

BI Project Coordinator Meeting Notes

August 5, 2016

Attending: Kathy Luker, Mary Kirk, Dale Matenaer, Sally Eckwright, Barb Holschbach, Bill Minser, Howard Haynes, Jeffrey Shokler, Jim Smola, Mark Clements, Mark Treiber, Peter Reese, Robert Flum, Scott Larson, TJ Teegan, Patrick Hare

Facilitator: Kathy Luker

Note taker: Mary Kirk

1. Information Items (Kathy)

- New BI Project Coordinator from UW-Whitewater: Howard Haynes (replacing Anand Vangipuram)
- **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): We are nearing completion of the selection of the consultant to help us with the OBIEE implementation.
- **OBIEE 12c for Analytical Work:** Kathy reached out to the Higher Education Data Warehouse (HEDW) forum, posting the question (from Institutional Research and System Admin perspective), "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, 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. Round 2 of the training will most likely occur at the end of October or early November. Kathy verified that Oshkosh (Mark Clements) and Stevens Point (Jim Smola) would like consulting services with Kathy and Robert, and will be sending staff to round 2 of the training. BI Coordinators should send to Kathy proposed timelines when their staff could attend training during October/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 (Robert)

- **Campus Representative Replacement**
Jen Chapek (UW-Stout) was recommended by the Operational Governance Team, reviewed 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 and presented to the Operations Governance Team and the BI Core Planning team, with the review of three options, including 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.
- **Decision Brief on Single OBIEE Instance (Single RPD – Repository)**
This document provides information the reason for the decision to implement a single RPD instance. It provides a good foundation for our current and future statuses. Once complete, the decision brief will be posted in Box for the BI Coordinators to review.

3. Positioning HRS/SFS for OBIEE (Kathy)

- **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.
- **Current State 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.
- **Current State 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 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.
- Immediate Next Steps: Work with the consultant to analyze 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.

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) – team led by Mark Trieber
- Shared queries (Lorie and Mary will work with the with Consultant to determine best path forward)
- Building student content in RPD
 - Early adopters: Milwaukee, Eau Claire, Green Bay, Platteville, Stout, Whitewater
 - Leveraging learners
 - Campuses using CDR data in the Interactive Reporting Workspace environment: Stout and Whitewater. Kathy will also be connecting with Lisa McGrath at System Admin.

It's important that campuses finish up their analysis (especially the early adopter campuses). Once the consultant is available, this documentation will be critical in finding common ground in student data. It will also assist in our learning and faster implementation, as well as reduce duplication of effort. All early adopter campuses indicated they would have their analysis complete and staff available to work on the project in September.

Kathy will consult with Madison (Jeff) to determine consulting option.

5. Determining Timeline Feasibility of June 2017 Date

Our engagement with the consultant will help clarify the feasibility of our June 2017 timeline, as well as understand what resources will be needed.

6. Questions/Comments

- For those who attended the recent dimensional modeling and RPD development training, will a test server environment be made available soon? It's important to remember that

once an environment is set up, security (authorization and authentication) need to be in place and firewall issues resolved, which requires work with the IAM group, before a test environment can be established. Eau Claire and Whitewater are currently using the Admin tool and developing on their desktops. Jon (Eau Claire) reported that the dimensional modeling training learned in class translated well to the process of working with non-dimensional data structures to dimensionally modeled structures. Mike (Whitewater) has made progress as well, but is hoping to be able to see data results in a test environment soon.