

BI Project Coordinator Meeting Notes

August 19, 2016

Attending: Kathy Luker, Mary Kirk, Mark Treiber, Andy Cunningham, Robert Flum, Barb Holschbach, Howard Haynes, Jim Smola, Mark Clements, Peter Reese, Scott Larson, Ed Melchior, Peter Weeks, Jen Chapek, Jeff Ohvall, Lisa McGrath, John Standard

Facilitator: Kathy Luker

Note taker: Mary Kirk

1. Status of 2015-16 Carryover Budget (Kathy)

The carryover budget request was approved. The budget committee relayed their commitment to assure a successful implementation of the newly acquired BI tool. Member of the Budget Committee include: Julie Gordon-UW System Admin, Rob Cramer-UW Platteville, Bob Hetzel-UW Lacrosse, David Kieper-UW Green Bay, Patricia Kleine-UW Eau Claire, Anne Milkovich-UW Oshkosh, Laura Pedrick-UW Milwaukee, David Stack-UW System Admin, and Al Thompson-UW Stevens Point. BI Project Coordinators: Please express the project's appreciation for support of this effort.

2. New BI and Reporting Technical Team at UW-Madison, DoIT (Andy)

Andy Cunningham, new BI/Reporting Team manager at DoIT introduced himself and the newly formed technical team at DoIT. This team has been tasked to expand and consolidate business intelligence and reporting. The initial task will be to develop and support HRS/SFS shared content in Interactive Reporting Workspace to OBIEE. The team has no intent to change how the current project is being handled and is committed to helping in each campus's data and analytics effort in any way we can. The new team members are Andy Cunningham (manager), Mark Manville, Nachi Ganesan, Reddy Vootkur, Jean Sutter and Mary Kirk.

3. RPD Training Update (Kathy)

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. Trainees can download the Admin tool their desktop and work in a repository environment locally. Individuals from Madison, LaCrosse, Platteville, River Falls, Superior and HRS will be attending the second round of training in Dimensional Modeling and OBIEE RPD Development (end of October/early November). Robert and Kathy will be consulting with Oshkosh and Parkside. Colleges/Extension has said they will wait until OBIEE is fully implemented until they engage. Stevens Point will resend their analysis information to Kathy.

4. Temporary Test Environment for RPD Developers (Mark)

Tim Lehmann (System Admin) from DoIT-DRMT, has been working with Eau Claire (with Robert Flum's assistance) on setting up a test server environment. Once Eau Claire has tested their RPD

development on the test server, Stout will test their RPD development, and then Milwaukee. At this time, the “Test” environment will hold only one campus at a time, so a “queue” needs to be set up for campuses to get into the environment. Whitewater, System Admin and Green Bay expressed an interest to get into the queue. Other campuses interested in getting into the queue need to get their analysis done and attend the dimensional modeling and RPD training.

Robert gave additional information on the test environment setup. Plugging in the RPD to the test environment is fairly easy. The difficult part is setting up security, firewalls and certifications between DoIT and each campus. The setup process takes 3 days for DoIT. Once the setup process was complete at Eau Claire, Robert worked with Eau Claire to ensure they could get in and out of the test server, create analyses, etc. Mark will work with Tim on a sign-up process for each campus’s security, etc. – coordinating it in one effort. Mark will schedule a group of campuses to meet with Robert to additionally save time in this effort. Robert indicated he would be available for follow-up questions. Kathy and group thanked Robert for all the time he has spent in helping in this effort. Discussion was held on the future process for the test environment. More will be known once the consultants weigh in on this topic.

Kathy showed a slide on “Roger’s Innovation Adoption Curve” and how it relates to our project.

Stout will not be ready to be in the “queue” until late next week.

5. Consulting Engagement

Files have been placed in a folder in Box which will be made available to the upcoming consultant engagement – initial meeting to be held on September 8, providing background information to the consultants. The consultants will be given access to the Box folders on Monday. The files include information on

- Technical infrastructure
- Shared queries analysis, including the analysis prepared by B. Dasika
- Student data content
 - Platteville
 - Campuses who have completed their analysis
(Whitewater has a spreadsheet, but no analysis – Howard will check on this and get back to Kathy)

Prior to meeting with the consultants, we hope to develop a project plan for the transition including resource requirements and timeline, and have an Infrastructure set-up so that we’d be ready to go with OBIEE.

6. Next Meeting

September 2, 2016