

BI Executive Sponsor Meeting Notes

December 18, 2015

Attending: Kathy Luker, Doug Wahl, Jason Fishbain, Sheryl Van Gruensven, Sasi Pillay, David Stack, Gigi Koenig, Ilya Yakovlev, Nikki Burton, Bob Beck, Jocelyn Milner, Werner Gade, Anne Milkovich, Steve Reed, Katie Jore, Lynsey Schwabrow, Sue Traxler, Bruce Maas, Chip Eckardt, Elena Pokot, Diane Sypula

Facilitator: Kathy Luker

1. Refresher – Project Goals and Objectives
 - a. Interactive Reporting out of support by CSRG June 2017; out of support by Oracle April 2018.
 - b. Primary goal - migrate IR Workspace content and users from Interactive Reporting to OBIEE.
 - c. FY16 budget covers software purchase/hardware/maintenance, shared query conversion, system administrator salary, training system/campus admins/two authors per campus, project coordination and management.
 - d. The responsibility campuses includes assessment/conversion of queries/reports/jobs, creation of student semantic layer, training of ad hoc query writers, training of users of new system.
 - e. Kathy covered the CSRG Base Budget FY 17-20 and a BI Initiative Budget Request (see ppt slide).
2. Refresher – Team Roles and Responsibilities
 - a. BI Executive Sponsors: Securing spending authority and resources for the project, vocal and visible champion, legitimizes the project's goals and objectives and the ultimate decision-maker for the project, provides support for the Project Coordinator and has final approval of all scope changes, and signs off on approvals to proceed to each succeeding project phase.
 - b. BI Project Coordinators: Serve as member of BI implementation team, identify the campus BI administrator, identify the two technical developers for training, communicate with and coordinate training of campus Workspace users, communicate with and coordinate training of the ad hoc IR users, review the conversion/consolidation/elimination of campus specific queries/reports to the new BI tool.
3. Challenges - UW System Transition from Interactive Reporting to New BI Tool

Kathy presented the revision of this graphic – which removed the “ideal” state that was in the previous version.
4. Announcement Regarding Oracle OBIEE 12c

An announcement regarding the purchase of Oracle OBIEE which includes OBIEE 12c, Endeca and BICS (to replace IR) was sent on December 2, 2015 to the BI Executive Sponsors, BI Project Coordinators and the BI Core team. Please communicate to your campus community as appropriate.

5. BI Tool Day

The “New BI Tool Day” is scheduled for January 13, 2016. It will be held at UW-Madison in the Pyle Center, with a video link for all campuses. See the PowerPoint slides for the draft agenda – Rusty Bruce from Oracle will be there to present and Robert Flum and his team from UW-Platteville will be there to demonstrate their implementation of OBIEE. The day will start with the broadest audience (high level information) first, as day goes on – the audience interest is narrowed. Information will be presented at a high level. Please share with your campus constituents as appropriate.

6. Priorities Identified at Last Meeting

- a. Executive Sponsors should work with BI Project Coordinators on communication plan for their campus.
- b. Project Planning Team should work with vendor to develop project plan including milestones, develop timeline, understand initial training -- who, what, when.
- c. Develop BI CSRG budget request to mitigate risks identified by Executive Sponsors.

7. Project Planning – Status

Kathy thanked Sasi for his commitment and role he played in championing the move from IR to a BI tool. David Stack will be assuming the role of Executive Sponsor of the BI Executive Sponsors Committee – the governance body for this project. The primary expectations of the Bi Executive Committee are to ensure or secure all resources needed to have a successful implementation of this project; ensure all IR content has been moved off of the Workspace, ensure all campus users are informed and can make the transition from IR to OBIEE.

Additional roles are:

- Project Coordinator – Kathy Luker
- Project Manager – Mark Treiber
- Training Partner – Maverick Solutions
- Planning Team
 - Kathy Luker/Dan Koetke
 - Mark Treiber
 - Mike Vavrus/Tim Lehman
 - Bob Turner/Christine Peterson
 - Robert Flum

Next Steps – Kathy and Mark will work on the following:

- Project Charter
- Develop Project Plan
- Develop Timeline
- Benchmark/Best Practices Research (surveying institutions in PeopleSoft who have transitioned from IR to OBIEE).

We are also lucky to have Robert Flum (UW-Platteville) who is a wealth of knowledge in OBIEE in our project planning process. We'll also be scheduling a call with Gartner to obtain further advice.

8. BI Project Risks and UW System Support Desired

Primary risks: lack of appropriate technical staff, lack of functional staff time, lack of financial resources

UW System support: provide training resources, clear communication, encourage staff resource sharing

9. Current Roles/Staffing and FTE Related to IR

Campuses have submitted their completed forms on current roles/staffing and FTE related to Interactive Reporting. Primary purpose of this was to discover where the lack of staffing exists in our move to OBIEE.

Mitigating Risks (see PPT slide) – reflects current FTE in various roles by campus. Immediate need campuses are those who identified student OCE's in the IR Workspace.

New BI Initiative funding would include training beyond FY16, dimensional data modeling, and semantic data layer development expertise.

The University of Pittsburgh moved from IR to OBIEE and identified some takeaways and lessons learned (slide from presentation at Alliance 2014) – highlight: complete training early in the process.

10. Training – Key Roles

Maverick Solutions were Oracle's recommendation for training. They would come on site to train the first round of students – possibly in February. This would be the training funded by the project. Kathy will send the course outline and a glossary of terms to the BI Executive committee members.

11. CSRG Budget Requests – Due Jan. 4

Kathy will be working with David Stack on this request for a new BI Initiative request to cover additional training and dimensional modeling/semantic layer support for campuses. Campuses who have moved to OBIEE have highly recommended that data sources being used in OBIEE be dimensionally modeled. This is our chance to go back to the table and try to get resources on consulting, training, etc.

12. Next meeting – the next meeting was scheduled for January 22.