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# ELIVE Webinar |Innovation at the Intersection of Technology and Teaching

September 13, 2018 | 1:00 PM - 2:00 PM Eastern

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>>> Welcome to EDUCAUSE Live! everyone. This is Adam La Faci, Online Event Producer at EDUCAUSE, and I'll be your moderator for today's ELive webinar, "What's new with the EDUCAUSE Core Data Service?" We'd like to thank Mindtree for their sponsorship of the 2018 EDUCAUSE Live! webinars. Mindtree helps education institutions engage constituents with richer experiences, empower educators, and optimize operations. You are probably familiar with the interface for our webinar, but here are a few reminders. We hope you'll join us in making this session interactive. Use the chat box on the left to submit questions, share resources and comments. If you're tweeting, please use the tag #EDULIVE, that's E-D-U-L-I-V-E. If you have any audio issues, click on the link in the lower left-hand corner. And, at any time you can direct a private message to "Technical Help" by clicking in the top-right corner of the Chat Pod. A drop-down menu will appear where you can select "Start Chat With" and "Hosts." The session recording and slides will be archived later today on the EDUCAUSE Live! website. Our webinar today is "What's new with the EDUCAUSE Core Data Service?" It's been an exciting year for the EDUCAUSE Core Data Service (CDS), and we want to share what we've been working on and the changes you'll be seeing in the months and years ahead. We are delighted to be joined by: Leah Lang, Director of Analytics Services at EDUCAUSE. Leah leads EDUCAUSE Analytics Services, a suite of data services, products, and tools that can be used to inform decision-making about IT in higher education. And we're also joined in the public chat by Mark McCormack, Senior Director of Analytics & Research at EDUCAUSE. Mark oversees the association's member-facing data and analytics services and portfolio of original research projects. Thanks to both Leah and Mark for joining us here today. And with that, let's begin. Over to you, Leah.

