

Data & Reporting Team (DART) Minutes, 06-22-17

BL 339, 8:30-10:00 AM

Minutes from last meeting: Previously approved via OneDrive.

New Data Architecture for Reporting—Matt Wesley, IT Data Architect

Matt walked through a diagram of the new reporting architecture (attached), showing how replicated source tables will flow from source systems (Banner, Peoplesoft, Canvas, etc.) into a 'raw layer' data repository. These replicated tables will be true copies, with no data transformations or manipulations. From the data repository, data marts will be derived to meet reporting needs of various types, including reports, dashboards, data feeds, and more. The primary reporting tool is currently slated to be Cognos, though that carries with it Framework Manager overhead. By June 30, 2017, 170 Banner tables and a smaller number of Peoplesoft (HSC and Norman), Canvas, and D2L tables will be in the repository. Use Cases presented to the DRRG/DGCC governance process will determine which data are included in the repository and which data marts will be built. Matt and Jeff Wall entertained questions for a lengthy period, and Matt offered to speak to additional groups. Matt and Jeff also said that if a new cloud-based ERP is implemented, the intent is to add that data to the data repository for use in data marts.

Cognos SharePoint Migration. This is complete. David Wilkins voiced appreciation for Susie Irwin's work on this project.

OneDrive migration to DART Home SharePoint Online. David Wilkins reported that the migration of DART content from his personal OneDrive space to a new DART Home SharePoint Online site is complete. David will remove access to his personal OneDrive to decommission that DART space.

Recent SharePoint/Delve Incident. David reviewed the recent incident with Delve accessing SharePoint content for those who were aware of only what was reported in the student newspaper. David mentioned that while setting up the new DART Home SharePoint site, he noticed that security settings, as delivered, might unknowingly allow others access. Further, care must be made when granting the Read (allows downloads from SharePoint) and View Only (does not allow downloads) permissions. Finally, David shared some additional input from IT's Aaron Baillio, who said the recent issue was due to overly permissive access privileges, possibly stemming from a legacy SharePoint site being migrated to Office 365 SharePoint Online without a review of permission levels. Aaron said that O365 is a very secure environment and can be trusted with PII, FERPA and HIPAA data and IT can monitor for violations with CloudLock. IT is now monitoring permission levels.

DART Subteam Updates

- **Communications (David Wilkins).** No recent activity. This subteam is available to help with communication needs within the reporting environment, and may become involved in communications for the Cognos 11 Go Live.

- **Community Support (David Wilkins)** Representatives from this group are meeting with Price College of Business Professor Mark Sharfman next week to learn of Price Business' reporting needs, especially since Cognos author Emily Kuenzi has been reassigned to other duties. This group will be meeting with other colleges soon.
- **Data Dictionary (David Wilkins)** This group has a new member: Amy Lyons from the College of Engineering. That college is putting together a Data Team, and David hopes it's a model for other colleges. This group is defining metadata for 100+ tables that don't yet have metadata, with the goal of completing that by fall. That team also appreciates the contributions of Subject Matter Experts like Chris Wallace, Brad Cook, and Kathi Robinett, who have supplied metadata entries for their tables. This group is also seeking to learn of various paths metadata may be submitted to it during the project approval processes of DRRG, DGCC, Project Governance Board, and SPCC. David also mentioned that Data Dictionary entries will need to be created for any new data marts, and Matt Wesley, also a member of the Data Dictionary Subteam, agreed.
- **Data Review (David Wilkins)** This team will meet soon to establish new leadership and formalize direction. This team will be given access to DRRG's Approved Projects folder and will have the opportunity to review approved packages, both for FYI purposes and just in case any recommendations for project enhancement can be made.
- **Data Quality & Training (Brendan Klein)** This group has identified a list of Data Quality issues and is putting together a pilot documentation/response protocol and package for how to respond to each. In some cases, issues may not be resolvable for various reasons, and those will be documented. Other issues may be remedied by training, or logged for consideration during apparent upcoming ERP migrations. Jeff Wall asked if the issue list can be made public, and Brendan Klein agreed that a form of that list could be made public and placed on the DART Data Quality & Training webpage.
- **Policy & Recommendations (David Wilkins)** This group elected new leadership and established a set of action items to pursue in the coming months. Once those are well underway, this group will likely scale back to meeting every 2 months, on the 4th Thursdays of the months that Big Dart doesn't meet. As authorized by the DGCC, this group has finished a review of existing IT- and Data-related policies, written summaries, and populated a matrix showing the privacy acts and areas covered by each policy. That has been sent to DGGC for review and to see if they desire any further action. During this review it was determined that some newly-adopted policies appear to have superseded older policies on the ITC website. Patrick Livingood, Chair of ITC, will initiate an ITC review of these older policies to see if they can be recommended for formal decommissioning. We also hope to publish a list of IT- and Data-related committees to the DART Policy & Recs website soon.
- **Reporting Tool Training (Susie Irwin)** The earliest that Cognos 11 could go live would be September, and discussions will have to take place as to the best time for Go Live with respect to the Academic Calendar. Once a Go Live date is set, Susie will establish training and orientation sessions, though some materials have already been developed. A Cognos User Group meeting might also be called. Jeff asked about the owner of the new Cognos PVU

licenses, and Susie was unsure. Jeff mentioned several different internal IT-related Cognos issues that IT will need to work out.

