

## **Data & Reporting Team (DART) Meeting Minutes, 04-27-17**

### **BL 339, 8:30-10:00 AM**

**ERP Discovery Update—Terri Pinkston, Assistant Vice President, Controller & Director of Administrative Systems** Terri said that because Peoplesoft is being sunsetted, OU has begun looking at options for replacement. Huron Consulting was engaged to assess the current state, pain points, and desired state, and made campus visits earlier this year. Huron is in the process of creating a report and recommendation that will be presented to the Executive Committee, which is comprised of Nick Hathaway (Executive Vice President and Vice President for Administration and Finance), Kyle Harper (Senior Vice President and Provost), Loretta Early (Vice President, Information Technology and Chief Information Officer), and others. The earliest an RFP would be created is next fall, with the more likely timeframe being next spring. Terri said that the current budget situation adds uncertainty, and that any migration will be a 5-7 year project. Citing a trend toward cloud architecture, Terri said the two leading products in the market are Workday and Oracle Cloud. OU's HR and Financial data systems would likely be the first to migrate, with Student data following sometime later as product offerings mature.

**Minutes from 02-23-17.** Previously approved via OneDrive.

**DART Chair Vote.** David Wilkins was re-elected chair by acclamation.

**Rules governing use of FAFSA Data.** Kathi Robinett gave an overview of some of the new guidance being disseminated on the conditions under which federal student financial aid information may be used for program evaluation and research purposes. Violating those conditions could incur penalties for the institution. Kathi referred to two guidance documents, which will be sent to DART members and posted on the Cognos SharePoint website for easy reference. Another summary reference document may be created for internal OU use. If anyone has any questions regarding the appropriate use of financial aid data, they should contact Kathi Robinett.

**Cognos License Renewal—**IT has purchased CPU-based Cognos licensing for up to approximately 200 concurrent users for FY18 and forward. These licenses can be used for any type of data—not just Student data.

**Cognos SharePoint Migration.** The migration is complete but the Community Support Subteam helping (particularly Susie Irwin/David Wilkins) are having to change all places the original site was referenced in support documentation, and other places, such as the Cognos License Request Form and Cognos Landing Page. This work should be done in early May.

**OneDrive migration to DART Home SharePoint Online site.** This migration is almost complete also, and should be done in early May.

**Admin Ofc Request to Academic Technology Expo for 2018 and beyond.** An Administrative Office Track will be created unless something unforeseen happens.

**SAS Analytics Conference at OU.** This has been postponed until next fall.

#### **IT Updates—Eric Blazek**

- **ESB/Dell Boomi**—Eric said that Boomi, which is replacing Mulesoft for ESB functionality, is being used for Salesforce integrations. Kathi Robinett asked if staff members other than IT would be able to use Informatica, and Eric said that there had been discussions about that and the obstacles may be more political than technical.
- **Other** None mentioned

#### **DART Subteam Updates**

- **Communications (David Wilkins).** No recent activity
- **Community Support (David Wilkins)** The Gollogly reach-out occurred on 3/8/17: Good meeting with Theresa Marks and Matthew Grover, and Matt added to Data Dictionary Team. Takeaways: 1) We should consider offering an overview of relational database processing during Cognos training, 2) The Coll of Engr folks mentioned that it was challenging to find data in Cognos, so David mentioned the possible creation of several new objects that had many columns on them, reducing the need to hunt for data—this idea was well received, 3) Add the Cognos Report Development form back to Cognos SharePoint (done), 4) Theresa Marks liked the idea of at least one Cognos Power User/Go To person per college, and she liked the Cognos author Brown Bag Lunch Idea for sharing of tips and tricks. This team making final changes to new Cognos SharePoint Online site. Many docs had links pointing the old site, which must be changed. Plus some help/support docs have been updated with new screenshots of the new site. The Cognos Landing Page also needs changes. David and Susie are making a list of required changes for next time. No Cognos User Group Meeting in spring. Glenn Crouch mentioned that perhaps Citrix Go To Meeting and other technology may help in any Cognos Author Brown Bag Lunch Sessions, allowing people to participate from their own offices using screen sharing and video from/on-PC/laptop cameras. David said this will be explored as a solution.
- **Data Dictionary (David Wilkins)** The team has two new members: Matthew Grover from College of Engineering and Matt Wesley from IT. This team reviewed 309 of 560 D2L metadata cols. Getting clarifications on questions, and will review rest next meeting. David also said there may be some utility to creating a set of tables that contain data elements common to D2L and Canvas, loaded with both D2L and Canvas data, so that trend analysis can be done. This team has also had 30-minute discovery calls with Collibra and iData/Data Cookbook on how their products might help task assigned by DGCC to look into tools appropriate for capturing business rules, business definitions, reporting rules, etc., provide for collaboration and make accessible across campus. This team also wants to explore Informatica/Informatica Axom. Jennifer Pittman and Matt Wesley may help with those. David showed a process flow for how metadata may come to this subteam during projects, and how it may flow out of this subteam for placement in the Oracle metadata tables used by the metadata web app.

- Data Review (Aaron Biggs via David Wilkins) “For the DART Data Review report, I would say that we are in the process of reviewing the mission of the sub-team given the issues we’ve had finding a good injection point in the Data Request process. We feel like the team’s time may be better spent further down the data request process, closer to implementation phase, where specifications are more locked down. We will also be seeking nominations for a new chair.” Aaron also mentioned that it’s possible this group might help facilitate some of the communications and highlight data initiatives to other DART teams.
- Data Quality & Training (Brendan Klein via David Wilkins) This group has begun development and testing of a framework/process to evaluate data quality issues and possible training opportunities. A draft process flow was shown detailing the steps this team might take while investigating potential data quality issues through the steps of making reports of findings or recommendations to DART and ultimately DGCC for possible issue remediation.
- Policy & Recommendations (Emilie Giustozzi/David Wilkins) Emilie had to resign from leadership of this team due to other work responsibilities. This subteam will meet this afternoon to recap team’s activities, look at possible future directions, and discuss leadership.
- Reporting Tool Training (Susie Irwin) Cognos 10.2.2 has an end-of-life of May, 2018. Cognos 11.0.5 is being put on its own server for evaluation. It was on a box where 10.2.2 was also installed, and IT feels that having two versions on the same box may be causing some issues. Susie would like to get 11.0.5 on a box, and have Power Authors test reports on that box to determine if there were any issues. Eric mentioned that as a part of the new license agreement, Cognos consultants/techs would come on-site for performance-tuning to resolve slowness issues. While summer is the best time for a Cognos upgrade on campus, this summer feels too soon with so much to do. It seemed agreed that a slower, measured roll-out of Cognos 11.0.5 would be better and lead to a better customer experience. More details to come.

#### **Other Updates**

- Portal Updates—Ozone to be decommissioned 6/2/17

#### **Other Issues?**

**Next meeting:** June 22, 2017, 8:30-10:00, BL 339