

BI Executive Sponsor Meeting Notes

November 3, 2016

Attending: Kathy Luker, David Stack, Anne Milkovich, T.J. Teegan, Mark Treiber, Jocelyn Milner, Jason Fishbain, Robert Flum, Lynsey Schwabrow, Elena Pokot, Nikki Burton, Sheryl Van Gruensven, Dan Dunbar, Bob Beck, Chip Eckhardt, Werner Gade, Sue Buth, Katie Jore, Jordania Leon-Jordan, Caty Cederoth-Huron, Emily Howe-Huron, David Felsenthal-Huron

Facilitators: David Stack, Kathy Luker and Cati Cederoth

Note taker: Mary Kirk

1. Meeting Objectives and Agenda (David)

Objectives:

- Update Executive Sponsors on the scope and progress of the UW-BI project (project charter and activities; working with Huron: what's been done to date).
- Executive sponsors need to provide input on two key decisions.
- Review the Executive Sponsor role in this project.
- Ask questions and discuss transition to OBIEE.

2. Overview of UW-BI Project (David)

- UW is replacing Oracle's Interactive Reporting (IR), with support ending June 2017, although could be extended to end of life in spring 2018.
- UW is transitioning to Oracle's business intelligence tool, OBIEE 12c as the replacement of choice.
- Huron is working with UW on best practices and assist us in creating recommendations for implementation plans in 3 areas: HRS Shared Queries, Student Pilot, and Infrastructure.

3. Review of Foundational Work of UW-BI effort – Progress through week 4 (David)

Completed:

- Purchase of OBIEE12c hardware
- Decision on project governance and management
- Huron hired as our consultant partner
- RPD development basics courses completed for campuses

In progress:

- OBIEE 12c Installation, configuration and security set up
- System configuration so dashboards/reports can be shared across campuses
- Monitor readiness of campuses with student data
- Initiate/analyze phase for conversion of HRS shared queries (fit-gap)
- Initiate/analyze phase for conversion of finance (SFS) queries (fit-gap)

- Initiate/analyze phase for conversion of campus-specific queries (student and other data sources)

Not yet started:

- Dashboard (authoring) training; end user training
- Ongoing support design and establishment

4. Project Decisions and Status (David)

David reviewed the project decisions made to-date and those that have yet to be decided, including timeframe for making decisions, who provides input in to the decisions, and the decision makers.

5. Current Project with Huron: Initiate and Analyze Phase (Cati)

Huron is working with UW staff (8 week project) to provide options, recommendations and implementation plans to support UW's shift from IR to OBIEE. Discovery and analysis phase is almost complete.

- Student Pilot: Working with 6 early adopter campuses (Eau Claire, Green Bay, Milwaukee, Platteville, Stout, Whitewater) to analyze and determine their current architecture, data models and IR content. High level current state diagrams have been created. An assessment of future state recommendations for common data models has begun.
- HRS Shared Queries: Working with UW-Madison BI reporting team in a fit-gap analysis. The fit-gap analysis will provide time-cost comparisons for 3 options: 1) OBIEE and develop from scratch, 2) OBIA and customize as required, 3) Re-develop EPM as a true dimensional warehouse.
- Infrastructure and Security: Working with UW central infrastructure and security experts on server and hardware configuration, RPD change control and configuration management processes.

Huron has also met with the CDR team to understand the data they collect and disseminate.

6. Student Data Campus Implementation Plans (Cati)

Huron will provide recommendations to assist campuses with their local process of converting student data, involving the following:

- Overview of current/future state: Architecture, reporting, analysis process, security, application support team and change management/training.
- Implementation plan: approach, schedule, cost estimate, key success factors, change management, dependencies, major phases and tasks of implementation, project management overview and staffing requirements.

7. Student Data Conversion Phases for replacing IR with OBIEE (Cati)

Life cycle for student data conversion phase includes initiate and analyze, data modeling, build RPD, build reports, test, train, deploy and maintenance. Huron provided timeframe estimates

for this life cycle based on similar projects. Based on their early assessment, most UW campuses will have at least 250-350 queries/reports to convert. There are 78 weeks until 4/30/2018. (Most campuses would need a full time 3-6 person team to do the work.) Based on current staffing levels and skills, each campus would need to add resources. Huron recommends the following during OBIEE RPD implementation/development: OBIEE team lead, experienced RPD developer, 2-4 OBIEE report writers (one with highly complex reporting experience in OBIEE). After implementation: 25% RPD developer, 10% RPD administration and 1 report developer.