>> Thanks, Adam. As you said, we have a really exciting development in the core data service. And we're excited to be able to share it with the community. And to the talk about the direction that we're headed in for the future years. So I would like to kick us off with understanding a little bit more about our audience's familiarity with core data. So if you could pull up the poll that we have programmed. I would like for everybody participating to answer how familiar they are with the core data service. If you are in a room full of participants, I know there are a few groups of institutions that have groups of people in a conference room right now. Maybe you could offer your one response for your institution, just an average familiarity with the core data service. Okay. So it seems like most of our participants so far annual participants. That's great. So you will be excited to -- you will have some context for the changes we've made to the service. And for those who are still new or just considering participating in core data, I just want to take you through what the service is all about really quickly. And to give you a little background on how we got to where we are. So I think that can be it for the poll. That was definitely helpful to understand a little bit about who is in the room of 70 participants today. So if you're not familiar with core data service, it is an annual survey of technology, FMs, staffing, and services. It covers the broad range of I.T. services that institution can provide. And about between 780 and 850 institutions in the U.S. and internationally participate annually. It is the first step in participating in core data service is to take the annual survey of I.T. financial staffing and services. And the survey runs from July to November of every year. And then for anyone who put data into the survey, they are entitled to access to all of the identifiable data that was submitted between January and November of each year. So you have to participate in the survey to get access to the data. And we're really excited about the data tools that we have available this year. And we've definitely upped our game a little bit the in terms of what we're providing to members. So if you participate in the survey, here's a view of the dash board that you would get access to. We have an interactive data visualization tool that you can use to explore data, both just the answers to each individual question off the survey but also to some combined statistics that we generate that we call core metrics. So this is a look at the core metrics dash board that's in the core data service is portal. And I'll share more about that later in the presentation. so just to dig into some of the more popular metrics that are produced from core data service. Here's a look at I.T. -- essential I.T. spending per institutional fte compared to centralized spending as a percentage. And this is a graph you would get access to in the CDS portal. This is a scat plot of all institutions that have participated. And another great benefit, if you participate in the survey, you can create a custom pier group so you would be able to filter this large peer group down to institutions that matter to yours. And then as you can see, the crosshairs on the scatter plot indicate your institution's value. So we provide a really easy, quick view into how your institution compares to your peer institutions for these core financial metrics. Another popular metric that comes out of core data service is the title of the highest ranking I.T. officer. This is still an issue at lots of institutions. And it provides -- it can provide a view into the technology leadership are structure at your institution as compared to peers. One thing I'll note on this graph is that the summary data is broken down by category. And you can see there's a different color for each bar, for each category. And the yellow bar at the top, you will notice in the new portal, yellow indicates what your institution's value is. So for a lot of the graphs that in the portal, you can take a quick look and see that most institutions for this particular institution, most institutions have a title of CIO as their highest ranking I.T. officer and because CIO is marked in yellow on this graph, this means my institution's title is CIO as well. As we go through other chart, other examples of data points that you can get out of core data, here's a look into your institution's preferred or all adoption to technology. So you can determine -- this institution prefers to approach technology at pace of peers. And for the peer group, that is the common response. Some institutions prefer to be early adopters and for this peer group, the next most popular group is the early adopters. And this type of information can set context around the financial data that you get out of core data if your peer state prison Tuesdays are spending a little bit more -- peer institutions are spending a little bit more or less, it could be because they have a different approach and using this metric could help context rise the other results of the survey. And we provide a rich set of market share data for up to 68, I think, at this point. Different system areas. Here's a look at the market share for project portfolio management systems. Again, you can see that the yellow color indicates the