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Developing a reporting strategy: A customer perspective

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Introduction

PeopleTools Reporting





PeopleSoft's Perspective on Reporting

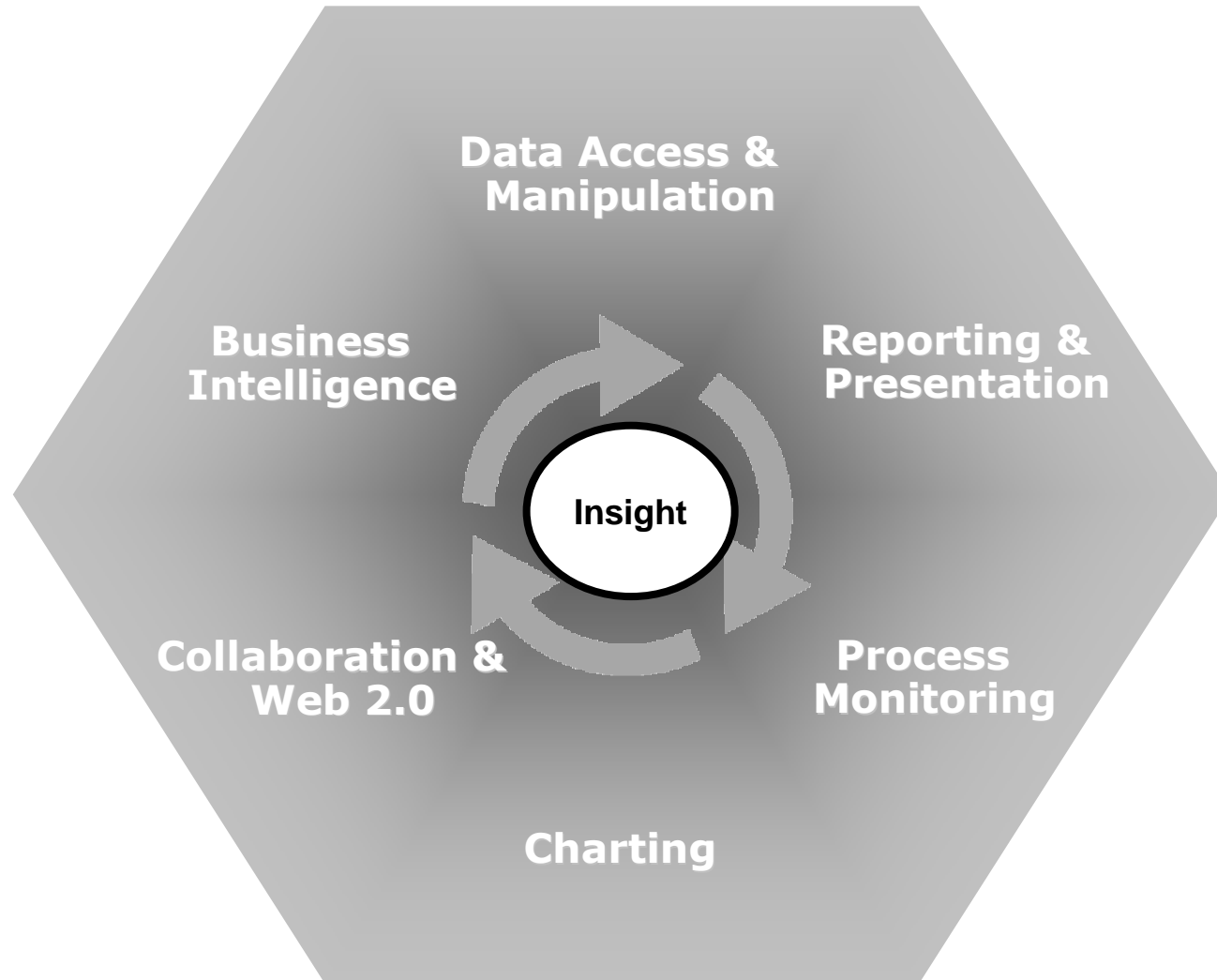
- Enterprise data is meant to be accessed, analyzed, presented and used
- Technology has shifted and users' demands and expectations have increased
- Rich Internet Applications provide personalized content in context
- To be effective and productive, users need their data where, when and how they want it
 - In the tools and context they use
 - In their language and localization

Not just greenbar anymore...



