



**Project IUUN0020 - Query Repository View Enhancements
February 25, 2003 - Mining & Minerals Bldg. - 3:00 – 4:00**

ATTENDEES: Administrative Users Group
PRESIDING: Jayna Cheesman and Kathy Hamperian
PROJECT COORDINATOR: Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> • WebFOCUS and Sybase Conversion 	<ul style="list-style-type: none"> ▪ Angela Back opened the meeting and turned it over to Jayna and Kathy. ▪ Jayna said the WebFOCUS and Sybase conversion is almost complete. She explained that IT (Information Technology), beginning with the Administrative Users Group, would like to establish workgroups to identify issues involving reporting against the Oracle Query Repository of the Data Warehouse. For instance: <ul style="list-style-type: none"> ▪ 1) Are there elements that need to be divided out/parsed because reporting off the first character is all that is required, ▪ 2) Would pre-joined views be beneficial, ▪ 3) What other types of data views would be beneficial, etc.?
<ul style="list-style-type: none"> • Volunteers 	<ul style="list-style-type: none"> ▪ Currently the Query Repository includes data from FRS, HRS, SIS and FES. ▪ Kathy said the data has been dumped to the repository and now volunteers are needed to assist IT in brainstorming the changes that need to be made to improve the Repository for user reporting. For instance, currently the Credit Account is labeled TBTCacct and needs to be renamed with a more English-like name. ▪ Someone asked about the transaction table and asked why the fields were not alphabetical, Department is at the bottom of the list. Kathy explained currently the Repository is a dump of the structure of the mainframe tables, and this is part of what the volunteer groups will be addressing. She said she would like to avoid having multiple views of the same data,

AGENDA ITEM	DISCUSSION
	<p>and part of the charge would be to come to agreement on the data views.</p> <ul style="list-style-type: none"> ▪ Kathy said no meetings dates or locations have been established yet, that IT is querying the group for interest in participation.
<ul style="list-style-type: none"> • Report Tools 	<ul style="list-style-type: none"> ▪ Jayna said IT would like to explore the possibility of standardizing on reporting tools. Currently there are large pockets of Brio, WebFOCUS and Crystal users. IT would like to start with an inventory of the products that are being used now, and ultimately evaluate the features of one tool against the features of another. For instance, the Controller's Office is using Crystal and has created some complex reports. Does Brio have the same capabilities? Will cost be an issue for using one product versus another? ▪ Kathy said having IT create pre-defined reports that could be used by several users would be something to look at. There are different levels of users and it may make sense to start with the most complicated reports and work down to less complicated reports. She said she is interested in how many travel transactions are posted to an account, how many FTE for each account, etc. ▪ Someone asked if security would be down to the department level and Kathy said yes. <ul style="list-style-type: none"> ▪ ACTION: Kathy will check HRS security, and where it stands and let Angela Back know so she can inform the Administrative Users Group. ▪ Kathy explained the groups should identify reports that can be changed with minimum effort and shared by others. Of course, this would be tool dependent. IT wants to put this power in the users hands.
<ul style="list-style-type: none"> • Warehouse Projects 	<ul style="list-style-type: none"> ▪ Jayna talked about the GASB Project, which is part of the Query Repository. The project involved automating the creation of the institutional financial statements. The time to create these statements has been reduced from about three

AGENDA ITEM	DISCUSSION
	<p>(3) months to hours. In addition, the statements are more accurate. Data quality reports are run on a scheduled basis to check quality. Phase II of the project will be to modify the financial statements to reflect both current and prior year amounts.</p> <ul style="list-style-type: none"> ▪ Jayna said the Course Management Data Mart (CMDM) will involve taking snapshots of data over periods of time. These will be used primarily for trend analysis, which is a different function than operational reports done against the Query Repository. ▪ Jayna said Connie Ray, Ruby Watts and Dale Austin are working on mapping the financial departments with the academic departments. This is a huge undertaking due to multi-disciplinary programs. Currently, the processes to do this are not being handled consistently across departments. The group is trying to define a schema that can be used by everyone.
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ Access to the data can now be pushed down to more users. Security will be at the department level and not at the account level in the financial systems (FES, FRS and HRS). ▪ Kathy said if it would be useful to write a report that crosses areas, IT may look at this using WebFOCUS. ▪ Kathee Norris asked if Beta93 reports would remain. Several of her users are interested in just viewing the reports. Kathy said Beta93 will remain for the reports that are being produced this way today. IT would like to be able to email reports to the users and this is something the groups should discuss and explore. ▪ Bob Marshall said users should look at repetitive reporting or tasks, or files they may have to dig through. For instance, if they have to dig through fiche to get the data needed, they may want to consider putting the data in the Query Repository. Reporting on the data will be much easier and quicker.

AGENDA ITEM	DISCUSSION
	<ul style="list-style-type: none"> ▪ Jayna said to look at what data goes together, and what makes the most sense for viewing. Does the data need to be looked at over fiscal years, calendar years, etc.? Is it possible to replace manual processes and screen prints? ▪ Kathy said Arts and Sciences and RGS currently receive extracts of the mainframe data. In addition, they maintain other databases of information. What information do they have that should be in the data repository for use by others? ▪ Kathy said no mainframe data has been excluded from the Query Repository. Incremental updates are performed every night. As new elements are added to the mainframe (FRS, HRS, SIS and FES), they are also added to the Query Repository.
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ ACTION: Kathy and Jayna will compose an email for Angela to send to the Administrative Users Group: <ul style="list-style-type: none"> ▪ 1) What tool(s) and version(s) are you currently using to query the repository? ▪ 2) Would you like to volunteer to participate on one of the groups (Academic or Financial) ▪ 4) Responses to be sent to dclaunch@email.uky.edu
<ul style="list-style-type: none"> • Contacts 	<ul style="list-style-type: none"> ▪ Jayna Cheesman jayna@email.uky.edu ▪ Kathy Hamperian syskathy@email.uky.edu ▪ Deb Claunch dclaunch@email.uky.edu