

## BI Executive Sponsor Meeting Notes

April 7, 2016

Attending: Mark Treiber, David Stack, Jason Fishbain, Ilya Yakovlev, Lorie Docken, Jocelyn Milner, Sue Traxler, Steve Reed, Chip Eckardt, Lynsey Schwabrow, Elena Pokot, Nikki Burton, David Kieper, Barb Holschbach (for Sheryl Van Gruensven), Dan Dunbar, Bob Beck, Anand Vangipuram

Facilitator: Kathy Luker

Note taker: Mary Kirk

### 1. Information Items

- Implementation Status (Mark): The virtual machines are sized and ready for installation. We'll be working with a consultant from Rittmann-Mead starting April 11 for a 3-4 week engagement to install and configure QA environment, discuss the security and authentication architecture, and plans for deployment. Any issues discovered will be brought to the attention of the Executive Sponsors.
- HEDW Conference (Higher Education Data Warehousing): Ten staff from five different campuses attended the conference, including one Executive Sponsor – Lynsey Schwabrow. We were able to benchmark with four different surveyed institutions (Cornell, Ohio State University, U of Minnesota and U of Arizona).  
Lynsey provided information from her perspective of the conference: Conference was attended by CIO's, IR staff, Chief Data Officers, IT - all types of BI titles. Hot topics centered on the importance of the formulation of BI Teams – needed for implementation and sustainability of BI, the importance of common definitions and collaboration between all layers of BI – IT, IR, operational units, functional units, etc. Use of consultants with varying amounts of purposes and length of consultant service time are recommended to assist in implementation and planning. In thinking ahead – will we have the use of the CDR database in OBIEE?  
Kathy provided her take-away from the conference and discussions with the benchmark universities:
  - From BI Executive Sponsor perspective: We need to have a BI team built on critical relationships, be forward thinking, use consultants to implement/train, and learn from other OBIEE institutions.
  - Consistent messages from peers: Dimensionally modeled data warehouses are the “heart of the activity” and can be used for many purposes – not only BI, centralize the BI team of specialists, perhaps plan to “build” twice , use consultants but get staff up to speed , BI Publisher can be problematic (doesn't work well with local joins and complex SQL).
  - Vendor - IData's “Data Cookbook” (a data governance tool for higher education): UW conference attendees were excited about this tool that provides a means to get at business definitions, data dictionary, report and

system specifications, report request/change workflow, data governance workflow, etc. The subscription price would be the same for UW System as it would be for one campus.

Kathy and Lynsey will provide additional notes and take-away from the conference/discussions with benchmark universities to the Executive Sponsor team.

- Status on FY17 Funding and RFP:
  - FY17 Funding: Additional CSRG proposal was submitted for consulting resources to help campuses implement student content (dimensional data modeling and semantic layer expertise) and training resources. Accepted by CSRG; will be forwarded to President Cross for approval.
  - RFP and RFP Scope: Lorie Docken reported that an RFP is being drafted to have a contract in place to procure consulting resources to support OBIEE implementation. We are seeking an experienced OBIEE implementation consulting firm to work with institutions to develop template dimensional data model & semantic layer for PeopleSoft student data, develop curriculum and materials for author, consumer, and train-the-trainer courses that can be used across the institutions. The evaluation criteria will include experience in complex environments – those firms with higher education experience will be scored higher. The requirements will also be extended to include technical, functional and project management roles that may be needed beyond the CSRG-funded initiative. The resulting UW System contract could be used by individual institutions (using their own funding) to transition from IR to OBIEE, individual institutions (using their own funding) to extend OBIEE functionality beyond scope of IR transition, and system-wide enterprise applications (i.e. HRS or SFS) to support transition from IR to OBIEE, and to extend functionality beyond scope of transition. This will be an annual contract with options to renew up to four years.
  - RFP timeline: The RFP will be issued sometime in April. Responses will be evaluated in June, with a target contract award for July 1 (to coincide with the availability of CSRG funding).
  
- UWBI Coordinator Discussions:
  - Common Role Definitions: Mark reported the UWBI Coordinators reviewed and approved the common role definitions with the expectations that items may change slightly as we learn more.
  - Campus Student Data Assessment: UWBI Coordinators were asked to prepare an analysis of their student content (similar to the HRS Shared Queries Analysis completed by Mary Kirk) to be ready by June 1. These analyses should be available to be used by consultants; peers at HEDW feel we're on the right track in this effort.

– Campus Based Training: UWBI Coordinators were asked to determine their staff to be sent to training by May 1. The training is tentatively planned for June. Kathy, Mark and Robert Flum will be working with our training partner (Maverick Solutions) on the training content which will be shared with the UWBI Coordinators. Cornell reported at the HEDW conference they had used Maverick Solutions and gave their “thumbs up”.

- Update - OBIEE 12c Tool – Timeline: Kathy provided an update on the OBIEE 12c tool implementation, which reflects we are still on track with installation and configuration, campus training, and the proposed student data consultant engagement.
- UWBI Governance Team: Jason reported that a team has been assembled to review governance, change management, campus strategies, and decision making processes. The initial goal is to meet monthly, with the first meeting to be held on April 28. More frequent meetings will be held as necessary. Members are: Jason Fishbain, Madison; Robert Flum, Platteville; Ed Melchior, Milwaukee; Mark Clements, Oshkosh; David Alarie, System; Anand Vangipuram, Whitewater; Tim Lehman, Madison (DoIT); Lorie Docken, System; Sally Eckwright, Eau Claire
- Definition of UWBI Named User: Kathy reported that this issue is on Ruth Ginsberg’s to-do list, but because of other priorities she hasn’t gotten to it yet. She’ll report on this once she’s talked with Oracle.

## 2. Discussion/Decision Items

- Policy of distribution of UWBI named user licenses: Kathy reviewed with the Executive Sponsors the statistics on the current license distribution of Interactive Reporting (IR) by campus, the number of IR active users by campus, and the proposed OBIEE license distribution by campus. Statistics on IR desktop client users are difficult to report. What is a named user license? How will we determine the user allocation? How will we allocate usage if the request for additional users increases? And, how will additional users be funded? We should wait to address these questions until Ruth provides her feedback after her discussions with Oracle.
- Elena Pokot (Whitewater) asked what the licensing structure was like and what happens if we have more people that are trying to use the product than we currently are licensed for. Sue Traxler (Platteville) said that technically if you have 100 licenses, the system won’t stop working if there are 110 people using the software. You need to purchase more licensing to get in compliance, but the software continues to run. Some software is metered so that after the 100 users, person 101 can’t even launch the app – this is not the case with this product.

