

Data & Reporting Team (DART) Meeting Minutes, 10-27-16

EL 216, 8:30-10:00 AM

Minutes: The minutes from the 8/25/16 meeting had been approved prior to this meeting via OneDrive.

To speed up posting of minutes to the DART website between meetings, virtual approval of minutes will be done one via OneDrive. Minutes will be posted to OneDrive within two weeks of a DART meeting, and members will be given two days to review. The Comments feature can be used to make motions to approve, second a motion to approve, or make another comment. Proposed changes can be made to the Word document. If, after two days, there are no Comments (including motions to approve) the minutes shall be considered approved.

Brendan Klein, ESFS/OAR--SAS Demo, Q&A

Brendan gave a demo of how OAR uses SAS Enterprise Miner for predictive modeling to better understand the recruitment landscape and help target 'best fit' students to improve recruiting efforts. David Wilkins encouraged others who may have interesting BI projects to consider giving demos at future DART meetings.

OneDrive Migration— IT's Bruce Alcock gave a presentation on the new Sharepoint Online and Office 365 Groups at a recent CITL meeting. David Wilkins will meet with Bruce about migrating DART content out of David's personal OneDrive this fall.

DART Website is 'live' - ou.edu/dart

The DART website is now live. In addition to DART minutes discussed above, subteam leaders are to send David their subteam minutes in a timely fashion. David will update website the 2nd and 4th Mondays. The DGCC site will link to the new DART site. David also solicited ideas for adding links to the DART website.

Cognos License Renewal 2017

Ellucian Cognos licenses expire in May, 2017, and the renewal period has been for three years. IBM Cognos licenses are renewed annually in June. IT's intention is to move all Cognos licenses under IBM, which is 138% cheaper. David mentioned that it might be wise to get on the radar (if it's not already on someone's radar) a complete review of Cognos license and report utilization in order to make a wise license renewal decision next May/June. It's possible that some Cognos licenses are unused or underutilized. If a small fraction of reports are used by most people, is there a more cost-effective platform for those reports? Can fewer licenses be renewed and the money saved be spent on tools that fill another niche? A DART subteam may choose to partner with IT and others in a Cognos license usage review, and may want to help make a renewal recommendation. The DART Community Support Subteam has looked at Cognos licensees as a side task in one of their projects. The upcoming Cognos 11

migration and orientation sessions may also help to better understand intended anticipated future Cognos usage.

Ellucian Analytics ‘Ethos’ Webinar recap

David Wilkins gave a recap of the recent Ellucian Analytics ‘Ethos’ webinar. Ethos: is best suited for institutions that have all Ellucian components, sits atop proprietary Ellucian data architecture, and uses Tableau as reporting front-end. Because OU uses many CRMs, and has Peoplesoft HR and Finance, Ethos would not be a solution at OU.

Data Platform Update—Jeff Wall

Jeff Wall gave an update on the Data Platform. IT gave a Star Schema (based from Informatica raw data layer) presentation to the College of Education to show Dean Garn what data could be useful for BI usage. Currently the raw data layer contains some PeopleSoft HR, some HSC HR, and a small amount of student data. Data can be added on a business ‘use case’ basis. The MuleSoft contract is being renegotiated.

Data Request Process Flow Update—Jeff Wall

Jeff Wall presented the Data Request Process flow used by DRRG and DGCC (attached at end). The flow did not contain any DART review until the end of the process, during the IT execution phase. Aaron Biggs suggested the point where the DART Data Review Subteam could interject input, citing a recent meeting with David Wilkins, where it was proposed that DART Data Review may be able to review package materials somewhere between Steps 8 & 9 (perhaps a new Step 8A), possibly as an extra layer in the DGCC review process so that DART aids DGCC. This review could be done virtually, allowing DART Data Review members to comment. It was agreed that if there was a two-day turnaround for the DART input, that it would be possible. The main objective would to allow for a DART review prior to IT execution in a way that didn’t slow project progress. Aaron will follow up on this possible revision.

Student Support Portfolio Update—Glenn Crouch

Glenn said that a new committee had been formed, called the Student System Portfolio Committee, chaired by Chris Kennedy. This new group replaces the former OCRC to examine and prioritize requests for reports, enhancements, and interfaces to the student system. Projects that are over 20 hours will be sent to the IT Project Governance Board while projects that are 20 hours and under will go to Andrea Eden’s team. Andrea will decide which projects go into which queue.

DART Subteam Updates

- **Communications—David Wilkins:** showed a draft of a communication matrix, listing different types of communication for the reporting environment, those responsible for making such communications, the audience, the communication method, etc. The goal is to identify all communication needs, and be sure all bases are covered. A draft will be posted to OneDrive

soon for others to review and comment. Remember that this team is available to help communicate issues involving the reporting environment. A volunteer was solicited to replace Misty Rhodes, who is no longer at the university. (Update: Brendan Klein volunteered to serve.)