response for your state prison Tuesdays. So you can -- your institution. You can provide a quick reference into the market for difference system areas and how your institution compares to the peers in your peer group. Data is available year-round. And we generally release the new the data that was released in January. And we provide that data for, well, we provide data service to those recent participants for an entire year. The data is always sitting in the portal. At this time, the most recent data is from the 2017 survey. And it covers the topics of I.T. financials and staffing. I.T. support services, research computing services, information systems and applications is another section of sur survey. And we are -- another section of the survey. And we are alternating that information. We want to gather rich information around system areas and products used for the system area, but we know that the ecosystem is quite large and we don't want to ask the questions every year because it's quite an ordeal to complete a long survey. So for the 2017 survey, we asked about I.T. systems, core I.T. systems that have been defined by a group of subject matter experts. and we asked about hr system is, financial systems, facilities, enterprise system, and research administration. We will rotate those system areas back into the survey in 2019. And provide statistics for how the market has shifted over time. Maturity indexes are ways for institutions to assess how capability their institutions are at providing certain realms of I.T. so in 2017, we gathered data about I.T. service management maturity. Success technologies maturity, research computing. And going along with maturity index, we have created a set that help to inform the community about the technology deployment in the maturity areas as well. So if there's a corresponding set, we identified those. And in 2017, we asked about student success technologies and research computing technologies. And for all of the questions we ask in the survey, they are informed in large part by subject matter expert. So every year, we condition convene a set of working groups to the define the questions that need to be asked from year to year, ensure that appropriate terminology is used in the survey and then we have just now implemented a process for doing some confirmatory analysis and make sure the questions are sound for the community and that they make sense to the respondent. So we are definitely upping our game on rigorous survey development processes as well. So we want good data going in and we're now producing great results in terms of graphics on the back end. Really quickly, I want the take you through the 2018 data that's available in the survey that's open now. And available to submit -- it's available for you to submit data to at this time. Every year we ask I.T. financial staffing and services. That's the main module. It's required by all participants. All the other modules are optional. The gain access at all to the data, you have to submit to the I.T. financial staffing and services module and they can pick and choose based on what data you want available to you throughout the year to make a case for different initiatives that you might have during the year. So for 2018, we are collecting information about educational technology services. And this year we have a lot of exciting new data points around online learning and active learning classrooms. Redesigned our educational technology services maturity index, so that's new this year. Information security has gotten a fresh revision and has a lot of great information about security training and authentication, which I noticed was a hot item on the CIO list recently. So we will be gathering great new data. Information systems and applications, again, we will be asking those core about the core I.T. systems assigned by the user group but now rotating in information about advancement system, academic systems, and student services. Maturity and deployment, we are asking that educational technology student, student success technologies again. This year we're asking about disaster recovery. We've created a really great maturity index to help institutions assess how prepared they are for their disaster recovery processes and I really encourage you to look at this index. I think it's a great way to go through the items that might be important for preparing for disaster recovery. We've revised the information security maturity index. And the analytics index. So those are all new bits of information that you would get access to if you participated in the 2018 survey. So later in this presentation, I'm going to do a quick demo using the new portal. And I really would love to know what the audience would like to see in the demo. If you could respond to the poll indicating your interest in taking a look at particular data points. and then I will hopefully, Murphy's law doesn't come into play here, provide you with a little walk through on how to get that type of data out of the portal. And Adam, I think we can keep the poll going. I'm not sure if there's a space to push it aside. And I will turn the conversation over to mark at this point. Mark, you can go through, kind of why we started changing core data and how we got here. And all of the bits of information that fed into our decision-making this year.

