

## **BI Executive Sponsor Meeting Notes**

### **May 5, 2016**

Attending: David Stack, Jason Fishbain, Lorie Docken, Sue Traxler, Chip Eckardt, Lynsey Schwabrow, Elena Pokot, Nikki Burton, Sheryl Van Gruensven, Dan Dunbar, Bob Beck, Anand Vangipuram, Gigi Koenig, T.J. Teegan, Ashi Yusuf, Peter Reese, Bruce Maas, Werner Gade, Mark Clements, Ed Melchior

Facilitator: Kathy Luker

Note taker: Mary Kirk

#### **1. Rittman-Mead Consulting Engagement – Implementation Status**

- Environment setup: OBIEE 12c Dev/QA environments have been installed and configured. Imported the RPD from UW-Platteville, and established connections to UW-Platteville and UW-Madison.
- Reviewed security and authentication: Worked with the Security and Middleware teams at DoIT on Proof of Concepts with Shibboleth and OBI LDAP integration. Successful tests will move toward an overall architectural design hopefully complete by mid-June. Preparing a design for the IAM Steering Committee review.
- System administrator curriculum training: Held with Tim Lehmann with good documentation being compiled.
- Rittman-Mead recommended RPD architecture: The RPD architecture recommendations were shared with the BI Core Planning Team. Additional discussion on the Rittman-Mead recommendations will be held at the upcoming Monday meeting. Takeaway: Both Kathy and David consider the recommendation complicated, but doable. Kathy provided a slide that reflected a diagram of the UW-System transition from Interactive Reporting to OBIEE. This slide will be added to the RFP for vendor consulting services to provide an idea of where we're currently at and where we want to go BI-wise. We hope to have the successful vendor assist us in building milestones (phases) in our implementation. The UW-Service Center and SFS is currently engaged with a consultant (8-week engagement) to develop short and long term road maps to prepare for OBIEE. Once the findings are complete, Lorie will present to the group. Some campuses stressed the need for a long term solution to move toward a common Campus Solutions data warehouse.
- Rittman-Mead best practice for our environment: Distributed data sources into one OBIEE repository will be the quickest way for us to get started once staff are trained.
  - Operational governance group: Because of our complexity, we need to manage our metadata. An operational governance group has been set up. Jason Fishbain is facilitating this group of 7 representatives from various campuses. This group will look at technical change management and decisions that need to be made surrounding architecture. The finalized charter will be presented to the Executive Sponsors group. The group will meet twice/month with the chair yet to be named.

- Other future RPD architecture options:
  - Centralized data warehouse into one OBIEE repository
  - Hybrid approach: One RPD for system-wide data (HRS, SFS, Budget, CDR); departmental reporting tools for campus-specific sources
  - Pluggable BI: has multiple tenancy capabilities, but not currently available from Oracle; may help our environment when available.

## 2. OBIEE 12c Training

- Campus readiness: Kathy and Robert are working with the campuses to assess their readiness for training. Robert will be working with our training partner to attempt to match the skill set of staff to the class offerings.
- Training/Attendees: Classes will be held in Madison. Dimensional modeling training will be held June 8, 9, & 10. Repository development training will be held June 20, 21 & 22. Campuses sending staff to attend the June training include UW-System (System Admin/HRS/SFS/Shared Queries), Platteville, Eau Claire, Madison, Stout, Milwaukee, and Whitewater. The break in between classes should allow staff to practice what they've learned.

## 3. Status of RFP for Consulting Services

- Reviewed by Gartner Analyst: We received valuable comments and suggestions shown below, leading to an enhanced RFP, and assuring we're on the right track.
  - Include more detail on IR workspace content
  - Specify expected years of experience on rate card
  - Request vendors expectations of UW resources (SMEs, IT, other)

## 4. UW-BI Project Planning at UW-Milwaukee

Ed Melchior presented UW-Milwaukee's BI tool implementation project plan.

- Defining success: Creation of standards; change management request process; use the term metadata repository – not semantic layer; build recognition; BI is a process and series of individual projects; communication and education on what BI is – what it can and can't do; 5-year strategy or roadmap; take deliberate steps to get data into metadata repository; start getting staff off using IR as soon as possible.
- Coordinator strategy: Biggest hurdle is the cultural change – users need to understand that if data isn't in the metadata repository – it needs to be requested through a process; this is a business project – not an IT project; craft a communication plan targeted to different audience levels – executive sponsor will be involved in communication plan; include governance in the beginning.
- Project Team: Meets once every two weeks. Make sure everyone understands this is business driven; be up front about cultural change; communicate often – share as much as possible and be up front about challenges. Participation in project team includes staff from

academia, administration, institutional research, human resources, registrar's office, project management and IT.

- Project Team sub-groups:
  - Metadata Repository design
  - Query Consolidation – shared queries (approx. 1,600)
  - Query consolidation – local queries (approx. 65,000)
  - Data governance design
  - Dashboard design
  - Communications
  - Training
- Project Plan Outline: Ed shared the plan deliverables with projected completion dates.

Bob Beck provided a BI Executive Sponsor perspective

- The Milwaukee project is fortunate to have Ed playing a lead role, a project manager and a long standing reporting community.
- Challenges include the magnitude of the project including the resources required and the number of people to engage. The project will be transformative for Milwaukee.
- The project is really a big deal and getting the message out to leadership is critical, but challenging.
- Bob felt it was a positive sign that the BI project got support from CSRG.