

# *Data Steward Work Session*

*September 25, 2008*

- Feedback on Data Management Program document
- Deliverables for October 1<sup>st</sup>
  - Draft plan
  - Draft data standardization process
  - Draft data standard package for Finance Subject Area
- Work Session on Tuesday 9/30
  - Location – Basement room (B030) – go through Constituent Services Area
  - Prioritize data entities for review
- Discuss future work sessions
  - Facilitator
  - Regular meeting dates, time and location
  - Homework assignments

To be successful, we will need to...

- Wear an “enterprise” hat – THINK Commonwealth
- Apply future state – “to be” ideas when defining the data
- Forget about technology, focus on the “WHAT” not the “HOW”
- Test the citizen’s viewpoint – let’s make it understandable to all!
- Identify unclear or unknown data requirements for Data Owners
- Manage and share our enterprise work

- **Program Plan reviewed with Data Owners on 9/15/08**

Meeting Outcomes:

- No changes to the Program Plan document
- Data Owners anticipating meeting more frequently in the near-term
- At a minimum, Data Owners will meet quarterly for updates
- Added Treasury to list of stakeholders
- Treasury will provide a data steward to participate
- Discussion around Phase 1 scope for data standardization

- **Feedback from VITA partners**

- No fundamental changes to Program plan – some clarifications suggested and changed in document

- **Feedback from Data Stewards and their IT Participants**

- Discuss your feedback or concerns*

## **October 1, 2008 Deliverables**

The Data Management Program work team will deliver the following items to Peggy Feldmann, CAO:

- An approved Plan for the Data Management Program.
- A draft Data Standardization Process for defining data standards.
- A draft Data Standards Package for the Finance subject area.

## **Future Deliverables and Timeframes**

- Deliverables beyond October 2008 will be defined as part of a detailed work plan for each of the four Tracks of work (Data Standardization, Organization / Governance, Policies and Procedures and Infrastructure).
- The detailed work plans will be created and reviewed by the work team during October 2008. A high level synopsis will be shared with the CAO and Data Owners in November 2008.

## *Data Management Program - Tracks of Work*

### **1. Data Standardization**

- 80% data steward time – defining data entities, attributes and relationships
- VEAP resources will be managing the data models