PeopleTools

Full spectrum of options



Introduction

Kari Branjord

- Project Director, MetamorphoSIS (October 2007)
- 9 years in Higher Education with PeopleSoft products
- Executive Vice President, VP of Technology, Higher Education User Group (HEUG)



Introduction

University of Colorado

- Founded in 1877
- One University System
- University of Colorado
 - Boulder
 - Colorado Springs
 - Denver (includes the health sciences center)
- Total student headcount: 52,122



Introduction

MetamorphoSIS Project

- 3 Year implementation project
- Total Project budget: \$44Million
 - Total technical staffing budget approximately 10% of total budget over 3 years.
 - Total budget covers hardware/software procurement and maintenance, backfill, and direct project expenditures
- Staffing mix: Primarily CU staff, Expert “A-Team” consultants from OCS (Ciber sub), and GSD.





What products is CU implementing?

- Campus Solutions (CS)
- Customer Relationship Management (CRM)
- Enterprise Performance Management, Campus Solutions Warehouse (EPM-CSW)
- PeopleSoft Enterprise Portal
- Oracle Fusion Middleware
- Seibel Universal Customer Master (UCM) for Master Data Management (MDM)
- User Productivity Kit (UPK)
- Degree Audit (DARS)
- Document Management System (TBD)



Why do we care about a reporting strategy?

- The ability to extract data from our transactional system is an expectation held at the highest levels of our institution.
- Previous implementations failed in this arena.
- We are replacing a rich, distributed reporting environment, and a perceived step backward will not be tolerated.
- The landscape appears to be complicated, thus simplifying assumptions must be communicated.



Our PeopleSoft environment

- PeopleSoft HR 8.9 on Ptools 8.46
- PeopleSoft Finance 8.4 on Ptools 8.44
- No crystal, no nVision
- Lots of SQR
- Robust warehouse.
- Cognos



Our Student environment

- SIS on a mainframe.
- IDMS SQL.
- Query framework allows distributed (uncoordinated?) report writing, across all campuses.
- Significant amount of direct ODBC connection.
- SAS
- A great deal of creativity in overcoming system limitations via reporting solutions



What are the considerations in a reporting strategy?

- Current skill sets.
- Current staffing levels and patterns.
- Existing technology assets.
- Availability and timeliness of data.
- Performance.
- Expected longevity of tools.
- Anticipated investment in tools.



Where did CU start in forming the strategy?

- Read the landscape
 - Understand the vendor roadmaps
 - Understand internal staffing patterns
 - Forecast needs and trends
- Looked at all possibilities then applied simplifying assumptions
- Targeted a 90% solution strategy



What questions does a strategy need to address?

- When to use the data warehouse vs. the transactional system
- What tools to use to create the report
- Who creates the reports
- To whom should reports be made available
- How should reports be delivered

What factors did we think would drive the answers?

- Brainstormed and arrived at this Suitability to Task matrix
- Quickly abandoned it!

	A	B	C	D	E	F	G	H	I	J	K	L
1	Suitability to Task											
2	Scale 1-5 (1=poor, 5=excellent)											
3	Tool	SQR	Application Engine	SAS	Cognos	Brio	PS Query	Crystal Reports	MS Access/TOAD	BI Publisher?	XML Publisher	Query framework
4	Performance	2	5					2				
5	Report scheduling	5	5									
6	High Volume	2	5				2	2				
7	Row/column security	1					5					
8	Real-time reporting						5					
9	reporting across multiple data sources		2				2	5				
10	Simple Reports		2				2	5				
11	Complex Reports - logic		5				2	5				
12	Complex reports - layout		2				2	5				
13	Report formatting options						4					
14	PDF											
15	Email			5								
16	Web Browser							5				
17	Paper							5				
18	Excel			5				5				
19	Ease of use		2				4	3				



How did we simplify from that point?

