



Query Repository View Enhancements (Project IUUN0020)

Financial Workgroup

May 12, 2003 - 149 ASTeCC - 3:00 – 4:30

ATTENDEES:

Frank Abraham, Dale Austin, Angela Back, Debra Claunch, Paula Cox, Courtney Higdon, Jenell Johnson, Keith LaVey, Christine Levitt, Gary Lindle, Marilyn Lyons, Stella Matuszak, Sue Myers, Barry Rankin, Diane Skoll, Lu Wang

GUESTS:

Doyle Friskney

PRESIDING:

Keith LaVey

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. Desktop tool Listservs welcome messages</u> <ul style="list-style-type: none"> ▪ On May 12, 2003, Deb sent a welcome message to everyone on the following lists which explained the purpose of each list: <ul style="list-style-type: none"> ▪ BRIO-L@lsv.uky.edu (BRIO Users List) ▪ CRYSTAL-L@lsv.uky.edu (Crystal Users List) ▪ EXCELQUERY-L@lsv.uky.edu (Excel-Query Users Lists) ▪ INFOMAKER-L@lsv.uky.edu (Infomaker Users List) ▪ MSACCESS-L@lsv.uky.edu (MS Access Users List) ▪ SAS-L@lsv.uky.edu (SAS Users List) ▪ UKWHERY@lsv.uky.edu (UKWH Users List) ▪ ZWRITER-L@lsv.uky.edu (Z-Writer Users List) ▪ Keith explained the lists were established for each toolset for users to share information about the tools. ▪ <u>b. HRS security</u> <ul style="list-style-type: none"> ▪ Keith said this is temporarily on hold. Department information needs to be added as a key to some HRS tables to improve the query process. This is not presently in the Query Repository environment. ▪ Keith said since there is no test environment, they plan to send email letting everyone know when the security will be implemented. The next day there may be problems. When a user logs on to the Query Repository environment, it attempts to emulate the security on IDMS. ▪ He said IT is trying to determine the best time to put this change into effect and would like to do it as soon as possible. There is a list of users waiting for this security to be implemented before they are given access to the Query Repository. ▪ <u>c. Metadata – element definitions.</u> <ul style="list-style-type: none"> ▪ Keith said the current metadata is based on the IDMS data dictionary. They are using the short title for the elements. If you go to https://reporting.uky.edu and select 'Data Views', you'll get a list of all the elements. A cross-reference of the IDMS short title, the synonym and COBOL names exists currently. Enhancements to the metadata will include the

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	<p>type of data, whether it is characters or numeric, length of the element, etc. Currently the HRS and FRS definitions are out there, as well as SIS FAMS definitions.</p> <ul style="list-style-type: none"> ▪ d. Purpose of DWERequests@email.uky.edu <ul style="list-style-type: none"> ▪ Keith explained this email had been recently established, and is to be used for all requests, changes, enhancements, notifications of missing data, or questions that deal with the Data Warehouse or Query Repository environments. For instance, questions such as, “Can this view include this element?”, or “I ran a query and one of the fields is not returning the proper values”, should be sent to this email address. ▪ Keith said the data in the Query Repository environment is refreshed daily. ▪ Email sent to this address will be forwarded to a triage team for prioritization and follow-up. ▪ e. Changes to the Reporting web page: https://reporting.uky.edu/ (handout) <ul style="list-style-type: none"> ▪ Keith explained some of the changes to the Reporting web site. <ul style="list-style-type: none"> ▪ Each reporting tool has been ‘boxed’. For instance, if you are a WebFOCUS user, all the related items are now together. ▪ A listserv has been established for each tool and is listed on the web site. ▪ Some tool boxes include documentation for connecting to the system, as well as the listserv. ▪ A new link, “Latest News”, has been added to highlight things of interest. ▪ “IT Recommendations” will list tips, hints and versions of software IT recommends users run. ▪ A link to the “Query Repository Workgroups” web site has been added. ▪ A link to DWERequests@email.uky.edu, the email established for all requests, changes, enhancements, etc. has been added for your convenience. ▪ Users of any tool but WebFOCUS will need the Oracle client and will come to this site to change their Oracle password. These are grouped on the right side of the site. ▪ The ‘Data Views’ are the links for the metadata. These will be enhanced and changed as the warehouse environment moves forward. ▪ ‘Schema Models’ depict how the data links together. ▪ ‘Special Reporting Requests’ should be used if you have a report you can’t figure out. Send your request to the appropriate link and someone on the triage team will help you create the report. ▪ f. Public folder in Exchange for report sharing <ul style="list-style-type: none"> ▪ Public folders in Exchange will be established so users can share reports. If you have a report you think will be useful to others, and you have an Exchange account, you will be able to drop the report in the appropriate folder to be shared. ▪ g. Comparison of Brio and Crystal functionality <ul style="list-style-type: none"> ▪ Mike Carter will be doing a demonstration of the features each of these tools has or does not have. This should take place mid-June 2003. ▪ h. Change requests – none received <ul style="list-style-type: none"> ▪ Deb said no change requests had been received.
<ul style="list-style-type: none"> • Discussion Items 	<ul style="list-style-type: none"> ▪ a. Definition of a view (handout) <ul style="list-style-type: none"> ▪ Keith said Jayna had developed a graphic to help define what a ‘view’ is. He said it is a grouping of data or a cross-section of tables that are relevant for the query you are running. It is not actual physical storage of the data. ▪ b. Process of prioritizing changes to the DWE

