Data & Reporting Team (DART) Agenda, 08-27-20
Via Zoom

Welcome

IT Recap and Look Ahead: Spring, Summer, Fall: Jeff Wall (OU IT Data Services)

OU's Data Catalog Journey & IT DS Governance Update: Cliff Mack (OU IT Data Services)

Compass Project Update

- **Timeline**
- **Impact on Cognos Data**

ACT/SAT Optional—Possible Impacts on Reporting

Coding for On-line Classes

OUCUSTOM.COURSE_SECTION_MEETING_TIME being added to Cognos

DART Subteam Updates

- **Active**
  - **Community Support** (David Wilkins)
    - **Cognos Support** David Wilkins emailed Cognos Resources and Support Options to Cognos Licensees. Are there any questions?
    - **Power BI Support** User Group meeting on Tuesday, Presentation by IT's Joe Cole. Building block trainings this fall being recorded for later viewing. PBI SharePoint and other resources being developed. Appreciate IT DS BIRDE Team (Susie Irwin). LISTSERV useful last week and this week. If would like slides from PBI UG mtg, David Wilkins know.
  - **Data Dictionary** (David Wilkins) Pause in activity for this group due to time spent on Data Catalog project. Group is working on definitions for a dozen more tables then may pivot to HR data.
  - **Data Quality & Training** (David Wilkins) Group is on hold but some data quality issues are being addressed through the HR Data group. The HR Data Group has also been somewhat paused due to the Compass project however some issues have been discussed as a part of that project.
  - **Reporting Tool Training** (Susie Irwin)
    - **Cognos Support** Susie has scheduled an intro training on HR Calendar plus Virtual Office Hours, which are listed on Cognos SharePoint. These are Proof-of-Concept efforts for possible rolling out of Power BI Office Hours/training in virtual format.
    - **Power BI Support** See update in Community Support above
- **Inactive**
  - **Data Review** (Patti Otto)

- o **Policy & Recommendations** (David Wilkins)

Other issues/upcoming activities

Next meeting: October 22, 8:30-9:30, Zoom

Welcome to the August Meeting!

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- **Welcome**

- **IT Recap and Look Ahead: Spring, Summer, Fall: Jeff Wall (OU IT Data Services)**

- **OU's Data Catalog Journey & IT DS Governance Update: Cliff Mack (OU IT Data Services)**

- **Compass Project Update**

- **ACT/SAT Optional—Possible Impacts on Reporting**

- **Identifying Sections with On-line Component**

- **New Meeting Time Object in Cognos**

- **DART Subteam Updates**

- **Other issues/upcoming activities**

- **Next meeting: October 22, 8:30-9:30, Zoom**

The UNIVERSITY of OKLAHOMA
DATA AND REPORTING TEAM
Supporting Data and Reporting Initiatives

Compass Project Update

Timeline:

- **Budget Go Live: 4/1/20**

- **FIN Go Live: 7/1/20**

- **HR System testing: now through 8/31**

- **HR Integration and Conversion Testing: 8/31-10/2**

- **HR User Acceptance and Conversion Testing: 10/5-11/13**

- **HR Parallel Testing: 11/16-12/11**

- **HR Test Move to Prod 12/14-12/18**

- **HR Go Live: 1/1/21**
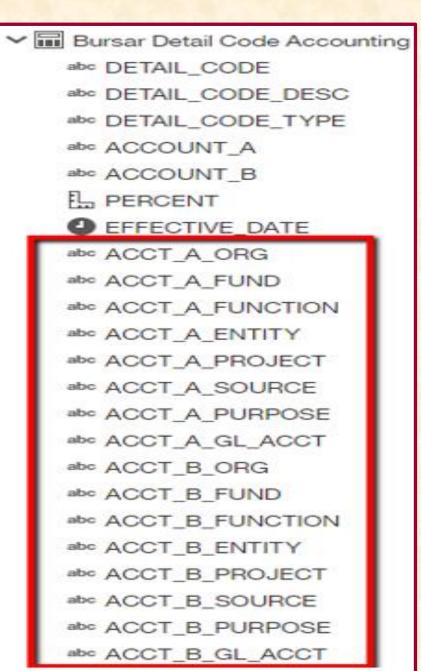
- **2021: Phase II Activities**

Impact of Compass PeopleSoft Financials Go Live on Data Used by Cognos

There is limited impact on the data that Cognos uses. However, columns are being added to the BURSAR_DETAIL_CODE_ACCOUNTING table, described below:

Cardinality	Table Description	Notes/Business Rules
One row per detail code.	Contains the accounting information for every detail code.	This information is used in part to determine which Peoplesoft department numbers funds are routed to or from for each detail code.

