



**Query Repository View Enhancements (Project IUUN0020)**

**Academic Workgroup**

**September 15, 2003 - 149 ASTeCC - 3:00 – 4:20**

**ATTENDEES:** Debra Claunch, Loretta DeToma, Christy Jacks, Gary Lindle, Diane Skoll, Raleigh Watson, Ruby Watts  
**PRESIDING:** Debra Claunch  
**PROJECT COORDINATOR:** Jayna Cheesman, Kathy Hamperian

| AGENDA ITEM   | DISCUSSION   |
|---|--|
| <ul style="list-style-type: none"> <li>• <b>Handouts</b></li> </ul>                       | <ul style="list-style-type: none"> <li>▪ <u>Process for Converting Reports to the New Data Views (DRAFT)</u></li> <li>▪ <u>UKHRS RPT Element Names dated 9/5/03</u></li> <li>▪ <u>Brio/Crystal Evaluation results</u></li> <li>▪ <u>Query Repository View Conversions spreadsheet dated 9/8/03</u></li> <li>▪ <u>Query Repository Report Conversions spreadsheet dated 9/8/03</u></li> </ul>   |
| <ul style="list-style-type: none"> <li>• <b>Report Tool Survey</b></li> </ul>             | <ul style="list-style-type: none"> <li>▪ Deb reviewed the results of the report tool survey. Deb said the scores for Crystal are slightly lower overall, except for Price.</li> <li>▪ Deb said some of the responses were incomplete, so the numbers of Current and Planned may not add up to the total number of respondents.</li> <li>▪ Ruby asked if the results of the survey now indicate which tool the University will recommend purchasing. Deb said, based on the phone call with the consultant several weeks ago, the consultant advised us not to make a decision about a reporting tool at this time. This is due to the buyouts of Brio and Crystal and possible product line changes. They suggested waiting until March 2004. The consultant said to continue to develop WebFOCUS, which is the most stable for an enterprise environment.</li> </ul>  |
| <ul style="list-style-type: none"> <li>• <b>HRS Element Names</b></li> </ul>              | <ul style="list-style-type: none"> <li>▪ Deb said if anyone was using the HRS views, to review the element naming standards spreadsheet, and let her know of any changes as soon as possible. The current list can be viewed at:<br/> <a href="http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-NamingStds/UKHRS_RPT.pdf">http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-NamingStds/UKHRS_RPT.pdf</a>.</li> </ul>  |
| <ul style="list-style-type: none"> <li>• <b>Process for Converting Reports</b></li> </ul> | <ul style="list-style-type: none"> <li>▪ Deb 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.</li> <li>▪ Deb explained the target dates on the process document are when IT hopes to have the new views created.</li> <li>▪ Deb 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 <a href="#">Query Repository View Conversion</a> spreadsheet and send it to Deb at <a href="mailto:Debra.Claunch@uky.edu">Debra.Claunch@uky.edu</a> by the date specified in the memo. These spreadsheets will be consolidated and prioritized based on the responses received, and work on converting these views will begin. This list will be posted on a web site, so everyone will know which views will be converted when.</li> <li>▪ Deb 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</li> </ul> |

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|   | <p>reports/queries.</p> <ul style="list-style-type: none"> <li>▪ Deb 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.</li> <li>▪ Deb said as the reports/queries are copied to the Public folder, the users should complete the <a href="#">Query Repository Report Conversion</a> spreadsheet. This will be used in conjunction with the View conversions to prioritize which reports/queries need to be converted first. 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.</li> <li>▪ Deb 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, and possibly have some hands-on training available as well.</li> <li>▪ Deb 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 Analyst 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.</li> <li>▪ Diane said the target date for the HRS views being available to the users will probably run past 9/30/03. She said IT is looking at the views and consolidating the change requests, so all changes to the views can be made at one time. This includes joining tables to create new views, implementing the element naming standards, adding calculated fields, adding lookup tables, and other enhancements, etc.</li> <li>▪ Loretta said Student Billing Services has hundreds of reports. She asked if the location of the Public folders is listed in the memo, and Deb said yes. Everyone else said they were using WebFOCUS for their reporting.</li> </ul> |
| <ul style="list-style-type: none"> <li>• <b>Next Meeting</b></li> </ul> | <ul style="list-style-type: none"> <li>▪ <b>Please refer to the schedule at:</b><br/> <a href="http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/QRVEWrkgrpIndx.htm">http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/QRVEWrkgrpIndx.htm</a></li> </ul>   |