Other Issues? None were mentioned.

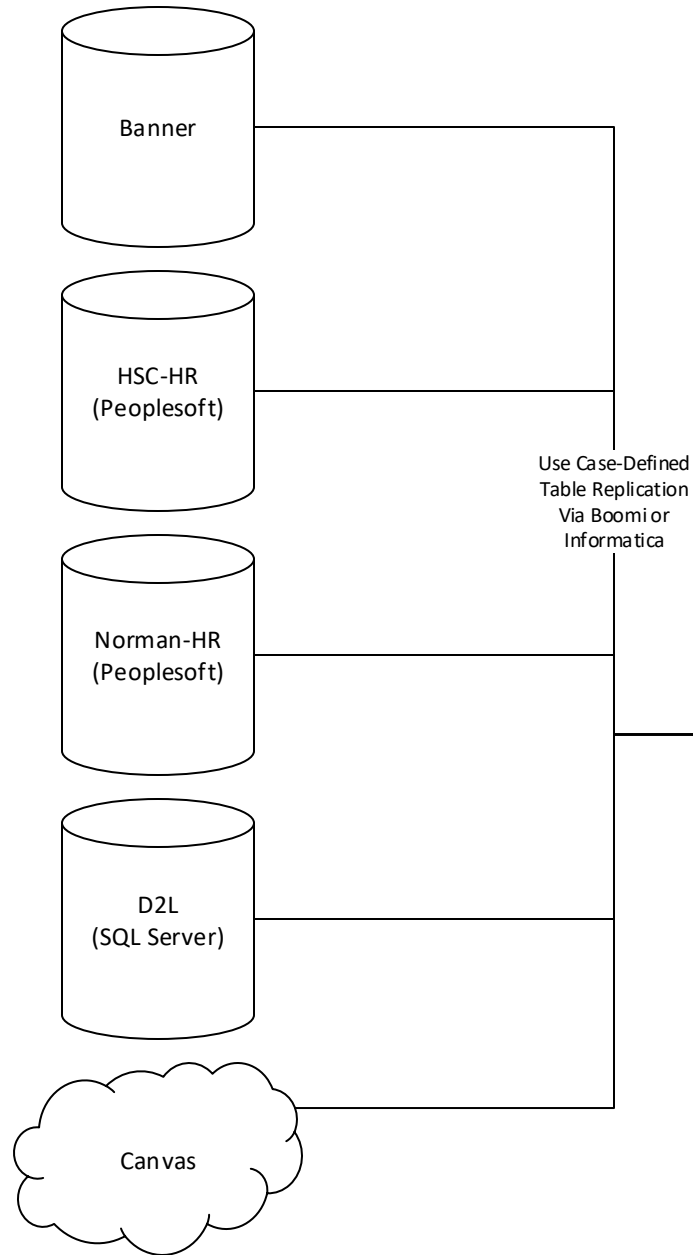
Next meeting: August 24, 2017, 8:30-10:00, BL 339

Presentation: Krystal Golding-Ross—College of Education Salesforce project

Data Services: From Source to Report

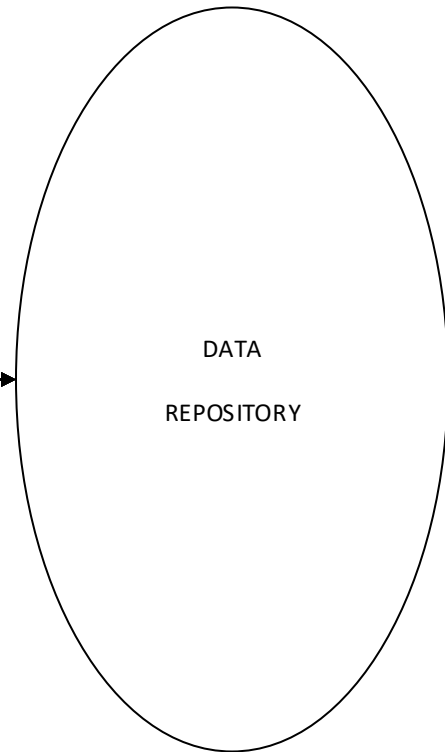
Source Systems (On Prem and Cloud)

