

BI Executive Sponsor Meeting Notes

November 17, 2015

Attending: Kathy Luker, Doug Wahl, Jason Fishbain, Michael Wick, Sheryl Van Gruensven, Sasi Pillay, David Stack, Gigi Koenig, Ilya Yakovlev, Lorie Docken, Nikki Burton, T.J. Teegan, Anand Vangipuram, Peter Reese, Bob Beck, Jocelyn Milner, Jeff Shokler, Sue Traxler, Werner Gade, Anne Milkovich

Facilitator: Kathy Luker

Note taker: Mary Kirk

1. Status Update for New BI Solution
 - a. Contract negotiation meeting scheduled for Wednesday, November 18.
 - b. Project Structure Update: Nikki Burton named as the Executive Sponsor for SFS. Scott Larson is the BI Project Coordinator for SFS.
2. Proposed New BI Tool Day
 - a. Full day session with selected vendor (including demo and Q/A) is tentatively scheduled for January 13. Plans are to have it as a video link to campuses. We are also hoping to have a room reserved in the Pyle Center at UW-Madison. An attempt will be made to segment the day based on target audiences: Overview for Executive Sponsors and other Executives, Preview for Consumers, Semantic Data Layer - Developers, Report/Dashboard – Authors, Overview for ‘Ad Hoc’ Report Developers, “Nuts and Bolts” for Campus Admins, etc.
 - b. Important that vendor presentations be aligned with what will be implemented.
 - c. January will be a busy time for many campuses; some can’t commit at this time to attendance.
3. Action Items from Last Executive Sponsor’s Meeting
 - a. Draft Message to Chancellors from President Cross
 1. Each campus is expected to fund their part of the overall project.
 2. Campus Provosts and CBO’s have named Executive Sponsors for the project.
 3. Being an Executive Sponsor means providing resources for the project.
 4. Many Executive Sponsors have indicated they will need to have conversations with campus leadership on how to provide the funding.
 5. This is NOT an optional project. There will be NO access to data without completing this project.
 - Regarding #1 and #3: Reword and soften language; sounds like campuses already have existing funding and resources (other wording examples: “provide funding”, “arrange for funding”, “and facilitate funding”). This should be a “heads up” for Campus CBO’s.
 - Regarding #5: Soften wording; do not use the word “NOT”.
 - Look at July 15th memo to Provosts for wording on Executive Sponsor and UW System funding responsibilities. Message to Chancellors should be consistent with message to Provosts.

- What will be the cost to campuses? The cost will vary by campus. CSRG budget for this year is \$965,000. Estimated/projected 3 year budget was approved by CSRG. After contract negotiations, more accurate numbers will be known. Note that this is CSRG paying for this – not UW System.
- The more information we can provide in this message – the better.
- b. Delivery of Message to Chancellors
 - Message should be delivered to Chancellors by December 4.
- c. Executive sponsors provided a list of risks that could keep the project from being successful, as well as the items that UW System could do to help campuses (see ppt slide).
 - High Risks: lack of appropriate technical staff, lack of functional staff time, lack of campus financial resources, lack of training resources.
 - Highly desired UW System Support: provide training resources, better and clear communication, encourage staff resource sharing.
- d. Illustration on what reporting looks like today vs what it will look like in the future (see ppt slide)
 - Today we use Interactive Reporting query language and create data models in the development of document content.
 - Future – we'll use a semantic layer (such as UW-Platteville's implementation of OBIEE) reflecting a physical layer, business layer (with subject areas), and presentation layer.
- e. Illustration on the definition of a semantic layer (see ppt slide)
 - Key component in a successful BI implementation.
 - Insulates the users from data models
 - Users see data as an organized list of business fields from multiple sources
 - Enables self-service
 - Implements a single version of the truth
- f. Illustration - "swim lane" diagram - to be used to present to groups on the transition of Interactive Reporting to Business Intelligence. Swim lanes included information topics such as data sources, data source warehouse silos, Interactive Reporting, Enterprise Data Warehouse, New Semantic Layers, Business Intelligence Tool and various Output within "Existing", Future", and "Visionary" lanes. (See ppt slide).
 - Jason does not feel we need to make any data modeling changes in current data warehouse designs to dimensional modeling prior to implementing a new BI tool. Kathy duly noted this, but feels we need to do some actual learning about this area once a vendor is selected. Perhaps the use of the word "required" on this topic is too strong.
 - To simplify this illustration, Kathy will remove the "visionary" swim lane; perhaps rename the "future" swim lane to "immediate future".
- g. Illustration of Existing Staffing Resources - Assessment of Campus Solutions - (fillable PDF form) sent to campus Executive Sponsors to complete, and will hopefully provide a sense of existing roles and FTE in current Campus Solutions and Interactive Reporting environment, as well as give campuses an idea of possible future gaps in roles and staffing with the new Business Intelligence tool. Names could be entered on the form to assist in determining FTE. Also provided is an explanation page and definitions of roles.

- Some campuses have trouble mapping what they currently have for existing roles and FTE.
 - What are Campus Solutions Subject Matter Experts? They are reporting teams of campus solutions functional end users. They can describe the data as it exists in PeopleSoft – how the source system works.
 - In order to successfully implement this project, Executives need to identify two key components: 1) how many FTE are available on your campus today, and 2) what are their competencies?
 - Some campuses feel they have 0% FTE to dedicate to a project of this size. This can be reflected in the explanation page of the document, and will be used to help identify gaps.
 - **Deadline to return information on existing campus resources, FTE and explanations should be sent to Kathy by December 11.**
- h. Illustration of Transitional Roles Related to Campus Solutions and Business Intelligence Reporting - (fillable PDF form). This is a map/crosswalk to the roles that may be needed to implement a new BI tool.
- Possible new roles are BI Trainer, BI Data Warehouse Dimensional Data Modeler, BI Semantic Layer Developer, BI Dashboard/Report Authors.
 - Semantic Layer development and number: one for HRS, one for SFS, possibly 13 different Campus Solution semantic layers (one for each campus)
 - Where does data governance (data definitions) fit into this? Data governance is outside the scope of this project. At a recent Data Governance meeting (attended by all campuses) it was evident campuses are interested in this topic, and realize it is a separate project from the implementation of a new BI tool.
 - Each campus will need to have some percentage of an FTE develop a semantic layer for campus solutions (will most likely need training), unless we can somehow leverage and share resource development. For example, can we get funding for a consultant to model perhaps 80% of a semantic layer solution for all campuses?
4. Project Resources – FY16
- a. CSRG Funding
- Tool software replacement
 - Conversion of System-wide shared queries
 - Limited training of selected roles at campuses: Campus Admins, Two developers per campus.
- b. Responsibilities of Campuses
- Assessment/conversion of queries/reports/jobs
 - Embedded in conversion is creation of semantic layer
 - Training of ad hoc query writers
 - Training of users of new system

5. Securing Project Resources – FY17

- a. After contract
 - Work with BI Project Coordinators on communication plan
 - Work with vendor, implementation partner to develop milestones, develop timeline, understand initial training who, on what, when . . .
 - Develop BI CSG budget request
 - Illustration: Campuses and their BI Executive Sponsors reflected that many Executive Sponsors are currently also members of the CSG committee (see ppt slide).
- 6. Next meeting – the next meeting was scheduled for December 17; however this is also the date of the CIO meeting. The next BI Executive Sponsor meeting will be rescheduled.