

Project Charter – BI Project - OBIEE Implementation

Project Name	<i>Business Intelligence (BI) Project - OBIEE Implementation</i>		
Project Manager	<i>Mark Treiber</i>	Organization	<i>UW-Madison – DoIT ADI</i>
Sponsor	<i>Kathy Luker</i>	Organization	<i>UW-System - OQI</i>
Executive Committee Sponsor	<i>David Stack</i>		
Document Version and Date	<i>Version 4 – 02/01/2016</i>		

Document Change Control			
Revision Number	Date of Issue	Author(s)	Brief Description of Change
<i>Version 1 (draft)</i>	<i>12/27/2015</i>	<i>Mark Treiber</i>	<i>Review with Kathy Luker & Robert Flum</i>
<i>Version 2 (draft)</i>	<i>01/04/2016</i>	<i>Kathy Luker Mark Treiber</i>	<i>Review with David Stack</i>
<i>Version 3</i>	<i>01/20/2016</i>	<i>Kathy Luker Mark Treiber</i>	<i>Review with BI Executive Sponsors</i>
<i>Version 4</i>	<i>02/01/2016</i>	<i>Kathy Luker Mark Treiber</i>	<i>Revisions from BI Executive Sponsors Feedback</i>

Project Scope	
Business Need	<p><i>Provide a brief overview and background information about the project. Explain at a high level what the project is to accomplish, who initiated the project and expected benefits (both tangible and intangible).</i></p> <p><i>The University of Wisconsin System (UWS) is proceeding with a new Business Intelligence (BI) tool to replace our legacy, system-wide reporting tool, Oracle's Brio/Hyperion Interactive Reporting (IR). This change is necessary because UW System's Oracle's software support ends June 30, 2017. An RFP was issued and the contract was awarded to Oracle OBIEE 12c product in December 2015. The conversion timeframe will begin then and is expected to go through June 2017 (depending on each campus' engagement).</i></p> <p><i>UWS (CSRG) is funding the tool replacement, conversion of the HRS/SFS system-wide shared queries and limited training for selected roles at each campus. Each campus is responsible for the assessment/conversion of queries/reports that are specific to their campus and for the training of their ad hoc query writers. This decision was made by the BI Steering Committee to encourage the use of shared system-wide queries and to encourage each institution to critically assess their use of custom/unique queries. UW-Platteville recently completed this process and the result was a considerable streamlining of their processes and fewer custom queries.</i></p>
Project Goals	<p><i>Identify the key project goals</i></p> <ol style="list-style-type: none"> <i>1. Purchase hardware for OBIEE 12c</i> <i>2. Install, configure, set up security and authentication in OBIEE 12c for the 15 UW System institutions allowing institutions to begin their campus specific implementations</i> <i>3. Insure that the system is configured so that dashboards/reports can be shared across all campuses/institutions</i> <i>4. Migrate the Platteville OBIEE 11g instance into the System OBIEE 12c instance</i> <i>5. Assessment of the system-wide shared queries to determine:</i> <ol style="list-style-type: none"> <i>a. Which of Platteville's already converted shared queries can be used</i> <i>b. Which queries that have not been converted by Platteville should be converted to OBIEE's BI Publisher using Dynasoft</i>

	<ul style="list-style-type: none"><i>c. Which queries remain that a dimensional data model should be developed to support</i><i>6. Create a dimensional data model for the data used by the 'Shared Queries' found in Interactive Reporting</i><i>7. Using the dimensional data models, create a metadata repository (semantic layer)</i><i>8. Create dashboards/reports using the semantic layer that serve to replace the 'Shared Queries' in Interactive Reporting</i><i>9. Effectively use training funding to train Campus/Institutional Administrators and necessary technical people supporting the system-wide shared queries and student data queries in Interactive Reporting in:</i><ul style="list-style-type: none"><i>a. Dimensional Modeling;</i><i>b. Repository, Catalog, and Security Management;</i><i>c. Analyses (criteria and reports/views), Prompts, and Dashboards.</i><i>10. Monitor readiness of campuses with student data related queries to move to OBIEE</i>
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Product Description

Describe the product or service that the project is to deliver.