Current list of
Approved Sources
(adding more over
time)



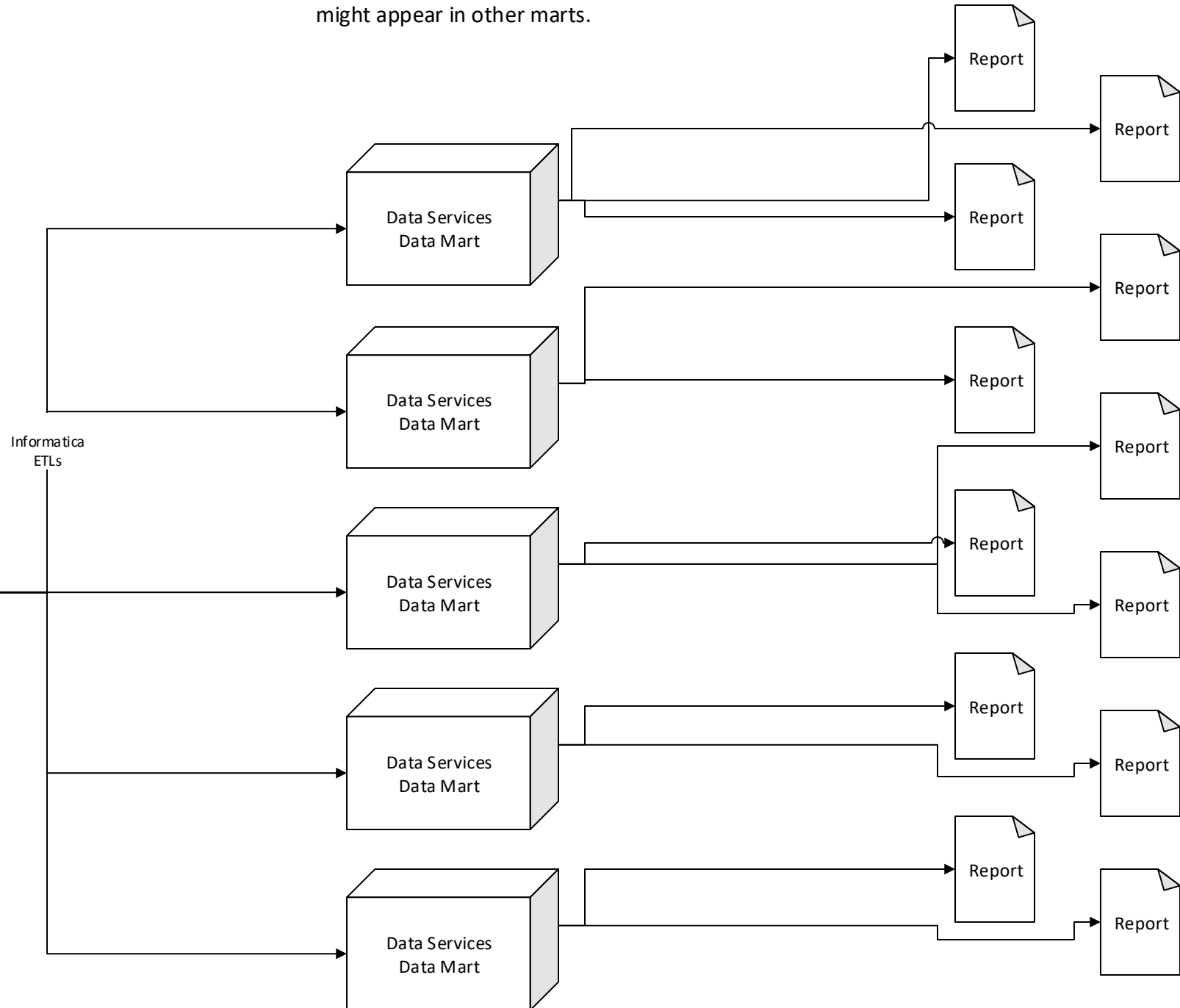
Data Repository

Replicated source tables, no
translation or massaging.
Does include loading
metadata to streamline Mart
creation



Data Marts (Report Information)

Custom-built information hubs. Data
can be translated, truncated, joined,
aggregated, and calculated, then
placed in an area where approved
users have access. More or less
robust versions of the same data
might appear in other marts.



Reports/Dashboards

Marts are built to provide
information in a tool-agnostic
way. The same mart might be
used for reports in Cognos,
PowerBI, SAS, Tableau, AWS
QuickSight. The user and
reporting tool do need access
to the mart.

