

## Minutes

AG/23/M1

Technology Advisory Group

Held on Thursday 16 virtually through MS Teams

Meeting scheduled to start at 10:30 until 14:30

Chair: TBC

Attendees:	Aaron Otubu	University of Greenwich
	Ann-Marie Cancemi	Nottingham Trent University
	Fiona Sanders	University of Leicester
	Sarah Graham	Bournemouth University
	David Harman	Lancaster University
	Sion Pennant Jones	Aberystwyth University
	Suzanne Grosvenor	Newcastle University
	Glyn Jeffries	University of Sheffield
	Rob Tucker	London Southbank University
	Wendy Webster	University of Dundee
	Susan Morgan	University of East Anglia
	Garry Main	University of the Highlands and Islands
	Steve Green	University of Lincoln
	Nicola Rossall	The University of Nottingham

TBC: Jo Birch

Apologies:	Alex Mortby	Bedford College Group
	Ben Stone	University of Wolverhampton
	Erin Edwards	University of Birmingham
	Amy Butterworth	University of Bristol
	Peter Fox	The University of Manchester

Presenting:	Adam Glaudot	Service Delivery Manager (Technical)
	Clare Cozens	Lead Product Manager
	Richard O'Kelly	Head of Data Reporting and Research

UCAS in attendance:	Laura Hawkins	Customer Engagement Coordinator
	Richard Leeman	Solution Architect

Observing:	Eduardo Castro	Data Manager
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**A3/20/01 Welcome and apologies**

The Group was welcomed to the meeting and the apologies were noted. The Group introduced themselves. Adam Glaudot chaired the meeting in absence of the Chair being replaced. Three new members and one returning member was welcomed.

**A3/20/02 Minutes and action log from previous meeting**

The minutes were approved as a correct and accurate reflection of the last meeting.

The open actions from the log were discussed:

- TG206 Course Data restructure Group workshop is ongoing and there is a roadmap for 2024-2025.

- TG214 Adam has raised an enhancement idea to make self-declared qualifications that an applicant can chose from when applying (former quals). Make that data available as reference data. Test environments align with available in production environment.

-TG218 A problem record for the applicant details record field not updating is open at UCAS. Several tickets have been raised against this issue.

**A3/20/03 Group Memberships Discussion**

New members were welcomed to the group.

The group are still in need of a new Chair and are encouraged to submit applications due to the number of new members coinciding with the end of the current chair's term. Send to [groupsandforums@ucas.ac.uk](mailto:groupsandforums@ucas.ac.uk)

**A3/20/04 Operational Update**

Adam delivered a presentation on C&C 2023, and 2024 cycle.

17 November 2022 - Star J data for HESA return delivery

24 November – Star X delivery. The opt-out was included and the majority of came from XML-Link users.

The group explained their reasons for opting out.

- Issues with data through applicants who had reapplied. Applicants who reapplied in the current cycle was switching data to what it was before so changed to UCO1 not UCO2.
- Duplicate Test scores
- In [Ellucian] Banner the data comes through as an operation that updates student's names e.g. preferred name or gender change in-between being an applicant to becoming an enrolled student.

2023 Maintenance calendar was made available on UCAS.com.

25 January Equal Consideration Deadline (ECD)

#### Confirmed 2024 Cycle Dates

October ECD – Monday 16 October 2023. There are ongoing discussions about potential changes.

January ECD – Wednesday 31 January 2024.

All confirmed calendar inclusive of Embargo dates is available on UCAS.com

Training module for Primary Correspondents will be launched early March and a wider rollout of training will be in May. There will be case studies based on breaches seen in previous years, along with a shift in the training focus to provide resources to embed zero-breach.

UCAS are piloting an option to allow providers to host embargo training. An industry standard package will be available to import and host on independent systems. UCAS are still accepting volunteers and are encouraged to get in touch with Adam Glaudot [a.glaudot@ucas.ac.uk](mailto:a.glaudot@ucas.ac.uk)

#### Development of Services

Infrastructure changes

System improvements are underway. A new WSDL is being deployed for the HEP 1 test environment. UCAS are having a call next week to continue development.

Web-Link will be available for smaller providers. Export reports performance improvements may be ready for testing soon.

Oracle database upgrade – demo made available for ODBC-Link assurance testing.

HEP1: 24/25/26/27 February – note the extra day of downtime.

HEP2: 17/18/19/20 February – note the extra day of downtime.