>> Thank you, Leah. Hello, everyone. Again, I'm mark Mccormick. The senior director of analytics research here at Educause. And I'm here really to help provide additional background and context about what we have been up to over the past year. And really just to give you a window into some of the things we've learned about the experience and what we might be able to do to make it better. So that hopefully when Leah starts walking you through a more detailed view in just a minute, you will have a deeper appreciation and understanding for just how far we have come and what it's taken to get here. So for the last year or so, we've been engaged in a pretty extensive thorough assessment of the CDS service. We have done a lot of listening to a lot of folks. And fortunately, we're at the point now where we've been able to leverage a lot of what we're learning to support a redesign of the CDS system, what I'll call CDS 3.0 that you will get to see in a minute. This assessment process included what we called a program review. And this is basically a 360 assessment of the program with focus groups of CDS users, interviews with Educause staff and an examination of CDS resources and operations. And at the same time, we've contracted with an outside user experience design team to the take a hard look at the online CDS interface. And help us understand how to make that experience easier and more user-friendly. So based on what we've experienced and learned through those processes, there are two things I'm showing here that I know to be true. First, I know that there's a real value here that we can offer participant and their institutions. We know our members want CDS and the benchmarking capabilities that it can offer. But at the same time, the second thing I know to be true is that particular vehicle through which we have been offering those capabilities, the CDS portal and survey, CDS 2.0, I know there's a lot we can do to make the experience better for the user. And make it easier to use. So we know that we've been missing the mark in some ways. And we have had that learning as well over the past year. So I'll share a few examples of what we've seen in recent survey data. The table that you see here is from the 2018 I.T. work force survey. And you're getting a little bit of an early sneak peek into some of this data. In fact, as I'm speaking, I think our research team is away working on the I.T. work force landscape report. But when we asked about the importance of a list of things for the respondent's professional growth, you can see at the top of the table, analyzing data to help inform strategic decision is at the top of the list in terms of importance. And obviously we're not asking about CDS here specifically but we're in the same family generally of the specific capabilities that CDS is intended to provide. So then if we look at your 2018 Educause member survey, when we asked about the importance of a list of more specific Educause benefits, you can see that 90% of CIO or VP-level respondents rated benchmarking CDS as important. And that's more than any other single Educause benefit on that long list of things. So we know that this is important. We know there's so much value in CDS to our members and their institutions and the clearly is this is something we want to continue offering and something we want to get right for our members and users. But historically, we know there are ways in which we haven't been doing that, getting it right. In some important ways. So I wanted to briefly walk you through a few screen shots of the old CDS portal experience. This is CDS 2.0. And we know that the visual experience tended to be cluttered. We know the speed was often slow and navigating the portal and doing things like downloading data. And it just generally was missing some of the features that our users told us they would like to see and have access to. Is the section of the portal where you would add your data. And you see here the section where you would then explore that data. And then finally, this is the section of CDS 2.0 where you would see the main hub the main dash board. So I'm showing you this to you, both as an illustration of historically where this service has been and to visually present you with some of the issues that we're going to highlight. But also, to hopefully help you have this perspective in mind so you can see much more vividly some of the changes that we made and where we've arrived now with CDS 3.0. So this is where we've come from. And we know historically there have been issues with how users have experienced these old interfaces. And the user satisfaction with the service has been. So if you recall if a few slides ago, I shared that from the 2018 member survey, 90% of the CIO and VP-level members rated this service as important. But when we asked them on the same survey about the satisfaction with that same benefit, a much lower 69% of them indicated they were satisfied. On most of the other benefits we asked about, important and satisfaction were pretty strongly correlated. So generally, if you thought a benefit was important, you were also pretty satisfied with it. But with benchmarking CDS, we actually have what ended up being the biggest, most significant gap between importance and satisfaction. So clearly, the narrative here is while it is important and it's something that our members want, will is work to be done in improving the service and improving user satisfaction with the service. So where specifically are the pain points that we have been identifying? I'll start with some of the program review, member and Educause staff feedback. We know from the program review that, first of all, there are concerns about the CDS data. Are those data accurate? Or reliable? Folks would often refer to this as the apples to apples or apples to oranges problem with benchmarking. So if I respond to a survey question and input a certain time of data, can I be confident that someone at a different institution is understanding that question to mean the same thing and they are inputting the same type of data so we can actually compare our data across institutions? We also got feedback, again, just about the performance of the portal. We know that the speed of the portal has been an issue. And we know generally navigating the portal and finding those features that you want has been difficult for some users. And then finally, we got a lot of comments about needing built-in, in-service train, things like resource document, guides, things to help the user in the service figure out how to use and access the things that they want to get out of the service. And looking at our user design testing feedback, by in large, we did share a lot of the same feedback in the ewer design testing. You see the feedback on the need for help, this idea of getting in-service resources and guides to help navigate the service. A lot of comments about the speed and the performance of the portal. Again, some concerns and comments about the data, are the data reliable and accurate? And then we got a lot of feedback through the design testing about users, members wanting faster and easier access to the data and the reports that know they're going to need. Maybe there's a report you know you use every year, you want easier, faster access to that. Or maybe there's a report that is fairly common across institutions for institutions to access and you want quick and easy access to that commonly used report. So those are some of the highlights of the feedback we've been hearing and Leah is going to go into more detail on that here in just a minute. So we found ourselves here over the past year with this challenge in front of us. And we know we have something at our fingertip, the value, and we know our members and institutions entente need. So how -- institutions want and need. How do we give them the experience they want and need? So Leah is going to walk you through more detailed oner is vagues and examples of all this. We're not finished with the feedback process on this service. And in fact, we will never be finished with the feedback process on this service. Truly is a process of listening and improving and listening and improving. And we know to the extent that we can continue hearing from you, and working with you, our chances of success with this and getting it right are much, much greater. So all that is to say, please never hesitate to reach out to myself or to Leah or anyone else at Educause and offer your feedback. We would certainly love to hear from you. But that's all I have. And I'm so glad you're here today. Thank you for being here. And I'll hand it back to you, Lee branch thanks, mark. I would just like -- Leah.