- **Community Support**—David Wilkins: This group is developing plan to reach out to chairs and directors, to see if their data needs are being met, and if not, letting them know that Cognos resources exist. In many cases, the chairs and directors may have someone within their area to run pre-existing Cognos reports.
- **Data Dictionary**—David Wilkins: This group is working on a Data Overview document to help people understand and find data in the ODS. An excerpt of the draft document was shown
- **Data Review**--Aaron Biggs: The primary activity has been determining where this team might fit in the DRRG/DGCC review process, per the prior agenda item. He has been working with Chris Kennedy, who sits on both the DRRG and DGCC.
- **Data Training**—David Wilkins: This group is focusing on data quality issues within Banner. They have identified 5 types of errors that tend to be common and will reach out to Cognos authors to learn of any additional common data errors in their reports. Having clean data in ERPs like Banner is especially important as we move into the API world. After identification of any common data errors, this group will work on plan to remediate those errors and/or suggest possible data entry standards in some cases. A leader for this team will be sought. Jeff Wall volunteered Jennifer Bergeron to serve on this team. (Update: Eric Blazek also volunteered to serve on this team.)
- **Policy & Recommendations**--David Wilkins (reporting for Emilie Giustozzi): This team is surveying the OU landscape for IT- and data-related policy-making bodies and policies.
- **Reporting Tool Training**--David Wilkins (reporting for Susie Irwin): A Cognos Consumer Overview training was held on 10/25. Sessions will be scheduled to help Cognos authors convert Cognos Query Studio reports to Workspace Advanced reports in advance of the Cognos 11 upgrade, as Query Studio is not a part of Cognos 11.

Other Updates

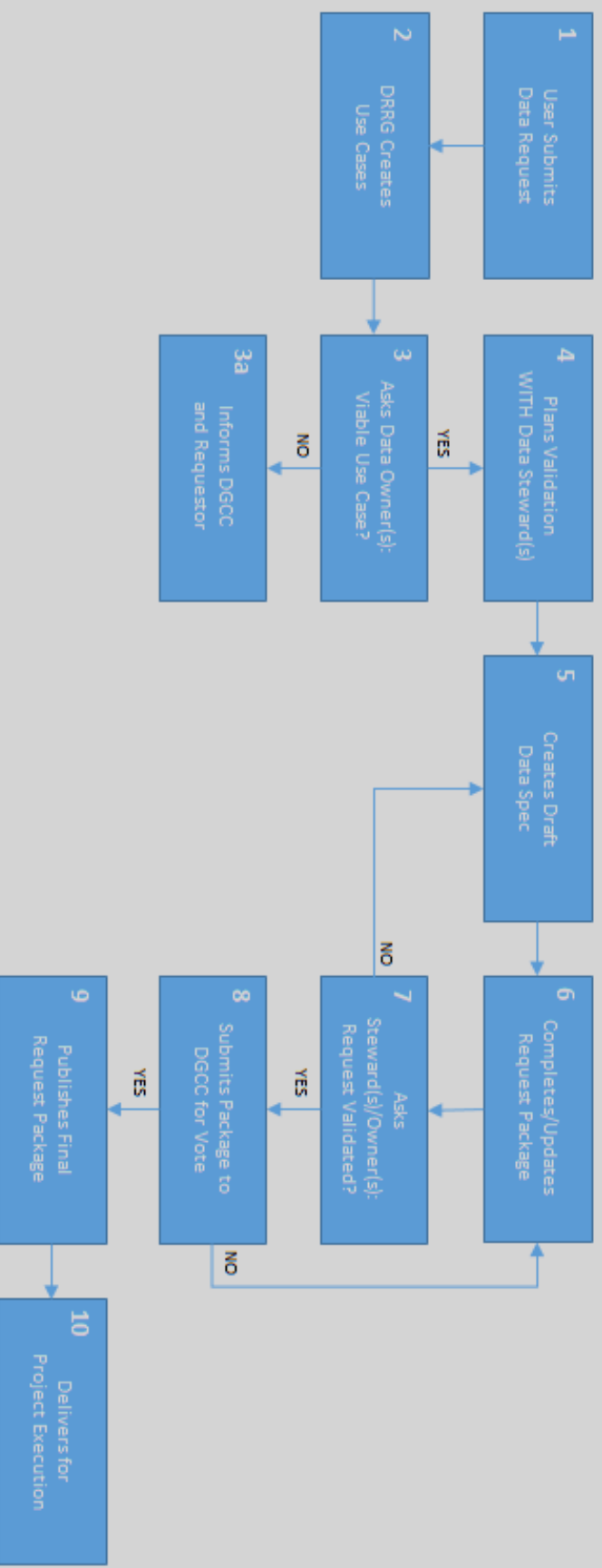
- **Portal**—Aaron Biggs

Aaron reported that the One U Portal should be fully operational by March. An Advising portal is in development, and a faculty portal is on-deck.

Next meeting: December 15, 2016, 8:30-10:00, EL 216

ATTACHMENT: Data Request Process Flow as shown by Jeff Wall.

Proposed: Data Request Process



Required Process Documents

- **Executive Summary:** Includes basic request information, delivery mechanism and associated use cases.
- **Data Owners List:** Outlines Data Owners and Data Stewards for broad data categories (Financial Aid, Payroll, Course Management, Bursar, Reporting etc.).
- **Validation Checklist:** Lists all required validation items for DGCC approval as well as additional validation items agreed upon in process step 4.
- **Data Spec:** Details data required to fulfill the request in appropriate data format (based on delivery mechanism, i.e. API, star schema, ...)
- **Supplementary Materials:** Captures key information about the Data Spec, such as caveats, assumptions, data limitations (refreshed every week, for instance), data classification details, and any key implementation information.