MINUTES
Task Force on Reporting Strategies
Old Alumni Building, Room 103
Columbia, MO
January 9, 2003
9:30 a.m. – 3:00 p.m.

Attendees: Bob Mullen, Bonnie Bourne, Mardy Eimers, Ben Phelps, Linda Koch, Cindy Martin, Bruce Bullock, Pat Morton, Pat Schwartz, Nancy Zielke, Art Brooks, Cynthia Clements, David Saphian, Laura Stoll, Jennifer Doll, Kandis Smith, Debbie Braun, Karen Kirkwood, Larry Westermeyer, Randy Sade

Welcome and Introductions – Bob Mullen

Bob welcomed everyone and noted that he wants the meetings to be a casual atmosphere. Today, the group will be setting the tone of what needs to be done between now and May. As a get-to-know-you exercise, Bonnie asked that members visit with the person next to them, get to know each other – finding common interests outside of work – and then members will introduce their neighbors with whom they visited.

Task Force Charge – Vice President Nikki Krawitz

Vice President Krawitz thanked everyone for agreeing to serve on the Task Force. She noted that at the beginning of ASP work, one of the goals was to meet the reporting needs of the University community. Here we are six years later determining how we ensure getting the information needed to perform or fulfill assigned responsibilities, which brings us back to reporting. The charge is to come up with an overall plan to enhance the reporting for all units of the University as well as external constituents.   The plan and steps that need to be taken to fulfill the plan will be presented to the Vice Presidents who will make the final decision of implementing the plan.

The four questions that will need to be addressed are:

1. How the University can enhance reporting capabilities and respond to the data needs of faculty, administrators, and staff?
2. How the University can address reporting needs in short-term during PeopleSoft implementation and in the long-term once PeopleSoft is fully implemented?
3. What strategies are needed to leverage new technologies and best practices to support reporting?
4. What resources, if any, are needed to implement any proposed interim and long-term reporting strategies.

Nikki believes users of information should be driving the reporting strategies – what kind of information is needed, what kind of access to the information is needed, and who should supply that information. She hopes that the group reaches out to multiple constituencies – including data needs among faculty leadership on the campuses which may be very different from our needs. We also need to look at what we need in the future – don't convert to the past, but convert the past to the future.

Nikki expressed her appreciation to Bob for heading up this Task Force and Bonnie for her role as facilitator. Bob, in turn, thanked Nikki for sponsoring the Task Force, and also thanked Mardy Eimers, Randy Sade and Bonita Lenger for their support.

Bob noted that there is no hidden agenda behind the work of the Task Force. Nikki noted one limitation to keep in mind – there is an information platform called PeopleSoft, and we need to take advantage of that platform as much as possible.

Opening comments thrown out for discussion by Task Force members were as follows:
- PeopleSoft needs to be our source of data; but we should not restrict our reporting to come directly from PeopleSoft because there is too much room for error. (Art Brooks)
- Reporting is a separate function from the control things such as registering students, and should be a separate entity. (Pat Morton)
- The majority of the modules have been implemented; but there are still more, and an overview of what will be implemented in the future would be beneficial. (Nancy Zielke)
- Reporting seems to be on the back burner of these implementations – we need to look at those needs before more is implemented. (Pat Schwartz) Nikki noted that from experience in the finance module, that is very difficult. A lot of time was spent creating reports out of MOBIUS to look a lot like what was produced out of FRS, and the feedback is that those reports are not very useful.
- Reports are generally thought of as a piece of paper, but we need to get into more of the languages of queries, selection criteria, etc. in the future. The terminology changes (such as the meaning of "account" in FRS vs. PeopleSoft) create a lot of problems. (Pat Morton)
- We need to grasp all options to handling reporting – no single option. Some may be as simple as a PS query, but others will be much more difficult. (Art Brooks)
- People use the same terms but are not talking about the same thing. For example, the definition of "faculty" differs from person to person. (Pat Morton)
- Concerned about effecting power in the users for reporting – erroneous reports. (Art Brooks)

Nikki questioned if the focus should be on the 10% exception reports or 90% needs, and hoped that focus of the group would be on the 90% needs.

Roles, Rules, and Guidelines – Bonnie Bourne

Bonnie explained that her job in working with the Task Force is a facilitator to help get the work done. She asked that everyone participate, contribute, learn, and remain focused – that focus being on the 90% needs. As we learn and work, we need to have fun also, and suggested casual clothing for future meetings to create a more comfortable atmosphere.

Review of Charge and outline of deliverables – Bob Mullen

Bob noted that there are not a lot of specifics in the meeting material, and it is the Task Force's job to fill in the specifics – listen to the various needs on the campuses, coming up with a plan to suit all needs, and present that plan to the Vice Presidents. The Vice President's want an overall reporting strategy that they can put their hands around. When the Task Force was put together, they were looking for people who would be good looking at reporting from different perspectives, levels, etc. from the University. You were nominated and your roll is important.

Focus groups will be held on all the campuses to listen to their needs and hopefully incorporate those needs into the strategy.

Bob handed out a list of the Task Force members which included a list of people that could be used in an advisor capacity. The more we share, the better likelihood of meeting the users needs. There is nothing confidential about our work. Bob asked that the members of the Task Force take a look at that list of advisors and determine if we need to add/delete anyone – people we need to keep up to date. We will be discussing how that communication should take place. Minutes will be sent to all these people for feedback. Jennifer Doll mentioned that she communicates with the Accounting Directors on a bi-weekly basis via a conference call and would be glad to keep them informed of the Task Force's work. Bob noted that Laura will be the communication link with the Registrars.

