BI Executive Sponsor Meeting Notes
December 1, 2016

Attending: Kathy Luker, David Stack, Anne Milkovich, T.J. Teegan, Mark Treiber, Jocelyn Milner, Lynsey Schwabrow, Elena Pokot, Nikki Burton, Sheryl Van Gruensven, Dan Dunbar, Ed Melchior, Chip Eckardt, Werner Gade, Sue Buth, Katie Jore, Lorie Docken, Sue Traxler, Caty Cederoth-Huron, Emily Howe-Huron

Facilitators: David Stack, Kathy Luker and Cati Cederoth
Note taker: Mary Kirk

1. **Review of UW-BI Effort** (David)
   - Replace Interactive Reporting – support ending Spring 2018
   - UW is transitioning to OBIEE12c as the replacement tool
   - Huron has been hired for a 2 month project to advise UW on best practices and create recommendations.

2. **Project Updates and Decisions** (David)
   - Foundational work for UWBI project is approximately ½ complete
   - Need input from Executive Sponsors on establishing the support organization
   - Decisions made to-date:
     o OBIEE 12c is replacing IR
     o System will maintain one OBIEE environment and RPD
     o IR retirement will be extended to April 2018
     o There is no interest/ability to align to a common student system – each campus will select their own path
     o A proposal will be submitted to CSRG for OBIA for HR and Finance

3. **Update on Current Project Work streams** (Cati)
   Huron is on track to complete work on time on UW's 3 foundational aspects of project in the initiate/analyze phase.
   - Infrastructure:
     o Completed: recommendations for security, infrastructure, RPD change control, merge process and configuration management processes.
     o Next steps: review security recommendations with IAM team, review updated architecture and RPD recommendations, review all recommendations with UWBI operational governance committee, finalize and present to David Stack for decision on going forward with recommendations.
     o Reviewed the architecture recommendation for Dev, Test (QA) and Production environments – in addition to the central environment, each campus will have their own development environment and will carry out an software install on a local server or VM – this allows campus to operate

> independently and eliminates the day-to-day merge into the central environment.

- o RPD merge process will be structured from end to end – utilizing the features of the BI Admin tool to accurately and efficiently merge all content together.
- o Reviewed slide of UW RPD development environment – distributed and common/merged RPD. Campuses will use a check-in/check-out process called MUDD. Campuses will be able to see and use the central data (HRS, SFS, CDR), but cannot change it.
- o Question: Will this be a "high availability" environment? Is this what end users want for reporting? What is the cost differential to support this type of environment? (Cati will seek input from the technical team on this question.)
- o Input from Executive Sponsors is needed on the recommendation of roles needed both at UW-System and each campus to support the infrastructure.
  - Environment management role: 1 FTE with a backup – skilled OBIEE administrator
  - Merge management role: 1 FTE with a backup (initially not needed because RPD's are being developed) – Skilled OBIEE RPD developer

- Shared Queries:
  - o Competed: Fit-gap analysis; points to OBIA as the ideal solution for UW HR/Finance shared queries. Diann Sypula and Nikki Burton concur with recommendation. Recommendation will be taken to CSRG for funding approval.
  - o Reviewed decision matrix used to determine recommendation.
  - o Lorie and Nikki are reviewing the proposal with Andy Cunningham (central UW-BI Reporting Team Manager) with additional cost information to be known by the end of this week.
  - o Question: How will the centralized OBIEE work (HR and Finance) impact the local campuses and their work – as far as changes to data warehouses? A roadmap is in place to address this issue; there will be a timeframe when both data structures (warehouses) will be available.

- Student Pilot:
  - o Completed: Partnered with early adopter campuses to assess reporting environments and data models. Recommended ideal future state and drafted highly customized implementation plan for each early adopter campus.
  - o For non-early adopter campuses – template implementation plans will be provided by mid-December.

4. **Training Update** (Kathy)
    - Campuses have been trained in RPD development and dimensional modeling (with the exception of Colleges/Extension).
    - The next training effort is OBIEE BI Answers (development of reports, dashboards, etc.) using the developed RPD. A small dollar amount will be requested for 2 people from each campus to attend training (Kathy has reached out to the BI Project Coordinators on who should attend). Kathy is researching the format of the training with Maverick.

5. **Summary** (David)
    - Executive Sponsors should review your implementation plan with your BI Coordinator – tailor and finalize it for your campus. This should be shared with your key local stakeholders.
    - Ensure you have resources for your project based on your campus needs and plans – connect with other campuses and the system to share resources and combine efforts when possible.

6. **Discussion/Questions**
    - How will campuses work together –teams and processes are being formalized now.
    - Where does EAB fit into this? Sue Traxler stated that her sense is that EAB compliments, but does not replace, UWBI.
    - Future meetings need to be scheduled.