BI Project Joint Executive Sponsor and Coordinator Meeting Notes
March 3, 2017

Attending:
Madison: Bruce Maas, Kathy Luker, Patrick Hare, Jocelyn Milner, Mark Treiber, Andy Cunningham, Mary Kirk; Milwaukee: Bob Beck, Ed Melchior, Dale Matenaur; Eau Claire: Chip Eckhardt, Sally Eckwright; Green Bay: Barb Holschbach; LaCrosse: T.J. Teegan; Oshkosh: Mark Clements; Parkside: John Standard; Platteville: Robert Flum; River Falls: Peter Reese; Stevens Point: Katie Jore, Shawn Voth; Stout: Jen Chapek, Stephen Scott, Shane Webb, Sue Traxler; Superior: Gigi Koenig, Mike Olson, Whitewater: Mike Olson, Claudio D'Agostino; System Admin (CDR): David Stack, Sue Buth, Lisa McGrath; HRS/SFS: Lorie Docken, Nikki Burton; Huron: Emily Howe, Cati Cederoth

Facilitator: Kathy Luker
Note taker: Mary Kirk

1. **Meeting Objectives and Agenda** (David)
   David reviewed the agenda topics, focusing on this opportunity for communication between the BI Project Coordinators and Executive Sponsors.

2. **Learnings from the University of Wyoming and Alliance Conference Update** (Kathy)
   At the recent Alliance conference, several staff attended a presentation from the University of Wyoming on their implementation of "WyoCloud". With the help of Huron Consulting Group, the University of Wyoming's new reporting environment leveraged the delivered data model from Oracle's BI Apps to integrate student, financials, grant/project, and HCM information together to create a single source of reporting truth for the University. A communications video on this project was shown.

   Valuable connections were also made with other universities doing similar projects as ours, including University of Cincinnati and Florida State University (OBIEE multiuser development environment, merge management), University of Missouri, and Penn State.

3. **UWBI Effort** (David)
   David reviewed the draft UWBI Progress Dashboard, currently under construction, in an effort to get feedback from the BI Coordinators and Executive Sponsors.

   Comments: Found it useful as long as changes/issues are reflected at a high level – those budget items that will require additional budget and items that need to go to CSRG, current road blocks/risks that prevent the project from moving forward with options for mitigation, etc. Avoid the colors red and green. Remove the section titled "Number of Groups Involved" – not sure what this meant. The dashboard reflecting campus progress has a good page layout, but topics should be "self-reporting" and documented at a high level – for example RPD development, BI answers/dashboard progress, etc.

Kathy reported that we have received the go-ahead to hire a Merge Manager, a new position in the BI & Reporting Team. We are also working on funding for Huron support in the shared query library redevelopment effort.

4. **Campus Progress** (All)

Milwaukee (Ed): The Huron engagement was extremely helpful, and provided staff with a practical understanding of building subject areas. A sandbox environment is up and running. They are focusing on business area assessment rather than replacing IR content one for one.

Eau Claire (Sally): Jon is working on the RPD and has redeveloped some more complex queries with help from Huron. They will be working on the Registrar's reporting effort next.

Stout (Jen): Holding sessions with Eau Claire was very beneficial – they could bounce ideas off each other (both in RDS environment). They are moving ahead with their RPD and BI analyses, and will be meeting with users to get feedback and assist with minimal testing. They are interested in knowing more about security and authentication process.

Green Bay (Barb): Held their first meeting with Huron (also attended by UW-Whitewater). They are reviewing their possible RPD setup and will have another week with Huron soon.

Whitewater (Claudio): Since they have no data warehouse environment, they will have to somehow emulate a star schema – which appears to be a difficult task, and hope to have more support from Huron. Cati Cederoth (Huron) is getting answers on this topic and will meet with Whitewater to discuss options next week.

System Admin – CDR (Lisa): Met for 1 ½ day with Huron which was very helpful – especially in the design of the RPD; currently working on the RPD on a development server, and will be meeting with Huron again in a couple of weeks.

Madison (Patrick): Redevelopment of reports is being done using BI Publisher. Users will be brought in to validate and evaluate whether BI Publisher is a viable option.

Platteville (Robert): Platteville is still in the 11g environment, but is moving to the 12c environment which needs testing and further evaluation. They are working with Andy and his team on testing the merge process, and are currently doing some housekeeping on security roles/groups.

5. **Collaboration Among Campuses - Wiki** (Mark)

Mark Treiber reviewed the Wiki – Confluence website, which is a central repository for project updates and documentation.

   https://wiki.doit.wisc.edu/confluence/pages/viewpage.action?pageId=117311321

Information at this site will reflect progress, operational governance, merge and catalog management, UW-Platteville OBIEE migration, campus SIS development progress and a blog for BI Coordinators and developers to provide information. FAQ will be added soon. Contact Mark Treiber to get set-up or changes in permission access, as well as provide comments or questions on this site.

6. **Questions and Discussion** (All)
   - What's happening with the security/authentication effort? A team is testing an authentication table from each campus in a central development environment, with a report and documentation to be provided at next week's Operational Governance team meeting.
   - What are the main concerns of the project? A critical need is the merge manager position, and concerns around setting up a merge process. However, good connections were made with other universities attending Alliance in this area (including the tools being used).
   - What is the status of the redevelopment of the shared queries in OBIEE? We've had good conversations within the last week and are looking at options in moving forward. Additional information will be known within the next couple of weeks.
   - What is the status of the redevelopment of WISDM in OBIEE? Awaiting the decision on OBIA request. (The BI and Reporting Team is focusing on redevelopment of HRS shared query content first, and then will look at WISDM.)
   - The week of training with Maverick went very well (Reports and Dashboards / Campus Admin). The BI Coordinators have requested to meet in Madison this summer to attend working sessions; Kathy will be looking into setting this up.
   - UW-River Falls is hosting the Maverick training for a Reports and Dashboards training session in mid-March. A few open spots are available for those campuses interested in attending ($2,200/person) – contact Peter Reese if interested.

7. **Next Meeting** (Kathy)
   The next joint meeting will be held March 31, 2017.