>> Thanks, mark. And I would like to piggy back on what you said about never being done on the service and constant improvement. We had the initial release of the new portal on July 23rd. And now we have an agile development, methodology for the development process. And you will be seeing changes in the portal as you go. We have incorporated user testing all along the way. So every three weeks, we decide what things that we need to improve in the portal. And then we work with our consultants to develop those changes. We work with our users to test the changes and give us feedback on that implementation. And at the end of the three-week period, we will release the new material into the CDS portal. As you use this, we used to be on an annual cycle for improvement which is so long for anyone using data tools. And because we have so much data at our fingertips now and we have such powerful data tools, we can be making the changes as we go and that's what we intend to do. If you don't see things as quite right, right now, we have a road map if for where we're going from here. Getting back to the feedback from user design testing, we heard that users need more guidance when they're in the portal. For many user, this is an every year-type of thing, an annual occurrence. So it's difficult to remember from time to time how to do something or where we were when they started before or the what the process is from year to year. So we have incorporated helpful tools into the new portal. I know, I'm a typical user. I go in and click x out of the tour but I encourage you to take a few seconds and go through the initial tour that comes up when you pop into the portal just to get familiar with the environment and what tools are available to you. We heard that users are needing more speed. So it's really difficult to kind of dig into that issue of speed. It means page loads and actual technical speed which we have worked on. We have upgraded our back-end environment. So that everything moves a lot faster. We did that infrastructure improvement in January before we started doing the development work to release the new portal. And speed also to our users, we found out, means this I don't know what I'm doing from year to year. I can't remember how to navigate the portal. It's slow. Just remembering how to use the system. Which is why we incorporated the help tools but also I'll note in the drop down options that you get when you go into the CDS portal, these red buttons and blue button, those are customized based on the role you have when you go into the portal. So only giving the tools and the dividens you need for your specific user role. So we tried to clear the clutter of trying to the decide what's for me, what's for somebody else so that your user experience when you go in is customized just for you so your experience is faster. You don't have to spend all that time figuring out what you're supposed to be doing. And in terms of data reliability, we are doing a few things to improve data reliability in core data. On the front-end, designing great questions. We have a senior on staff now who has a rigorous process for developing great survey content that is customized for our community by our community. And then on the back end, we have a team that is working on cleaning our data. So as we speak right now, we have a new member of our team, Thomas, and he's working with our data analytics developer Bradley, to incorporate a data cleaning process so that only cleaned data is produced back into the CDS portal so when you are analyzing your metrics, you're only getting most -- what we have identified as clean data. So we're going to try to filter out those responses that are outliers or seem confusing or just don't pass muster based on our standards and. We are incorporating documentation around how we clean the data and produce statistics, so you know as the user where the information is coming from and you can speak confidently about how to use the data. On the core metrics piece, you will notice there's a very descriptive, very long helper dock men Asian around how we have created every single core metric. So if you are curious about how we have arrived at at a particular answer, you can dig in and have the answer at your fingertips for when you're speaking about this in your presentation. The need for data short cuts and being able to access where we were before. So this is one of the best new features of the core data service portal. You can save a report and return to it. And right now, this functionality exists just for analyzing question by question data points in the portal. But we're working to release the functional throughout the portal so you can return to any data extracts that you have created through the download feature as well as your exploration in the core metrics dash board. So I'll also take you through this piece when I do my demo in just a minute. This is an ability to the analyze a bit of information and then save that report page and filters. It goes to a dash board for you to see which reports you have. You can favorite reports you like the most. And then later in the year, you will see that Educause will start to populate a report page and share it out to the community. So as we see items that are interesting on the CIO list or just generally our common topics being discussed within the community, we can create reports and then share them out to you so that as a user, you have quick access to data points that are interesting at any given point in time. So actually, I will go through a tour of the CDS portal. Adam, if you could please pull up that poll. Oh, man, everybody's evenly split. You want to analyze everything. This is great. Okay. So I'll share my screen and take a look at the core metrics dash board. And if we have a minute, I will dig into I.T. service portfolios so we will get to see a view into two pieces of information, two bits of the new CDS portal. All right, can you one of you confirm, Adam or mark, see my screen now?