### **2. Organization/Governance**

- 50% data steward time – defining deliverables and resolving feedback

### **3. Policies and Procedures**

- 20% data steward time – reviewing deliverables & providing comment

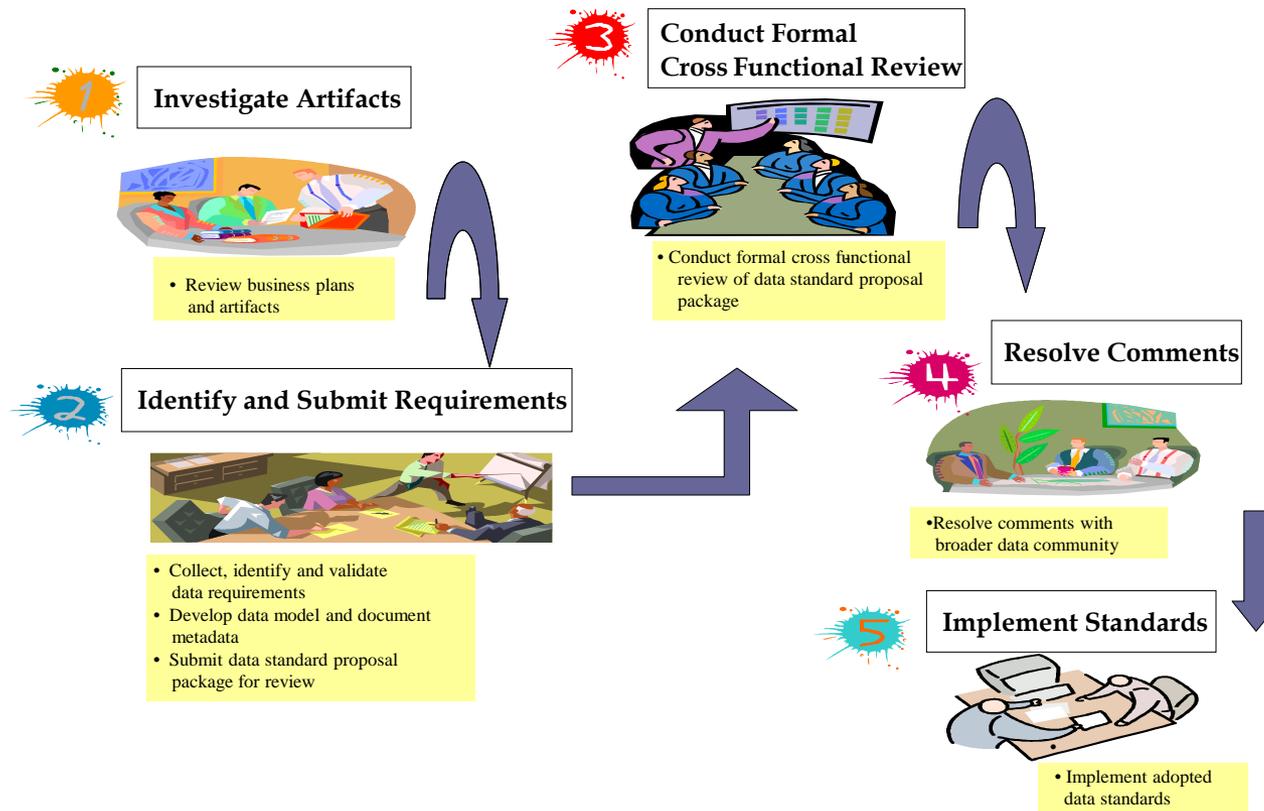
### **4. Infrastructure**

- 20% data steward time – identifying requirements for managing metadata

- The five primary phases involved in developing and implementing data standards are as follows:
  1. Investigate artifacts
  2. Identify and submit requirements
  3. Conduct formal cross-functional review
  4. Resolve comments
  5. Implement standards

# Primary Data Standardization Phases

## Data Standardization Phases



### **1. Investigate artifacts**

- Review business references and artifacts

### **2. Identify and submit requirements**

- Collect and identify data requirements
- Validate data requirements
- Identify existing data standards
- Develop logical data models
- Document data element metadata
- Conduct initial data coordination
- Submit data standard proposal package
- Review data standard proposal package for completeness

### **3. Conduct formal cross-functional review**

- Conduct formal review
- Facilitate review

### **4. Resolve comments**

- Conduct resolution for standard data
- Confirm review resolution and establish standard

### **5. Implement standards**

- Extend and update the COV Data Model
- Transform logical model to physical schema
- Transform logical model to information exchange package documentation
- Transform logical model to XML tags and schemas

- Subject Area - Finance
  - Information Classes (specific view of data)
    - Chart of Accounts (Agency, Fund, Service Area, Central Project, etc.)
    - Time and Attendance (Employee, Timesheet, Leave Sheet, Non-Employee, etc.)
    - Purchasing (Supplier, Solicitation, Requisition, Purchase Order, Commodity Code, etc.)
    - Accounts Receivable (Customer, A/R Balance, Deposit, etc.)
    - Accounts Payable (Payee, Payment, etc.)
  - Discuss Work Plan - timeframes

- Discuss future work sessions
  - Facilitator and Scribe
    - Paul Flanagan - Facilitator
    - Nadine Hoffman - Scribe
  - Regular meeting dates, time and location
    - Suggestions - Thursday afternoons 1-3, Tuesday afternoons 1-3
  - Homework assignments - examples
    - researching items
    - drafting items
    - reviewing items and providing feedback

## *Data Steward Contact Info*

<b>Agency</b>	<b>Data Steward</b>	<b>Email</b>	<b>Phone</b>
DHRM	Bob Weaver	bob.weaver@dhrm.virginia.gov	225-2251
DOA	Randy McCabe (Finance) Lora George (Payroll) Martha Laster (Payroll)	Randy.mccabe@doa.virginia.gov lora.george@doa.virginia.gov Martha.laster@doa.virginia.gov	225-2000 225-2245 225-2382
DPB	Mitch Rosenfeld Gary Janak (interim)	mitch.rosenfeld@dpb.virginia.gov gary.janak@dpb.virginia.gov	786-1687 786-2200
DGS	Bryan Wagner (Finance) Bob Sievert (Purchasing)	bryan.wagner@dgs.virginia.gov bob.sievert@dgs.virginia.gov	786-7925 786-5079
TRS	Kristin Reiter	kristin.reiter@trs.virginia.gov	225-3240

Nadine Hoffman      nadine.hoffman@veap.virginia.gov      786-0543

Jan Fatouros      jan.fatouros@veap.virginia.gov      786-1819