu/bic/data-governance/data-security
Data Access = Data Protection
Responsible Research

Using CORE data for Research?

Know the rules first

Contact the
Office of Research Integrity
for more information

research.oregonstate.edu/irb
Any Questions about Security?

“Mr. Osborne, may I be excused? My brain is full.”
CORE Demo
A Note about Browsers & CORE

The BIC systems development team recommends using Chrome or Firefox. Do not use Internet Explorer or MS Edge.
Where to find a link to CORE

• Bookmark: core.oregonstate.edu
• OSU Home Page
  o Tools & Services
  o OSU Faculty & Staff Page
• Finance & Administration Home Page
  o Units (BIC or CORE)
• Budget & Fiscal Planning Home Page
• Business Intelligence Center Home Page
Terms of Use
Oregon State University's CORE data system contains information that is confidential in nature. By accessing this system, I agree to abide by the following terms:

1. I understand and agree that I may only access information necessary to perform my job responsibilities. I agree not to disclose, communicate or otherwise share protected or sensitive University information in any way other than within the course of my job responsibilities. I agree to appropriately secure sensitive and protected data downloaded from CORE or other systems. I agree that I will not share my account information, including password, with any other individuals. I understand this system is managed securely, and data access is logged for security review if needed.

2. I have read and agree to abide by Oregon State University’s Information Security Policies and Procedures Manual, the Acceptable Use of University Computing Resources Policy, the Acceptable Use of University Information Policy, and Institutional Review Board.

3. If accessing student information, I affirm that I have completed the FERPA Tutorial. If I receive a public records request or subpoena for University information, I agree to contact the Office of General Counsel.

FERPA Tutorial Required for Elevated Student Information Access
You will have access to more student information in CORE once you have completed the OSU Family Educational Rights and Privacy Act (FERPA) Tutorial.

See the OSU FERPA Tutorial page http://oregonstate.edu/registrar/ferpa-training-module for details.

Welcome!
Hello, and welcome to CORE, the Oregon State University Cooperative Open Reporting Environment.

Please take 20 minutes to acquaint yourself with how to use CORE by watching our overview video, available on the CORE Help page or with this link https://core.oregonstate.edu/reports/221.

Don't have 20 minutes? We understand! Here are four important tips to help you get started right away:

• Search. From the header search box, you can search for people, reports, FOAPAL elements, courses (try MTH111) and more.
CORE Cascading Parameters

1) Fiscal Year
   - 2018
   - (Select All)
   - 2018
   - 2017
   - 2016
   - 2015

2) Index
   - qfa002

3) Account Code
   - %

4) Fiscal Period

5) Transaction Type
   - Expense Transactions

6) Activity Code

7) Include Account Types
   - Labor, General Expense, Transfer

8) Include Commodity Description
   - True

9) Include Coding Details
   - True

10) Through Period
    - 2020
    - 2019
    - 2018
    - 2017
    - 2016
    - 2015
    - 2014
    - 2013
    - 2012
    - 2011
    - 2010
    - 2009
CORE Composite Filters

Transaction Details by Account (FIN1903)

Account Details by Account (FIN1903)

Transaction Details by Account (FIN1903)
CORE – Top Menu Bar
CORE Search Box Demo

Search...

