BI Executive Sponsor Meeting Notes
August 4, 2016

Attending: David Stack, Kathy Luker, Mark Treiber, Jocelyn Milner, Jason Fishbain, Bob Beck, Chip Eckhardt, Sheryl Van Gruensven, Anne Milkovich, Jordania Leon-Jordan, Suzanne Traxler, Dan Dunbar, Elena Pokot, Lynsey Schwabrow, Bill Minsor, Lorie Docken, Nikki Burton, Diann Sypula

Facilitator: David Stack
Note taker: Mary Kirk

1. **Information Items**
   - **CSRG Carryover Funding Request from 2015-16:** The request to carry forward CSRG unspent funds of $407,120 has been submitted.
   - **BI Consulting Services RFP Update** (provides funding for consulting and training services to assist campuses in moving campus solutions and campus specific content to OBIEE): Reference checks have been made for the consultant finalist and the process should wrap up soon with a consultant selection.
   - **OBIEE 12c for Analytical Work**: Kathy reached out to the Higher Education Data Warehouse (HEDW) forum, posting the question, "The University of Wisconsin System is moving from Interactive Reporting to OBIEE 12c. Some campuses are using Tableau. For campuses in OBIEE what tools are used by Institutional Research offices for analytical work including medium complex models and just-in-time multi-source analyses?" SUNY (campus also phasing out Interactive Reporting) responded they are using OBIEE with BI Publisher, which seemed to be the most natural replacement for Interactive Reporting. They are also using existing dashboards and reports together to gather data, and then export it to another tool like SPSS, or Excel to do the real analyzing. They recommended looking into Oracle Data Visualization tool that can be added on to OBIEE. Like BI Publisher, you can upload your own data and mash it up with OBIEE subject areas, but you are also able to explore it with a little more flexibility, like in Tableau. Kathy noted that we do have the mashups capability with our current OBIEE contract.
   - **RPD Training Update**: Kathy noted that Round 1 of the Dimensional Modeling and OBIEE RPD Development training has been completed with staff attending from the following campuses/environments: Madison, Milwaukee, Eau Claire, Green Bay, Platteville, Stout, Whitewater, System Admin, HRS and SFS. Attendees can download the OBIEE Administration Tool and work in an RPD on their desktop, but cannot connect to a server yet to view data results. Tim Lehmann will be working with a consultant to get a Test environment established, however, the authorization/authentication process still needs to be worked out yet. It was suggested that perhaps an intermediary step could be worked out to provide server access for the attendees of the training. This suggestion will be brought to the BI Technical Team for review. Round 2 of the training will most likely occur at the end of October or early November.

- **Campus Admin Training**: Kathy reported that all campus admins have been selected. Training for the campus admins (one day class) will be scheduled with the Maverick trainer once we fully understand the system configuration and implementation.

2. **Updates from Operational Governance Team** (Lorie)
   - **Campus Representative Replacement**
     Jen Chapek (UW-Stout) was recommended and approved by the BI Executive Sponsors to replace Anand Vangipuram.
   - **Recommendation for Authorization/Authentication process**
     High level requirements for an authorization/authentication process have been documented, with the review of three options. These options were presented and discussed at a recent IAM TAG meeting. The three options are: 1) establish and build a Wisconsin federation authentication, 2) authorization through IAA supplemental feeds, and 3) use Oracle's UWS provisioning system integration (OIM). Further analysis still needs to be completed, especially for central data sources. We hope to have a recommendation by next month to present to the BI Executive Sponsors for review and decision.
   - **Decision Brief on Single OBIEE Instance (Single RPD – Repository)**
     Questions/comments from the BI Executive Sponsors included:
     - When a campus makes changes to their section of the RPD, how will this affect other campuses? A change management process still needs to be coordinated and established (we'll work with the consultant on this).
     - The decision brief needs to note how further investment (dollars) to maintain the system will be incurred going forward. Strategically, System Admin leaders need to understand and support the financial commitment needed in this area. Should this come from System Admin or CSRG? David reported that he has no strong opinion at this point, and the only funding we currently have is CSRG funding (central system-wide commitment now). The System VP's are well aware that this was not a well-funded and complete project (implementing with "Option 0"), and are open to hearing the recommendations from the upcoming consultant engagement. David, Lorie and Kathy will work with the consultants on this issue in the decision brief.

3. **Positioning HRS/SFS for OBIEE** (Lorie)
   - Summary: The 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 was completed. The consultant provided recommendations on short and long-term strategic roadmap for maintaining an enterprise reporting, business intelligence and data warehousing solution.
   - Factors / Risks - HRS/EPM Reporting: EPM Application (HRS data warehouse) is not supported (being retired by Oracle), current ETL tool used to extract data from HRS and place in EPM is no longer supported, current EPM database is highly customized (packaged PeopleSoft objects are not used), there is a strong reliance on PS Query usage and power users.

- Factors/Risks - WISDM/WISER: Very stable, but highly dependent on custom code, it is based on multiple technologies so could be difficult to maintain, and it has very limited data integration with other sources of data.
- Current path for transitioning shared queries to meet June 2017 timeline: Build the OBIEE data source based on current EPM and WISDM/WISER data structures, and develop reports to replace the IR shared queries, with work completed by spring 2017. The consultant worked with the existing teams to obtain a high level of work estimates, which included the following: 5,600 hours to convert 105 shared queries/templates, and a cost of $593K for internal DoIT resources or $878K for consulting resources. The implications of this current path include concern about resource availability, cost, and schedule. This path would accomplish initial transition, but is not optimal for ongoing OBIEE support. We eventually need to build new data structures (particularly for HRS) to support analytical and predictive features of the new OBIEE tool. It also does not address the current HRS/EPM data warehouse situation.
- Recommended Strategic Approach (long term): Evaluate OBIA (Oracle Business Intelligence Applications), an additional Oracle tool that is part of Oracle's BI suite. Look at conducting a POC (Proof of Concept) to evaluate OBIA, which could replace EPM, replace the IR shared query content, deliver pre-built analytics and dashboards and provide a foundation for building a common enterprise data warehouse, starting with HCM, FIN, and then potentially Campus Solutions. We would also develop a data governance strategy for the BI landscape going forward.
- Next Steps: Lorie will work with our consultant partner regarding the feasibility of providing an HRS POC or some type of trial period given our current timeframe. Conversations will also be held with the consultant about a POC for financials and Campus Solutions as well. Discussion was held on including this initiative in the upcoming August CSRG agenda.

4. **Planning Underway for Work with BI Consultants** (Kathy)

   The BI Core Planning Team has formed several sub-committees to work on:
   - Technical infrastructure (working on statement of work and authorization/authentication)
   - Shared queries (will work with the with Consultant to determine best path forward)
   - Building student content in RPD (early adopters, leveraging learners, campuses using CDR data in the Interactive Reporting Workspace environment). It was suggested that Kathy work with Sue Buth at OPAR to assist in the CDR analysis effort.
   - Consultant engagement will help determine timeline. Questions were raised regarding nailing down a timeline, but engaging consultant expertise to help formulate a timeline is necessary and this engagement is planned to begin in September.

5. **Next meeting**

   The next meeting will be on September 1, 2016.