Data & Reporting Team (DART) Meeting Agenda, 08-25-16
Devon Hall, Room 220, 8:30-10:00 AM

Welcome new members: Emilie Giustozzi (Policy & Recs Subteam Leader) and Susie Irwin (Reporting Tool Training Subteam Leader)

Minutes: review and approve. The minutes from the meeting on 06/23/16 were approved.

Cherwell Overview: Presented by Justin Davis. Highlights:

- Scope for Cherwell service desk does not include S2.
- S2 (OKC, Tulsa) staying on ServiceNow for 3 more years. IT will try automating data exchanges between the systems at some point in time.
- Customizations and ServiceNow product roadmap necessitated change to Cherwell.
- Customers are encouraged to use itscnorman.ou.edu to enter the Service Catalog.
- Customers can access the Cherwell portal to view their incidents via ou.edu/itsupport. The portal, and other service offerings, can also be accessed via needhelp.ou.edu.
- To create an incident request, you can e-mail needhelp@ou.edu, which will generate a ticket automatically, and the ticket will be routed to the appropriate IT personnel for response.
- The Chat feature on itscnorman.ou.edu is popular.

OneDrive Folder Migration. New Sharepoint and Group capability are coming online. A presentation on these platforms will be made at an upcoming CITL meeting. The current DART working folders originated inside of David Wilkins' personal OneDrive because the new Sharepoint and Group capabilities were not ready. The DART folders will be migrated to the new Sharepoint or Group (whichever is appropriate) sometime this fall.

Big 12 BI Conference? David Wilkins has suggested the possibility of a Big 12 BI conference to contacts at the University of Texas, who were interested in the idea. David also mentioned this idea to Susannah Livingood, who may also mention it at upcoming Big 12 IR/Business meeting to see if the idea can gain traction there.

DART Website Review. David Wilkins gave an overview of the DART website, which is scheduled to go live on September 8. Stock photos were used, and a few changes will be made before the website goes live. The url will be ou.edu/dart. Jeff Wall suggested that the Contact Us link be routed to people in more than one department. Patti Otto suggested that the DART Communications Subteam would be a good choice. David will set up the Contact Us feature so that it is routed to those in the DART Communications Subteam. DART members were encouraged to send David any additional ideas for revisions or improvement. Emilie Giustozzi volunteered to maintain the Policy & Recommendations portion of the website.

DART Subteam Updates

- <u>Communications – David Wilkins:</u> This subteam is continuing to revise/polish 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. Examples of 2 areas where we can do better: Publicizing new reports available to general

public, and publicizing new data objects that are available. If DART members can think of other communication shortcomings, please let this team know. Also, the team may recommend expanding use if IT Alerts for major ODS data problems, as was done in the one instance recently. DART members were encouraged to remember that this team is available to help communicate issues involving the reporting environment to the broader reporting community.

- Community Support—David Wilkins: This team created a Qualtrics survey, sent to Cognos authors, to learn of any reports stored personal or department folders that may be useful to other areas on campus. May do Round Two of the survey for reports that may be useful to administrative offices but may not be appropriate for all Cognos licensees to access. Any such reports could be placed in a folder with permissions that are restricted to admin offices only.
- Data Dictionary—David Wilkins: This subteam recently published 33 Data FAQs to Cognos Sharepoint. Creating a Data Overview Guidance Document, to help people find data in the ODS.
- Data Review—Aaron Biggs: The DRRG will be meeting to further review/revise the Data Request Process. The team is also reviewing several data requests.
- Data Training—David Wilkins: This subteam is determining its scope: ERP data entry training vs reporting layer data training or both. Next meeting is Friday.
- Policy & Recommendations—Emilie Giustozzi: This subteam is surveying the Norman and Tulsa campuses for current policy-making bodies and policies, and working with Patrick Livingood, Chair of the ITC, who has created a list of IT- and Data-related committees for an ITC project. By working together, synergies can be developed and the ITC effort can be used to save the Policy & Recs subteam some time.
- Reporting Tool Training—Susie Irwin: Cognos 11 has a very different user interface than Cognos 10.2, and will no longer support Query Studio. An analysis of Query Studio reports still in use needs to be done so those reports may be converted to Workspace Advanced. Cognos 11 will be rolled out next summer. This group meets next week to determine training strategy and offerings for this fall.

DART Subteam Engagement Process Flows

David mentioned that having formalized DART subteam engagement process flows, similar to the Data Request Process flow now underway, would be beneficial, and would help ensure that DART subteams contribute to the success of the OU reporting environment at appropriate points in meaningful ways.

Other Updates

- Request Approval Flow & Student Support Portfolio: Final reviews taking place and will be presented at a future meeting.
- Student Portal. Aaron Biggs said that the soft rollout has taken place, the new portal will run in parallel with Ozone this fall, and then Ozone will be decommissioned leaving the new One portal going forward alone next spring.

Next meetings: Future meetings moved to EL 216
October 27, 8:30-10:00, EL 216
December 15, 8:30-10:00, EL 216