Student Services Transformation (SST)
Data Access Town Hall Meeting

Mark Molnar, Academic Planning & Budget
Gary Pacer, Administrative Computing Services
October 26, 2010
Agenda

- Where we are
- Roll-out Plan
- Primer: Academic Structure
- Admissions Data
Timeline

- Core Configuration began January 2009; Completed January 2010
- Complex Extensions and Environmental Adaptations began July 2009
- Go Live dates for the Summer 2011 semester:

<table>
<thead>
<tr>
<th>Go Live #1</th>
<th>Student Records - Course Catalog</th>
<th>February 2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go Live #2</td>
<td>Campus Community, Admissions, Student Records - Schedule of Classes, Portal</td>
<td>August 2010</td>
</tr>
<tr>
<td>Go Live #3</td>
<td>Financial Aid</td>
<td>February 2011</td>
</tr>
<tr>
<td>Go Live #4</td>
<td>Student Records-Registration</td>
<td>March 2011</td>
</tr>
<tr>
<td>Go Live #5</td>
<td>Student Financials</td>
<td>May 2011</td>
</tr>
<tr>
<td>Go Live #6</td>
<td>All remaining Student Records items and Academic Advising/Degree Audit</td>
<td>July 2011</td>
</tr>
</tbody>
</table>
## Detailed Timeline

<table>
<thead>
<tr>
<th>Department</th>
<th>Task Description</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Records</td>
<td>Course Catalog - Central Scheduling only</td>
<td>February 2010</td>
</tr>
<tr>
<td></td>
<td>Ahead of schedule and under budget</td>
<td></td>
</tr>
<tr>
<td>Portal</td>
<td>Look and feel updates - Students, Faculty and Staff</td>
<td>May 2010</td>
</tr>
<tr>
<td>Admissions</td>
<td>Applications for Summer and Fall 2011</td>
<td>August 2010</td>
</tr>
<tr>
<td>Portal &amp; Campus Community</td>
<td>MyUB; Biographic and demographic information for Summer and Fall 2011 incoming</td>
<td>August 2010</td>
</tr>
<tr>
<td></td>
<td>students</td>
<td></td>
</tr>
<tr>
<td>Student Records</td>
<td>Schedule of Classes - Department Schedulers</td>
<td>August 2010</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>ISIR Loads - Summer and Fall 2011</td>
<td>January 2011</td>
</tr>
<tr>
<td>Academic Advising</td>
<td>Degree audit reports for Fall 2011 incoming undergraduate transfer students</td>
<td>January 2011</td>
</tr>
</tbody>
</table>
# Detailed Timeline

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions</td>
<td>Decision processing for Summer and Fall 2011 applicants</td>
<td>January 2011</td>
</tr>
<tr>
<td>Admissions</td>
<td>Matriculate students</td>
<td>March 2011</td>
</tr>
<tr>
<td>Campus Community</td>
<td>New Student Information System becomes system of record for all UB students</td>
<td>March 2011</td>
</tr>
<tr>
<td>Portal</td>
<td>Updates to MyUB for all Faculty, Staff, and Students</td>
<td>March 2011</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Packaging for Summer and Fall 2011</td>
<td>March 2011</td>
</tr>
<tr>
<td>Student Records</td>
<td>Registration for Summer and Fall 2011</td>
<td>March 2011</td>
</tr>
<tr>
<td>Student Financials</td>
<td>Cashiering; refunding; tuition calculation; and self-service</td>
<td>May 2011</td>
</tr>
</tbody>
</table>
## Detailed Timeline

<table>
<thead>
<tr>
<th>Department</th>
<th>Task Description</th>
<th>Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid</td>
<td>Direct Loan processing</td>
<td>June 2011</td>
</tr>
<tr>
<td>Student Financials</td>
<td>Billing for Summer 2011; Late fee processing</td>
<td>June 2011</td>
</tr>
<tr>
<td>Student Records</td>
<td>Grade entry and grade posting; transcript generation</td>
<td>June 2011</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Disbursement of Summer 2011 aid</td>
<td>July 2011</td>
</tr>
<tr>
<td>Student Financials</td>
<td>Billing for Fall 2011; Collections</td>
<td>July 2011</td>
</tr>
<tr>
<td>Academic Advising</td>
<td>Degree audit reports for all undergraduate students; some graduate students</td>
<td>July 2011</td>
</tr>
<tr>
<td>Financial Aid</td>
<td>Disbursement of Fall 2011 aid; TAP certification</td>
<td>August 2011</td>
</tr>
</tbody>
</table>
## Detailed Timeline

<table>
<thead>
<tr>
<th>Student Records</th>
<th>Posting degrees</th>
<th>September 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Financials</td>
<td>1098T processing</td>
<td>October 2011</td>
</tr>
</tbody>
</table>
How are we going to deploy this at UB?
How are we going to deploy this at UB?

