April 2024 - Data User Advisory Group Workshop

(DW Modernization Review Navigation and Help Concept and Additional Filter Controls on Dashboards)
Thursday, April 25th, 2024, 2 - 4 PM Via Zoom

Join Zoom Meeting: https://csumb.zoom.us/j/83085257688
Meeting ID: 830 8525 7688
Passcode: <mark>DUAG</mark>

Agenda

1. Opening Announcements
- **Data Exploration Open Labs** - every week, alternating Wednesdays 4 PM-5 PM or Fridays at 10 AM-11 AM

2. Data Warehouse Modernization Updates (~10 minutes)
- **Updates and Next Steps:**
  - **Data Warehouse Code Freeze**
    - **No new data warehouse development requests until after modernization is completed (expected mid-Spring 2024)**
    - **Production bugs will be worked on, so data warehouse problem tickets may be submitted**
  - **Existing (Oracle) CSUMB Data Warehouse to remain available until the DW Modernization project is complete**
  - **Canvas course: DUAG: CSUMB Data Warehouse Modernization**
    - We will be using this tool to share resources related to modernization and the new dashboards in Amazon QuickSight as they become available
    - All DUAG members have been added. If you would like an invite, let Michael know (mdorsch@csumb.edu)
  - **UAT Updates**
    - **Goals of the UAT**
      - User interface testing
      - Discoverability testing
      - Functionality testing
      - High-level data testing
      - Translating business problems into the new toolset
      - Identifying documentation needs
      - Identifying training needs
    - UAT Team Canvas Course - used by UAT Team members to organize testing assignments and report problems/feedback; reported problems are

communicated to the collaborative/development team via Jira tickets submitted by IAR

- **UAT Assignments Completed:**
    - Assignment 1 (MVP Dashboards - Term Enrollments **P2ERS pending**)
    - Assignment 2 (Phase 1 dashboards - Student Degrees **CSUMB Signed Off**; prioritizing data elements for dashboard Optional Filters)
    - Assignment 3 (Phase 1 dashboards - Class Meeting Pattern **CSUMB Signed Off**; Class Enrollments **P2ERS pending**)
    - Assignment 4 (Phase 1 dashboards - Class Enrollments continued **P2ERS pending**; Phase 2 dashboards - Class Instructor)
    - Assignment 5 (Phase 2 dashboards - Academic Class; Academic Plan Summary)
    - Assignment 6 (Phase 2 dashboards - APDB Section; ERS Credential; ERS Degree)
    - Faculty Assignment (Phase 3 dashboards - Faculty Student Success)
    - Assignment 7 (Phase 2 dashboards - ERS Student)
    - Assignment 8 (Phase 3 dashboards - Cost of Instruction, Financial Aid, Student Enrollment Aggregate - Snapshot)
    - Assignment 9 (Phase 3 dashboards - Admissions Funnel)
    - Assignment 10 (Phase 3 dashboards - Degree Composite)
- **UAT Assignment In Progress:**
    - Assignment 11 (Phase 3 dashboards - Institution Summary - Par 1)
        - Kick-off: Friday, April 12
        - Testing period: April 12 - April 26, 2024
        - Wrap-up: Friday, March 26, 11 AM
- **UAT Issues Identified and Status to date:**
    - **UAT Canvas Discussion Postings**
        - MVP Term Enrollments   163
        - P1 (All)   465
        - P2 Class Instructor   5
        - P2 Academic Class   194
        - P2 Academic Plan Summary 8
        - P2 APDB Section   144
        - P2 ERS Credential   72
        - P2 ERS Degree   256
        - P2 ERS Student   593
        - P3 FSSD   192
        - P3 Cost of Instruction   42
        - P3 Financial Aid   29
        - P3 Student Enroll Agg Snp   35
        - P3 Admissions Funnel   188
        - P3 Degree Composite   106
        - P3 Institution Summary   29
        - **Grand Total**   **2,514**
    - **Jira issues status**

Issues Status	Count of Issues
Done	547
In Progress	148
Review	185

- - ■ To Do   46
    - ■ **Grand Total**   **926**
  - ● **Review the upcoming UAT schedules (tentative)**
    - ○ [P3 UAT Timelines](#) - updated 3/13/2024
    - ○ The last UAT on Institution Summary is planned to wrap up on Friday, May 10, 2024
  - ● **Next steps:**
    - ○ Production infrastructure and QuickSight setup ongoing
    - ○ May 22nd - planning to demo a few of the Grades dashboards from QuickSight as part of the campuswide Student Success Retreat
    - ○ Move to production (sometime in May)
    - ○ Resolving UAT tickets

3. Activity 1 - Navigation and Help Dashboard (~ 45 minutes)

- ○ Review the existing Oracle [Navigation and Help](#) dashboard
- ○ Discuss functionality and QuickSight limitations
- ○ Review the QuickSight [Navigation and Help redesign concept](#)
- ○ **Breakout Group Activity 1 (25 minutes)**
  - ■ Review the QuickSight Navigation and Help redesign concept and compare it with the existing Oracle version
    - ● Consider the following questions:
      - ○ What are your reactions to the QuickSight Navigation and Help redesign concept? Will it help you find the information you are looking for in the Data Warehouse?
      - ○ Do you notice any missing functionality or problems with the QuickSight Navigation and Help redesign concept?
      - ○ Are there any resources or things that you would like to see added to the QuickSight Navigation and Help concept?
      - ○ Do you have any other suggestions for improving the Navigation and Help dashboard for QuickSight?
- ○ Group report out and discussion (10 minutes)

4. Activity 2 - Review Additional Filter Controls in QuickSight (~ 60 minutes)

- ○ For each of the data models listed in your group activity guide, review the "Additional Filter Controls Requested" linked documents. These are the filters we requested to add either on the dashboards or to the collapsable controls sections on the dashboards in QuickSight.
  - ■ DUAG helped us prioritize the filter controls to add to the dashboards in previous workshops
  - ■ The goal for this activity:
    - ● Verification of what was requested
    - ● Not currently discussing what should be there

- Review the linked QuickSight dashboards listed in your activity guides to see if the requested filter controls have been added to each of the dashboard pages. Try each of the different filter controls to see if they update the visualizations on the dashboard when selections are made.
- Make note of any problems directly in your group activity guide document (e.g. requested filter controls missing, controls not updating the dashboard visualizations as expected, etc.) Please be specific in reporting problems (e.g. what page are you looking at, what filter are you using, what is not working or looking weird; include a screenshot if possible)
  - Things to look out for:
    - Wrong values showing in the control
    - Codes showing rather than descriptions
    - "-" or blanks showing in the control
    - Performance when applying the filter (should be fast)
    - Prompt interactions (is the control showing relevant values based on other control selections - see italicized notes on relevant values in the "Additional Filter Controls Requested" linked documentation)
    - Filters are applied to all visualizations on the page rather than just one or a few visualizations
- **Breakout Group Activity 2 (45 minutes)**
  - [Group 1 Activity 2 Guide](#)
  - [Group 2 Activity 2 Guide](#)
- Group report out (5 minutes)

5. Next Workshop
- Thursday, May 30, 2024, 2 PM-4 PM
- Topics TBD:
  - Tentative
    - Testing QuickSight Single Sign-On
    - Testing QuickSight production dashboards
    - Getting Started Guide