Data & Reporting Team (DART) Minutes, 08-22-19
BL 339

Minutes from last meeting: These were approved.

Reporting Tool Review: Tool Evaluation Scorecard Matrix Draft The group reviewed a reporting tool evaluation matrix, which was presented by David Wilkins. The group made recommendations for enhancements and those are included in the copy of the matrix attached to these minutes. David shared a list of DART members who have volunteered to serve in a review of reporting tools. The reporting tool review process will be led by IT's Melissa Nestor and she hopes to start the process soon.

[Academic Technology Expo 2020](#); **Jan 9 (HSC) & 10 (Norman).** David encouraged DART members to consider submitting a proposal to showcase their work.

Directory Information Reminder David Wilkins reminded the group that an indicator exists within Cognos for a student's preference on withholding directory information. A separate indicator exists for deceased students. Some of the following were reviewed:

- [Directory Information Hold Form (PDF)](#)
- Directory hold guidance from [Records and Transcripts](#)
- Directory hold guidance from [Public Affairs](#).
- The Cognos folder location and [Data Dictionary](#) entry for Confidentiality_Ind.

David said that the DART Data Dictionary Subteam, which has written guidance documents before, will write a guidance document for the Confidentiality and Deceased indicators, and this document will be posted on Cognos SharePoint and other websites.

Power BI User Group Monthly Meetings have been scheduled for the 2nd Wednesday of every month, at 4PP Room 3065, from 3:00-4:00 pm. A standing Zoom meeting has been established.

COGNOS UPGRADE: Susie Irwin reported that this upgrade will be transparent for Cognos Consumers but some of the GUI interface has changed for Cognos Authors. Susie is creating quick reference guides and other documentation, to be placed on [Cognos SharePoint](#).

DART Subteam Updates

- **Active**
  - **Community Support** (David Wilkins) Worked on reporting tool survey. Had POWER BI UG MEETING on 8/14/19. Good presentation by JEB Sheriff. Next scheduled for 9/11/19. Lindsey Johnston will demo. Also working on a PBI Team Collaboration Site.
  - **Data Dictionary** (David Wilkins) This group is putting the finishing touches on 944 Columns covering 14 Objects.
  - **Reporting Tool Training** (Susie Irwin) Susie continues to hold Cognos trainings and conduct Cognos Office Hours.
- **Inactive**
  - **Data Review** (Patti Otto)
  - **Data Quality & Training** (David Wilkins) Group on hold. But some data quality issues are being addressed through the HR Data group.

- o **Policy & Recommendations** (David Wilkins) This group has been in a holding pattern with the advent of the N-DGC and is currently uncertain of future activities pending direction of N-DGC.   David has sent a list of IT- and Data-related Committees to April Lee. The list was reviewed by the group during this meeting and updates were solicited.

Other issues/upcoming activities

Next meeting: October 24nd, 8:30-10:00, BL 339

REPORTING TOOL SCORECARD DRAFT

Last updated by David Wilkins, 08-28-19

Category	Weight	Criteria	Weight	Product 1		Product 2		Product 3		Product 4	
				Score	Weighted	Score	Weighted	Score	Weighted	Score	Weighted
Data Sources		Connect to different kinds of sources									
		Self-service data ingestion. No IT involvement required for ETL into tool.									
		Can use Enterprise-wide data sources									
		Frequent data refreshes									
		Can use local data sources (bring your own data)									
		Offers data security									
		Is special data transformation required to use the tool?									
		Creates data cubes dynamically									
		No limits for data ingestion									
		Allows data discovery to gain new insights									
		Provides for data cleansing									
		Allows collaboration/sharing of datasets with others									
		TOTAL									
Reporting Functionality		Filters									
		Queries									
		Calculated Fields									
		Customized Formatting									
		Robust Visualization Capability									
		Easy Drill-Down Capability									
		Integrated Statistical Functions									
		Robust pre-built analytic functions									
		Export Results?									
		Scheduling of data refresh & report execution/distribution									
		TOTAL									
Usability		Intuitive, GUI-interface									
		Useable by Non-Programmers									
		TOTAL									
Performance		Data Load/Refresh									
		Report Execution Speed									
		TOTAL									
Report Delivery		Enterprise-wide									

Category	Weight	Criteria	Weight	Product 1		Product 2		Product 3		Product 4	
				Score	Weighted	Score	Weighted	Score	Weighted	Score	Weighted
		Mobile									
		Report Security both for initial report and any successive 'shares'									
		Different Output Formats									
		Triggers for automated notifications to stakeholders for metrics above or below desired thresholds									
		TOTAL									
Governance		Fully supports the five pillars to data governance: quality and consistency, data policies and standards, security and privacy, regulatory compliance, and retention and archiving.									
		Suppress low aggregate values									
		Supports data masking									
		Supports role-based security for data use and report distribution									
		Supports role-based controls for downloading or exporting data									
		TOTAL									
Cost		Initial									
		Ongoing									
		Site license vs seat license									
		Author cost vs viewer cost									
		TOTAL									
Implementation		Ease of Stand Up for report authors									
		Ease of Stand Up for IT									
		Offers data on premises									
		Offers data in cloud									
		Offers on-prem and cloud									
		Local machine installation required									
		TOTAL									
IT Effort Required		Stand Up									
		Tool Administration									
		Audit log capability									
		Data Administration/Access									
		IT effort required to make data available									
		On-prem or Cloud?									
		Ongoing FTE Required									
		TOTAL									
Vendor & Tool Reputation		Industry Reputation									
		Gartner Rating									

Category	Weight	Criteria	Weight	Product 1		Product 2		Product 3		Product 4	
				Score	Weighted	Score	Weighted	Score	Weighted	Score	Weighted
		Financial Stability									
		Frequency of updates									
		Vendor Vision for Future/Roadmap									
		TOTAL									
TOTALS											