Data & Reporting Team (DART) Minutes, 08-23-18
Bizzell 339

Update on New Data Architecture for Reporting: Jeff Wall, Managing Director, Data Services and Business Intelligence, IT (See attached graphic entitled 'Data Services: From Source to Report' for more details on this project. Capitalized items below refer to items on the graphic)

Jeff gave an update on many IT-related topics.

Source System: All of the Source System data is in the Data Repository.

Data Mart: Focus has been on Financials Data Mart due to current focus of President Gallogly. Terri Pinkston, Stewart Berkinshaw, Kevin Boydstun, and Amy Redden are working on the project. Glenn Crouch is leading a pilot reporting project with the Power BI reporting tool. Quick, iterative reports have been produced. Expense reports are finished and Revenue reports are on deck. After the Financial data mart is complete, there is a long line of additional marts with Admissions, others.

Reporting Tools:

Power BI was chosen as visualization reporting tool for Financials project in what was termed as an 'Unproject' because a decision was needed, and was made by a previous vice president. The Power BI Gateway sits on-premise, reads data, and makes data available to a cloud BI. Power BI is being used by IT, Graduate College, The Foundation. Power BI presents security challenges as reports are published to SharePoint but can then be shared with others. Tracking those 'shares' to restrict access to those who should be viewing them is difficult.

Cognos has been used extensively to report student data and will continue to be used due to the sheer number of existing reports and the effort required to convert those to another reporting tool. Cognos is/will be used for standard list reports. Power BI is better at visualizations. David Wilkins asked if IT had checked new capabilities offered by Cognos Analytics for dashboards, visualizations, etc., since that was one reason given for a fall 2017 implementation so that new capabilities could be explored in spring 2018 and perhaps rolled out to the user community by fall 2018. Jeff Wall said it was unlikely that Glenn Crouch's group had time to explore new functionality since IT had reduced resources for Cognos support with only .6 FTE for Cognos Framework Manager. IT would unlikely have time to explore new Cognos functionality and those explorations would be up to Cognos Users.

Tableau is being used by OBA.

Domo was examined by Jeff Wall, Aaron Biggs, and others. While the output was promising, the tool exposed underlying data to great risk.

Salesforce Integations by IT: College of Education, Retention (OBA, phase 3 or 4), Internal IT, PACS, Law.

Jeff mentioned that governance limbo with the change from the disbanded Data Governance Coordinating Committee (DGCC) to Regents Data Governance Committee (R-DGC) has caused delays,

including security and others. In the interim, IT is asking Data Owners for data approval so projects can continue.

Informatica: IT has discovered that Informatica is powerful but has much overload/overhead for the way it used at OU. Typing code is faster than using Informatica, which can take 1.5 hours per table load. IT is looking at Informatica Cloud Services and other solutions. IT is looking at using Snowflake atop Amazon Web Services, but that would replace the storage component only. A Proof of Concept will be done in October.

If a suitable replacement is found, Informatica projects may be migrated but that is also costly.

For reporting table availability, Jeff mentioned that IT is using Flip-Flop Switch Joins so that even as one table is being loaded the other 'twin' table is available for reporting.

Jeff also mentioned the need for a Chief Data Officer and making the role of Data Owner part of certain job descriptions.

Academic Technology Expo, 2019 David Wilkins mentioned that ATE 2019 will be held in early January 2019. The Administrative Staff Track was initiated in 2018 to gave staff a forum to show/share their work, with great success. David encouraged DART members look for the ATE Call for Proposal e-mail (sent from IT) in October and choose the Administrative Staff Track as a track choice.

Upcoming Fall Data/Reporting Activities No special activities were mentioned. The Student Team continues to work on Banner 9.

HR Data Group David Wilkins mentioned that an HR Data Group has been created to collaborate, coordinate, and enhance, solve problems related to HR data. The group membership is set: Terri Pinkston (Assistant Vice President & Controller, HR Data Owner), Marcy Fleming (Interim VP, HR), Michelle Boydstun (Payroll), Glenn Hansen (OBA), Aaron Osei (HR/OBA), Yan Zhou (IRR), David Wilkins (IRR), Diana Fitzpatrick (APR). Susannah Livingood and Stewart Berkinshaw also get meeting invitations, minutes, and a standing invitation to join a meeting when they deem necessary.

Cognos Legacy Code? David asked whether cohort changes and other code changes are made in existing Cognos reports to ensure accuracy as codes, policies, etc. change. Some areas may be doing a better job maintaining legacy Cognos reports than others.

DART Subteam Updates

- **Community Support** (David Wilkins). This subteam has not met during summer. Will meet soon. David will e-mail a reminder of Cognos support resources to the Cognos Community this week. This group has assumed responsibility for providing communications to the reporting community if no other group is meeting those needs. David asked whether there were any DART/Cognos Community Support or communication needs. None were mentioned.

