UNM IT Academic Technologies Advisory Board
Minutes: Tuesday, September 26, 2017
Scholes Hall Roberts Room
9:00 am – 10:00 am

Chair: Julie Coonrod
Support: Emily Morelli

Topics

1. Approval of Previous Minutes (July 2017)
   • Approved

2. Opening Comments by Julie
   • Julie has spoken to Duane about her frustrations with the advisory board being more of an information-gathering group than an advisement group. That will soon shift, in coming board meetings, when IT will be bringing projects to the board for review and prioritization in alignment with the FY19 budget planning cycle.
   • Julie also stated the advisory board chairs meet with IT monthly, and one obvious need for everyone is accessible data. Obtaining data has become more difficult and data management is an important topic.

3. Enterprise Data Warehouse (ALESIA & Cross-functional Team) – Presentation Attached
   • Alesia introduced a presentation by Barbara Pfaff regarding a new, cross-campus, cross-functional team comprised of staff responsible for reporting. They have been meeting to share and gather information with the goal of recommending a proposed architecture and next steps to the IT advisory boards. Their vision is to be able to provide the right level of access to the right data to the right people with the right set of tools. Next steps are to finish Proof of Concept projects.
   • Present team members introduced themselves.
   • Brian stated that the proposed architecture will help solve the problem of decentralized data.
   • Julie asked about why it was so difficult to get data (requesting, as opposed to writing) from a security perspective. Brian answered that the challenge is that there currently is no good process for allowing access; currently, a data steward has to approve access to requested data, which slows down the process. In the future, IT will be using role-based access with Identity Management, so, for example, someone with FERPA training would automatically be allowed to access certain data. Julie – inquired who the data stewards are. They are in Enrollment Management, and Financial Services Management and HR. The current Data Warehouse Management group has been discussing simplifying the process with stewards, such as with IDM. They are also exploring having stewards in an oversight capacity, providing approvals ahead of time. Data models will be critical to this as well.
   • The Data Integration Tool project involves application-application integrations, as well as data integrations and that is why it is spun off as a separate project.
   • A timeline with dates and milestones will be part of the planning process, after the current information gathering phase is completed.
Alesia noted that she will bring projects to the Academic Advisory Board next month for escalation & prioritization.

Q & A:
Q: What is meant by “single version of the truth”? Does that refer to the interpretation of data, or just numbers?
A: It refers to data, ensuring consistent counts and that transformation rules are understood. Valerie explained data might vary depending on business need and what is trying to be accomplished. Alesia noted the goal it to move toward oversight and policy for data stewards. Currently, it is not possible to trace back information to the source of data, therefore the data cannot be trusted.
Q: What do we do currently when we want some data on students, e.g., finding which grad programs have a high percentage of Native American students?
A: For now, to solve some gaps, Alesia sees an opportunity to strengthen training on Webfocus. Currently, you can submit a help ticket for walkthrough assistance, but creating more self-service solutions will be better.
Alesia did note that there were 400 problems with integrations over the last few months and it becomes a resource issue. She will start sharing more for decision-making.
Q: Which come first, truth or access?
A: Truth comes first. The vision for every data warehouse is that there are canned official reports allowing users to drill down, with the ability to do some of their own reports. When data does not roll back up to original numbers, the data needs to be followed in a discernable way to be trusted.
Julie noted that when a user pulls data in real time, there is always an asterisk that the data is not corrected, but the user is able to get answers for their inquiries. Users should be able to do this.
Valerie noted that if users are having issues with anything on the student tab on My Reports, they can email emrt@ unm.edu. They do average 20-40 ad hocs/ week on top of security and end user support, so a response may take a couple of days. They coordinate with OIA every Friday afternoon and hand off some requests (if working with official numbers, fill out data access request on their website). The registrar site has a form that goes to the ER team for ad hoc data. Users may also email suggestions for new reports, etc.
Alesia noted that she will work on and share later a consolidated process flow regarding how and to whom requests for information should be made, and that financial data training schedule is published.

4. Pearson Agreement Update (Elisha Allen)
• The Extended Learning, now Academic Technologies, have worked for the past 4-5 years on coming to an agreement with Pearson in response to requests from faculty to integrate online publisher content with the Learn system. There were FERPA issues with exporting student data to publishing sites – basic demographic information would be going to published data site.
• They have hammered out an agreement to integrate My Labs and other products from Pearson into Learn beginning in January.
• Other publishers are queuing up for the same arrangement. Academic Technologies has a master agreement that can be modified by University Counsel for other publishers.
• There was discussion about how best to communicate and publicize this development for faculty. Academic Technologies will notify faculty with announcements in Learn, to the instructor mailing list, to the ITOs, and at faculty meetings, etc. Julie suggested placement in the President’s message, and an email to the Alfa list as well.

5. Strategic Plan (Elaine Rising)
Elaine demonstrated the interactive IT strategic planning website, which is currently under development, and show how programs and projects align with strategic goals for both UNM and IT.

Current work includes editing titles and opportunity statements to be more understandable for a public-facing site, and reviewing which goals projects align with for consistency.

Q&A:
Q: How does this interface with intake?
A: Alesia noted all information is from the Help.UNM ticketing system, and management champions are tagging projects. The Boards will have full access to project information with MyIT dashboard and prioritization view. Other areas are slowly onboarding to MyIT.

Q: What is the target date?
A: IT will finish the site by the next board meeting.

Q: Julie asked, since ITOs are sitting in colleges and know what they need, is there a synergistic way for them to have a similar model?
A: Brian noted that positions involved with reporting and web design were singled out in the E&E process as positions not to centralize. Current ITOs are desktop and server positions, not reporting groups. Alesia noted she is working directly in a collaborative way to create a similar model, and onboarding ITOs into the Cherwell system.

It was noted that previously, the EMRT had representation with others at an Academic Reporting Group meeting. It was suggested that a group like that be reformed - not to replace higher level reporting groups but to have dialogue for those in the trenches that are trying to help solve problems, as a venue to exchange ideas and surface common struggles. Brian suggested Alesia could add a user group to the data warehouse initiative.

Next Meeting: October 24, 9:00-10:30am Scholes Hall, Roberts Room