Search
# uReports – Library of Reports

## Data Areas

<table>
<thead>
<tr>
<th>Data Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diversity Data Area</td>
</tr>
<tr>
<td>Enrollment Management Data Area</td>
</tr>
<tr>
<td>Facilities Services Data Area</td>
</tr>
<tr>
<td>Finance Data Area</td>
</tr>
<tr>
<td>- Ad-Hoc Lite</td>
</tr>
<tr>
<td>- Admin / General (0001 - 0049)</td>
</tr>
<tr>
<td>- AES Annual Reports</td>
</tr>
<tr>
<td>- AR/AP (2000 - 2049)</td>
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<tr>
<td>- Business Center Reports (0050 - 0099)</td>
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<tr>
<td>- Data Audit (2850 - 2899)</td>
</tr>
<tr>
<td>- Data Dump (2550 - 2599)</td>
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<tr>
<td>- Encumbrances (2300-2349)</td>
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<tr>
<td>- Finance Test Area</td>
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<tr>
<td>- Fixed Assets (2050 - 2099)</td>
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<tr>
<td>- General Ledger (1800 - 1849)</td>
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<td>- Grant/Inception to Date (1750 - 1799)</td>
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<td>- Operating Ledger (1850 - 1899)</td>
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<tr>
<td>- Transaction Ledger (1900 - 1949)</td>
</tr>
<tr>
<td>- Travel Reports (2400 - 2449)</td>
</tr>
<tr>
<td>- Vendor</td>
</tr>
<tr>
<td>Financial Aid Data Area</td>
</tr>
<tr>
<td>Foundation Data Area</td>
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<tr>
<td>Graduate School Data Area</td>
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<tr>
<td>Help Data Area</td>
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<tr>
<td>Honors College Data Area</td>
</tr>
<tr>
<td>Human Resources Data Area</td>
</tr>
</tbody>
</table>
# uReports Parameters

![uReports Parameters Image]

## Reports Parameters

1. **Fiscal Year:** 2017
2. **Index:** QFA002
3. **Account Code:**
4. **JV Type:** All Transactions
5. **Activity Code:** Exclude Activity Code
6. **Include Account Types:** Labor, General Expense, Transfer
7. **Include Coding Details:** True
8. **Include Commodity Desc:** False

## FY 2017 Expense

<table>
<thead>
<tr>
<th>Prod</th>
<th>Date</th>
<th>Doc Code</th>
<th>Acct</th>
<th>Acct Type</th>
<th>Acct Title</th>
<th>Doc Type</th>
<th>Rule Code</th>
<th>Item#</th>
<th>Seq#</th>
<th>Trans Date</th>
<th>Activity Date</th>
<th>Invoice #</th>
<th>Description</th>
<th>Debits</th>
<th>Detebs</th>
<th>Ore</th>
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<tbody>
<tr>
<td>01</td>
<td>7/15/16</td>
<td>VPC00983</td>
<td>24400</td>
<td>Printing &amp; Copying Expense</td>
<td>JV</td>
<td>6MAL</td>
<td>0</td>
<td>10</td>
<td>07/15/2016</td>
<td>07/20/2016</td>
<td>L001911: Directory Sign</td>
<td>22.20</td>
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<td></td>
<td>7/20/16</td>
<td>10107</td>
<td>60</td>
<td>Other Unclassified Salary &amp; Stipend</td>
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<td>6HGR</td>
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<td>07/24/2016</td>
<td>HR Payroll 2016 M0 7 0</td>
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<td></td>
<td>7/29/16</td>
<td>10968</td>
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<td>OPE Unl Other</td>
<td>JV</td>
<td>6ERE</td>
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<td>56</td>
<td>07/29/2016</td>
<td>07/26/2016</td>
<td>HR Payroll 2016 M0 7 0</td>
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<td></td>
<td>7/29/16</td>
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</tbody>
</table>

**Posting Period 01 Subtotals:** 83,594.25
uReports Features & Functions
CORE Help Resources

Questions? core.bic@oregonstate.edu

CORE help resources: fa.oregonstate.edu/bic/core/core-help
A few CORE Reminders

1. **USE**: CORE *Search* function to find people, reports, etc.

2. **BROWSER**: CORE is acting funky, check or change your browser

3. **REMEMBER**: Data security is your responsibility!

4. **ENGAGE**: The listserv for Weekly Updates

5. **QUESTIONS**: Contact the BIC Team, core.bic@oregonstate.edu

Weekly Updates sign up link: fa.oregonstate.edu/bic/core/core-updates
Questions?

Business Intelligence Center
fa.oregonstate.edu/bic - 510 Kerr Administration Building