

Data Stewardship Committee: Minutes of March 21, 2016

In attendance:

Greg Olsen (Data Analytics), Mychal Ostuni (GEMS), Mike Korona (Registrar), Rachel Link (OIA), Gary Pacer (EAS), Shirley Walker (Student Accounts), Michele Sedor (OIA), Laura Stevens (Student Accounts), Corey Hill (Student Accounts), Mark Molnar (OIA), Leah Feroletto (Socioial Work), Joe Mantione (OIA), Ashley Kravitz (Resource Planning), John Gottardy (Financial Aid), Craig Abbey (OIA), Jose Aviles (Admissions), Mark Coldren (HR).

Meeting called to order at 4:05 p.m. by Gary.

Gary went over the agenda, which consisted of the following items:

- Data Cookbook Implementation
- Business Intelligence Task Force
 - Oracle/CIBER visit update
- Review and approve items from Student Financials

Michele provided an update on the status of the Data Cookbook implementation. External authentication using UBIT and password is underway. Content training and review of import/export functionalities will be completed in March and April. Those who will be attending will receive emails with special training passwords and logins to use for the training. Once the external authentication is ready, the UBIT will replace the training accounts. Functionalities have also been reviewed with iData. Workflow training will be held in April. Michele is also working on ways to integrate existing Tableau and OBIEE reports with Data Cookbook.

Michele next provided a brief demonstration of Data Cookbook. The site will be buffalo.datacookbook.com. The community area is where users can look at public definitions, which includes all IPEDS definitions, along with others that various institutions have chosen to make public. Users can copy definitions directly from the community area into their own areas. Definitions can also be browsed individually. The only data currently on the UB pages are for testing and training purposes.

Michele next demonstrated the testing area and showed how data were imported from Capital Space and Planning, as well as how she had created several test definitions. As definitions are created, suggestions pop up, showing similar definitions in an attempt to reduce duplication.

Michele next showed the committee the specifications, which define a specific report and link the definitions used in that report. Specifications can be assigned ot individuals and used to track progress towards completion.

Reports created in Tableau and OBIEE can also be linked back to Data Cookbook. Michele showed an enrollment Tableau report that had embedded links within the dashboards that linked back to specific definitions of those fields in Data Cookbook. The links also point to the specifications, showing which definitions are included in the reports, and from those definitions, users can find other reports using them. Embedded definition and specification links can also be used to display text when the mouse pointer hovers over the text, or as a roll over.

Gary next provided some updates on the outcomes from the Oracle visit on 2/25 and 2/26. The objective and scope of the Business Intelligence Task Force was to create a 3 to 5 year strategic roadmap and business case for improving efficiency and effectiveness of business intelligence and analytics landscape, and to address tactical issues and support future growth.

Oracle met with key stakeholders, including Scott Weber, Laura Hubbard, the Provost, Planning and Budget offices, Business areas, HR, technical staff, and Student life. The key questions asked of most groups were “what problems are you trying to solve” and “how do you use data to solve these problems?”

The consultants are in the process of compiling their notes to prepare their report and recommendations, and may reach out to groups for clarification or further information. A follow-up call is scheduled for March 30.

Gary asked if any attendees had input on meetings they’d had with the consultants. Craig said that there were interesting conversations in the meetings he sat in on. People said similar things when speaking of the institution’s strategic plans. Coordinated technology was another issue that arose. They did not get too deep into this and the consultants may want more information on this topic for their report. Gary mentioned that the consultants expressed surprise that so many senior leadership staff made themselves available for the meetings. This shows the interest and commitment to the process at UB. It was good to get the third party perspective from the consultants and to see how we stack up relative to others that Oracle has done business with.

Corey spoke next about the process to create the Student Financials definitions. Their office does not do a lot of strategic reporting: most of their work is operational, or they work with other offices to collect data or complete reports. Thus, they used examples of reports shared across campus as a starting point for creating definitions.

Mark stated that this group did a fine job. Some revisions were made to the definitions, but the group worked hard and came together well. Student Financials may not do much reporting but often will run queries and put the results into spreadsheets, and those are then used for decision making. The tuition revenue definitions are included with student financials because the two are so closely entwined. These tuition revenue data are operational, but are frozen and then used for planning purposes.

Craig stated that Student Financials data are key ones that impact a number of downstream reports. For example, NY State residency impacts many other areas. People may make university level decisions from Student Financial data.

Mark said there is some overlap of definitions used in Student Financials with those in other areas. For example, NY State residency may not mean the same thing in Admissions as it does in Student Financials. Michele mentioned that Georgia Tech has struggled with similar issues in their implementation of Data Cookbook and has established a group to go through overlapping definitions to come up with a single unified definition that can be used across domains.

The Student Financials definitions were approved unanimously and the meeting was adjourned at 4:36 p.m. by Gary. Next meeting will be **April 18 at 4 p.m. in Capen 567.**