



Query Repository View Enhancements (Project IUUN0020)

Financial Workgroup

April 7, 2003 - Hardymon Alltel Room - 3:00 – 4:30

ATTENDEES:

Dale Austin, Frank Abraham, Nick Arnold, Angela Back, Jayna Cheesman, Paula Cox, Penny Cox, Chris Donahoe, Courtney Higdon, Jeanne Hurak, Jenell Johnson, Christine Levitt, Marilyn Lyons, Sonja Mather, Jennifer Miles, Kathee Norris, Trish Polly, Barry Rankin, Diane Skoll, Lee Song, Lu Wang, Tina Ward

PRESIDING:

Jayna Cheesman

PROJECT COORDINATOR:

Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> • Tasks in progress 	<ul style="list-style-type: none"> ▪ <u>a. Developed desktop tool listservs. Will send out email to everyone on each list, and it will include the names of everyone on that list.</u> <ul style="list-style-type: none"> ▪ In response to the last meeting, the names of the desktop tool users will not be published on the web. ▪ Kathy Norris asked if Brio users need to be using the same version of Brio in order to share reports. Jayna suggested that everyone use the most current version of Brio, as some things don't work on the older versions. 6.6 is the latest version of Brio. Penny said the latest version can be downloaded from the web site with a key. The company can also send you a password to get an upgrade. ▪ <u>b. HRS security – should be available the middle to the later part of the month.</u> <ul style="list-style-type: none"> ▪ The DBAs are working on the HRS security and it should be available mid- to late April. Some information in HRS may need to be protected. This is being investigated and it may take longer to implement security for these protected elements. Per the Data Stewards, the intent is to use departmental security. ▪ <u>c. Metadata – element definitions. Will focus on HRS, so these are available when HRS security is implemented.</u> ▪ <u>d. New email address to request changes to the Query Repository.</u> <ul style="list-style-type: none"> ▪ A new email address will be established to request changes to the Query Repository. <ul style="list-style-type: none"> ▪ ACTION: To request changes to the Query Repository before the April 28, 2003 meeting, send changes to Debra.Claunch@uky.edu.
<ul style="list-style-type: none"> • Tasks to be done or started in the near future 	<ul style="list-style-type: none"> ▪ <u>a. Updates to Reporting web page</u> <ul style="list-style-type: none"> ▪ The format of the Reporting web site will be changed somewhat to include the addresses for each of the report tool listservs and the new email address to request changes to the Query Repository. ▪ <u>b. Element cross-reference – to identify element names in Oracle views that represent the same source element in IDMS.</u> <ul style="list-style-type: none"> ▪ A cross reference of the IDMS elements and the places they can be found in the Query Repository views will be provided. ▪ <u>c. Public folder in Exchange for report sharing. Who is not currently an Exchange user?</u> <ul style="list-style-type: none"> ▪ ACTION: Users should provide the names of anyone in their department who is not an Exchange user to Debra.Claunch@uky.edu. ▪ ACTION: Users should provide the names of anyone in their department who is currently an Exchange user,

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	<p>so they can be given access to a Public folder for report sharing, to Debra.Claunch@uky.edu.</p> <ul style="list-style-type: none"> ▪ d. <u>Comparison of Brio and Crystal functionality.</u> <ul style="list-style-type: none"> ▪ Mike Carter is evaluating the functionality of Brio and Crystal, and will do a presentation of these report tools in a month or so.
<ul style="list-style-type: none"> • Discussion Items 	<ul style="list-style-type: none"> ▪ a. <u>Views to access multiple years of FRS transaction data (i.e. current year plus ? years of history)</u> <ul style="list-style-type: none"> ▪ Kathy Norris needs the current year plus the two previous years of data. For budget purposes, the current year plus the previous five years of transactions are available. What do people need? The consensus is the Controllers area needs the current year plus the ten previous years of transactions. All non-Controller areas need the current year plus the previous five years of transactions. ▪ b. <u>View changes – migration to RPT views.</u> At some point in the future, other views (_ACCESS, _SYB and _FOC will be eliminated). Users will need to rewrite reports. <ul style="list-style-type: none"> ▪ In the future, those using the _ACCESS, _SYB, and _FOC views will be migrated to the _RPT views. Reports will have to be rewritten. ▪ IT is trying to decide how their staff can help with this migration. Crystal users may not have to rewrite their queries. Brio users will have to rewrite their queries. ▪ c. <u>All new reports written by existing Oracle users should use the _RPT views when they are available. All new Oracle users will only be given access to the _RPT views.</u> <ul style="list-style-type: none"> ▪ IT will document any proposed view element name changes and notify users as soon as possible via the listservs. ▪ Old views will be discontinued some time in the future. ▪ Any new reports should be written using the _RPT views. ▪ Some users have complained about the element names. The QRVE workgroup will have to reach a consensus on defining the naming standards. <ul style="list-style-type: none"> ▪ ACTION: If there are any elements that have confusing names, send email to Debra.Claunch@uky.edu. ▪ Kathy Norris said definitions of the elements will help instead of having to guess what the elements are, and having to run reports to see if the correct elements have been chosen. ▪ Jayna said some parsed fields are missing in the Query Repository. For example, the department and account number can be broken down into components that may need to be defined in the view. <ul style="list-style-type: none"> ▪ ACTION: If parsed fields are needed, send email to Debra.Claunch@uky.edu, describing the parsed field(s) needed. ▪ d. <u>Renaming views and elements to “English-like” names.</u> ▪ e. <u>Redefines/substrings of element in the Oracle views.</u> <ul style="list-style-type: none"> ▪ Trish said she uses the department table and joins it to the acct_sub_code history transactions. The acct_mo in trans_history and acct_sub_code_history, need to have the dept_name and acct_title added to the views. ▪ The Department Number is the last field in the table views. <ul style="list-style-type: none"> ▪ ACTION: If the sequence of the elements/columns in the views needs to be reordered, send email to Debra.Claunch@uky.edu. ▪ ACTION: Deb will create a list of the change requests so they can be prioritized by the workgroup at the April 28, 2003 meeting. ▪ Trish Polly said she tried to get new access to the Query Repository. No new users will be added until the security is in place. Trish said she needs to run Brio reports for a person who has left a position, and asked if exceptions could

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	<p>be made to not giving new users access to the Query Repository until the security is established.</p> <ul style="list-style-type: none"> ▪ ACTION: For exceptions to obtaining access to Oracle prior to security being established, requests detailing the exception should be sent to Dale Austin at: col003@email.uky.edu. <p>f. EXCEL XP should be used to access Oracle. (Go to www.uky.edu/uksoftware or Library or your technical support staff to obtain copies of the software.)</p> <ul style="list-style-type: none"> ▪ Trish said MCIS is not supporting Excel XP in her college. Jayna said Keith LaVey recommends using Excel XP to access Oracle. Kathy indicated MCIS is supporting XP as she is using it. <ul style="list-style-type: none"> ▪ ACTION: Trish will verify with MCIS whether or not Excel XP will be supported. (Completed 4/8/03. Trish did determine that MCIS is supporting MS Office XP, but she said main people haven't changed to it yet.) ▪ Dale asked about the target date for FES value-based security and asked if the FES metadata was completed. These need to be loaded to the Query Repository. <ul style="list-style-type: none"> ▪ ACTION: Diane will verify the FES definitions are complete in IDMS.
<ul style="list-style-type: none"> • Next Meeting 	<ul style="list-style-type: none"> ▪ April 28, 2003 (Monday) at 3:00 in the Alltel Room (Hardymon Building – corner of Rose and Maxwell)