- **Requirements** - what are they?
  - We can’t wait to determine what we want; we need to provide solutions for existing customers with priority to the functional needs of support units

- Replicate Current Infosource content as much as possible - subjects areas / reports

- Because systems do things differently, content will change

- New elements, eliminated elements, values, concepts
How are we going to deploy this at UB? (continued)

- Understanding that new system will trigger new needs - iterative development
- Piggyback on module “Go-Lives”
  - stage deployment of new views to module rollout schedule
  - Data Access efforts highly dependent on module configuration and implementation; we’re just behind!
What Assistance will there be?

- Metadata
- Cross walk ("field was / field is") - where applicable
- More Town Hall sessions
- Listserv
- User Groups - Directed presentations
- Other possibilities....
So, where are we?

- Admissions Live 8/4 - PS_RPT_APPLICATIONS populated
- Schedule of Classes / Course Live - August 2010 - -
  - PS_RPT.CLASSSCHEDULE_V
  - PS_RPT.CLASSINSTRUCTION
  - PS_RPT.COURSEATTRIBUTES_V
  - PS_RPT.COURSE_TRANSFORM_V
  - PS_RPT.CLASS_NOTES_V
- Orientation / workshop sessions held for Student Records, Student Financials and Financial Aid
- More Town Hall sessions
iStrategy - An “Out of The Box” Data Warehouse Solution

- UBSIS - over 15,000 tables and complex views
- The iStrategy Data Warehouse solution
- Creating data cubes for higher education analytics
- Cubes span the needs of a typical student enterprise
- Deployment guided by Go-Live schedule and module needs.
- “Flattened” cubes will reside within InfoSource
- Integration with SIRI
iStrategy – The 10,000 Foot View

A - Selected data move from UB SIS to iStrategy
   iStrategy reports created in Proclarity tool.
B - iStrategy data move to InfoSource
C - InfoSource iStrategy data move to SIRI.
D - SIRI acts as a portal for iStrategy rpts *or*
   SIRI rpts generated from iStrategy data.
E - User community obtains iStrategy data
   directly from InfoSource.

Diagram:

- UB SIS
- InfoSource
- User Community (MS Access)
- SIRI
- iStrategy Reports Through SIRI
- iStrategy
- Queries
Roll-out Plan: Moving iStrategy Models to InfoSource

- Step 1: Update InfoSource On-Line MetaData with iStrategy Model information
- Step 2: Validate Models Against Module Reporting Requirements (via Town Halls / Metadata)
- Step 3: Revise Models as Needed
- Step 4: Test and Freeze Configuration - Update MetaData
- Step 5: Develop Reports/Data Views
- Step 6: Advise Campus of Impending Model Release
- Step 7: Final Check and Secure Release Permission from Data Trustee
- Step 8: Advise Campus the Model Has Been Released
- Step 9: Conduct Town Hall sessions re: Model at 2 week intervals
Review: Old vs. New

- SIS is not UBSIS - not even close
- Legacy Mainframe vs. Modern Oracle environment
- Business processes have been redesigned
- New jargon:
  - SIS - Semester, Division and Major
  - UBSIS - Term, Career and Plan
- At a minimum, users will need to know basic Academic Structure definitions to begin to use the data
Primer: Academic Structure

- General representation of UB within the system
- Majors, Courses, Calendars, Organizational Structure and Facilities
- Configuration and taxonomy shaped by institutional need
- Present model underwent several refinements
- Validated by hundreds of hours of testing by both functional and technical personnel
Primer: Academic Structure - TERM

- Time period to which students are admitted and enrolled
- SIS SEMESTER = UBSIS TERM
- Term Format - Century + Year YY + Semester ID
- Fall 2011 = 2119
- Fall 2009 = 2099
- Spring 1985 = 1851
- Summer 2006 = 2066
Primer: Academic Structure - CAREER

