



Query Repository View Enhancements (Project IUUN0020)

Financial Workgroup

June 2, 2003 - 149 ASTeCC - 3:00 – 4:30

ATTENDEES:

Dale Austin, Angela Back, Jayna Cheesman, Debra Claunch, Paula Cox, Chris Donahoe, Robert Garrett, Courtney Higdon, Keith LaVey, Christine Levitt, Gary Lindle, Stella Matuszak, Jennifer Miles, Kathee Norris, Debbie O'Daniel, Trish Polly, Chris Shotwell, Lu Wang

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>HRS Security</u> <ul style="list-style-type: none"> ▪ Keith said they have been testing the HRS security and there were some bumps that were resolved late last week. They will be working with Kathy Hamperian on how and when to publicize the implementation. He said the system will only return the department(s) you are authorized to access based on the security defined in IDMS. He said one caveat is that a user's ID in Oracle (the data warehouse) must match their ID in IDMS. A user's ID for all the mainframe systems, SIS, FRS, HRS, etc. will have to be the same, if they wish to report on this data in the Query Repository. <ul style="list-style-type: none"> ▪ ACTION: Keith will give Dale a list of the HRS users who have a problem with their IDs not matching the Oracle ID. ▪ Keith said the current HRS_RPT views containing security are based on the 10 views previously defined for Sybase. These include views with more English-like names, such as, Employee, Position, etc. These are the views to which users will be given access. <ul style="list-style-type: none"> ▪ ACTION: If you would like to define other data views which would be beneficial for the community at large, please send your request to DWERequests@email.uky.edu.
<ul style="list-style-type: none"> • Data Element Naming Standards 	<ul style="list-style-type: none"> ▪ Handouts: Data Element Naming Standards (6/2/03) Prime Words (5/3/03) Draft Class Words (5/30/03) Draft Qualifiers/Modifiers (5/30/03) Draft Standard Abbreviations (5/30/03) Draft • Jayna said the names in IDMS or other 'source' databases would not be changed. • Jayna reviewed the Data Element Naming Standards document. She said the goal is to change the element names in the views so they are consistent and easily understood. There will be a cross-reference to COBOL and IDMS names and synonyms. In some cases data is replicated across systems, and the goal is to have one unique name for the data no matter what system it is in. If the element has a different definition, it should have a different name. • Logical and physical names will contain, at a minimum, a prime word, class word and qualifiers (optional). • Jayna talked about the Prime Words and said the workgroup may need to define additional prime words. She said the