These dates will be sent out in the correspondence bulletin every week.

UCAS will approach the group for testing volunteers.

Reason for confirmation delay

Reference data is available for student record vendor systems is available in a test environment.

#### Enhanced Gender

There will be no changes to the configuration of existing fields. The wording of the questions and available responses will be changing. Additional new codes will be added.

I prefer not to say (N)

Woman (B)

Man (C)

I use another term (A)

Test data can be made available by specific request.

#### HESA (Star J)

UCAS data will be mapped to new HESA data feature codes

- Previous Institution (PREVINST)

- Ethnic Origin (ETHNIC)
- Religious belief (RELIGION)

UCAS data currently included but not part of the HESA spec will return no values: National identity, Socio-Economic Classification (SEC) and Social Class (SOC) – not 2010 or 2020, and Degree class.

New data items will be added and mapped to the HESA data futures codes (Scottish and Welsh providers only)  
Carer responsibilities (CARER), Estranged from parents (ENSTRANGED) and xml-Link/ODCB-LINK/Web-Link/Flat files.

technical briefing document available on UCAS.com. and the test environments deployment will be confirmed.

### A3/20/05 ODCB Link Update

At the end of the 2023 cycle, ODBC-Link will be turned off. There will be no 2024 applications delivered via ODBC-Link, so everyone is encouraged to transition over to XML-link. All student record system vendors expect to have updates available in Q1/Q2 2023. In house providers are developing at different stages but UCAS are increasing contact for test of environmental credentials and use of test environment.

The group gave the following feedback

- Documentation doesn't provide examples of transaction at code level.

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#### UCAS Support

Queries and teams to support test environments are available, UCAS have reactively and proactively improving and updating through experience with vendors. XML-Link load testing has been underway and the existing BAU infrastructure can cope with six times the load and scalable up to 21 times for the new users on C&C. BAU levels test data request volumes are being handled.

XML-link production request will be done via the support portal. Some may already exist but there is a 90-day expiry and XML-Link is restricted to UK IP addresses but there is an exemption request service via portal.

#### Group members experience of switching over to XML-link

The member engaged with their vendors consultancy service and found details of the user accounts that were needed by using the information available in technical documents from UCAS and Tribal. The group are advised to think about the downstream processes as data comes into a different place in XML. The vendor needed to collaborate between their team and the IT team as they didn't have everything available within their CIS e.g. background running processes. They made XML-link active in UCAS live and HEP environment and tested it with the vendor technical consultant.

If anyone is a CIS-Tribal they need to include UCAS user ID as well as code during implementation. They will also be required to complete data mapping and prepare for changing tables. It was noted some of the UCAS data reference tables weren't up

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to date in the production environment. Red flag errors are manageable but marvin code didn't work initially until Tribal put a solution in place.

### **A3/20/06 Showcase Power BI**

Rich O'Kelly delivered a presentation on Showcase Power BI. UCAS are using Power BI in three areas of the business - BI reports, open data and reports made available to providers.

#### Internal BI

BI reports can be embedded in PowerPoint. It presents trends across the admissions cycle. UCAS contribute data to research service UK-med across nations and publish open data. When providers log into UCAS.com they will be able to access a report section with multiple tabs covered. UCAS used 'as a service' offering from Microsoft added to 365 to deliver public dashboards. Platform engineering teams look after administration, but the rest are set to defaults.

APIs across the system that allow UCAS.com to make that bridge between SSO ID and institution permission. UCAS invest less than one FTE on the open data and one FTE on the BI Reports. There are data pipelines which can be set up to enter a gateway and create analytical data sets on Power BI, and pre-existing data pipelines to provide auto re-refresh reports. The open data dashboards from undergraduate admissions platform are connected through one ONS data and national people database to give estimates on free school meals. The other dashboard information comes from CRM, google analytics, auto identity management system, careers platform. This will come from databases such as SQL, Oracle and Salesforce. Data accuracy is cross-checked with the national pupil database but it is shown that applicants take time and care in the process.

### **A3/20/07 Development of Services**

Clare Cozens delivered an update on References and Personal Statements. Changes implemented by UCAS for 2024 entry cycle. From a technical perspective nothing will be changed. Free text in References will be structured in questions.

The three sections will consist of

1. Contextualising the place of learning
2. (Optional) Academic achievement e.g. explaining mismatched trajectory with predicted grades vs results.
3. (Optional) Anything else providers need to know e.g. Creative writing applicant may not be good in an interview setting.