To accommodate the new Chartfield structure, the data items in the red box are being added to the BURSAR_DETAIL_CODE_ACCOUNTING table. Columns ACCOUNT_A and ACCOUNT_B will also be changed to include all of the information in the new data items in a single string. Some of these fields are optional, so if one or more of them are blank, that will be represented by pound signs (#).

DETAIL_CODE	DETAIL_CODE_DESC	DETAIL_CODE_TYPE	ACCOUNT_A
SPAA	Human Relations Online Special	C	PRN12001EGFEE0000000000########NEOMHMRL########150300
SPM1	Geospatial Technologies Specia	C	PRN12001EGFEE0000000000########NEOMGOTC########150300
LPE6	KHELSC Advantage Ed Loan	P	UNN06400MISCA0001800000####################551000

Bursar Detail Code Accounting
- abc DETAIL_CODE
- abc DETAIL_CODE_DESC
- abc DETAIL_CODE_TYPE
- abc ACCOUNT_A
- abc ACCOUNT_B
- PERCENT
- EFFECTIVE_DATE
- abc ACCT_A_ORG
- abc ACCT_A_FUND
- abc ACCT_A_FUNCTION
- abc ACCT_A_ENTITY
- abc ACCT_A_PROJECT
- abc ACCT_A_SOURCE
- abc ACCT_A_PURPOSE
- abc ACCT_A_GL_ACCT
- abc ACCT_B_ORG
- abc ACCT_B_FUND
- abc ACCT_B_FUNCTION
- abc ACCT_B_ENTITY
- abc ACCT_B_PROJECT
- abc ACCT_B_SOURCE
- abc ACCT_B_PURPOSE
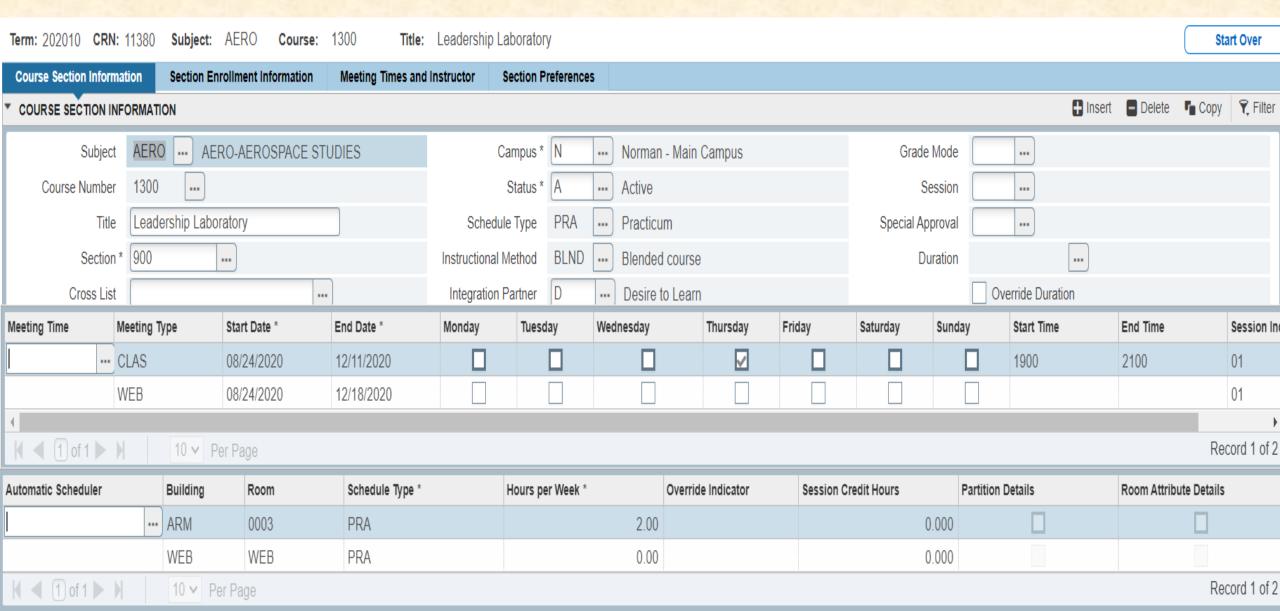- abc ACCT_B_GL_ACCT

ACT/SAT Optional—Possible Impacts on Reporting

- **Fall 2020: 18, all discretionary, Cohort: ADXCPT2020**

- **Spring 2021: _Possible_ cohort of TESTOPTOUT**

- **Meetings soon. Much yet to be decided. Stay tuned for more info.**

Identifying Sections with On-line Component

- **INSTRUCTION_METHOD_CODE is either 'WEB' or 'BLND'**
- **OR if a Meeting Time has a MEETING_TYPE_CODE = 'WEB'**
- **OR if a Meeting Time has a BUILDING_CODE of 'WEB' or 'VIDC'**
- **OR if the section has an attribute of any of the following: 'VIDC', 'WEBX', 'BLDX'**

