

BI Executive Sponsor Meeting Notes

July 7, 2016, 2016

Attending: David Stack, Lorie Docken, Chip Eckardt, Elena Pokot, Nikki Burton, Dan Dunbar, Bob Beck, Gigi Koenig, T.J. Teegan, Peter Reese, Werner Gade, Jocelyn Milner, Katie Jore, Robert Flum, Sue Buth, Barb Holschbach, Mark Treiber

Facilitator: Kathy Luker

Note taker: Mary Kirk

1. Updates

- **Synopsis – OBIEE Authentication/Authorization Options:** The UW System Identity & Access Management Support Team is developing a recommended technical model for authorizing users to the UWBI service based OBIEE product. In order to ensure that the recommended authorization model works with campus infrastructures, the IAM Support Team will need to consult with campus identity and management staff. The IAM Support Team anticipates bringing forward a technical recommendation at the end of July and will be seeking review and feedback from the campus identity and access management staff in August. Tom Jordan from DoIT's Middleware team will be interacting with appropriate technical staff at all campuses. Executive Sponsors are asked to make sure appropriate staff are ready to partner with Tom. Executive committee support is crucial in order to keep the project moving forward.
- **BI Consulting Services RFP** (provides funding for consulting and training services to assist campuses in moving campus solutions and campus specific content to OBIEE): Proposals have been scored. Finalist vendor interviews will be held July 13 and 14, with the contract being awarded shortly thereafter.
- **Project structure – Operational Governance Committee Leadership and New Members:** Lorie Docken will serve as chair of the Operational Governance Committee and Robert Flum will serve as co-chair. Steve Devoti (DoIT) has been added to the team as a system architect resource. Anand Vangipuram has accepted a position at DoIT; Elena Pokot will be selecting another person to fill his spot as BI Coordinator for UW-Whitewater.

2. For Discussion and Approval

- **Single RPD Architecture:**

Robert Flum refreshed memories on the structure of the OBIEE repository (RPD). The RPD is a metadata repository consisting of three components/layers: physical connections, business model, and presentation layer. The UWBI platform can connect to many different sources. Developers will work in a desktop OBIEE administration tool to develop the RPD – connecting to authorized data sources in the physical layer, pushing dimensions and facts to the business layer (business rules can be configured in this layer), and finally pushing items to the presentation layer (this is what the end users will see in the OBIEE web server environment). Staff who attended dimensional modeling/OBIEE repository development training will be able to use the OBIEE administration tool (desktop client), connect to authorized data sources, and work in the business and presentation layers. In this effort, they see the tables/columns, but not the actual data. When a test server environment is made available, developers can move their work to this environment to see data made available from the presentation layer. We will have only one repository, with each campus being assigned a “section” for their campus specific data. Each campus will see only their portion of the presentation layer – so as to match specific campus data definitions. The Operational Governance Committee will be creating policies and procedures to manage the single environment. Once the

presentation layer is visible in the web environment, end users can log into the UWBI server, pick one to many subject areas and create analyses/reports (drag and drop method).

Lorie Docken presented information regarding the single RPD architecture – which was recommended by the UW BI Operational Governance Team; seeking BI Executive Sponsor approval. Pros and cons of a single RPD were presented:

- Pros:
 - A single instance of OBIEE provides more consistent end-user experience for all sources of data
 - Auditing user access occurs in one place with one OBIEE instance across the UW-System
 - Shared data sources (such as EPM) are developed / maintained only once for the entire system.
- Cons:
 - Coordination among the UW-System institutions/departments for development and production environment management. Not as flexible.
 - Security model will be more complex.
 - Larger RPD file may impact query performance. More administration / environment ‘tuning’ will be required.

Details of a single RPD need to be worked out, including change management.

- How will physical layer changes be executed for each institution?
- What will change management process entail? How will changes be vetted by the user community? How will changes be prioritized? How will changes be migrated?
- Do we need to develop centralized guidelines for object naming convention?
- Do we need an SLA?

Cost associated with providing centralized change management support also need to be worked out.

Questions were posed/discussion was held on the assumption that OBIEE is a good approach for reporting, but not necessarily for analysis work. What is the level of resource commitment and turnaround time for development work? If OBIEE has limitations, do we need to start thinking about other tools that might be needed by IR staff (for example)? Kathy will facilitate a meeting with Jocelyn, Lynsey and Mya Starling (UW Colleges) to gather more information and details on IR’s needs. If it does appear that OBIEE will not meet the needs of IR, we may need to look at other solutions (requiring SLA’s).

CDR data is included in this effort. Lisa McGrath will be developing this portion of the RPD.

The Executive Sponsors approved the single RPD architecture proposal (with the knowledge that specific details still need to be worked out).

- **Operational Governance Charter:**

The Executive Sponsors received via email the proposed UWBI Operational Governance Committee Charter. Conversation at recent Core Planning Team meetings resulted in the creation of this group, realizing we needed policies and procedures in place for change management, security controls and the architecture of the system. This is NOT a data governance group and will not be providing training or educational resources in the use of OBIEE.

The Executive Sponsors approved the UWBI Operational Governance Committee Charter.

Note: Executive Sponsors should forward nominations to Lorie Docken to replace Anand Vangipuram on this committee.

3. UWBI Readiness Assessment – Summary

- HRS (EPM) and SFS brought in a consultant to assist in an 8 week assessment of current data warehouse and reporting platforms supporting HRS and SFS and options for positioning these platforms for OBIEE and operational reporting demands. The current path to meet the June 2017 timeline to sunset Interactive Reporting was examined, and included the following:
 - Build the OBIEE data source based on current EPM and Wisdm/Wiser data structures.
 - Develop reports to replace the IR shared queries.
 - Implications:
 - Cost and resource availability to meet June 2017 in question.
 - Accomplishes initial transition, but not optimal for supporting OBIEE ongoing.
 - Eventually need to build new data source (particularly for HRS) to support analytical and predictive features of the new OBIEE tool (duplicate effort).
 - Does not address HRS/EPM data warehouse situation.

Kathy Luker, David Stack, Lorie Docken and Nikki Burton met with David Miller, Julie Gordon and Jim Henderson to discuss a longer term strategic approach: Consider a POC with OBIA for HRS – potential solution for replacing EPM. OBIA includes pre-built analytics and dashboards, provides a foundation for enhanced BI analytics/predictive analytics, and a foundation for building a common enterprise data warehouse. This approach was approved.

Lorie Docken will also discuss with Oracle the possibility of a POC with OBIA for Campus Solutions.

4. Next meeting

The next meeting will be on August 4, 10-11am.