



Query Repository View Enhancements (Project IUUN0020)

Academic Workgroup

March 31, 2003 - Hardymon Alltel Room - 3:00 – 4:00

ATTENDEES:

Paula Arnett, Janet Baynham, Linda Bradford, Jayna Cheesman, Yan Chen, Debra Claunch, Loretta DeToma, Lynda George, Kathy Hamperian, Janet Jones, Sally Jones, Keith LaVey, Christine Levitt, Gary Lindle, Ann Livingstone, Marilyn Lyons, Deborah Moore, John Pica, Barry Rankin, Diane Skoll, Lu Wang, Raleigh Watson, Nimmi Wiggins

PRESIDING:

Jayna Cheesman, Kathy Hamperian

PROJECT COORDINATOR:

Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> • Security Decisions 	<ul style="list-style-type: none"> ▪ Jayna asked everyone to introduce themselves, and tell what department or area they represented. ▪ Jayna said the purpose of the workgroups is to give Data Administration and the Database Administrators group feedback on the Query Repository views, changes to the Query Repository, and to report any problems. The goal is to identify any required changes and make them to the system at one time. ▪ The current security of the Query Repository mimics the security of the online mainframe systems. Security for FRS, FES and HRS will be at the department level, but not everyone has been given access to these views. Security cannot be applied at the account level. Areas that cross many departments will likely be given global access for reporting purposes. Those being given global access will be minimized and reviewed on an individual basis. ▪ Users must have mainframe access to get Query Repository access. ▪ HRS security should be in place by mid-April. ▪ If a user currently has global access to the Query Repository, but not to the mainframe and it is required, they should request this information from Ruby Watts' office. This can be requested using the form: http://www.uky.edu/Registrar/sisacc.html. ▪ Keith LaVey said there will eventually be documentation posted on the Reporting web site on how to get access to the Query Repository. The ID used on the mainframe will need to match the ID used for the Query Repository. Not all IDs match at this time, and the users will be contacted. Matching IDs are needed to help pull and duplicate the security from IDMS.
<ul style="list-style-type: none"> • Current Problems 	<ul style="list-style-type: none"> ▪ Kathy explained UKWHEREY@lsv.uky.edu will be used to convey general information about the Query Repository to the users. Memos related to the data not being updated yet, or global problems that may affect all users will be posted to this listserv. ▪ Kathy said, based on the responses from the Query Repository View Enhancements Financial Workgroup, several llistservs will be established, one for each reporting tool currently being used. This will include a listserv for Brio users, Crystal users, Infomaker users, Excel Query users, Access users, etc. ▪ Keith said REPORTING-L@lsv.uky.edu should be used for questions of a technical nature and primarily for the triage groups to address.

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	<ul style="list-style-type: none"> ▪ WFSUPPORT_L@lsv.uky.edu is for questions addressed to the technical triage team who support WebFOCUS. ▪ WEBFOCUS-L@lsv.uky.edu is for questions or concerns of interest to all users of WebFOCUS. If you have a new report you think someone else may be able to use, you can post the information to this list. If you've found a new aspect of the tool you'd like to share with others, it can be posted to this listserv.
<ul style="list-style-type: none"> • Report Requirements discussion 	<ul style="list-style-type: none"> ▪ https://reporting.uky.edu/ is the central web site that has been established to convey information about WebFOCUS, how to activate an Active Directory account, how to change an Active Directory password, contacts for special reporting requests, schema models and report views, directions on how to install Brio, and how to get the Oracle client. <ul style="list-style-type: none"> ▪ ACTION: Keith LaVey will add the various listserv addresses, and a link to the Query Repository web site, to the Reporting web site. ▪ Kathy said a list of views is available by selecting "Data View" from the drop-down list on this page. From the displayed list of views, information about the data element or column, along with a description of each element can be viewed. The DBA's are currently working on these descriptions. ▪ Kathy displayed the Schema Model for UKFRS and explained this is a graphical representation of how the data is linked together. ▪ ACTION: Users should let IT (Reporting-L@lsv.uky.edu) know if this is meaningful and if so, schemas will be created for the other views. Keith said most of these views are HTML friendly, but are not printable. The DBAs will be altering the format to Word format so they can be printed. ▪ Suggestions for other links or additional information that should be on the https://reporting.uky.edu web site should be sent to REPORTING-L@lsv.uky.edu.
<ul style="list-style-type: none"> • Listserv 	<ul style="list-style-type: none"> ▪ QRVE-ACADEMIC@lsv.uky.edu has been established for the QRVE Academic workgroup. This is a way for the group to communicate with each other for help in finding where particular data elements may be located, discussions of views users would like to see created or changed, etc.
<ul style="list-style-type: none"> • Web site 	<ul style="list-style-type: none"> ▪ http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVEIndex.html is the Query Repository View Enhancements web site. The minutes from each meeting, meeting calendar, members list and other information will be posted here. A link, "Report Requests", links to https://reporting.uky.edu/. ▪ Jayna said this is not a closed committee and if the members know of others who should be added to the committee, please forward their name and email address to Debra.Claunch@uky.edu.
	<ul style="list-style-type: none"> ▪ Kathy said IT is interested in knowing what each user needs to do their job, what do they have today, what do they need yet, etc. The current Query Repository is a data dump of what is on the mainframe. The views and groups that will be most beneficial to the users need to be identified. If there are things about the data that don't look right, these should be identified. The group will decide what should be addressed first. Jayna said Ruby has asked for some additional data from SIS to be added to the Query Repository. ▪ Kathy said, per a decision of the Area Security Liasons, no new users will be added to the Query Repository until the security is put in place. <ul style="list-style-type: none"> • ACTION ITEM: For the April 14, 2003 meeting, users should think about what data they don't currently have access to, what problems are they trying to solve, what is needed to get the data they needed, how to do things and share the information, etc. ▪ Kathy said this workgroup would set priorities on the views that need to be created. She said decisions made by the DBAs for the system as to what is best and fastest may not necessarily be the best for the users.
<ul style="list-style-type: none"> • Report Tools 	<ul style="list-style-type: none"> • Jayna talked about the reporting tool options, and said no one tool would answer the needs of everyone. She said high-