Oracle OBIEE 12c --- Referenced in RFP# RG-15-2603

Note: The Endeca and Oracle Cloud services are included in the purchase, but the services are not in scope for the initial phases of the project

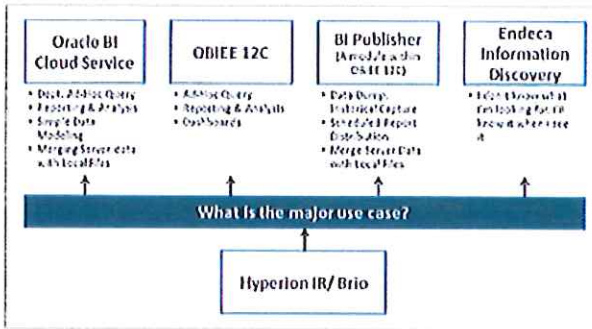
December 2, 2015

UW System purchases Oracle BI Toolset to replace Interactive Reporting

The University of Wisconsin System has taken a big step toward managing and reporting its data with the purchase of a Business Intelligence toolset from Oracle Corporation. Those who need quick access to data for intelligent, responsive decisions will find the Toolset extremely helpful.

The BI Toolset will replace the soon to be discontinued Interactive Reporting software used by all thirteen UW campuses. Included in the toolset is OBIEE 12c, BI Publisher, Endeca Information Discovery, and a "Sandbox" environment for Oracle BI Cloud Service (BICS).

Key new features in OBIEE 12c, released in October, include Visual Analyzer that brings Tableau-style reporting to OBIEE users along with another new feature called "data-mashups," which enables users to upload spreadsheets of their own data to combine with their main curated datasets. Oracle Endeca Information Discovery also offers a broad range of features for the exploration and visualization of information. Each feature is accessible through an improved user interface.



Profile of the tools available from Oracle BI

Planning for implementation has begun, and will span the next couple of years. To learn more about the tools and their features, plan to attend a **New BI Tool Day January 13th at the Pyle Center** on the Madison Campus or via video link to other campuses. An agenda for that day is being developed and will be announced as soon as it is known.

Special thanks go to the dedicated RFP Evaluation Committee whose work made this acquisition possible:
 Ruth Ginsberg, UWSA
 Kathy Luker, UW Madison
 Rita Deltzer, UW Milwaukee
 Lynsey Schwabrow, UW Whitewater
 Marguerite Middendorp, UW Eau Claire
 Jen Chapak, UW Stout
 Robert Flum, UW Flatteville
 Jason Fishbain, UW Madison
 Mary Kirk, UW Madison
 Bob Turner, UW Madison
 Derek Kozalke, UW Madison

The Subject Matter Experts supporting the RFP Evaluation Team were:
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 George Lufzerna, UWSA
 Bruce Maas, UW Madison
 Mike Roszkowski, UW Madison
 Mike Vavrus, UW Madison
 Jeff Armstrong, UW Madison
 Kay Stelner, UW Madison
 Sasi Pilly, UWSA

Members of the Contract Negotiating Team were:
 Ruth Ginsberg, UWSA
 Kathy Luker, UW Madison
 Bruce Maas, UW Madison
 Mike Vavrus, UW Madison
 Bob Turner, UW Madison
 Robert Flum, UW Flatteville
 Sasi Pilly, UWSA

<p>In Scope/Out of Scope</p>	<p><i>The scope sets the boundaries of the project. Enter those key items that are a part of the project and those major items that will not be worked on as part of this project. This is a high level description of what is in and what is out of the boundaries of the project.</i></p> <p><i>Note: Individual campus/institution migration projects (moving off Interactive Reporting) will be happening in parallel, but the shared UW-System environment and training will need to be completed before actual migrations can occur.</i></p> <p style="text-align: center;">OBIEE 12c Tool – Scope Definition</p>
<p>Critical Success Factors</p>	<p><i>Identify the critical success factors for the project. Critical success factors are outcomes that must be achieved in order for the project to be considered a success.</i></p> <ol style="list-style-type: none"> 1. OBIEE 12C installed and configured to support the 15 UW System institutions 2. Platteville OBIEE 11g instance migrated to OBIEE 12c 3. System-wide shared query 'content' available in OBIEE 12c and accessible to all campus/institutions' authorized consumers 4. Campuses with student data content in Interactive Reporting given ample knowledge to prepare for their migration to OBIEE 5. OBIEE effectively replaces the Interactive Reporting - Hyperion existing functionality

