



Argos Maintenance Procedures and Practices

Revision History

April 24, 2020

George Herrick

Initial draft.

Introduction

These procedures and practices will govern the creation, editing, and/or the deletion of Argos Reports (known herein as “reports”) and the folders that make up the organizational structure of the reports (known herein as “folders”). The Data Governance Committee (known herein as the “committee”) has the responsibility to ensure that all reports provide accurate and consistent data, are organized in the most logical and efficient manner, and access to reports is granted only to the users that need to have access.

The committee members with design access and other designated non-committee designers (known herein collectively as “designers”) will perform the modifications to the reports and the folders. The committee members that are able to manage security will modify a user’s access to the reports and folders.

Changes to these procedures and practices must be presented, discussed, and approved at a Data Governance Committee meeting. These procedures and practices will cover:

- a) That the committee itself can determine and implement changes.
- b) That only Deans and administrative department heads can submit requests for changes for themselves or their subordinates.
- c) That the committee will maintain a Change Management Log to document all changes.
- d) That the committee will maintain a Common Data Dictionary for all reports.
- e) That the committee will perform periodical reviews of the reports and folders, and security rights.

Changes Implemented by the Committee Itself

The committee reserves the right to create, edit, or delete any reports and/or folders as they see fit. The committee can also grant, alter, or remove a user’s access to any report or folder as necessary. These changes must be presented, discussed, justified, and approved by the committee. At the discretion of the committee, these changes can be delegated to any of the designers.

The User Request Process

1. The user needing the change will consult the Dean of their school/college (if faculty) or their administrative department head (if staff) to obtain permission for the request. If permission is granted, the Dean or the administrative department head will send an email to Data.Governance@fairmontstate.edu outlining the request in detail and providing a justification (this email can simply be a forward from the user that is making the request). Unless the email comes from the users’ Dean or administrative department head, the request will be denied.
2. The committee chair will monitor this account on a regular basis. When a request is submitted, the chair will forward the message to Help@fairmontstate.edu so that a ticket will be created automatically (this process will place the body of the request message in the ticket). The ticket will be initially be assigned to the chair.

The chair will then initiate a discussion with the committee to determine the course of action to be taken and to evaluate the justification. The actions that can be taken are:

- a) If an existing report can fulfill the request, then the user will simply be granted access to it.
- b) If no report exists that can fulfill the request, then it will be created and the user granted access to it, or to the folder it resides in, depending on the nature of the request.
- c) If an existing report just needs to be modified, a decision will be made by the committee as to whether to make a copy of the report, rename the copy, and then make the necessary modifications; OR to modify the report's user interface to accommodate the change (i.e. specify an additional criteria option) so both existing users and new users can utilize the same report. The committee will notify all users of any changes to reports that they routinely use.
- d) If the request is to remove a user's access, then that access will be removed.

If the committee denies the request, an explanation will be sent to the user and their Dean or department head. The chair will then update and close the ticket.

If the committee approves the request, a designer will be assigned to carry out the request and the ticket will be reassigned to them. A separate ticket category can be created specifically for Argos Maintenance for the purpose of creating ticket reports. Upon completion of the request, the designer will follow up with the user and then update and close the ticket.

Common Data Dictionary

The committee will maintain an Excel spreadsheet named *Common Data Dictionary* in the Microsoft Team **Data Governance**. This table will define in detail all terms and methodologies used in Argos Repots. The rules that this data dictionary outlines must be followed for all reports. The committee will continuously build and maintain this data dictionary as needs change. Any committee member proposing changes to this table will request that the proposal be added as an agenda item for the next committee meeting so it can be discussed. This table will be available to all designers.

Change Management

The committee, as well as the other designers, will maintain an Excel spreadsheet named *Change Management Log* in the Microsoft Team **Data Governance**. This file will chronicle all creations, edits, and deletes to individual reports and folders. The Change Management Log will detail:

- (1) The ticket number of the request.
- (2) The action taken; The creation, editing, or deletion of a report; OR the altering of the organizational structure of the reports; OR the change in a user's access.
- (3) The name of the report or folder in question.
- (4) A description of the changes in as much detail as possible.
- (5) The user who requested the change (or the committee, if the request originates from the committee).

- (6) User's Unit (or the committee).
- (7) The justification of the change.
- (8) The name of the designer who made the change
- (9) The date of the completion of the change.

Periodic Review

The committee will periodically review all reports, folders, and security rights. This review should take place a least once a semester and will determine:

- a) If the committee needs to create any new reports, modify existing reports, and/or remove any reports that are no longer required, applicable, or deemed useful.
- b) The review will also determine if any folders changes need to be made.
- c) The review will also re-evaluate security rights.