CASE STUDY

EAB

How the University of Montana Is Accelerating Governed Institutional Reporting with Edify and AI



UNIVERSITY OF MONTANA

The University of Montana (UMT) initially partnered with Edify, EAB's higher ed data management platform, in 2020 to establish a governed data foundation across reporting, analytics, and institutional decision-making. Now, UMT is testing a "**bring your own AI" model** where a Claude AI assistant is built on Edify to accelerate trusted ad hoc reporting.

Opportunity

UMT's IR and IT teams faced **growing demand for fast answers** to ad hoc data questions, but report-building often required SQL expertise, campus-specific definitions, and multiple rounds of human validation.

Solution

UMT connected Claude to **Edify's governed data foundation**, including documentation, metadata, higher ed data model, and reporting APIs, so Claude can draft SQL, interrogate Edify data, and publish reports from natural-language prompts.

Impact

UMT expects the pilot to move governed first-draft report creation **from weeks to hours**, giving IR and data teams **more capacity** to support one-off questions.

The Value of Edify

Faster First Drafts

Expected to reduce report-building time **from weeks to hours** and help teams quickly move from request to usable starting point.

Report-Ready AI Output

Turns **natural-language questions** into draft SQL and reports that can be published directly within Edify.

Validation Built Into the Workflow

Generates validator queries alongside draft reports so **humans can review logic** before outputs are shared.

> "We want to enable our Institutional Research office and also empower users that may not be native SQL developers to **have a conversation with the data**."
>
> *Corey Cardoza,*
> *Enterprise & Strategic Technology, University of Montana*

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How Claude and Edify Work Together

Governed AI Reporting

UMT + Claude Provide

AI Tool and Experimentation
Claude expertise, agentic AI/MCP exploration, and campus-led innovation.

Real Reporting Questions
High-value ad hoc questions from IR, IT, and functional users.

Natural-Language Interface
A conversational way for non-SQL users to engage with institutional data.

Edify Provides

Governed Data Foundation
Trusted institutional data structures, definitions, and reporting context.

Metadata, Documentation, and APIs
The context Claude needs to draft stronger SQL and reports.

Publishing and Validation Workflow
Reports can be created in Edify with human review and validator queries.

"Bring Your Own AI" in Action

1 ASK



User enters a plain-English reporting question into Claude

2 GROUND



Claude references Edify documentation, Quad structures, metadata, and business context

3 BUILD



Claude interrogates Edify data, drafts SQL, and checks logic

4 PUBLISH & VALIDATE



Claude publishes the report to Edify and can generate a validator query



Example Request
UMT asks Claude to compare Applied, Admitted, and Enrolled counts for Biology majors.

Edify-Connected Execution
Claude loads the Edify skill, tests the query, and publishes the report.

Report Output
The report appears in Edify for review, validation, and sharing.

Interested in finding out what your institution can do with trusted, accessible data? Learn more and request a demo at **eab.com/edify.**

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