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	<p>end users are using SAS. Low-end users can probably use Excel Query or Access. Mid-level users are using Crystal or Brio. She said the Office of Controller and Treasurer is using Crystal. Based on the responses received earlier, there are currently more Brio users than Crystal users. Kathy said there have been requests for training and education on the tools, and more importantly on the data. IT cannot guarantee support in each of these tools and is trying to narrow the focus. During the Financial Workgroup meeting Chris Donahoe said it is hard to share queries if users are not using the same tool.</p> <ul style="list-style-type: none"> • Kathy said they would like to pursue parameter driven reports that can be shared by many users for such things as the current staff FTE or current student count. • Raleigh asked if WebFOCUS was being considered as a report tool. Kathy said no new people are being given WebFocus access unless they need to run reports. Currently there is no available training on Web FOCUS. She said it is not a friendly tool for users. However, Keith said all levels of users can use Web FOCUS to produce simple to very complex reports. • Raleigh asked what is needed for the other tools. Kathy said they are PC-based and connect to the Data Warehouse. Queries are run and the data is loaded to the desktop. She said Excel is the simplest to use. More complex queries would require Crystal or Brio. Loretta said she uses these tools for determining how many students had a music fee charged last semester. Linda said she does queries on who has financial aid waivers, and who is past due on the installment plan. • Gary asked about the breakout of users. How many SIS users are using WebFOCUS? Who is the largest user of each tool? Kathy said SIS has not been open to users in the past for reporting. Raleigh or IT ran most of the reports needed by the users. SIS was not in Sybase. The largest group of users will be from WebFOCUS. • Raleigh asked if there was a site license for any of these tools. Kathy said if the University decides on a particular tool, then they can pursue a site license. • Linda said she uses both Brio and FOCUS, and both have their shortcomings. She is moving to Brio. • Raleigh asked if queries could be stored and re-used, or shared by others? Kathy said yes. • Raleigh asked if there would be a common repository where users could put reports for sharing. Kathy said if the users are Exchange users, there is a place to put shared reports. If not, a place can be found for them. • Kathy said listservs will be established for each of the reporting tools, so users of a tool know who the other users are. • John asked if training and support would be available for new users. Kathy said training for new WebFOCUS users is not in place. She said the Desktop Training group has offered Brio training in the past and some Crystal training offsite. She said if a standard is adopted, training could be brought in-house and would be less expensive. • Raleigh said he has about 40 reports in FOCUS which allow users to fill in the parameters. Jayna said it would be a couple of months before a decision on standard report tools will be made. Mike Carter is currently doing a comparison on Brio and Crystal. • Gary said he asks for subsets of data to avoid hitting the entire database. He can then pull the information by account or department number if he doesn't want everything. Kathy said other tools also have 'excludes'. • Jayna said the desktop reporting tools can be used against other databases than Oracle. The tool can access any database that is ODBC compliant. • Linda said she has noticed that Brio ties up more resources on her desktop than WebFOCUS does. • Jayna said IT will be looking at desktop and enterprise versions of the tools. She said they are leaning towards Crystal

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	for financial reasons. • Loretta said there is also a yearly maintenance fee for Brio, \$149.00, and it is advantageous to keep this activated.
•	▪ ACTION ITEM: For the April 14, 2003 meeting, everyone should identify the top 1 to 3 problems they are having with reporting and ways to solve these problems. She is hoping for some overlap.
• Next Meeting	▪ April 14, 2003 (Monday) at 3:00 in the Alltel Room (Hardymon Building – corner of Rose and Maxwell)