



Query Repository View Enhancements (Project IUUN0020)

Financial Workgroup

September 8, 2003 - 149 ASTeCC - 3:00 – 4:20

ATTENDEES: Dale Austin, Jayna Cheesman, Debra Claunch, Robert Garrett, Jeanne Hurak, Christy Jacks, Jennell Johnson, Keith LaVey, Gary Lindle, Barry Rankin, Diane Skoll, Lu Wang

PRESIDING: Jayna Cheesman

PROJECT COORDINATOR: Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> • Handouts 	<ul style="list-style-type: none"> ▪ <u>Process for Converting Reports to the New Data Views (DRAFT)</u> ▪ <u>UKHRS RPT Element Names dated 9/5/03</u> ▪ <u>Brio/Crystal Evaluation results</u> ▪ <u>Query Repository View Conversions spreadsheet dated 9/8/03</u> ▪ <u>Query Repository Report Conversions spreadsheet dated 9/8/03</u>
<ul style="list-style-type: none"> • Report Tool Survey 	<ul style="list-style-type: none"> ▪ Jayna reviewed the results of the report tool survey. She said the Training scores are probably a reflection of UK's training, as well as the vendor's training. Jayna said the scores for Crystal are slightly lower overall, except for Price. ▪ Jayna said some users did not weight or rate their response, but said if they had to choose a tool, they would select 'X'. ▪ Dale said he responded for his entire group. He said there are 23 Crystal licenses in use in OCT. These numbers are not reflected in the responses. ▪ Jayna said some of the responses were incomplete, so the numbers of Current and Planned may not add up to the total of different survey counts. Diane said according to Brio, there are about 79 users on campus. ▪ Jayna asked if everyone received the email that was sent about two weeks ago, where the consultant advised us not to make a decision about a reporting tool at this time. This is due to the buy outs of Brio and Crystal and possible changes. They suggested waiting until March 2004. The consultant said to continue to develop WebFOCUS, which is the most stable for an enterprise environment. They said to continue to support Brio and Crystal, but not to add any other tools at the desktop level. Everyone said they had received the email.
<ul style="list-style-type: none"> • HRS Element Names 	<ul style="list-style-type: none"> ▪ Jayna said an email was sent on 9/5/03 asking the users to review the spreadsheet of HRS element names. Jayna said Diane is working on the requirements document for additional enhancements to the views including joins, adding lookup tables to the views, etc. This document should be completed shortly. The goal is to make all the changes to the views at one time, limiting the changes that need to be made to the reports and queries. ▪ Diane said some fields are not being used and these will be identified in the metadata. ▪ Diane said someone has asked for a view with all the fields in it. She said they are working on defining this view now. ▪ Jayna said the smaller views of data will also be available. <ul style="list-style-type: none"> ▪ ACTION: Users should let Diane know if they have any other view changes or additions they would like added to the requirements document as soon as possible, at skolld@email.uky.edu.

