

**MINUTES**  
**Task Force on Reporting Strategies**  
Old Alumni Building, Room 103  
Columbia, MO  
March 13, 2003  
9:30 a.m. – 3:00 pm.

Attendees: Ben Phelps, Linda Koch, Cindy Martin, Bill Edwards, Bob Mullen, Lanette Vaughn (for Bonita Lenger), Bonnie Bourne, Donna Johanning (For Jennifer Doll), Kandis Smith, Mardy Eimers, Randy Sade, Michael Ray, Barb Breen, Mike Nolan, Pat Morton, Pat Schwartz, Sandy Monson, Laurence Kaptain, Nancy Zielke, Art Brooks, Cynthia Clements, David Saphian, Laura Stoll, Debbie Braun, Karen Kirkwood, Larry Westermeyer.

**Welcome and Introductions/Review of Charge - Bob Mullen**

Summary by Bob Mullen – things are going well. Interviews were conducted with the Vice Presidents and they were positive. We are finished with the focus groups. We enjoyed listening to everyone – their thoughts and comments were very enlightening. If we are to have a user-driven strategy, we must have user input. Bob introduced Bonnie Bourne to begin the day's activities.

The first activity was to meet in campus groups (plus an academic group and a system group). Each group reviewed the notes from their focus group session and picked out 10 specific themes (major areas) that will later form the core of the recommendations from the focus groups. Also, each group selected, and summarized, "quick wins" – quick, easy and without spending a lot of money to help people get through their reporting needs as best as possible for the near future.

Bonnie – reconvened group – each group reported. A summary of the group reporting is included here.

[Themes](#) (For a complete listing of themes and quick Wins from each group. Below are the summaries, of themes, which the entire group did together at the task force meeting.)

**Group Summary of Themes**

UMSL – Review all reports for redundancy. We need to look at what we have done and see if it is really relevant to what we are doing now and what end user needs are. (2 others had this theme)

UMC added that people do not know what is available and so we need a list of reports that are available (Pat said, have menu(s) because there are too many available for calling it a "list"). All groups agreed with this.

UMR – Encumbrances – 4 others had that also – HR, payroll – Reliability of the data – lack of confidence in the reports – the finance system – slow reports (This could be a short term fix also.)

UMC – Training – too late – wrong time – re training – on everybody’s list – Pat – maybe not so many people have to be trained on very technical reports – we don’t separate data entry from doing complex reports when we do the training—not everyone needs the same training. We need to have training specific to users. Also, new employees need training to get up to speed (Mike Nolan).

Pat Morton – We need a good data element dictionary – and a different use for different things – a good fit between data – compromise between flexibility and consistency. There is a lack of common definitions. We need to look at data in light of questions we are trying to answer - several had this on their list – also only one dictionary - every group should not be developing their own list or there will be no consistency. Reporting should be separated from control systems that underlie it. PS has been around for 8 or 10 years but we will always have a reporting system – we need to have a good reporting system regardless of whether it is PS or something else. The titles for payroll are not useable for academic – we need to have an extra level of dictionary that is reporting specific.

SYSTEM – Integrated data store. When people do reporting, they can do it from student, hr, finance but we need one place where all this information sets. Everyone has this on their list of themes. Some tables need to be loaded nightly and others annually and others nightly– so need some kind of schedule. We need a Web-based Integrated Data Store.

UMKC – A common data set – a system benchmarking system. The ability to take data and allow the units to do planning – faculty workload planning – budget planning – cross-pollination of data. Repository for benchmarking – a call for comparative data. All areas said this. Harder to compare at a college level but the campus comparing works fairly well. That is why we were arguing for good meta data. Somehow we need to recognize different comparison groups for different needs.

UMSL – End user involvement in specifications and future reports. They need to get together and say what users need rather than the system getting together and saying what we need and then telling us to do it.

UMR – Response time and long delays – UMSL and UMKC had that also. Academic said also. Why is this – it is slow because of the number of tables. Pat, I tried to load a report – it took 2 and ½ hours. Also – inconsistent – sometimes the report does okay and then next day, it says no data there or timed out. Pat – need to identify indexes – if those can be cleaned up, it will greatly improve time. Defining reporting as a separate problem helps the speed also.

UMC- Communication – there is information out there - people have certain info – but it doesn’t get to everyone. Ex. Wisconsin said, in their implementation, you cannot over communicate – all campuses agreed with this.

ACADEMIC – a single source for data reports – a dean or VP says, I can go there and get the report and everyone will get the same report – from the same source. A Dean could go to one place and get what they need about their dept without having to go to HR for this and finance comes from a different place.

SYSTEM – We need to establish/define a relationship between functional and technical people. UMKC also.

UMKC – Understanding of what information is available – especially as it relates to HR payroll – people want access to faculty data, leave of absence data, promotion and tenure dates. Availability of payroll information. 1 other group said this also.

UMSL – We need to review the process flow – and try to simplify – ex. Redundant input and doing more things electronically – also UMKC

UMR – Faculty work load and faculty accomplishment. UMC also said this.

UMC – Security – but people need access to data to do their work - Bill Edwards said that there is even more legislation to limit access to data than ever before. UMSL ran into the problem with the names being the same and without identifying numbers the wrong person could even get paid for work someone else conducted. Some places there is too much security and some places there is too little. We need to be able to go across the whole system as it relates to each person. Linda says there is a solution to this already. It is Search Match - she described how to do this and others were very glad to know the information.

