

## **BI Project Coordinator Meeting Notes**

### **September 16, 2016**

Attending: Kathy Luker, Mary Kirk, Mark Treiber, Mike Bubolz, Mark Clements, Peter Reese, Dale Matenaur, Sally Eckwright, John Standard, T.J. Teegan, Bill Minser, Robert Flum, Jen Chapek, Jeff Ohvall, Erica DeBord, Howard Haynes, Jeff Shokler, Pauline Delfeld, Shawn Voth, Scott Larson, Lisa McGrath, Andy Cunningham, Amy Crist, Cati Cederroth (Huron), Emily Howe (Huron), Barry Nuckolls (Huron), Don Ferguson (Huron), Callen Raveret (Huron), Paul Colucci (Huron)

Facilitator: Kathy Luker

Note taker: Mary Kirk

#### **A. Huron Team**

1. The Huron team introduced themselves:
  - Cati Cederroth – Project Manager
  - Emily Howe – Change Management and team manager for Higher Ed
  - Callen Raveret – Oracle Analyst – student data
  - Barry Nuckolls – Oracle Architect – student data
  - Paul Colucci – Oracle Architect
  - Don Ferguson – Oracle Architect – HCM and SFS

#### **B. Review Project Scope and Deliverables (Cati)**

1. Cati reviewed the project scope and major deliverables: Get off of IR and implement OBIEE 12c as UW's replacement of choice for IR.
2. The current 8-week project: Initiate and analyze phases of the IR replacement. Huron is working closely with the campuses in the following areas:
  - Shared Queries
    - Reviewing OBIA HCM and Financials (fit/gap) as a possible replacement. Out of the box OBIA provides a data warehouse, ETL's, repository (RPD), reports and dashboards. The data warehouse is dimensionally modeled – critical to reporting.
    - Assist the UW-Madison BI and Reporting Team, with a goal of producing an implementation plan for “build” or “buy” – depending on the fit/gap results.
  - Student Pilot
    - Analyze current data sources from the “early adopter” campuses to determine common model “templates” for 3 different types of solutions: Campuses already using a dimensional model, campuses using a partial dimension model (RDS), and campuses not using a dimensional model.
    - Assist early adopter (pilot) campuses in documenting requirements and building implementation plans to establish the next phase of work.
  - Infrastructure

- In an effort to ensure each campus work in the repository on a daily basis – review and recommend architecture details for development, test and production environments.
- Review/recommend approach to configure OBIEE authentication using the Wisconsin federation of campus-specific SAML2 IDPs.
- Review/recommend approach for OBIEE authorization.
- Assist with implementing RPD change and configuration management processes.

### **C. First 2 Weeks – Updates and Next Steps (Cati)**

1. Shared Queries
  - First 2 weeks: Held meetings with the UW BI and Reporting Team to begin work on a “build” or “buy” comparison – with 3 possible options in mind: develop OBIEE from scratch, implement OBIA and customize as needed, redevelop EPM as a true dimensional warehouse.
  - Next steps: Continue and complete fit/gap comparison of delivered OBIA against shared queries. Complete time-cost model for options.
2. Infrastructure
  - First 2 weeks: Held briefings with central IT experts from the Identity and Access Management group; explored current state of server, hardware and RPD to consider development recommendations.
  - Next steps: Continue to review recommendations, partnering with central IT experts.
3. Student Pilot
  - First 2 weeks: Held 7 meetings with early adopter campuses and the CDR team to understand current reporting environments and data models. Requested additional metadata extracts from campuses to review future state.
  - Next steps: Prepare high level current state diagrams and distill metadata related to campus BQYs to collect information needed to prepare future state recommendations and create a common data model.
  - Summary of meetings: UW-Stout, UW-Milwaukee and UW-Eau Claire are the 3 RDS campuses; UW-Platteville has OBIEE112g in production and use EPM-dimensional modeled data warehouse, and is currently testing OBIEE 12c environment; UW-Green Bay and UW-Whitewater have no data warehouse.

### **D. Implementation Plans (Cati)**

1. Recommendations to assist your campus with local process of converting from IR – overview of the project and plan to make the project happen
  - Produce documentation to provide an understanding of current state and what the future state would look like in architecture, reporting, analysis process, security, application support team, change management/training.
  - Produce documentation on an implementation plan:

- Implementation approach: big bang, waterfall, agile, etc.
- Schedule: timeline/work effort
- Cost estimate
- Key success factors: Huron adds what they know with staff (data validations, etc.)
- Change management process
- Dependencies: competing initiatives that impact schedule/timeline/effort – either functional or technical
- Major phases and tasks of implementation
- Project management overview
- Staffing requirements: list of roles/responsibilities
- Question: Will each campus have to develop their implementation plan, or will Huron assist in creating this? Answer: Huron will work with each of the 6 pilot campuses to help in creating an implementation plan – with the hope these can be used by the other campuses.

#### **E. Key Points for Campus Executive Sponsors (Cati)**

1. Share this presentation with your campus executive sponsor(s). Review the scope and progress plans described in this document.
2. Alert your campus executive sponsor to your resource needs.
3. Kathy and Lori presented details on this project to CSRG, who support the fit/gap effort to compare “build” or “buy” (OBIA).

Question: Can a central “location” be created where campuses can review the status/progress of this project and where campuses can load their information? Answer: We do have “Box” today, and will examine additional effort on this topic with Huron, Kathy and Mark T.

#### **F. RPD Training (Kathy)**

1. The second offering of RPD training will be held Oct. 26-28. After this session, all campuses will have sent participants to this training with the exception of Colleges/Extension.

#### **G. Feedback/Additional Questions**

Question: Does Huron anticipate additional meetings with the pilot campuses? Answer: Yes, either remotely or on the specific campus.

Question: Will HRS and SFS data be made available for campuses to use (either via the RPD or in the presentation layer of OBIEE)? Answer: Yes – data models will be created from the UW-Madison BI and Reporting Team for campuses to use. Current analysis is being done on the HRS-EPM and SFS BQs in this effort. It is critical that users are able to combine HRS, Financials and student information.

Question: What is the timeline for getting off of the IR Workspace? Answer: Kathy will bring this topic to the next Executive Sponsor meeting with the hope to have an answer in early December.