Data Stewardship Committee: Minutes of October 31, 2016

In attendance: Craig Abbey (OIA), Gary Pacer (EAS), Joe Lewandowski (RP), Michele Sedor (OIA), Mark Molnar (OIA), Mychal Ostuni (VPEM/GEMS), Michael Korona (Registrar), Greg Olson (VPEM), Brian O'Connor (OIA), David Love (SEAS), Jose Avilas (Admissions).

Meeting called to order at 3:01 p.m. by Gary Pacer.

The last meeting of the Data Stewardship Committee was April 18, so Gary provided a brief overview of what has been happening since the group last convened, and an agenda for the day's meeting.

1. Where We Have Been/Oracle Updates
2. Data Analytics
3. Data Cookbook
4. Definition Update
5. New Models and Model Changes in InfoSource
6. Next Meeting

Oracle Insight has been in somewhat of a holding pattern pending the outcome of the report. The initial Oracle visit to campus was in February, and Oracle returned to campus on September 8 for a "health check". Oracle's initial visit was with campus stakeholders, leadership, and functional users, and Oracle gathered information for their proposal on how people use data and what their needs are. The initial intent of the Oracle visits and conversations was to act as an impartial third party to offer UB feedback on data solutions.

Oracle's presentation for the DGC only had two people in attendance, and they have been asked to return to present it to a larger group. The health check in September was intended to be a deeper dive into UB's needs, but instead was only a two hour meeting, so the holding pattern continues. Oracle will return to campus after the first of the year, and may present during a DSC meeting, either in person or via WebEx. Part of the reason for the delay is a change in leadership on the CIBER team at Oracle, due to the loss of a staff member this summer.

Gary added that the DGC last met on April 29, which was the day the Oracle report was presented. Changes in senior leadership at UB are impacting the membership of the DGC, and Gary and Craig will be in contact with Brice Bible, CIO, to see if the group will be reformed.

Craig spoke about the formation of a Data Analytics group within OIA to enhance the reporting and analytic capabilities on campus. An announcement will be forthcoming. Two additional staff members have been hired for OIA: Corey Hill from Student Accounts and Lynne DePasquale from Resource planning.

Michele provided an update on Data Cookbook. Currently, there are more than 650 definitions, and more will be added as time goes on. Now that we are in the post-implementation phase, the focus shifts to marketing of Data Cookbook: in other words, how to communicate to various UB audiences about its existence, and how to tie it in with existing and new SIRI and Tableau reports. Beginning this spring, users of some SIRI and Tableau reports will see Data Cookbook icons that link to definitions and report references.

Michele mentioned that she continues to add context to the Data Cookbook site, which is linked off the data governance site. This will include a secured document and training repository; user guides, and possibly short videos of how to add or validate data definitions. Michele is open to additional suggestions and encouraged other DSC members to contact her with ideas for the site.

Michael Korona asked if definitions might expand to include technical ones, like the SQL needed to produce a certain report. Michele stated that currently, what is in Data Cookbook is what the working groups came up with, but they have explored adding metadata, including tables and the logic to produce them. At this point, people are not yet quite there in terms of technical definitions, but in the next round, they may be.

Craig suggested a gap analysis to identify what definitions might be missing to make sure we have covered the wide array of data at UB. Brian next asked if definitions are open for edits. Craig asserted that they are, and Gary solicited suggestions on making this more visible and encouraging feedback from users. Mark suggested putting elementary definitions out for review with information on how to add or update them, and seeing what happens.

Data model updates: the DSC provides a forum to discuss and communicate data model changes to structures having widespread use on campus. The primary focus is on data within InfoSource at this point, but the scope may widen in the future. The current list serve structure is seen as ineffective from audience communication and participation, as well as timing perspective. As part of the DSC's charge, these items will be brought forward for discussion. The DSC can be a place to discuss ideas, possible changes, and suggestions. With the initial work of definitions now approaching implementation, the group's focus can shift slightly to include data model work.

Changes in data access at UB have led to more people using canned reports, and not accessing data directly. Also, some data models used by many groups on campus are scheduled for updates or replacements.

Jose discussed how new models will impact those viewing admissions data. PS_RPT_APPLICATIONS_V, the primary model used to view application activity (for undergraduates) is being filtered to display applications data for those who have received an application decision, or who have deposited or matriculated. Previously, all application activity was updated on a nightly basis. A new revised APPLICATIONS_V is in test right now, and will provide a new view, using these updated filtering criteria, and contains new SAT score fields and the most popular fields from the previous version. Gary asked Jose if there had been any feedback to these new models yet. Jose explained that the transition into Slate, the new CRM used by Admissions, allows for workflow, reporting, and event management. During this transition, they want to wait to allow data to be more stable before moving it into InfoSource. Changes to an application can occur before a decision is rendered, so this allows cleaner data to move into InfoSource. Once the application cycle is complete, all incomplete apps will be populated into InfoSource. Otherwise, applications will move over once a decision is made.

Jose's office will continue to put out broad reports weekly, and dashboards using Slate will be available in the future to allow viewing of operational data at the decanal and program levels as well as overall. Jose asked the group how often ad-hoc reports are requested, and how much could be answered by more standard reporting or interactive dashboards.

Mark next spoke on SUNY_IR views. A new view of student data will be released to users, which contains expanded dimensionality and history. This view merges ISI and SUNY_IR views, and allows users to see data going back to Fall 1980. This project required extensive work to join disparate fields from legacy and HUB sources as data coding varied significantly between the two. The combined view allows the exploration of student flow from operational and official reporting, and will be refreshed and updated regularly. Up to 5 plans can now be included. Mark displayed examples of differences in the ISI and HUB student data to explain the work that Jon and Michele went through to create this view, and mentioned that ISI will be retired at some point in the future.

Gary asked how we should let people know about new views like this one. Should we use the list serve, or soft rollouts? Mark suggested a rollout informing DDAs about it to start. Jose stated that 400 user accounts have access to APPLICATIONS_V. Craig asked about how to communicate with these users. InfoSource access does not go away if someone is no longer at the university. We need a better communication mechanism. Gary stated that there is no auditing of who access tables or writes queries using them. Jose suggested in-person meetings at the decanal or unit level in this year of transition, as the data users are accustomed to will not be available and dramatic changes have been made. In person meetings might be the best way to communicate. So far, Jose stated he has had no questions on access application data for this cycle: users are most interested in admitted individuals.

Mark stated that there are different audiences for a view versus a report. The latter is a guided experience and user level varies. People may not know what they should be aware of. Craig and Gary suggested a group to explore how to communicate changes in data.

Human Resources data is now snapshotted monthly. How could we leverage Data Cookbook with these snapshots? Craig suggested discussion on who is using these data and for what reports. Various agencies might request different data and we should consider that.

Next meetings will be November 28 and December 12, both at 4 p.m. in Capen 567. The 2017 schedule will be sent out soon.

Meeting adjourned at 4:03 p.m.