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	<p>handouts were compiled from several sources, and there is both some consistency and inconsistency among the sources. We will have to decide what the standards for UK will be.</p> <ul style="list-style-type: none"> • Gary said Account and Accounts have the same abbreviation, and asked if an 's' should be added to Accounts. Jayna said the documents she has read on naming standards indicate that nouns should be singular, but that UK needs to decide how they want to do this. <ul style="list-style-type: none"> ○ ACTION: Workgroup members should review the Prime Words document prior to the June 19, 2003 meeting. If workgroup members identify any prime words that should be added to the list, please send the information to Debra.Claunch@uky.edu. • Jayna reviewed the Class Words document. She said class words describe the type of data, what the data element is. Four categories, Chronology, Measurement, Identification, and Text have been identified for categorizing the class words. <ul style="list-style-type: none"> ○ ACTION: Workgroup members should review the Class Words document prior to the June 19, 2003 meeting. If workgroup members identify any class words that should be added to the list, please send the information to Debra.Claunch@uky.edu. • Jayna said the goal is to build official Prime Words, Class Words, Qualifiers/Modifiers, and Abbreviations lists that will be used for creating standardized element names. • Jayna explained a secondary prime word could be used as a qualifier. She said definitions should be "positive" and define what the data is, and not "negative" or what the data is not. In the example, Employee Prime Department Code, 'Department' is the qualifier, but can also be a prime word. • The goal is to put as much logic/meaning in the element names, so users don't have to go back to the definitions to know what the element is. • Jayna said different software products use different naming conventions. For instance, Oracle uses an underscore, while COBOL uses a dash to separate words. The university will have to decide what convention to use in the data warehouse, although this will likely be mandated by the database(s). • Jayna said all abbreviations will be capitalized, but the logical names will be mixed case. Keith said that when building a query, elements will automatically be converted to upper case. • Jayna said she hopes to use these standards with the data extracted into the Data Warehouse Environment from an ERP system as well. • Jayna asked the workgroup if they would: <ul style="list-style-type: none"> ○ 1. like IT to pick values for the Prime Words, Class Words, Qualifiers/Modifiers, and Abbreviations ○ 2. like the entire workgroup to pick the values or, ○ 3. have a sub-committee work with IT to pick the values <p>It was decided that IT should pick the values and present it to the workgroup for review.</p>
<ul style="list-style-type: none"> • Data Elements Naming Standards Pilot 	<ul style="list-style-type: none"> ▪ Jayna said she would talk to Marc Mathews about Purchasing views being used as a pilot for the Naming Standards. There are fewer views in Purchasing than in some of the other systems. She suggested Jody Reed, Dale Austin and Deb Claunch work on coming up with standards for these views. OCT is currently trying to extract some of the Purchasing data for EBars.
<ul style="list-style-type: none"> • General Discussion 	<ul style="list-style-type: none"> ▪ Jayna said the abbreviations need to make structured, logical sense. ▪ Chris asked if it would make sense to add 'Plant' and 'Grants and Contracts' for funds. Jayna said she knows the SL (Subsidiary Ledger) and GL (General Ledger) elements are different, but are there certain attributes that only apply to one and not the other? Dale said the attributes exist for both in most cases.

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	<ul style="list-style-type: none"> ▪ Kathee said she would like to add the 'Sponsor' on grant accounts and be able to query for the sponsor. Chris said if she wants to look for ITI as a sponsor, she would not be able to find it. She said this could be found in a translation table. Jayna asked if a web search of the elements could allow you to search on a word or words contained within an element name, and not just element that start with the word. Keith said yes, this is possible. ▪ Jayna said there is no limit on the number of qualifiers that can be in an element name. She said there is a significant amount of the data that most users will not be reviewing. ▪ Debbie asked if you want to get all the ProCard transactions for a year, would you go through the Purchasing or Account elements to get the data. Dale said you would go through Account tables. ▪ ACTION: Jayna and Keith will review the Prime Words, Class Words, Qualifiers/Modifiers, and Abbreviations documents and compile their suggestions or committee review. ▪ Chris asked when IT thought the naming changes would be completed? She said OCT currently has about 903 Crystal Reports and they would not want to make any changes to these reports at year end. Jayna said the goal is to transfer reports to a public folder which would allow the DBAs time to work on converting them while the user runs the existing reports. ▪ Trish said she changed user codes for previous months and has a Brio report where the user codes were not updated in the report from Oracle although they had been changed in FRS. She said some had changed and some had not. Keith said the DBA handling the data extracts had been making decision on what data to filter. It was assumed all the data was being extracted and this was not the case. These filters have been in place for many years and were based on previous space limitations. ▪ ACTION: Trish will define the problem she is having with the Brio report and send it to Keith.LaVey@uky.edu. ▪ ACTION: IF report data is not representing what you know to be true, notify Keith.LaVey@uky.edu. ▪ General discussion about using WebFOCUS from home and how slow it is. Keith said the university is looking at locking things down (network security) even more than it has been in the past. He said users may need to load VPN (Virtual Private Network) on their PC. ▪ Keith said the DBAs still need to work on the request to show all elements on a screen (or map) on the web page. He said they recently identified a batch job to load these.
<ul style="list-style-type: none"> • Next Meeting 	<ul style="list-style-type: none"> ▪ June 16, 2003 (Monday) at 3:00, Room 149 ASTeCC