>> Yep, see it correctly.

>> Thank you. Had is the new CDS portal. Here's the helper tutorial that I shared earlier. If you have a minute, I suggest you walk through. I'm familiar so I'm going to close out of this. Here are the drop downs that have options that are only is specific the to you as a user. Just wanted to show you those. And then here on the dash board are also, I have act is International Space Station to my favorite reports that I have shared. So we're giving you quick access into the reports that you have decided are your favorites so you don't have to navigate through all of our options to find that page again. Looking at I.T. financials, I'll draw your attention to the core metrics dash board. Starting with spending range, I won't go through every page in this dash board. Of course, always the live version -- I think because I have this page opened for quite a bit of time earlier today, it's asking me to sign in again. I wasn't expecting \hah\that. It's okay. Here we are back at the core metrics dash board. We are planning to produce more of these types of dash boards that combine stories of at that data reliability at that if for you based on what we know are interesting data points for the user community. We envision other boards for staffing and maturity indexes in the future. It walks you through the question you might ask when you're look at the data, what's a practical range for my total budge senate you can filter databased off of a peer group. I get to see everyone's peer groups. You won't see quite as many peer groups in here. I can filter, let's filter on bachelor’s institutions. All bachelors institutions that participated in the survey in 2017. And you can drill into the values for your peer group. if you've created a custom Mizeed peer group, that peer group will be available in the drop down as well. All of the graphs have this expansion icon. So for some bits -- for some graphs, the title kind of gets cut off here or the data points are small and it's difficult to see. So if you're interested in extracting a screen shot of a graphic, you can use the scale-up feature and see the full values that are in each graph. I'll also highlight another feature that I really love about our interface. We use click sense as our data visualization tool. If you click on the graph on apologetics, you can further filter into the data. And for this scatter plot in particular, the most interesting feature is the lasso selection. If you click on the lasso and lasso around a few data points, so perhaps your peer group has some outliers and you don't want to analyze the median for your peer group using the outliers, lasso around and click confirm. And then it zooms in to that specific amount of data. And the corresponding graphs in the core metric dash board just calculates statistics off the lassoed selection. So all of the graphs filter down based on what you want to see. And in here, you can expand, here a plot for total central I.T. spending per institutional and this is just for the specific peer group. As you walk through the app, you can see changes in spending rake from year to year for this peer group. At the bottom, it gives you information around how to use the data and that really detailed core metrics documentation that I discussed earlier. We have spending dash boards on the distribution of spending so all of those really tough questions in the I.T. organization, staffing and financing module, this is why we ask those so you can get a view into the distribution of spending for your peer group and how your institution compares. If you click into any of these individual box plots here, your institution's value comes up. And then you can expand this image and if you're interested in taking a screen shot for a presentation, you can do that and it will easily display how your institution compares for the use of subsets of spending. As you notice when you drill down, these selections don't population through to the rest of the graphs. And you can use the dark gray bar at the top to x out of the sleeks you made and return to -- the selections you made and return to the regular view on this page. And then finally, we have a dash board on decentralized spending. This is a lot of great information about if your institution is decentralized and how your institution compares. There's documentation at the bottom around how to use the information. And the final page in the core metrics dash board is detailed tables so you can extract all of the data that's used in this dash board. If you want to do your own analysis, and if you want to extract anything in this environment, if right-click, usually most of the graphs have -- actually, again with the live demo, always fun. If you right-click a pop-up comes up and you can extract the data which is it's not. This is why. You can use the upper right-hand corner export data. And your table will come out using that. So that's the core metrics dash board. I went through that pretty quickly. But I also want to take you through how to create a report and save a report. And using the information from the poll, so this is the initial create report page. We have most questions from the survey from from 2017, 2016, and 2015 in this question selector list. We're still working on refining the user functionality here. We know that it's quite daunting to go through the list and a lot of the question text is very long. So we are working with our user group to refine this process. My advice for going through this in the meantime is to use the search functionality. And if you type two stars and then the search term you're looking for in between those stars, you will be able to filter the data down to something you're looking for. So if you're looking for product, here's all the questions that include products for a certain system areas. We have information about deployment. So you can pull up graphs related to research computing deployment, success technologies deployment. We are looking for -- I know that the service portfolio question is itosfq6. And it's 2017 so we will look at that one. I'm going to click the green check mark in the upper right-hand corner and then generate report. And the report page comes up including the report -- the report will include the current year of data and any past data, if it's available. So this is a view at 2017 and 2016 service portfolios for all eligible institutions. We can filter again on bachelor’s institutions if we want. And then select year and we will get just the 2017 view. So here what we're seeing is 100% of bachelor’s institutions that responded to core data in 2017 have network services reporting to their central I.T. department. The question here in the survey was to context, indicate the services for which central I.T. primary responsibility. So this is a look at the central I.T. service portfolio for bachelors institutions in 2017. You can see research computing is less popular service provided. Only 38% of bachelors institutions lab manage. Systems. If you would like to further filter into the data service data, you can click the items in graph and you get a view into just infrastructure services, for example. Again, yellow here is indicates my institution's value. So for my institution, I'm in line with my peers for providing network infrastructure. And many of the other infrastructure services but I don't provide data services through my central I.T. department. And I'm curious about that so I want so I want to click data center and uncheck infrastructure. Well, that didn't quite work the way I expected it to either. And that's because this question doesn't drill down in that way. I'm thinking of another question type. So if you are curious, your data center institution, if your institution wasn't providing data centers, it was being provided by another department and that's why we don't collect that counter data. So as you -- you can also again expand the graph here, if you want get a bigger view of this type of graph. And you can export the data that supports creating this graph. At the bottom of every page, we include a detailed tables from the data that is used to support that graph. And you can download the data for that graph as well. All of the tables are pivot tables so if you don't like the fact that there's a column or a row, you can move the items left to right and typically they'll move around. And they aren't for me. So we will save this report. Itosfq6 and I'll say service portfolio. And I'll save this report and then go to view and manage report. And you can see my itosfq6 port polio report is right here for me. And we're selecting all of the initial reports as favorites, so it pops up to the top of the page. And I can easily return with bachelor’s institutions selected and the year 2017 selected. So that's a look into the way to create I can't haves in the CDS portal -- create graphs in the CDS portal at this time. Aisle trying to navigate back to Adobe connect to unshare my screen. And I'm having a little bit of trouble doing that. So I'm going to log out. Oh, there it is. Actually just popped up for me. I'm going to log out and log back in. And maybe mark, you could go through the last couple of slides, just get me started on completing core data in one, two, three. I start off by talking about how when I created the graphs for this presentation, there were 41 days left in the core data service cycle. And now there's only 34 days left. And I'm going to share with you, that's a little over a month, to finish up on creating core data, on submitting your responses to core data.