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<ul style="list-style-type: none"> • Process for Converting Reports 	<ul style="list-style-type: none"> ▪ Jayna reviewed the document, “Process for Converting Reports to the New Data Views”. She explained this is the proposed process for converting reports/queries from the old views to the new views. ▪ Jayna said the UKHRS_RPT Element Names memo, dated 9/5/03, asks the users to review the elements and respond to Deb, Debra.Claunch@uky.edu, by 9/12/03 with any changes or corrections. Jayna said some elements are commonly known by two names and one was selected for use in the Warehouse. For instance, Termination Code and Separation Code. Based on input from the users, Separation Code was selected as the element name. ▪ Jayna explained the target dates on the process document are when IT hopes to have the new views created. She said the users would be given a minimum of 90 days to convert their reports/queries. Jayna said IT is starting with HRS elements. She said several users have asked for access to this data. This access has been delayed until value-based security can be implemented and changes to the views put in place. ▪ Jayna said Deb is working with Dale Austin and Jody Reed on the Purchasing elements and views. She said IT hopes to have these views completed by mid-October, and the old views removed three (3) months later. FRS is targeted for mid-November, and SIS by the end of December 2003. However, the actual dates will depend on timely user input on proposed element names and other DWE priorities. ▪ Jayna said IT is focusing on the views that most departmental users are using now. This should affect the largest number of people. ▪ Jayna said after the changes are made to Oracle, IT will look at making the same changes to WebFOCUS. Changes to WebFOCUS will entail changing the reports/queries in WebFOCUS as well. ▪ Jayna said the first step in the process is for the users to look at their existing reports/queries and the views used for these. The users are then asked to complete the “Query Repository View Conversion” spreadsheet and send it to Deb at Debra.Claunch@uky.edu by the date specified in the memo. These spreadsheets will be consolidated and prioritized based on the responses, and work on converting these views will begin. This list will be posted on the Reporting and Data Administration web sites so everyone will know which views will be converted when. ▪ Jayna said once the new views are created by the DBAs, all reports/queries using these views will have to be converted. The timeframe for conversion will be a minimum of 90 days and will be dependent on the number of existing reports/queries. ▪ Jayna said a Public folder in Exchange has been created, so the users can drag and drop any reports/queries they wish IT to convert. This will be limited to Brio and Crystal reports/queries, and does not include MS ExcelQuery reports. ▪ Jayna said as the reports/queries are copied to the Public folder, the users should complete the “Query Repository Report Conversion” spreadsheet. This will be used in conjunction with the View conversions to prioritize which reports/queries need to be converted first. Jayna said one column on this spreadsheet, Variation of Report, asks the user to identify reports that may be variations of each other. For instance, someone may be responsible for multiple departments or accounts, and may have reports/queries that are copies of each other, and the parameters have been hard-coded for each individual department or account. This will help IT identify groups of reports that can be converted faster. Jayna said the grayed columns are for IT use. A master list of reports being converted will be posted to the web on a weekly basis. Users will always be able to see the progress or status of the reports/queries under conversion. ▪ Jayna said if someone has a limited amount of reports/queries and/or doesn’t want IT to convert the reports for them, IT will post some instructions on converting reports/queries using Brio or Crystal, and possibly have some hands-on training available as well.

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	<ul style="list-style-type: none"> ▪ Jayna said weekly email will be sent to the users to notify them which of their reports have been converted. ▪ Jayna said after the report/queries are converted, the users will need to drag or drop the new report/query to their desktop. They should run the new report and compare the results to the results of the old report. The IT Analyst who converted the report should be notified regarding any problems. The verification process should be completed within 30 days. After the report/query is approved as being correct, the new report should be used from that point forward. The old report/query should be deleted, as the old view will eventually be deleted as well. ▪ Jayna said IT will try to stick with the target deadlines as much as possible. She asked if anyone had any questions or comments regarding the memorandum. ▪ Dale said OCT has 100s of reports, and asked if it makes sense to move these to a public folder, or if giving the analysts in IT access to a folder on their server would be sufficient? Deb asked if these reports are for OCT use only, or if any of them might be utilized by others? Dale said they would probably not be used outside their division. <ul style="list-style-type: none"> ▪ ACTION: Jayna will review the feasibility of Dale's suggestion to give analyst(s) access to reports/queries in the OCT Public folders for conversion, versus copying the reports/queries to the Reporting Public folders. (Completed 9/9/03. Mike Carter will work with OCT on this.) ▪ Robert asked if the views used in Excel reports/queries will be changed. Jayna said yes. Jayna said the reports/queries in Excel would not be converted by IT. She said if there is no hurry to start writing any new reports, users should wait until the new views are finalized, if possible. ▪ Diane said Excel is good for getting quick data results, but that if you want to total, subtotal, or pivot the data, another tool would be needed. ▪ Diane said at this time it may be easier to say this process affects everyone, but WebFOCUS. ▪ Jayna asked those present if they had a lot of reports/queries to convert and if they thought they would ask IT to convert them. Jenell said it depends on how difficult it would be to convert them. Keith said the process to convert is tedious. Jayna said you have to open the report/query, select the new view, select the new elements, map the new to the old elements, possibly delete the old elements, and save the report. Diane said if the report/query includes pivots, the changes need to be made there as well. ▪ Jayna said IT is looking at purchasing a tool the help convert Brio reports. She said as far as we know, one does not exist for Crystal reports at this time. ▪ Jayna said after talking with the QRVE Academic Workgroup on Monday September 15, 2003, she will finalize the Process document and send it to the users.
<ul style="list-style-type: none"> • Next Meeting 	<ul style="list-style-type: none"> ▪ 10/6/03, 149 ASTeCC, 3:00