- Grouping of academic work within a level of study
- SIS DIVISION ~ UBSIS CAREER
- UGRD = Undergraduate
- GRAD = Graduate
- MED = School of Medicine
- SDM = School of Dental Medicine
- LAW = Law School
- PHRM = School of Pharmacy
# Primer: Academic Structure - PROGRAM

- Student major grouping consisting of decanal unit plus award
- No SIS Equivalent
- 4 character field
- Positions 1 and 2 = College/School
- Position 3 = Degree Type
- Position 4 = Degree Level
- 27 R 3 = Arts and Sciences Regular Bachelor
- 07 C 4 = Engineering Combined Masters
- 11 S 3 = Management Subsequent Bachelor
- 08 N 0 = Public Health Non Degree
Primer: Academic Structure - PLAN

- Student area of study
- SIS Approved/Intended Major, Minor, Concentration
- 9 character field
- Positions 1 - 3 = Entity abbreviation
- Positions 4 - 6 = Award type
- Position 7 = Funding source
- Position 8 = Enumerative value
- Position 9 = Approved/Intended Differentiator
- **APY 010 R 0 I** = Intended Anthropology BA
- **MES 035 X 0** = Master of Ed in Singapore EdM
- **ECO M01 R 0** = Economics Minor
Primer: Academic Structure - SUBPLAN

- Area of specialization or emphasis linked to a Plan
- Maximum 8 character field
- Positions 1 - 3 = Entity abbreviation
- Position 4 = Concentration/Track differentiator
- Positions 5 - 6 = Concentration/Track identifier
- Position 7 = Approved, Intended or subsequent plan
- Position 8 = Approved or Intended if subsequent plan
- **AMS C 01 A** = Asian American Studies Concentration
- **CL9 C 03 5 I** = Intended Subsequent Mediterranean Archlgy
- **AMS T 04 A** = Caribbean Studies Track
- **APY C 53** = Archeology (Graduate Level)
Primer: Academic Structure - A Word About Entities

- Objects associated with campus activities are coded using entities
- Entities are placed within a logical structure known as the Hierarchy
- Nearly all campus systems weave Entity and/or Hierarchy into their core business logic
- Common Entity and Hierarchy definitions permit the “fusion” of information across the enterprise, as well as a shared understanding of campus structure
- Entity/Hierarchy concepts permeate UBSIS to facilitate reporting and analysis
Primer: Academic Structure - Plan to Entity Crosswalk

- InfoSource Academic Structure foundation tables
- Basis for placing common structural values in a shared institutional framework
- Data Access Advisory Group indicated a Plan to Entity mapping was important
- PS_RPT_LOK_PLAN_ENTITY_V performs this function
- Will create additional views as needed
Admissions Data

- New view name is PS_RPT_APPLICATIONS
- How is this different from ADM-ACTIVE?
  - Was / Is ?
- How Admissions Office is using new view to convert existing queries
- How we’ll handle questions along the way
- Implement then Optimize
A Few Notes on ‘APPLICATIONS_V’

- Data refreshed daily from UBSIS, but may have up to a 2 day lag before new information appears
- More dimensions than most units will need
- Columns labeled “SOURCEKEY” contain raw UBSIS codes
- Helpful SIS to UBSIS landmarks:
  - PERSON_NUMBER = Studentsourcekey
  - PERSON_NAME = Student
Next Town Hall

- November 9, 2010
- Topic - Schedule of Classes / Course
Where Do I Go For Help?

- InfoSource On Line
- MyUB > UB InfoSource > Understanding InfoSource Data > Search Table by View > DB_OWNER > PS_RPT
- InfoSource PS_RPT tables
- Project Web Site www.buffalo.edu/ub2020/sst
- UB Academic Structure Examples at:
- Email us questions at: ub-sst@buffalo.edu
Communications

- SST Website at www.buffalo.edu/ub2020/sst
- “SST This Month” updates
- Reporter and Spectrum Articles
- Specific Go-Live Communications
- Two-Way Communications
  - Change Readiness Assessment Surveys
  - Focus groups
  - Feedback to us at ub-sst@buffalo.edu
Thank you!

Questions and Discussion

The public website for the project is located at: http://www.buffalo.edu/ub2020/sst

We welcome your feedback!
Please email questions and comments to: ub-sst@buffalo.edu