Project Assumptions	<p><i>List any assumptions made in defining the project. Assumptions can affect any area of the project including scope, stakeholders, business objectives and functional requirements.</i></p> <p><i>BI Executive Sponsor Role:</i></p> <ul style="list-style-type: none"> • <i>Serve as a member of the BI Implementation Executive Team</i> • <i>Provide leadership for campus/institution to meet milestones and deliverables</i> • <i>Provide for the needed staff resources at campus/institution</i> • <i>Provide for the needed training at campus/institution</i> • <i>Provide support and direction to make the needed business process changes</i> • <i>Ensure the reporting of any issues that impact the BI implementation plan</i> <p><i>BI Project Coordinator Role:</i></p> <ul style="list-style-type: none"> • <i>Serve as a member of the BI Implementation Coordinator Team</i> • <i>Identification of a campus/institution BI administrator for the new BI tool and ensure this person attends the UWS sponsored training</i> • <i>Identification of two technical developers and ensure that they attend the UWS sponsored training</i> • <i>Communication with and training of the currently authorized IR users at each campus/institution to ensure their understanding, support, commitment, and action during this transition</i> • <i>Communication with and training of the Ad Hoc IR users at each campus/institution to ensure their understanding, support, commitment, and action regarding their own local/specialized queries</i> • <i>Review, assess, convert/consolidate/eliminate the campus/institution specific queries/reports to the new BI tool</i> • <i>Review, assess, convert/consolidate/eliminate the campus/institution specific report jobs to the new BI tool</i> <p><i>BI Project Core Planning Team:</i></p> <ul style="list-style-type: none"> • <i>Serve as a liaison to impacted groups, departments, and projects outside of BI Project</i> • <i>Recommend and review agenda items, decision requests, issue resolution for BI Coordinator & BI Executive Sponsor</i> • <i>Gather technical guidance for UW-System installation of OBIEE</i> • <i>Plan communication and training needs for campus/institution implementation</i> • <i>Create consistency in terminology across UW-System</i> <p><i>Campus/Institution Responsibilities:</i></p> <ul style="list-style-type: none"> • <i>Assessment/conversion of queries/reports/jobs</i> • <i>Embedded in conversion is creation of semantic layer</i> • <i>Training of ad hoc query writers</i> • <i>Training of users of new system</i>
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Project Constraints	<p>Summarize the key constraints that will serve as limitations and boundaries for the project team in their decision making.</p> <p>Fiscal Year 2016 budget covers:</p> <ul style="list-style-type: none"> • Software purchase/hardware/maintenance • Shared query conversion • System Administrator • Training system/campus admins; two authors/campus • Project Coordination and Management
Project Deliverables	<p>List the key deliverables of the project with a short description of each.</p> <ul style="list-style-type: none"> • Interactive Reporting Out of Support by CSRG 6/2017; Oracle 4/2018 • Migrate workspace content and users from IR → OBIEE • HRS/SFS Shared Queries – Funded by CSRG • Campuses' Student Queries funded by each campus

<p>Requirements</p> <p>Identify the functional requirements here. Functional requirements describe what characteristics the proposed product or service must have and provides a list of the minimum features that must be in place when the project is complete.</p> <p>Key Functional Requirements are contained in the RFP --- Referenced in RFP# RG-15-2603</p>