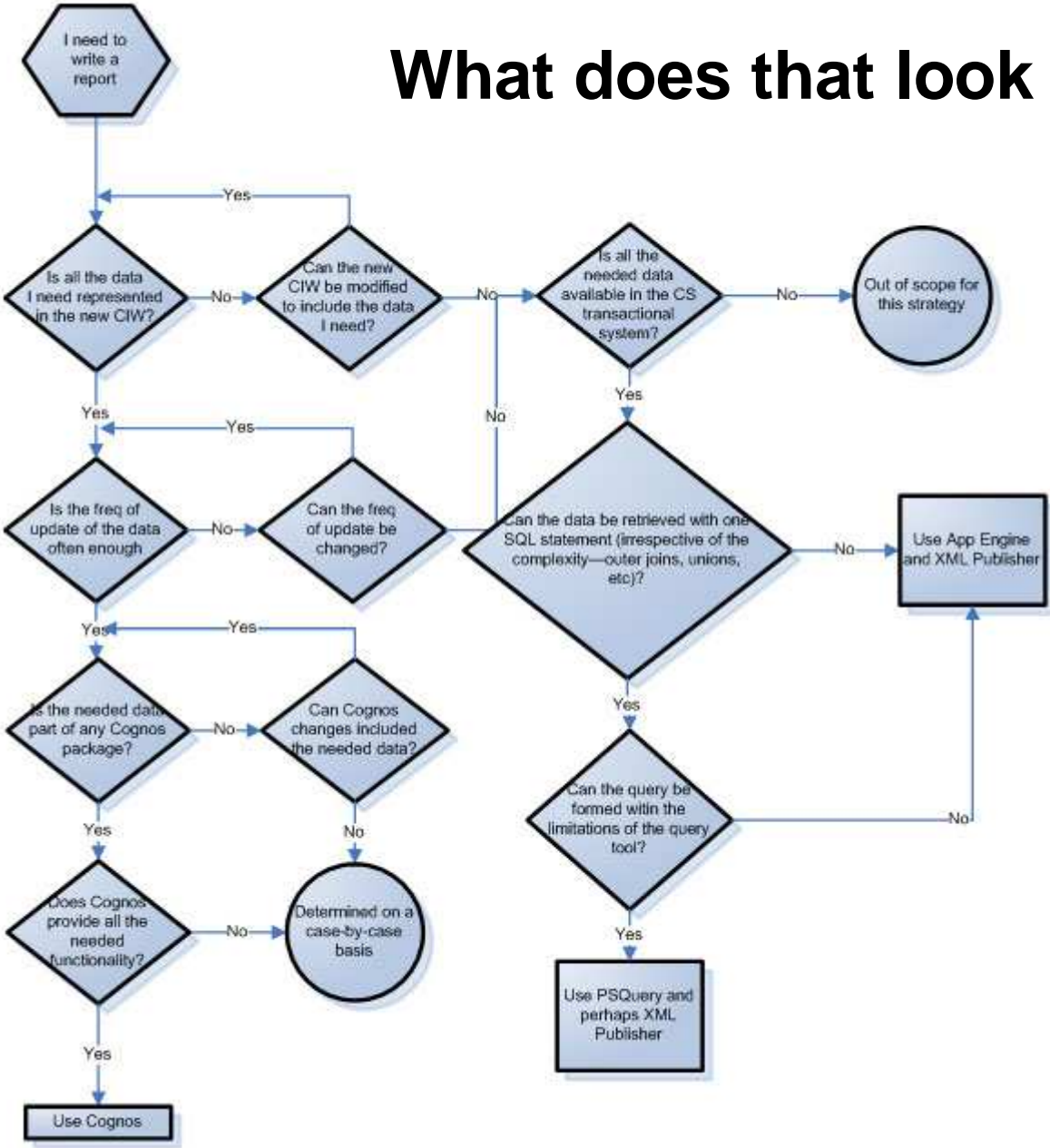
- Presumption lies with the warehouse
 - If data exists, is timely enough, and has defined metadata, write the report against the warehouse.
 - Use Cognos Report Studio for Enterprise level reports or Cognos Query Studio for ad hoc or department level reports
- Mandate rules for reporting against the transactional system
 - PSQuery is preferred tool
 - App Engine to be used for complex logic
 - XMLP can be used in conjunction with either



What happened to the familiar favorites?

- We will not write new jobs in “batch object” technologies:
 - SQR
 - Crystal
 - COBOL
- We will not allow ODBC connections via:
 - Brio
 - MS Access
 - Anything else...

What does that look like?





Who creates the reports?

- Will train current “super users” and report writers in Cognos Query Studio and PS Query.
- Will train functional experts in XML Publisher
- Central resources will write App Engines



How will reports be delivered?

- Via the PeopleSoft Enterprise Portal
 - Data source should be invisible to end users
 - Must indicate timeliness of data
 - Enforce security either within the report itself or at the presentation layer
- Select reports will be available within the PS Menu structure
- Jobs that report data to regulatory and quasi-regulatory bodies, smell like a report, could be considered an interface—distinction is irrelevant



How to go from approach to implementation?

- 2-pronged approach:
 - Functional team members think through business process and envision reporting needs.
 - Gather information from report authors about anticipated needs
 - See Report Inventory spreadsheet
- Ask the question: Is this report necessary?
- Based on select criteria and data presented, can we condense the separate reports into one?
- Use the decision tree to funnel appropriately



What else can you do with the PS reporting tools?

- Too much to enumerate, but here are a couple of ideas for taking advantage of XMLP
 - Transcripts
 - View the application for admission exactly as submitted by the applicant
- On-line chart/graph for the Admissions Funnel
- Does my preconceived notion of “report” limit me to thinking of something that looks like a spreadsheet?



Q & A



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