- **Data Dictionary** (David Wilkins) This subteam has been defining columns in Admission_Application and other Admissions tables and will be sending those to IT to push into the Oracle web app soon.
- **Data Review** (Patti Otto) This group has been dormant due to changes in governance structure and pending guidance (as has the DRRG).
- **Data Quality & Training** (Brendan Klein) With governance in flux at the moment, this group is continuing to add data quality issues/concerns to a master list. Once governance is working more smoothly, it's hoped some of those can be addressed.
- **Policy & Recommendations** (David Wilkins) This group has been in a holding pattern with the advent of the R-DGC and is currently uncertain of future activities pending direction of R-DGC.
- **Reporting Tool Training** (Susie Irwin) Cognos Office Hours 9/6/18 & 9/20/18. Additional author trainings will be held. Susie will also be conducting author training for Financial Aid, per request of Kathi Robinett.
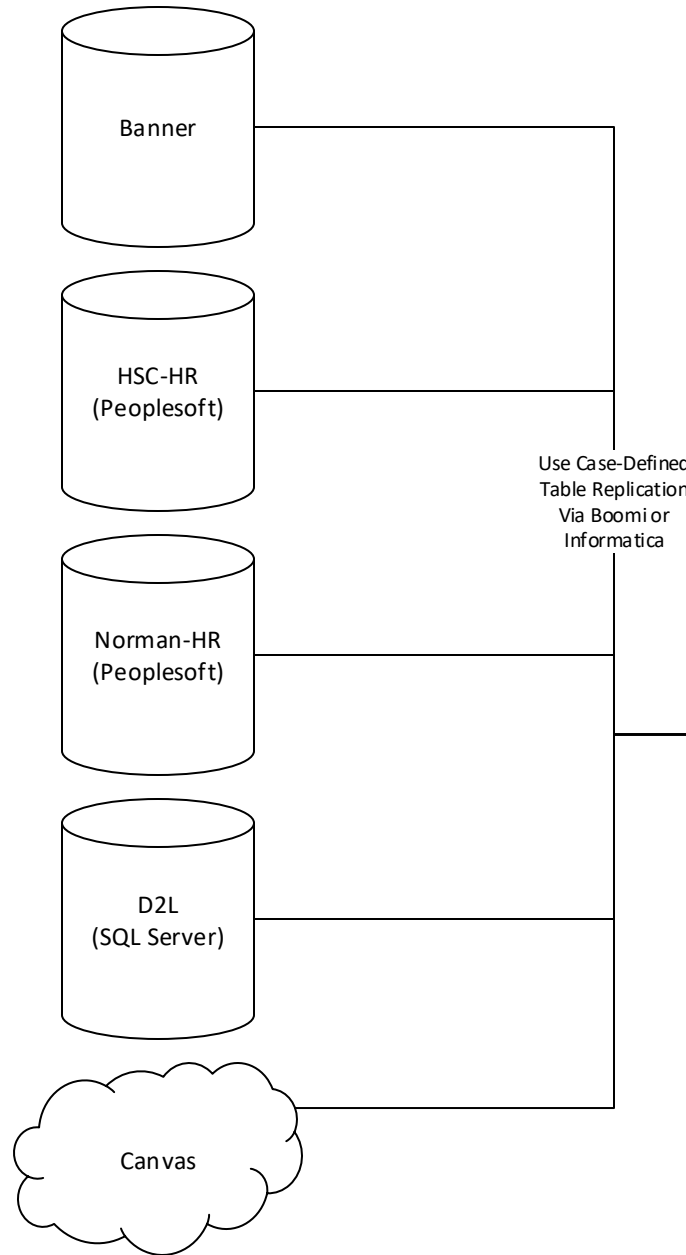
Other Issues? None were mentioned.

Next meeting: October 25, 2018

Data Services: From Source to Report
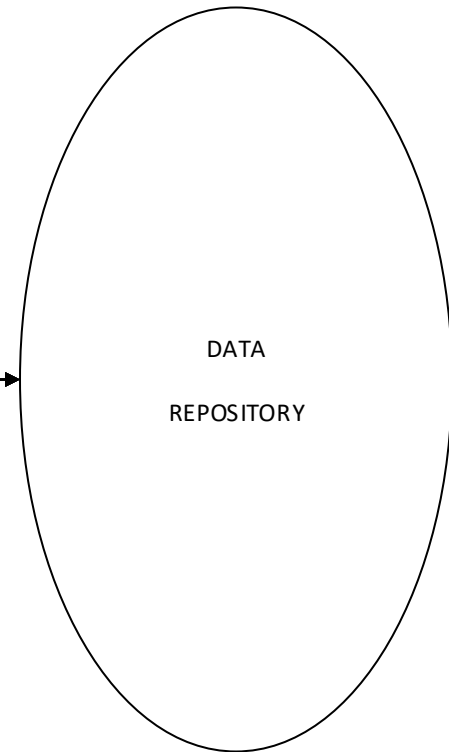
Source Systems
(On Prem and Cloud)