>> Sure, Leah do you want me to advance the slides?

>> Sure, that would be great.

>> Okay. Sorry. So there you see, 34 days remaining until the survey closes. Okay, Leah. I'm actually back in. That's great. Okay, thank you. Okay, so there's 34 days left and that's plenty of time to complete the survey. The first -- I'm just going to help you get started with the first few steps. You take time now today, it will be really quick to decide which modules you want to complete. If you click on the link to modules or go to a resource, that show you all of the questions and the survey, you can just skim through the survey and take a look at the types of questions we're asking and decide for yourself, which modules will you complete. Check off -- that's your to-do for today. Can you advance this one more slide, mark? Okay. And tomorrow, put on the to-do list to delegate. Now that you've decided which modules you will complete in the core data service survey, think about who's best to answer that data in your institutions. Most use this as a project management exercise and assign different questions to different people on their campus or within their I.T. department. And they divvy up the work and make it easier so not just one person has to respond to all of the questions. Within our portal, assign roles which gives other users at your institution the ability to put the data into the survey directly so that you don't have to collect the information yourself and have one person put the data in. So I encourage you use the author designation role to hand that responsibility to different users. And then you can send resources to your team. Again, in the drop down on the CDS portal dash board, if your CDS administer, your view into the survey open drop down will have a link to send resources to teams and that will send an email to all of the authors assigned at your institution, with the information they need to complete the survey approximately. Next slide. And then, on the third day, so when you come back to the office on Monday, you can go in to the submit and Ed mitt responses page in the CDS portal. And start taking the survey. So you click on take module. And then survey pops up. And you can start answering the questions in the survey. On the portal side of things, your progress will be denoted with these little progress indicators, so you can quickly see whether or not a mod you will has been started or completed. The survey will save your responses as you go. So if you don't have all the answers on Monday, maybe on Monday you have the first three answers and just go in, answer the first three. You click next on that page. And it will save your answers. You can close out of the browser. When you go back in the next day to answer four, five, and six, your responses will be there for you. Next slide. And I know this was a quick run through on lots of different new and exciting features of the CDS portal. If you want more, we encourage you to register for our online course in October. And we will take you through use cases for participating in core data and other users in the community will share with you how they use CDS data. And we will take you through really thoroughly how to complete the survey in an effective manner and make sure your data quality is sound going into the survey. And then the last day of the course is how to use CDS data and use to it create a data story that's compelling and using the graphs coming out the CDS portal. So those are all of my Augusts about what's new and exciting about the CDS -- all of my thoughts about what's new and exciting about the CDS portal. And I don't think I'm a presenter anymore, so I can't see if there are questions in the chat. But maybe Adam or mark, if there are questions, we can go through those?