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	<ul style="list-style-type: none"> ▪ Keith said that he and Jayna would be meeting once a week to prioritize any requests for changes to the Data Warehouse Environment. He said if they have any questions they would go to the person making the request, and/or they may have to involve other groups, or the Data Stewards. He said the process is a work in progress and may change as it progresses. ▪ c. Discuss types of queries users are generating <ul style="list-style-type: none"> ▪ Keith asked the group if each of them were able to query the repository and the response was yes. He asked if the metadata was a help and the response was yes. ▪ Keith asked those present to think about the names that are being used now for each element. He explained the goal is to move to one set of views and pick a name for each element and move to this standard. Currently there are different names for the same piece of data. ▪ Someone asked what determines what view you have access to? Keith said initially, anyone defined in Sybase either had access to everything or was limited by department. IT tried to duplicate this security in the Query Repository. FOCUS users were given slightly different views to the data. The _ACCESS view replicates the Sybase environment at the department level. The _SYB view is wide open with most users authorized to see all accounts. Keith said these views are out of sync as far as maintaining them. He said approximately 150 people had the _SYB view. IT laid the FOCUS environment on top of this. IT is working towards one view, one name per element. ▪ Keith said in FRS there are many queries that need the Account Description or Department Name. Users have to link another table just to get this element in their queries. He said it would be convenient to have a view that included this element along with the elements in the other table. ▪ Frank said there are some tables that only have two or three elements and it would be nice to combine these into one table, thus reducing the total number of tables one has to select from. ▪ d. Discuss deadline for converting queries to _RPT <ul style="list-style-type: none"> ▪ Keith said the HRS Security would have to be in place before users are moved to the _RPT views. ▪ Keith said they would like to start with more English- like names for the elements. There would be a limited number of names. Should the COBOL names be shortened, should standard abbreviations be used, etc. For instance, UKID is also called ID_NO in other tables, which should be the standard? ▪ Dale said we would have to be careful in doing this. There are 17 different annual salaries defined in IDMS, the Position Annual Salary, the Insurance Annual Salary, etc. Each is different for a different purpose and they are not all the same data. He said a qualifier would have to be added to the name to distinguish each one. ▪ Dale said the online IDMS screens can limit the access to data that a user has and this is not the same in the reporting environment. He said a synonym is sometimes the only way to identify the data. The COBOL name is not always on the screen. ▪ Keith said IT will be adding a look-up feature to the metadata. If you know the synonym only, you can find the views where the data for this element is located. ▪ Diane said if you know which Annual Salary for which you need to report, on a regular basis, along with the other elements needed for your query, this can help define the views. <ul style="list-style-type: none"> ▪ ACTION: Everyone should review the queries they are running now to see if they can define views to help improve the efficiency. Request should be sent to DWERequests@email.uky.edu. ▪ Lu said a cross-reference of the new name and old name would be needed, but more importantly, the description would be needed.

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	<ul style="list-style-type: none"> ▪ Keith said some online fields are calculations of other fields. The question is, should you go back to the root element, or should the repository include these calculated fields? ▪ Lu said it would be helpful to know which elements appear on which screens. Keith said if you want data that appears on Screen XXX, and you want to know where it is in the warehouse, this could be defined as a view. <ul style="list-style-type: none"> ▪ ACTION: Lu will send the request for a cross-reference between screen numbers and elements to DWERRequests@email.uky.edu. ▪ Keith said, regarding the HRS Security, do they just need to pick a date and implement the security. He said IT can send the date to the UKWHEREY list and post it on the Reporting web site, to inform users as to when it will happen. Dale said to do it whenever IT is ready. There are very few requests against the data at this time, and this will only grow over time. There would be less impact to the users to do it now. <ul style="list-style-type: none"> ▪ ACTION: Keith will check with Jayna and Kathy Hamperian to see if Monday, May 19th, 2003 would be a good time to implement the HRS Security. ▪ ACTION: Keith will send a list of people with HRS access to Dale.
<ul style="list-style-type: none"> • Next Meeting 	<ul style="list-style-type: none"> ▪ June 2, 2003 (Monday) at 3:00, Room 149 ASTeCC