

BI Project Joint Executive Sponsor and Coordinator Meeting Notes

April 28, 2017

Attending: David Stack, Kathy Luker, Mary Kirk, Mark Treiber, Andy Cunningham, Diann Sypula, Cati Cederoth, Jenny Jiang, Bob Beck, Stephanie Warner, Ed Melchior, Dale Matenaur, Jim Smola, Werner Gade, Sally Eckwright, Chip Eckhardt, Jon Allen, Jason Fishbane, Jocelyn Milner, Patrick Hare, Paula Ganyard, TJ Teegan, Anne Milkovich, Robert Flum, Any Crist, Peter Reese, Shawn Voth, Jen Chapek, Stephen Scott, Shane Webb, Elena Pokot, Claudio D’Agostino, Mike Olson (Whitewater), Mike Olson (Superior), Sue Buth, David Blough, Nikki Burton, Scott Larson

Facilitator: Kathy Luker

Note taker: Mary Kirk

1. Meeting Objectives and Agenda (David)

David reviewed the agenda topics, with objectives focusing on Huron consulting support and options, campus progress dashboard, and project identified issues and risks.

2. HEDW Conference (Kathy, Mary, Andy and Amy)

Attendees of the recent Higher Education Data Warehouse conference commented on the presentations made by other higher education institutions. Topics of interest included data governance, cloud offerings, lessons learned in BI and analytic implementations, ad-hoc querying tools, and the importance of a good communication, collaboration and robust training plans in providing BI to users.

3. UWBI Progress Dashboard (David)

David reviewed the UWBI Progress Dashboard, highlighting the campus’ self-reported progress. Minor delays include catalog/merge management, security and the UW-Platteville migration. Potential issues (risks) include hiring a merge manager, and finding options for an ad-hoc querying tool.

4. Campus Student Consulting Support Options (Cati)

Cati provided a high level summary on the results of campus student - Huron consulting support options (Eau Claire, Stout, Milwaukee, Platteville, River Falls and Whitewater responded). The summary of requests/concerns included: training materials and templates, additional Maverick training, financials RPD ready for use, on demand technical assistance, collaboration among campuses and limited RPD and report development assistance.

Discussion points:

- Jason: What does “Financials” include? Some campuses have created their own queries in Interactive Reporting against SFS (WISDM) stars. Some shared queries combine HR/Payroll and WISDM data. Robert reported that UW-Platteville has held conversations with Stout and Eau Claire about reviewing the WISDM stars (with subject areas) that UW-Platteville has

created in OBIEE. Andy commented that we need to discuss how to deliver these stars in the event that WISER may replace WISDM in the future (avoid change).

- Jocelyn was not aware of any request to submit consulting support options/concerns and may need to discuss these with her team. Kathy will forward the request sent to Executive Sponsors to Jocelyn. Note that no financial stars are available for testing in an RPD.
- Kathy will be asking Project Coordinators about additional Maverick training within the next 6 months (a 3-day class has been scheduled and filled for July).
- Claudio asked if the contract with Maverick included offerings in other topics such as PeopleSoft upgrades and Fluid user interface. Kathy will research and get back to Claudio.
- Stephanie Warner asked about the UW-led collaboration among campuses effort. Huron could present on requested topics at their Friday “office hours”. Kathy would facilitate this – please send topics to her.
- Use of Central Team with Huron: The top priorities include the central environment setup, including security and merge management. The shared query conversion is in progress. Additional tasks include development of standard training materials, technical assistance, campus RPD and report development (Whitewater and Eau Claire have asked for support), financial (SFS) RPD and report development.

5. **System and Campus Progress/Updates** (Kathy)

Huron will be meeting with River Falls next week.

HRS/SFS Shared Queries:

Andy reported on the scope and progress of this project.

- Migration of 68 BQY shared queries into UWBI.
- Dimensional models are being built against EPM data warehouse.
- RPD and report development will be done iteratively – by 4 releases within proposed data domains.
- Reports and dashboards will fulfill the same informational needs as the existing queries (and will most likely result in fewer reports) with subject areas and detailed drill-down capabilities.
- Campuses will be using “OBIEE Answers” to create their own specific analyses.

Rollout approach for each release:

- Pilot/Beta – UW Service Center affinity groups will be first testing group.
- Power users/decision makers from each campus will test. Send proposed names for this testing group to Diann Sypula.
- Each group will validate and provide feedback.

- Rollout to campuses (who choose to provide access for institution users)
- Dimensional models and RPD will be provided.
- No timelines have been determined yet on the above.

6. **Eau Claire Demo (Jon)**

Jon Allen demonstrated UW-Eau Claire's OBIEE prototype for navigation using portals/dashboards – utilizing dashboards as a framework to navigate to various landing pages (controlled by security). The main page reflected information on the data warehouse, links to other pages and a query repository. The term “query” was used on this page as a translation term for users to link “old” to “new”. Security roles were evaluated and modeled from the existing Interactive Reporting Security roles.

7. **Other Topics**

Jocelyn reported that her team has finished the testing of BI Publisher as an ad-hoc reporting tool. They have determined that BI Publisher cannot be used as a replacement for IR Studio. A more formal report is forthcoming.

8. **Next Update**

May 26 or June 2.