

DART Policy & Recommendations Subteam Agenda, 04-28-16

- Different meeting location: Collings, Room 223
- Previous meeting minutes were approved. The team saw no need to reformat the minutes before posting to a website.
- Finalize charter wording, using draft below as starting point. Charter was approved as-is.

Study and make recommendations on issues affecting the reporting environment such as data, reporting tools and licensing, best practices, policies, standards, and other items, focusing primarily on the areas of student, human resources, and financial data. Communicate to the DART Chair and/or Data Governance Coordinating Committee any critical data issue, data definition issue, data security issue, reporting tool issue, questions of project priority or resources, issues requiring a decision between conflicting views or alternatives, and issues that have broad implications for the reporting environment. Implement decisions of the DGCC.

- Leadership and leadership rotation will be decided at the next meeting.
- Possible upcoming projects
 - DART document branding standards. The document branding template was approved. If a subteam generates a document, the subteam should be identified in the opening paragraph of a document or near the header, so that the document source can be identified. The person's name in the Revised By portion of the footer will also be used to track a document to its source.
 - Review/revise/adopt Cognos Report Standards created by ODS Team (report content standards and policy for moving to production). This document will be placed in the team's OneDrive folder for review and comment, and a deadline for responses.
 - Statement of Appropriate Use--including references to Oklahoma Regents policy and updated OU data policy (in progress). The subteam will review drafts created. The drafts will refer to the state regent policy and updated OU policy (in progress). This document will not be a duplication of those policies, but rather an extension. The training will be administered online (perhaps using OnPoint LMS), and the employee agreement will generate a row in the Peoplesoft training table. The statement of appropriate use will be updated annually.
 - Propose a virtual Cognos report-writer team? A hybrid approach of IT and functional department authors was discussed. For a new report request, Jeff suggested that Susie Irwin should be asked if the report already exists, or if a request already exists in the OCRC queue. For requests that are really new reports, Jeff suggested asking functional report writers to see if they have time to write the report before asking IT resources. Jeff also mentioned that the process of ensuring reports meet standards, including cosmetic uniform look-and-feel, could be done by a group other than report developers, citing the current portal project, where developers concentrated on functionality and a separate group came behind to do cosmetic work to ensure consistent look-and-feel. The new IT policy on a 20-hour dividing line for routing project requests has not yet been approved. That may also factor into how a virtual Cognos report-writer team might

work. This proposal needs more investigation and discussion before a policy is suggested. (Side Notes: Justin Wollenberg may have written reports that would satisfy some faculty reporting needs listed by Patrick Livingood in the recent Faculty Reporting Needs meeting. Those report needs will be given to Justin to see if he has already written some of those reports. IT's Chris Burton is learning Cognos to serve as an additional author resource. During this conversation, David said that a functional author has a number of reports to be moved to PROD, and this author was told that there were not enough IT resources to vet the reports. Jeff wondered how the request was made (ticket, e-mail, verbal), and whether Motio could be used to mass vet a number of reports. David will find out more details on this particular request to move reports to PROD.

- Others as identified by the group? No other projects were identified.
- Look at Reporting at OU Survey for other opportunities to serve. This was not done due to a lack of time.
- Next meeting: May 26th, Collings Hall, Room 237