



Query Repository View Enhancements (Project IUUN0020)

Academic Workgroup

April 14, 2003 - Hardymon Alltel Room - 3:00 – 4:00

ATTENDEES:

Janet Baynham, Linda Bradford, Jayna Cheesman, Judy Chism, Debra Claunch, Janet Jones, Keith LaVey, Gary Lindle, Ann Livingstone, Marilyn Lyons, Deborah Moore, Tonya Prince, Barry Rankin, Lu Wang

GUESTS:

Victor Chewing, Keith Henry

PRESIDING:

Jayna Cheesman

PROJECT COORDINATOR:

Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> • Introduction of Guests 	<ul style="list-style-type: none"> ▪ Jayna introduced Victor Chewing and Keith Henry. She explained they are the DBAs (Database Administrators) who work in Keith LaVey's group, and are the primary DBAs working with the Query Repository. ▪ Jayna asked of those present at the meeting, how many are currently using the Oracle data. Six (6) indicated they are using the data.
<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"> ▪ Jayna explained listservs have been established for each of the reporting tools. These listservs will be used for discussions about the tool, and for sharing information about reports. ▪ <u>b. HRS security – should be available mid- to late April.</u> <ul style="list-style-type: none"> ▪ Jayna said the security for SIS is on the agenda and will be addressed after security for HRS is finalized. ▪ Jayna said she talked with Connie Ray last week. People in the Institutional Research Office who do not have online IDMS access should ask Connie to request this for them. ▪ Keith L. said all users of the Query Repository will need to have IDMS access established before access to the Query Repository will be given. ▪ <u>c. Metadata – element definitions. Will focus on HRS, so these are available when HRS security is implemented.</u> <ul style="list-style-type: none"> ▪ Jayna said she had asked the business owners to review and update the IDMS definitions. She said the DBAs are working on making this information available online. Currently they are working on the HRS metadata. ▪ Keith L. said the updates to the metadata for all the systems should be made at the same time. The target date for this is May 5, 2003. ▪ <u>d. New email address to request changes to the Query Repository.</u> <ul style="list-style-type: none"> ▪ Jayna said an email address will be established to request ongoing changes to the Query Repository. This will include requests for data to be added to the Query Repository, requests for changes to the views, requests for parsing elements, etc. <ul style="list-style-type: none"> ▪ ACTION: To request changes to the Query Repository before the new email address is established, send requests to QRVE-Academic@lsv.uky.edu or 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"> ▪ Jayna said the format of the Reporting web site will be changed to include the addresses for each of the report tool listservs and the new email address to request changes to the Query Repository. Users should check this site on a regular basis: https://reporting.uky.edu/. <ul style="list-style-type: none"> ▪ ACTION: Deb and Keith LaVey will meet on Tuesday, April 15, 2003 to discuss changes to the web site. (Completed 4/15/03, 9:00 am.) ▪ <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"> ▪ Jayna said the element cross-reference will help users determine what view(s) to use in a report. Users will be able to search for elements in various ways. The cross-reference tool will be established after completion of the element definitions. ▪ <u>c. Public folder in Exchange for report sharing. Who is not currently an Exchange user?</u> <ul style="list-style-type: none"> ▪ Jayna said a Public folder will be established in Exchange for report sharing. <ul style="list-style-type: none"> ▪ ACTION: Users should send email to QRVE-Academic@lsv.uky.edu or Debra.Claunch@uky.edu if they are not currently an Exchange user, or if they know of anyone in their area(s) who are not an Exchange user, and will need access for sharing reports. ▪ <u>d. Comparison of Brio and Crystal functionality.</u> <ul style="list-style-type: none"> ▪ Jayna said for basic, low-level reports, users could use Excel or Access which is free. High-end users will use SAS. IT is in the process of recommending a tool for mid-level users. ▪ Mike Carter is doing a comparison of Brio and Crystal functionality and will do a demonstration for each of the Query Repository workgroups, illustrating the differences and strengths of these two tools. These demonstrations should take place in three to four weeks.
<ul style="list-style-type: none"> • Discussion items 	<ul style="list-style-type: none"> ▪ <u>a. Views to access multiple years of SIS data (i.e. current plus ? years of history?)</u> <ul style="list-style-type: none"> ▪ General discussion determined this is not an issue for SIS. ▪ Janet said SIS data is available back to 1988. Victor cautioned some FAM information has been purged from the system. ▪ <u>b. View changes – migration to RPT views. At some point in future, other views (ACCESS, _SYB and _FOC will be eliminated). Users will need to rewrite reports.</u> <ul style="list-style-type: none"> ▪ Jayna said several views were created for the Query Repository which mimic the various ways users previously viewed the IDMS data. To reduce the time involved in maintaining these various views, to facilitate report sharing and to standardize the data, migrating to one view, _RPT, is the goal. ▪ Jayna said anyone who was querying Sybase in the past has already moved from Sybase to Oracle, and may have to go through another migration from _SYB to _RPT. ▪ Keith said the goal is to have centralized views and metadata. Currently the element names are not standardized. They are different from view to view. Having standard views removes a layer of difficulty in accessing the data. ▪ Someone asked if users would be notified when they needed to migrate from one view to another. Keith said yes and that the migration will take several months to complete. He said IT is leaning towards having the users send their queries to IT and letting IT migrate or convert the queries. The advantage to this is that IT can see precisely the types of reports users are creating, they can possibly improve the reports so they run faster, and possibly consolidate reports for sharing.