>> Yeah. I would like to kick-off with a big thank you for sharing that functionality with us. It looks very user-friendly and just a lot of great new functions for everyone the to utilize.

>> Thanks. We're super excited to share it.

>> Excellent. And I do see we have a few questions that came in throughout the session today. And I'll kick it off with one of the questions about the website speed. One of the participants was wondering if the website speed varies at different times of the day? And one added, the speed seems slower in the afternoon when the USA wakes up.

>> I'm not sure about that. I can have our consultants look into the logs on speed times. And to determine if there is maybe -- whenever the U.S. wakes up, everybody is getting into the CDS portal right away. I know I am, but I'm probably not a typical user.

>> All right, great, thank you. And Victoria is wondering -- go ahead.

>> Right, I see Victoria's question now. We still have access to all the data regardless of role. So in order to gain access to all of the data, you need to be assigned a reviewer within your institution. If we haven't asked a module in a particular year, we are providing that module's worth of data to any of the recent participants. So if, for example, this year we're not asking about I.T. support services. But if you participate in the required module, we're going the give you access to all of those off-cycle modules and just as long as you're a reviewer in the system, you will get access to that data.

>> Great. And how far back can the data go? Right now, it goes back to the I.T. organization's staffing and financing data from 2015. We also have some all modules for 2016 and all modules for 2017. And with my very exciting team that we've just put together, who is cleaning the data and developing systemic data processes that really be, provide us with a fast turn-around on data, we're going to go back through all of the old surveys and input that amount of data into the tool as well some as you go, you will start to see older data populate. And we're trying to ask the community about, get a sense for how long the time series needs to be to be effective. I'm curious about why the survey opens in July and seems like it stays so long. It always seems like it extends.

>> It is open in July every year. It used to be open in the winter months. But maybe around seven years ago, we changed the survey period because we were getting feedback that the financial data that was collected was so far out of date by the time we released the data because we ask about the prior fiscal year. So we polled the community and understand now through the survey that most institutions that participate have a fiscal year ending at the end of June. So we start the survey in July so we can gather most recently closed fiscal years’ worth of data. And produce that as soon as we possibly can. So you have that information to turn around for budget planning for the following year. Can you assign questions -- can you assign modules to various people? Yes, and no. We can't assign at the question level quite yet. That's still a problem I haven't wrapped my head around. But if you manage the response process, you can have one author assigned to a module and then when that author indicates that they have completed all of their questions, then you can shift responsibility for that module within our system to a new user. And from what we're seeing on the side of things, just as long as the users have closed out of the browser sessions and there are no live surveys open at that time, the hand-off will be pretty clean so when the new user goes in to respond to whatever questions they are assigned to, they'll be able to just pick up from where ever that past user left off. I think that was the last question. So thank you so much for allowing me to share today. And thank you mark for sharing your thoughts as well. And I'll turn it back over to you, Adam.

>> That's great, thank you so much. And I think as several saw already, we shared email addresses that you can use for any follow-up questions or if you would like a further explanation on anything we discussed today. So please save those so you have them available for you. And we will move into the wrap-up here. On behalf of EDUCAUSE and our speakers, this is Adam La Faci, and I thank all of you for joining us today for an engaging session and conversation. Before you sign off, please click on the session evaluation link-which you will find in the bottom left corner of your screen. Your comments are very important to us. The session will be archived on the EDUCAUSE Live! website, including slides and a complete recording. Please feel free to share it with your colleagues. And finally, please join us for the next Elive! webinar on Thursday, October 11th at 1:00pm ET to hear about the Utah Valley University "Campuswise 2FA (Two-Factor Authentication) Saturation Campaign". On behalf of EDUCAUSE, this is Adam La Faci, thanks for joining us today for EDUCAUSE Live!

**End of Webinar**