- Discussion on how Huron came up with conversion effort numbers and whether they were too high. Huron looked at complexity of BQY's to convert – simple/medium/complex, and number of resources.

8. Input from Executive Sponsors – Question 1: Should our date for UW retiring IR be extended?
(David)

- Background: UW System's paid maintenance of IR ends June 2017. Oracle's "end of life" for IR is April 2018.
- Why change the date?: Delay in start of UW-BI program due to RFP for consulting services, initial timelines just being developed, campus resources scarce, long term decision need to be made – analytics vs operational reporting, etc.
- Huron recommends moving the date to April 2018.
- **Decision: All attendees agreed that UW should extend the retirement date of IR to April 2018.**

9. Input from Executive Sponsors – Question 2: What will the future student data model be for UW? (David/Cati)

- Do we want to continue to do operational reporting, or move towards more robust analytics locally and at the system level?
- If set up right (dimensionally modeled in a united effort), OBIEE will give us fast, flexible, robust information for informed decision making.
- Based on Huron's initial discussion with early adopter campuses, it is clear that each campus is planning to convert independently, very little of current campus reporting is based on dimensional models, most are doing operational reporting but expressed an interest in moving to analytical reporting.
 - Our current approach: Transactional reporting – each campus converts their data independently. This option provides the type of transactional reporting being done today and demands the most resources from campuses because each campus has to convert and maintain tool themselves. Each campus has their own "section" of the RPD, and they can develop the RPD and produce content or use BI Publisher to produce reports.
 - Best practice approach: A unified student data model – a single student data model across campuses. This option requires more coordination among

campuses, but individual campus needs could be built into the design. (Example - OBIA for Campus Solutions uses a common dimensionally modeled data warehouse and RPD, but data could still be segregated.)

- o Hybrid approach: UW campuses would agree on a standard student data model, share some technical resources and still enable autonomy. This approach simplifies support and decreases implementation costs. Campuses with similar warehouse structures work together jointly and share resources. This approach provides a framework for analytics across campuses.
- Huron recommends the hybrid approach in order to decrease conversion efforts and costs, better support long term BI vision and shift from operational reporting to analytical reporting.
- Discussion:
 - o Should the BI Executive Sponsor group be making this decision?
 - o This is a leadership issue and involves shared governance.
 - o What would it take to achieve the hybrid model and what impact would there be? Resources, costs, etc.
 - o Common data dimensional models will be available for HRS, SFS and CDR.
 - o Kathy will ask Lorie Docken what she has discovered regarding the cost of OBIA for HCM and Financials.
 - o **Decision: Change question.... Should we explore what a shared Student Information Systems dimensional data model would look like? (The exploration should be done at no additional cost or scope creep).**

10. Wrap-up (David)

A reminder of Executive Sponsor roles:

ASAP:

- Understand the current state of your campus data and use of IR. Huron is outlining the current state for early adopter campuses.
- Consider what kind of reporting we ideally need as a system and locally. Huron is outlining recommendations for early adopter campuses.
- Work with your BI Coordinator to understand your campus plan, timeline, and resource needs related to transitioning to OBIEE. Huron is outlining suggested timelines and resources for early adopter campuses.

Mid-December 2016:

- Review your implementation plan for transitioning your student data to OBIEE and share information with key local stakeholders. Huron is creating implementation plans for early adopter campuses as well as sample plans for remaining campuses.
- Secure resources for your project based on your campus needs and plans; connect with other campuses and system to share resources and combine efforts where possible. Huron is defining this specifically for early adopter campuses and designing sample implementation plans for remaining campuses.

Note that all BI Executive Sponsors are invited to attend next week's BI Project Coordinator meeting (Friday, November 11 at 11am). Huron will present the early adopter implementation plan thoughts; this will be a working session. Let Kathy know if you're interested in attending.