There is a lot of work to be done between now and our last meeting on April 10. Our recommendation needs to be to the Vice Presidents by early May. Everyone will be asked to participate in writing the recommendation.

Schedules for remaining meetings and Focus Groups – Bob Mullen

Bob distributed a handout outlining the schedule and focus of future meetings. The Task Force will be looking at needs, what other institutions are doing, and best practices to develop a theme on how needs are being met. We will also look at what is delivered by PeopleSoft and determine how these fit in with our needs to come up with an implementation plan.

Review and Discussion of White Paper / White Paper Activity – Review of reporting needs by functional areas – Bonnie Bourne

The Task Force on Reporting Strategies White Paper was distributed. Bonnie asked members to take 10 minutes to read through it, underlining main points which will be the basis for discussion. The following items were noted for each section of the White Paper:

Components of a Reporting Strategy
The first question is incomplete – students and external constituents need to be added. (Pat M.)
Data – translate to information (Laura)
Second question – switch "operating system" for PeopleSoft (Pat M.)
Clarify what "Reporting" means (Pat S.)
Empowering users (Art) – "Responsibility" of users
  – Jennifer said that on the Finance side, users were given the "power" and it has been a nightmare. They don't know how to use the data.
  – Karen noted that current web reports don't agree from screen to screen – it pulls data from different tables so you get different numbers.
Ability to understand what questions need to be answered
Issues of similarities/differences
Further defining "Roles"
Standardized definitions
Distributing load for reporting
Short-term and long-term issues
  – Jennifer feels five months down the road for a solution is too late.
  – Bob mentioned shadow systems are being built.
  – Linda asked at what point we say that PeopleSoft does not provide the data needed.
Independence between reporting and data

Types of Users and Their Needs

Types of Data and Reporting Needs

How to Match
Multiple solutions (referring to tools and tool independent)

Lunch

White Paper Follow-up and Summarization – Bonnie Bourne

Bonnie distributed a list of Functional Teams and a list of six Functional Group Questions. Task Force members were asked to do the following:

Individually write down thoughts for each question.
Get Functional Teams together.
Appoint a recorder/reporter.
Discuss each question.
Record main points on flipchart paper for reporting to the big group.

See Attachment A for reports from each group.

What have we learned?/What do we need to do next?/How do we need to organize to finish tasks? – Bonnie Bourne/Bob Mullen

Items noted that were learned from discussions today:

– There is more frustration from academics and end users. (Bonnie)
– Need to listen to student needs. (Pat S.)
– More controls needed on Procards, but less controls on HR. (Bruce)
– Training (on UMSL in particular) is an issue. (Karen)
– Management is not receiving reports to aid in making decisions. (Nancy)
– A lot of reporting has been done without user involvement. (Bob)
– When reports were spec'ed, systems were not running. (Larry)
– Duplication of efforts – each campus reinventing the wheel to get things done. (Linda)

Bob noted that we are hearing recurring things about training, data integration, and data complexity across all the systems.

Ben noted that the student system will have a significant impact on HR as well. Once we go live with the student module, which is the largest, security has to be tight to protect the data due to regulations. Data also has to be fed into the HR system. All of this is important to remember in the strategy.

Art noted that he objects to the idea of only addressing the 90% needs – we need to address 100% or we are failing our duties.

Bob asked what the number one piece of advice would you give to someone implementing a new system – identify reporting before you go into production. Jennifer commented that she didn't think we were at a point to say things don't work and start over.

Bob outlined the tentative schedule for Focus Group sessions on each of the campuses as follows:

St. Louis – January 21-22 – Larry Westermeyer is the contact
Columbia – Week of January 27 – Pat Schwartz is the contact (27, 28, and 29 if needed)
Kansas City – Week of February 3 – Nancy Zielke is the contact
Rolla – Week of February 24 – Laura Stoll is the contact

Sessions should run about two hours each, with not more than 20 in each session. There will probably need to be four or five sessions on each campus. We will be there to listen and learn, which is the reason for keeping the groups small.

Bruce suggested a group be focused on Research. May need another group for the Chancellor's staff.

It was questioned what would be done at the Hospital? There is no representative from the Hospital on the Task Force. Ben mentioned that the Hospital has gone out and done some things on themselves, so they might be able to give this group some insight. Bob will follow up on Hospital participation.

Bob distributed a handout on what we hope will happen over the course of our next three meetings. At the second meeting, we will start to look at what other customers are doing for reporting. Presentations will be given on the campus focus groups that have been completed, and there will also be presentations on financial reporting "best practices." We will also begin looking at how we would measure our success in creating our recommendation, and strategy success.

By the third meeting we will have the completion of the last campus focus group reports. We will also start to look at UM and campus resources needed to implement our recommendation. Hope to also have a first draft of recommendations.

At the fourth meeting we will complete the writing of recommendations as much as we can. We have from April 10 to end of May to finalize the presentation. We are not sure at this point whether the presentation to the Vice President's will be in person or in writing.

Nancy noted that some framework needs to be done for the focus groups – make scope of groups a little more definitive. Larry noted that he would like this information ASAP because he is sending invitations out next Tuesday.

Ben questioned if the goal is to reach a consensus, or give options and resources tied to those options. Bonnie understood that the Task Force is to develop a plan for the Vice President's, and that plan could include options.

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