	<ul style="list-style-type: none"> ▪ 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> ▪ d. <u>Renaming views and elements to “English-like” names.</u> <ul style="list-style-type: none"> ▪ Deborah said that as a new user, the names mean nothing to her. She asked who would be naming the elements. Jayna said part of the naming conventions would be the responsibility of the workgroups and would be discussed in the meetings. ▪ e. <u>Redefines/substrings of element in the Oracle views.</u> <ul style="list-style-type: none"> ▪ Jayna said an example was if you wanted to focus on the first digit of the account number, then an element for the ‘ledger’ was created. If you wanted to focus on the first digit of the department number, what used to be the sector identifier, another element was created. ▪ Keith said if you routinely join views, this can be done automatically in a view. If you parse names into three separate fields, so you can sort on the last name only, first name only, etc., this can be done automatically in a view. ▪ Jayna said if any financial data is needed in conjunction with the SIS data, the elements need to be specified. <ul style="list-style-type: none"> ▪ ACTION: Requests for element redefines or substrings, joining, parsing or additional data should be sent to QRVE-Academic@lsv.uky.edu or Debra.Claunch@uky.edu. ▪ f. <u>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.)</u> <ul style="list-style-type: none"> ▪ Keith said the MS Query interface in Excel XP has been improved from the one in Excel 2000. Keith suggested upgrading all MS Office products, such as Word, Excel, Access and Powerpoint. He said the operating system can remain as Windows 98 or Windows 2000. ▪ Lu said she has been hearing that XP causes problems. General discussion determined the problem may be the operating system Windows XP. Keith and his group are unaware of any problems with Office XP, and in particular Excel XP. Keith said it is much easier for IT to support one version. ▪ Marilyn said she was having a problem with a report. After some discussion, Keith asked her to send her WebFOCUS query to WFSupport @lsv.uky.edu and someone on his staff would look at it. ▪ Keith said getting queries correct is usually 99% of the problems they receive. He said in some cases they discover problems with the data, but usually it is in the way the queries are structured. ▪ Jayna asked if having a demonstration of using Excel against the Query Repository would be beneficial to the users. <ul style="list-style-type: none"> ▪ ACTION: Someone on Keith LaVey’s staff will do a demonstration using Excel MS Query. ▪ ACTION: Jayna will check to see if an FRS/SIS department number cross-reference exists in IDMS.
<ul style="list-style-type: none"> • Next Meeting 	<ul style="list-style-type: none"> ▪ May 19, 2003 at 3:00 in Room 149 ASTeCC