- **NOTE: Courses with 'TRAD' Method of Delivery may still have a MEETING_TYPE_CODE of 'WEB' or a BUILDING_CODE of 'WEB' OR 'VIDC' (and these may be combined with meeting times in a traditional building and room for in-person)**

Identifying Sections with On-line Component

Identifying Sections with On-line Component

Term: 202010 **CRN:** 11380 **Subject:** AERO **Course:** 1300 **Title:** Leadership Laboratory **[Start Over]**

Course Section Information	Section Enrollment Information	Meeting Times and Instructor	Section Preferences

▼ **COURSE SECTION INFORMATION** ➕ Insert ➖ Delete 📋 Copy 🔻 Filter

Subject	AERO ... AERO-AEROSPACE STUDIES	Campus * N ... Norman - Main Campus	Grade Mode ...
Course Number	1300 ...	Status * A ... Active	Session ...
Title	Leadership Laboratory	Schedule Type PRA ... Practicum	Special Approval ...
Section *	900 ...	Instructional Method BLND ... Blended course	Duration ...
Cross List	...	Integration Partner D ... Desire to Learn	☐ Override Duration

Meeting Time	Meeting Type	Start Date *	End Date *	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Start Time	End Time	Session In
...	CLAS	08/24/2020	12/11/2020	☐	☐	☐	☑	☐	☐	☐	1900	2100	01
	WEB	08/24/2020	12/18/2020	☐	☐	☐	☐	☐	☐	☐			01

◀ ◀ 1 of 1 ▶ ▶   10 ˅ Per Page   Record 1 of 2

Automatic Scheduler	Building	Room	Schedule Type *	Hours per Week *	Override Indicator	Session Credit Hours	Partition Details	Room Attribute Details
...	ARM	0003	PRA	2.00		0.000	☐	☐
	WEB	WEB	PRA	0.00		0.000		

◀ ◀ 1 of 1 ▶ ▶   10 ˅ Per Page   Record 1 of 2

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New Meeting Time Object in Cognos

From: (X9 'Across')

1 row per term_code, CRN

```
∨ ▥ Course Section
  > ▉ Course Section Detail
  > ▉ Catalog Info
  > ▉ Instructor
  > ▉ Open Learning
  > ▉ Hours
  > ▉ Attribute
  > ▉ Fee
  ∨ ▣ Meeting Time
      #  MEETING_TIME_COUNT
      abc MEETING1_BUILDING_CODE
      abc MEETING1_BUILDING_DESC
      abc MEETING1_DAYS
      🕐 MEETING1_END_DATE
      abc MEETING1_END_TIME
      abc MEETING1_FRIDAY_CODE
      #  MEETING1_HOURS_PER_WEEK
      abc MEETING1_MONDAY_CODE
      abc MEETING1_ROOM
      abc MEETING1_SATURDAY_CODE
      🕐 MEETING1_START_DATE
      abc MEETING1_START_TIME
      abc MEETING1_SUNDAY_CODE
      abc MEETING1_THURSDAY_CODE
      abc MEETING1_TUESDAY_CODE
      abc MEETING1_TYPE_CODE
      abc MEETING1_TYPE_DESC
      abc MEETING1_WEDNESDAY_CODE
      abc MEETING2_BUILDING_CODE
      abc MEETING2_BUILDING_DESC
      abc MEETING2_DAYS
      🕐 MEETING2_END_DATE
      abc MEETING2_END_TIME
      abc MEETING2_FRIDAY_CODE
      #  MEETING2_HOURS_PER_WEEK
      abc MEETING2_MONDAY_CODE
      abc MEETING2_ROOM
```

To: (X1 'Down')

1 row per term_code, CRN, and meeting time

```
TERM_CODE
COURSE_REFERENCE_NUMBER
START_DATE
END_DATE
START_TIME
END_TIME
BUILDING_CODE
BUILDING_DESC
ROOM
MONDAY_CODE
TUESDAY_CODE
WEDNESDAY_CODE
THURSDAY_CODE
FRIDAY_CODE
SATURDAY_CODE
SUNDAY_CODE
MEETING_DAYS
MEETING_HOURS_PER_WEEK
MEETING_TYPE_CODE
MEETING_TYPE_DESC
```

DART Subteam Updates

- **Community Support (David Wilkins)**
  - **Cognos Support**
  - **Power BI Support**
- **Data Dictionary (David Wilkins)**
- **Data Quality & Training (David Wilkins)**
  - **Via HR Data Group/Compass Project**
- **Reporting Tool Training (Susie Irwin)**
  - **Cognos Support**
  - **Power BI Support**