ACADEMIC – Inputs and outputs are both important. UMSL – getting feed back from the academic people – we need to listen to these. All campuses said this. UMC – every meeting I go to, people say we aren't satisfied with lists – we want to download data – primarily to Excel.

UMKC – ability to take information and put it into a final presentation format – publishing, printing from data – no one else had that one.

UMSL- It appears that the UM system is not responsive to future needs. – Problems get reported and nothing happens. UMC said this also but put it on the short-term quick fixes. Even if the answer is no way – we aren't fixing it – at least that is an answer of some sort and we would know where we stand.

UMR – Summary reports – all campuses said that.

UMC – Eliminating shadow systems – but some rationale or decision making as to when third party reporting system is necessary. We mean the true shadow systems that duplicate things that are already in the system – these are not good and cause problems. Some shadow systems are needed. Shadow system is not a bad shadow system if it extends information – but not –“I am keeping it because I don't trust the PS system”.

UMSL – Simplified data system for reporting purposes – lessen the number of tables that have to be linked – a well-defined sub set of data for typical reporting. Can't get it all but identify a vast majority of data and simplify it for everyone.

UMSL – more responsive data systems – it takes too long to get people authorized particularly on the financial side. It took me 3 weeks to authorize people for crystal access. People need access quickly so they can do their jobs. UMR – yes, need to streamline process people have to go through to get access.

UMR – The end date doesn't mean anything on a PAF in PS. So we have to have a shadow system to have ending dates.

UMR – Data warehouse issue is important. All groups agreed.

UMC – Standards – naming conventions – standards for requesting reports and naming reports – this should be looked at up front before we started accumulating reports out there.

Bill – Input data and the integrity of the field you are dealing with. People are short handing their information – this means they are making data entry easier but it makes reporting terrible or impossible. This isn't new – we did it in legacy – creative cheating to get payroll out and that ruins reporting. If it is that hard to enter things correctly, then the process for entering needs to be changed.

### BEN – People Soft PRESENTATION

After Ben's presentation, there were questions:

- Why are we here if the reporting decisions have already been made
- Has money already been spent on more PS reporting and where will the money come to fix the problems and develop a system of reporting that works for us.

Lunch was served.

### LARRY – PRESENTATION OVER FOCUS GROUPS and UMKC overview

Larry Westermeyer – how long would it take to get a Dean's workbench to come up with a list of what they need as far as reporting?

### ART BROOKS – UMR PRESENTATION

Questions/comments following Art's presentation:

- Can you do this for all the campuses?
- Donna, so basically you go out and see if there are existing tables  
How many tables do you have? Answer: 20-30 – several 100 for all. Mostly 2-3 tables for each question – the most would take 5.
- Some of the functional tables – are they all de normalized where there is no view created. Answer: We have made them physical – no views. If you have a redundant field and a functional table – do you have to load it twice – no, disk space is cheap and processing is expensive so it is done in pre-select process.
- Do you have separate pre selects for each table or each group of tables – yes, but there are commonalities.

### MIKE RAY – HOSPITAL –PRESENTATION – DIAMOND MINE

Customize what each person needs to see.

### CINDY MARTIN – PRESENTATION

Bob – Critical Success Factors – many of you have sent me information but some of you have not. Between now and our 4<sup>th</sup> meeting, a lot of writing is going to take place. We need your help. Please send your ideas/comments on critical success factors to us.

Bob – Interim solutions – the quick wins will be part of it.

Pat Schwartz – When we mentioned our quick wins and long term improvements, we did not mention resources and we will have to have these in order to do many of the things we mentioned.

Donna – Yes, that is why some of these things haven't been done – it is not that we never realized it. It is just -- who will do it and where is the money?

UMSL – I am worried that we didn't hit all that was on the notes today – that we have missed some things that were said in the focus groups. – We may need to have each campus get together and do a more comprehensive list of our top themes.

Bob, Lanette will combine all the lists and send them to you – would you all like that? All groups said, yes. That way, you can review the list and add things that may have been missed. Also, when you get the list, let us know if these things are already getting done or, if you know, the timeline for things on the lists that you know are being solved.

Other comments:

We have to look at some of the shadow systems.

We need to make reporting easier, more complete and better by doing it the way we recommend – we do not have the authority to MAKE people do things. We need to bring the shadow systems up into the light so we can see them so we can see that a need is being met in that way – and we can provide groups something better to do that will enhance reporting.

Pat – language – I would like to make the language clear – on shadow systems so that we won't have the negative connotation. Various names were suggested for the term shadow systems – legitimate and illegitimate systems – we need to be very careful about our language so that we separate good shadow systems that are necessary and bad ones that are repetitious and make for inconsistent reports. Also, it is good to use the language of bridge rather than old and new systems.

Bob, we will soon have a draft and will send it for you to review.

Larry Westermeyer said – let us not meet if the report is not finished. I want to see the report ahead of time and then come to the meeting.

Bob – Yes, you will have it to read before the meeting.

Bob – Do we need a 5<sup>th</sup> meeting?

Discussion - Yes, we need a 5<sup>th</sup> meeting – Randy will start looking for a date in early May. The report due date has not been changed and is still due in May – but we could have a meeting around the first of the month or the middle.

ADJOURN