AuditCon

by ACUA

Louisville Kentucky | September 14-18, 2025

ACUA

Data Analytics Roundtable

Progress through Sharing

Roundtable Agenda

- Why are we here? (5 minutes)
  - Working group experience
  - Higher Education clients / recent projects
- Data Analtyics Building Blocks (5 minutes)
  - Process Map
  - Body of Knowledge
- Overcoming common roadblocks (15 minutes)
- Let's do some planning together (40 minutes)
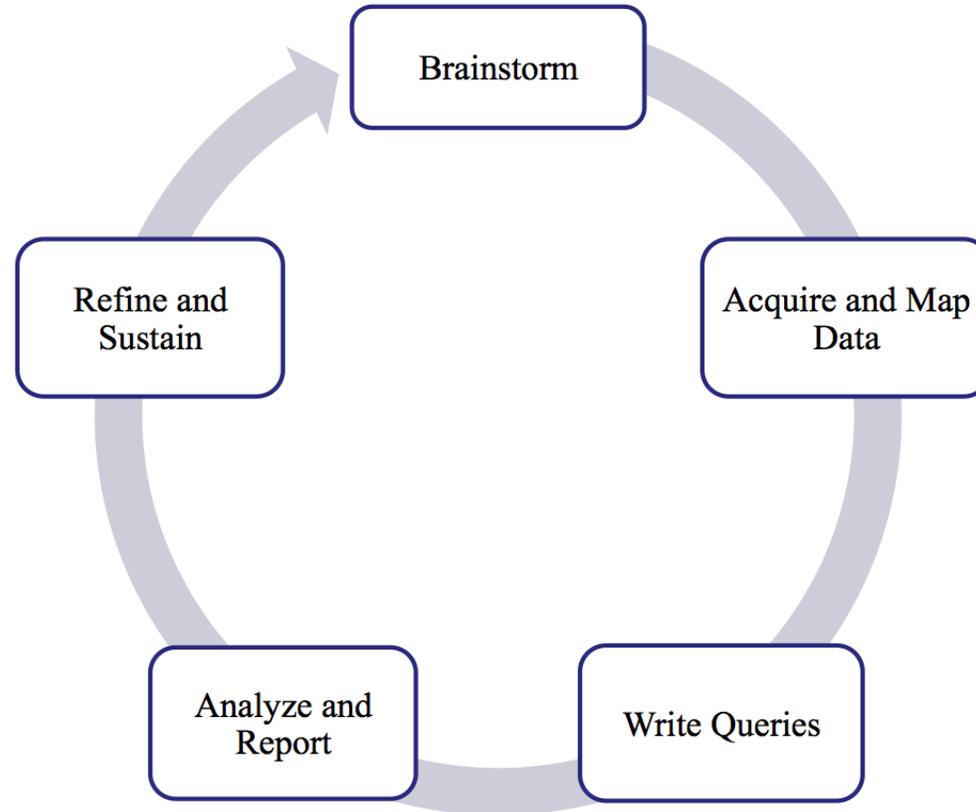- Next steps / resources (5 minutes)

Data Analytics and Artificial Intelligence Building Blocks

	Past	Present	Future
Information	What happened? Data Analysis as **reporting**	What is happening now? Data Analysis as **alerts**	What will happen? Data analysis as **extrapolation**
Insight	How and why did it happen? Data analysis as **modeling / design**	What's the next best action? Data analysis as **recommendation** (value add)	What's the best / worst that can happen? Data analysis as **prediction / simulation**

This is the foundation of Artificial Intelligence, so if you care about AI use and governance, this session is also valuable for you

A Repeatable Process for Data Analysis QuickStart Methodology (2006 – present)

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Brainstorm	Acquire and Map Data	Write Queries	Analyze and Report	Refine and Sustain
• Plan audit objectives	• Export data	• Write and test queries	• Priortize by size, age	• Fix root cause
• Understand data sources	• Secure	• Review initial results	• Prioritize by source	• Refine or add inputs
• Review risks and controls	• Balance	• Refine queries and filter criteria	• Assess root cause	• Lower or raise limits
• Select audit queries	• Transmit		• Prioritize with audit objectives	• Determine need for ongoing monitoring
• Prioritize audit queries	• Import			
	• Balance			

Body of Knowledge –
Skills needed for Data Analytics Success

- Project Management

- Data Acquisition and Manipulation

- Statistical Techniques

- Visual Reporting Techniques

- Communication

- (Finance and Audit) Domain Expertise

- Change Management / Strategic Thinking

apra | INSIGHT PHILANTHROPY RESULTS

Who on your teams has some or most of these skills?
How can you supplement these base skills with others at your university?

What are your obstacles?

Let's do some planning together
Beginner – PCard, Travel, Payroll or A/P

Let's do some planning together
Intermediate – Insights from Multiple Files

Let's do some planning together
Advanced – Quantitative or Qualitative Analysis

Data Analytics Roundtable Additional Resources

- ACUA Working Group

- Microsoft Community Gallery

- Tableau Public

- Tableau User Group - Higher Education
  - Appalachian State Data Analytics Day
  - Slack Channel (run by Ohio State)

- ACUA Higher Ed Kickstarter Guides

- Other resources