BI Project Coordinator Meeting Notes
August 25, 2017

Attending: Cati Cederoth, Mark Treiber, Tim Lehmann, Miguel Garcia, Jocelyn Milner, Jason Fishbain, Patrick Hare, Bob Dasika, Kay Steiner, Ed Melchior, Dale Matenaer, Jenny Jiang, Josh Ebert, Stephanie Warner, Sally Eckwright, Paula Ganyard, Barb Holschbach, Mike Bubolz, Jordania Leon-Jordan, Nick Brumback, Robert Flum, Amy Crist, Peter Reese, Shawn Voth, Jen Chapek, Shane Webb, Steven Scott, Mike Olson (Superior), Mike Olson (Whitewater) Claudio D'Agostino, Bill Minser, Sue Buth, Andy Cunningham, Mary Kirk, Scott Larson

Facilitator: Kathy Luker
Note taker: Mary Kirk

1. **Meeting Objectives and Agenda** (Kathy)
   Kathy reviewed the meeting objectives and agenda topics.

2. **Reports and Dashboards Class** (Kathy)
   The Reports and Dashboards, given by Maverick Solutions will be held September 6-8 in Eau Claire. The class is full – 20 participants and attendees have received class logistics.

3. **UWBI & Reporting Staff Updates** (Andy)
   The Shared Queries BI Developer position has been filled; the new person will be starting September 5. The Merge Manager position has also been filled, and this person will be starting either on September 5 or the following week.

4. **UWBI Configuration Changes** (Mark)
   The UWBI Operational Governance team has formed a Change Control Working Group. Members include Mark Treiber, Robert Flum, Tim Lehman, Andy Cunningham and Jon Allen. Requests for configuration changes should be submitted to the group email: uwbi-change-request@lists.wisc.edu. All configuration changes documentation will be maintained on the Wiki.

5. **Review Updated Project Deployment Timeline** (Kathy)
   Note: Tim reported the production server will be available by September 18 for testing.
   Platteville: Currently in Central Dev environment with non-HRS scheduled for production by the end of September.
   Madison: Currently in Central Dev environment with BI Publisher on track to move to production in mid-September.
   CDR: Assuming CDR will be ready for Central Dev sometime in September (Lisa is currently on vacation).

HRS Shared Queries: The HRS shared query redevelopment effort for Release A will move into Central Dev once the multi-factor authentication is in place. The merge management process including GIT timeline should also be okay.

Stout: They will not be ready for Central Dev until October (move from September).

Milwaukee: They are ready to move 2-3 SA's to Central Dev in September.

Eau Claire: Ready for the move to Central Dev in September.

River Falls: Ready for Central Dev in October.

Green Bay: Ready for Central Dev in November.

Parkside: Ready for Central Dev in December.

LaCrosse: No response

Oshkosh: No response

6. **Review Migration Checklist** (Cati)
   Reviewed the migration (Dev → Test → Prod) checklist with resources.
   Contact Mark Treiber or Cati Cederoth with questions on the process.
   a. Object Migration for campuses
      - Follow RPD merge process using GIT
      - RPD is free of merge errors and warnings
      - Catalog and RPD checked into GIT
      - Security table and update process in place: as campuses move into Central Dev, security processes will be reviewed with campus.
        Mark and Cati will set up a teleconference with Eau Claire and Stout to go over security processes, and will send documentation on the security processes as well as a description of the dev, test and prod environments to Eau Claire (Ed) and Stout.
        Will the authentication process use the federated login? Answer (Tim): Yes. The MFA team is working on this; further discussion will occur when more is known.
      - Content tested after migration
      - Provide config file changes for review and default settings (responsibility of Campus Admin)
      - Data source connection information provided (responsibility of Campus Admin
   b. Deployment Readiness
      - End user training conducted
      - Author training conducted
      - UAT completed
      - Help Desk/support in place
      - Plan for ongoing training

7. **Project Training/Communication** (Robert)
   The Search committee members for the Project Training/Communications position are: Renee Pfeifer-Luckett, Lorie Docken, Jennifer Chapek, Stephanie Warner, and Robert Flum (chair). A

PD is being developed – using notes from the July 11 summer meeting, CSRG input and Huron input. Once the PD is in place, UW System HR will handle the recruitment. We hope to have someone in place by November/December timeframe.

8. **Training and Communication Plan** (Kathy)
   To keep the project moving forward, a proposal to build out both the training and communication plans is being presented to UW leadership today (3-4 week effort).
   The training scope includes:
   - Develop generic, standard training materials (written, on-line, special topics, train the trainer) – including Introduction to OBIEE, short course for authors and consumer training.
   - Provide instructor led training for end users
   - Develop resource library of useful information
   - Training on best practices and new features
   - Self-paced training on OBIEE
   - Maintain central document portal
   - Develop videos of merge process
   - Develop videos for end users
   - Provide 11g to 12c transition training (Platteville)

9. **Next meeting**
   TBD.