

## BUSINESS INTELLIGENCE

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### Project Information

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| <b>Project Team Leads:</b>         | Mike Noel<br>Guangming Du |
| <b>Project Manager:</b>            | Rebekah Ahrens            |
| <b>TeamDynamix Project Number:</b> | 241117                    |

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### Project Overview

Business Intelligence (BI) is an enabling technology on campus providing faster and better decision making. BI can deliver greater insight into institutional performance, enable faster and better informed decisions, and can provide information for quicker response to opportunities and threats. BI Solutions can scale across organizational boundaries in order to represent significant cost savings.

Self-service BI solutions empower end users to do their analysis and reporting reducing the need for local or central reporting support. The University has recently adopted the Microsoft BI stack, including Excel PowerPivot and PowerView, as the set of self-service BI tools. This project will encourage the adoption of these new tools to provide self-service reporting.

This project also seeks to mature the BI community and governance to aid in cost savings through collaboration and careful prioritization of projects. The existing Institutional Data Users Group has already increased the data reporting collaboration across campus and this project will further enhance this growing community. The development of the Institutional Data Governance team will provide guidance to bring central and distributed groups together.

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### Project Purpose and Benefits to Campus

Business Intelligence on campus over time has been highly distributed and primarily focused on solving individual organizational or departmental problems with point solutions. This creates many opportunities to provide broader enterprise solutions that scale across many units across campus and result in more cost effective solutions. The identification of report opportunities will lead to potential projects for central teams which will benefit users across campus. As collaboration increases, consistent and secure use of data will also improve as users increase their understanding of data standards. Likewise, the increased use of common tools will provide a more consistent user interface for end users seeking data and reports. This will also provide a more consistent set of tools for desktop consultants to

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## Project Charter



support. Last, the collaborative approach to this project will leverage existing expertise already on campus when possible. This will take advantage of existing domain knowledge.

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### Project Scope Statement

#### *In scope:*

- Determine and maximize cost savings of BI initiatives in order to reduce duplicate reports provided on campus.
- Determine and realize cost savings of current BI initiatives already in progress.
- Perform high level campus BI needs assessment.
- Continue to encourage self-service knowledge discovery within units and collaboration amongst those units.

#### *Not in scope:*

- Reduce duplicate report hosting applications (such as MAX, Proview, and Sharepoint) because this falls under the scope of Application Portfolio Management.
  - Changes in reporting structure for existing report writing staff on campus.
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### High-Level Requirements

- The project team will identify units across campus to interview regarding the data sources, tools, and reports they use.
  - The team will identify the potential cost savings of centrally deployed BI infrastructure, such as the newly deployed Microsoft BI stack, CLAS MAX Financial Reports, and centrally provided student record reporting.
  - The implementation of the Institutional Data Governance team will provide oversight and prioritization.
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### High-Level Risks

While self-service BI provides users with quick access to necessary data, some users may not find the tools intuitive, potentially result in decreased adoption and support. This will be mitigated using training sessions, including security awareness.

On-going hosting and support for reports or tools may need to be addressed. This is particularly evident with the CLAS MAX subproject as the team works to transition support from CLAS to FBIS.

Performing the needs assessment sets false expectations that we will be able to provide solutions to all of the opportunities identified.

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### Assumptions and Constraints

Throughout the project, we will identify potential BI solutions which will be assessed individually.

BISSC will continue to be a priority and initial hiring will be complete in the near term. As BISSC staff are hired, the project team will be revised as appropriate. This team and campus BI community will be engaged in delivering BI solutions identified.

During the Campus BI Needs Assessment, opportunities will be identified, however, the time needed to complete any necessary work may not be available from the team(s) required. Any inability from units, including non-IT staff, to participate would constrain the ability for the BI team to identify or reduce redundancies.

Many aspects of this project depend on the new Microsoft BI stack being fully operational and supported, including Sharepoint. Any problems discovered may constrain one or more subprojects, potentially significantly.

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### Project Governance

The OneIT Steering Committee is ultimately responsible for overseeing and certifying the viability, support, and overall success of the BI project at the Department and Organization levels. The OneIT Steering Committee has the following responsibilities:

- Champion the BI project.
- Approve the BI Project Charter.
- Provide adequate staffing and resources.
- Provide high-level oversight, and support.
- Review and approve major scope changes to the BI project.

#### *The OneIT Program Office*

- Champion the BI project.
- Provide escalation resolutions.
- Provide oversight of requirements, and support.
- Provide clarification of issues, questions, and concerns.

Advisory groups will be created naturally for each subproject based on the individuals involved.

Appropriate stakeholders, including IDUG and IDUG Executive Committee, will be consulted as BI project opportunities are identified.

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### Anticipated Cost Savings Categories

Infrastructure Retirements, Staffing, Licensing, Cost Avoidance

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### Sub Projects

- Student Record Self-service BI
  - Implement BI infrastructure to provide self-service BI to campus.
  - Replace 100+ existing Division of Continuing Education (DCE) reports with self-service BI solution.
- Campus Financial Reporting
  - Implement existing financial reports from CLAS for Budget Officers across colleges and orgs.
  - Transition on-going support to FBIS.
- General Ledger Self-service BI
  - Implement BI infrastructure to provide self-service BI to campus in the context of General Ledger data.
- Admissions Self-service BI
  - Implement BI infrastructure to provide self-service BI to campus in the context of Admissions data.
- Campus BI Needs Assessment

Interview key unit representatives regarding data needs, what data and solutions they are currently using and identification of unmet needs.

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### Preliminary Milestones

|  |                  |
|--|------------------|
| CLAS MAX GL Reports: Pilot for Collegiate Budget Officers                          | March 23rd, 2015 |
| CLAS MAX GL Reports: Available for all Budget Officers                             | Fall 2015        |
| Self-service BI: Registrar's Office Self-service BI Solution Internal & Collegiate | Fall 2014        |
| Self-service BI: Replace DCE Student Record Reports                                | Fall 2015        |
| Kickoff Campus BI Needs Assessment   | June 2015        |

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### Project Team

- David Thole
- Sara Novotny

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## Project Charter



- Chris Fomon
- Hans Hoerschelman
- Warren Staal
- Kris Yows
- Brenda Ulin

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**Stakeholders:**

- Refer to Stakeholder Registry

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**Potential Implementation Cost:**

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Target Start Date:

Target Go-live Date:

Charter Ratification Date

MM/DD/YY