

# Data Stewardship Committee: Minutes of February 20, 2017

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In attendance: Craig Abbey (OIA), Gary Pacer (EAS), Mark Molnar (OIA), John Gottardy (Financial Aid), Jose Aviles (Admissions), Joe Mantione (OIA), Mark Coldren (HR), Tom Okon (EAS), Valerie Dennis (CFO), Michele Sedor (OIA), Rachel Link (OIA), Dave Barnas (Facilities), Gregg Olson (VPEM), Laurie Barnum (RP), Jennifer Eisenhauer (SF), Mike Koziej (Registrar), Tom Wendt (VPR).

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

Gary first covered some changes to the DSC membership. Valerie Dennis will replace Beth Corry and Dave Barnas will replace Kelly Hayes-MacAlonie. Jennifer Eisenhauer is attended today for Shirley Walker, and Tom Wendt has joined the group today as well.

Gary next asked for feedback concerning the January Oracle/Ciber presentation. Mark Coldren said that he felt there was not a lot of data behind what they presented. Craig stated that there was a larger presentation and a full report should be forthcoming. We did not pay for the visits nor the report. Craig felt that Oracle did identify many issues, but that a number of these have improved or are improving since their initial visit in early 2016. Gary suggested touching base with Brice to see if he has the final report.

Joe Mantione spoke next on role-based security. He is coordinating a group to look at this and how security is handled at UB. Joe explained that users connect to resources at UB in various ways each day: Tableau, SIRI, Box, and SharePoint are all common resources used. How is role-based security managed across reporting and data platforms? Joe provided examples of reporting platforms (SUNY BI, SIRI, Tableau), developed applications hosted in-house (GRAdmit, PSI), and hosted solutions (Baseline/Campus Labs, Data Cookbook, Academic Analytics). Existing user groups include LDAP, AD (active directory), local Oracle, and local SQL. Joe pointed that currently, there are 6,514 top-level AD groups – more than the total number of faculty and staff on campus!

There are more questions than answers at this point, and the group aims to provide some solutions. Questions the group will look at who audits access controls when people change roles or leave a unit and how the report catalog is managed. The goal is for all deans, associate deans, and CFOs to have consistent access to reporting, regardless of platform. Craig provided some background: there are certain things people in specific roles should have access to. If we can get this set up correctly, we can allow better access to needed tools and data and also to remove access when roles change. Mark M. urged caution on assigning roles and suggested not doing this solely on job title. Craig agreed and said this raises the question of who grants access. Perhaps look at what people do. Gary stated that the 20% can get in the way of the 80% -- we should focus on the non-special (aka standard) cases first.

Joe's group will look at both technical issues as well as policy issues. Each system will ultimately need to be examined to determine who has access to what and if there are users who have changed roles and no longer need or should have access to certain data. Dave Barnas provided an example of how access to PSI is handled when users move and how IT assists in the process.

Michele next provided additional information on the Data Cookbook implementation, starting with a review of the timeline and concluding with today's status, where Shibboleth authentication (single sign-on) is in place and definitions have been reviewed. Post implementation plans include establishing one Data Cookbook stewardship group going forward, and linking Data Cookbook to established Tableau reports.

The stewardship group will consist of two teams: a centralized data oversight team and a data stewardship moderator's team. The first team will work with EAS, serve as administrators, and coordinate and run the group. Moderators (generally 2 from each functional area) will create definitions for their own functional areas, enter definitions, approve definitions for functional areas, and work with oversight groups. They will also represent their functional area at Data Cookbook stewardship meetings.

Michele demonstrated what Data Cookbook implementation looks like connected to Tableau reports. This will be forthcoming for Tableau and SIRI reporting. Mike K. asked if Data Cookbook definitions are intended for end users or more technical definitions. Michele stated that both groups can use the product. The new version of Data Cookbook has a feature that goes into the system to pull out metadata to get terms for definitions. Mike stated there are many questions in his area regarding what tables or fields to use in Info Source for queries and expressed hope that the metadata would assist with these questions.

Mark next presented on reporting and data. Mark provided an overview of the group's purpose and our mission statement. So far, we have:

- Created an environment where data/information challenge is recognized
- Obtained recommendations from outside vendors
- Developed common understanding about information
- Identified key definitions across subject areas
- Deployed new tools to support and focus our efforts

What do we want to do next?

- Catalog all available data, processes, reports, and models
- Maximize accuracy and quality of information at our disposal
- Develop ability to quickly respond to campus needs
  - New and creative data models to meet current and emerging needs
  - Information certification and exchange (proposed)
- Deliver common toolsets to support key planning efforts
  - Standard reports endorsed by campus community
- Encourage and facilitate productive dialogues with constituents

- Town halls, walking tours, or individual instruction

Moving forward, we need to understand what we have, and:

- Assemble experts from across campus to
- Identify data, processes, reports, and models critical to support campus information needs
- Develop methods to catalog critical data, processes, reports, and models
- Identify means to deliver content to constituents
- Develop overarching process to maintain, update, or revise catalog content
- Promote a culture that first looks at the catalog for answers to data related questions

Craig asked if any working teams had definition updates. None were provided. Mike K. mentioned that PS\_COURSE\_CATALOG\_ALL\_V is now available and allows a historical view of catalog information by term. Prior versions only allowed current courses.

Gary asked if people in individual areas are using Data Cookbook yet. Michele stated that she, Jon Havey, and Lynne Depasquale from OIA would be presenting sessions on the product at UB's Business Days to market it, and solicited additional ideas. Valerie suggested adding links to Data Cookbook on the Administrative Services Gateway. Laurie suggested a presentation to the CFO group once the SIRI implementation is complete.

Meeting adjourned at 4:52 p.m. by Gary.