#### Personal Statements

Students expressed personal statements give them a voice during the application. However, the pressure and stress of writing one had been noted and so UCAS have been working on making it a simpler process. The personal statement has been set into sections for applicants. Feedback surveys, road shows and wider engagement will end in the next couple of weeks. UCAS will then look at how to deliver the change technically. will close at the end of February to start development in March.

UCAS hope to Deliver this by the 2025 cycle. The survey will be sent as a link to the group.

#### UCAS-Link

An overview of UCAS' link product plan is being built, a bulk-processor to enable UCAS to process data in bulk. Vendors and providers who are mature XML-Link users will be a pilot group to ensure everything is running smoothly before it is launched to a wider audience.

The roadmap shows

- 1a) Bulk processor – milestone 1
- 1b) RPA API build
- 2a) Bulk processor – milestone 2
- 2b) Migrating MCDS from moveit to UCAS-link. This will be available for providers to choose either way.
- 3a) Bulk processor milestones 3&4
- 4a) XML-link reference data build
- 4b) XML-link road-data build
- 4c) XML-link write-data build

Vendors expressed that address fields are not being pre-defined in the apply system - data comes down in transactions and overrides existing data. The goal is to enable providers to choose which data fields to have deriving from their own source of truth, or UCAS' data.

#### **Option 1**

Self-service XML-link password resets.

- Some providers can self-manage by always checking if p/w is due to expire and proactively resetting.

#### **Option 2**

ODBC-Link to XML-Link mapping documents improvements.

- Expand this to best practice guide as well as mapping
- More examples in terms of requests would be helpful

#### **Option 3**

Making UCAS route dates available via XML-Link

#### **Option 4**

Make the reason for an application being cancelled available in reference data

- Institutions aren't getting cancellations through.
- Some high-level data is already available but could be more detailed

#### **Option 5**

Enable bulk download in 'get ReferencesUnits'

#### **Option 6**

Add HESA disability code mapping to XML-link

A proposed 'Option 7' from the group was 'undergo embargo until' field to each PQR record. Clare responded that this was being considered in another workstream.

The group ordered in terms of preference –

Option 6 (38.50), Option 3 (32), Option 4 (30.50), Option 2 (9), Option 1 (6), and Option 5 (4.50)

**A3/20/08 Round Table**

Common themes were shared by the group

- Moving to XML-link
- Working on new product called Tribal blueprints, moving from SITS to online system. It comes with a new applicant and agent portal. Mapping and data modelling is ongoing 80/20 out of the box system.
- Mapping out end-end admissions journey from application to enrolment using salesforce. Migrating ODCB-link.
- Implemented Microsoft dynamics as a front end user interface for Ug admissions - PGT, PGR and PGCE is underway too.
- Working with SAP with changes in UCAS and discussions in house about gender change questions.
- SITS-Tribal software change to SITS-cloud, and MuleSoft for data integration.
- Salesforce CRM applicant journey mapping.
- Student management system is live technology one universities product. Migrated 20 years of unvalidated data to valid.
- Moving undergraduates and postgraduates to new system
- Gone live with a new accommodation system. Deposit payment process will have to be reviewed because of integrating the portal.
- Redeveloping course management system.
- Implementing HESA data futures
- C&C and embargo planning
- Upgrading SITS system 10 to version 10.5
- Migrated cloud / banner to Star EZ.
- Implementing CRM with all enquiries and prospective students.
- Re-hosting student system into the cloud and updating the oracle database.
- Student data transformation project looking at improving the data in student record system.
- Accommodation group project moving from banner to Star EZ.
- Apprenticeship system to be able to do everything – software vendors will be giving demos of what they can provide.
- New student life-cycle CRM system.
- Xtender Project – upgrade to system that handles image attachments to records in our Student Record System (Banner)
- Updating our Extenuating Circumstances system on Banner
- Data Purge project - identifying records where they withdrew - different withdraw routes (2 UCAS, 1 Direct), current criteria not capturing all
- Looking at a new record matching issue - overwriting of existing records, due to the new 'HESA Surname at 16' question during registration
- Online Registration project - new system to work with Ellucian's Action Item Processing

The group would like an update on Apprenticeships

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Group  
Member

**A3/20/09 Any other business and Close**

Action

Preferred names on CRM comes through as skewed data. First name and middle name fields – UCAS to look into this.

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The date of the next meeting has been set for Thursday 15 June.