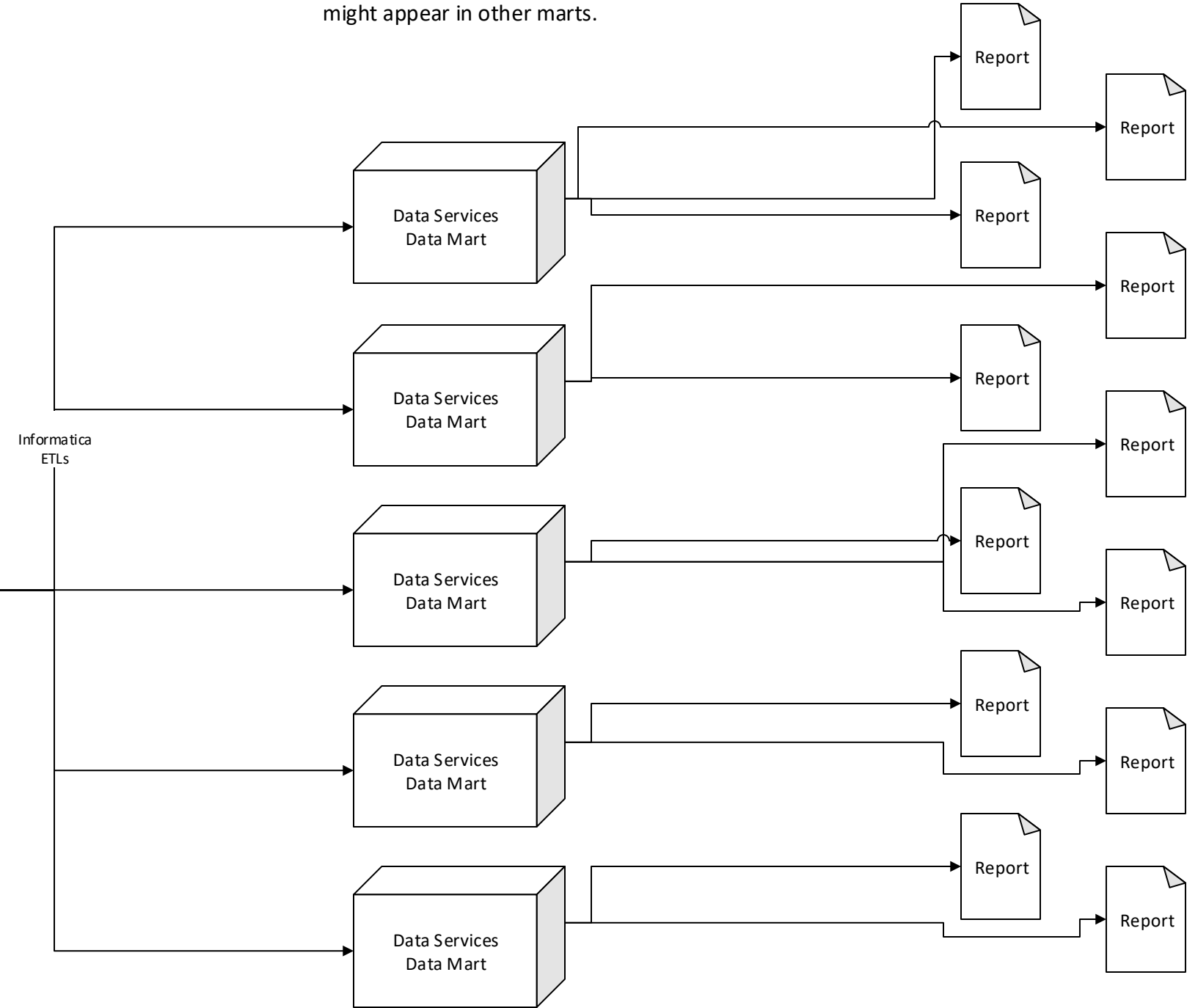Current list of Approved Sources (adding more over time)

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.

Banner

HSC-HR (Peoplesoft)

Norman-HR (Peoplesoft)

D2L (SQL Server)

Canvas

Use Case-Defined Table Replication Via Boomi or Informatica

DATA REPOSITORY

Informatica ETLs

Data Services Data Mart

Data Services Data Mart

Data Services Data Mart

Data Services Data Mart

Data Services Data Mart

Report

Report

Report

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