Agenda
Power BI User Group Meeting

1. Introduction and Welcome—David Wilkins (dwilkins@ou.edu)

2. New and enhanced Power BI support resources

3. Survey for desired user group meeting content

4. Guest Presentation: Joe Cole (OU IT)

   – *Intro to Power BI Desktop*

5. Other questions or issues?

6. Next Meeting: September 22, 2020 (4th Tuesday?)

New and enhanced Power BI support resources

1. OU Power BI SharePoint

2. New Confirmation E-mail for PRO licensees—later this fall

3. Power BI Office Hours—Virtual Cognos Ofc Hrs as POC

4. Listserv for fast help

5. Publish UG Roster to OU Power BI SharePoint

6. Other resources

The UNIVERSITY of OKLAHOMA
Power BI Support Site

Upcoming Events:

OU Power BI User Group Meeting: August 25 3:30-4:30

See details and Zoom information: OU Power BI User Group Page

Getting Started with Power BI

Power BI Contacts	Questions or not sure how to get started? This is a list of contacts that can point you in the right direction.
Request a Power BI Desktop Pro License (Norman)	This is a link to the IT Software catalog to request a Power BI Desktop Pro License for Norman campus employees. The Pro license will allow you to share Power BI reports and dashboards with other users.
Request a Power BI Desktop Pro License (HSC)	Please email IT-BI@ou.edu to request a Power BI Desktop Pro License if you are an HSC employee. The Pro license will allow you to share Power BI reports and dashboards with other users.

Training Documents & Videos

Microsoft Power BI Documentation	This is a link to Microsoft Power BI documentation for all levels of Power BI Users.
Microsoft Guided Learning	Microsoft sequenced collection of guided learning courses.
Guy in a Cube Training Videos	How-to videos covering a wide variety of Power BI content and questions. Includes basic to more advanced topics.

Policies & Security

FERPA Summary Page	This document was created by OU ESFS and is a brief summary of the Family Educational Rights and Privacy Act (FERPA), which governs appropriate use of student data.
OU Data & Security Policies	Link to the OU Data & Security Policies web page.
OU Policies on Sensitive & Confidential Data	Link to OU policies for data handling requirements of sensitive and confidential data.

User Groups and Support Sites

OU Power BI User Group	Information about the University of Oklahoma User Group. This group meets the second Wednesday of the month in person or via Zoom.
OU Power BI User Group Listserv	OU Power BI User Group Listserv is an opt-in mailing list that allows subscribers to collaborate and learn from each other.
Oklahoma Power BI User Group	Okie Pug meets monthly, generally alternating meetings between OKC and Tulsa. The website contains future event information as well as presenter slides, documents and information on previous meetings and events.
Microsoft Power BI Community Forum	Microsoft's Power BI Community site allows you to connect, learn and discuss with business intelligence experts

DATA AND REPORTING TEAM
The UNIVERSITY of OKLAHOMA

DART Home

Membership

Meeting Minutes

DART Projects

DART Subteams

Data Governance Committee

OU Data & Security Policies

Resources and Documentation

Contact Us

QUICKLINKS

> IT Alerts

> OU Campus Calendar

DATA AND REPORTING TEAM, DART / RESOURCES AND DOCUMENTATION

Resources and Documentation

The following resources are available to help those creating reports and running pre-existing reports that use data about students. The primary reporting tool used is Cognos, and the data used for reporting is found in the Operational Data Store (ODS).

- **OU Power BI User Group Website** - Contains many useful resources related to the Power BI reporting tool, including training materials, requesting a PRO license, joining the Power BI Listserv, information on the OU Power BI User group, information on the Oklahoma Power BI User Group (Okie PUG), and more.
- **OU Cognos User Group Website** - Contains many useful resources related to the Cognos reporting tool, the data that Cognos uses, guidance documents, an overview of some of the reports available for use, and a wealth of other resources
- **Overview of Cognos support resources** - Contains descriptions of the many support resources available to the Cognos community
- **Cognos Data Dictionary** - Contains descriptions for the data that Cognos uses
- **Ask A Mentor** - Ask a Cognos expert a question about how to use Cognos
- **Ask a Data Expert** - Ask a data expert a question about the data Cognos uses
- **Join a Cognos Listserv** - Send a question to Cognos authors who run reports, or to Cognos Consumers, who run pre-existing reports

You must **request a Cognos license** before using Cognos. For additional questions or help with Cognos, e-mail **cognoshelp@ou.edu.**

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The UNIVERSITY of OKLAHOMA
DATA AND REPORTING TEAM
Supporting Data and Reporting Initiatives

Thank you for Zooming with us!

Next Meeting: October 22, 2020

- **David Wilkins**
- **(dwilkins@ou.edu)**
- **Irr.ou.edu**
- **Ou.edu/dart**
- **Last updated by David Wilkins, 08-26-20**