High-Level Milestones and Timeline																							
<p>Milestones are deliverables or major events that may be readily identified as completed or not completed on a specified date. Project Milestones are 'how are we doing' thresholds that indicate whether a project is on track to finish as expected.</p>																							
<p>Enter the project's key milestones with an estimated date for the completion of the milestone.</p>																							
<table border="1"> <thead> <tr> <th data-bbox="337 1289 868 1339">Milestone/Task</th> <th data-bbox="881 1289 1166 1339">Estimated Completion Date</th> </tr> </thead> <tbody> <tr> <td data-bbox="337 1346 868 1371">Oracle BI Tool Day (OBIEE)</td> <td data-bbox="881 1346 1166 1371">01/13/2015</td> </tr> <tr> <td data-bbox="337 1377 868 1402">Confirm Project Team Members</td> <td data-bbox="881 1377 1166 1402">01/31/2015</td> </tr> <tr> <td data-bbox="337 1409 868 1434">Confirm System Admin Training</td> <td data-bbox="881 1409 1166 1434">03/31/2015</td> </tr> <tr> <td data-bbox="337 1440 868 1465">Oracle OBIEE 12c Technical Implementation</td> <td data-bbox="881 1440 1166 1465">06/30/2015</td> </tr> <tr> <td data-bbox="337 1472 868 1522">Confirm Campus/Institution Admin / Developer Training</td> <td data-bbox="881 1472 1166 1522">TBD</td> </tr> <tr> <td data-bbox="337 1528 868 1554">Shared Queries Conversion</td> <td data-bbox="881 1528 1166 1554">TBD</td> </tr> <tr> <td data-bbox="337 1560 868 1610">Migration of UW-Platteville Instance to UW-System Instance</td> <td data-bbox="881 1560 1166 1610">TBD</td> </tr> <tr> <td data-bbox="337 1617 868 1642">Wave #1 Campus/Institution Training</td> <td data-bbox="881 1617 1166 1642">TBD</td> </tr> <tr> <td data-bbox="337 1648 868 1673">Wave #2 Campus/Institution Training</td> <td data-bbox="881 1648 1166 1673">TBD</td> </tr> <tr> <td data-bbox="337 1680 868 1705">Transition to Operational Support</td> <td data-bbox="881 1680 1166 1705">TBD</td> </tr> </tbody> </table>	Milestone/Task	Estimated Completion Date	Oracle BI Tool Day (OBIEE)	01/13/2015	Confirm Project Team Members	01/31/2015	Confirm System Admin Training	03/31/2015	Oracle OBIEE 12c Technical Implementation	06/30/2015	Confirm Campus/Institution Admin / Developer Training	TBD	Shared Queries Conversion	TBD	Migration of UW-Platteville Instance to UW-System Instance	TBD	Wave #1 Campus/Institution Training	TBD	Wave #2 Campus/Institution Training	TBD	Transition to Operational Support	TBD	
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Enter the roles and project responsibility for each role required for the project. Enter the skills required of the role. Enter the preliminary FTE estimates for resource commitment for the fiscal year. Enter a total of the FTE for the fiscal year. Enter the planned or recommended source for acquiring the resource.
 Example: Contractor or the name of the organization that might provide the resource.

High-Level Roles				
Role	Project Responsibility	Skills Required	FTE FY yy-yy	Recommended Source
<i>Executive Sponsor</i>	<i>Leadership & Decision support</i>			
<i>BI Executive Sponsor</i>	<i>Member of BI Executive Sponsors</i>	<i>See project assumptions</i>		
<i>Product Owner</i>	<i>Primary ownership for the Oracle OBIEE Product</i>			
<i>Project Manager</i>	<i>Management of implementation project</i>			
<i>System Administrator & Backup</i>	<i>Administration of OBIEE System</i>			
<i>Campus/Institution Administrator</i>	<i>Campus/Institution Administration of OBIEE System</i>			
<i>BI Project Coordinator</i>	<i>Campus/Institution coordinators</i>	<i>See project assumptions</i>		
<i>Data Analyst/Report Designer</i>	<i>Review data & report consistency</i>			
<i>Security Liaison</i>	<i>Ensure implementation security standards are met</i>			
<i>Developers</i>	<i>Persons that will create dimensional data models/ semantic layer</i>			
<i>Authors</i>	<i>Persons that will create content to be consumed using the semantic layer</i>			
<i>End-Users</i>	<i>Consumers of System-wide Shared Queries content</i>			

Project Management Strategy

The project will be managed using a Project Management Plan, below is the Table of Contents as reference to what is contained in that document:



BI Project – OBIEE Implementation
Project Manager: Mark J. Treiber
Last Updated: January 6, 2016

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