

MINUTES
Task Force on Reporting Strategies
Old Alumni Building
Room 103
Columbia, MO
April 10, 2003
9:30 a.m. – 3:00 p.m.

Attendees: Ben Phelps, Linda Koch, Cindy Martin, Bob Mullen, Bonita Lenger, Bonnie Bourne, Jennifer Doll, Kandis Smith, Mardy Eimers, Randy Sade, Michael Ray, Barb Breen, Mike Nolan, Pat Schwartz, Nancy Zielke, Art Brooks, Cynthia Clements, David Saphian, Karen Kirkwood, Larry Westermeyer, Bill Edwards

Review of Charge and outline of deliverables

Begin Review of Draft Recommendations

As a result of the discussions regarding the format of the recommendations, it was decided that the structure of the recommendations would be as follows:

- Executive Summary
- Introduction
- Process
- Findings
- Strategies and Recommendations
- Supporting Materials

Mardy noted that we need to be mindful of the audience intended for the recommendations and we need to think carefully about how we explain things. It was suggested that having someone outside the group review the document for clarity before it is presented may be beneficial.

It was also suggested that consistent wording be used throughout the document. For example, data mart versus data warehouse. Since both of these terms, among others, may be used, it was decided to add an appendix titled Definition of Terms. Terms mentioned that need to be included in the appendix were as follows:

- Data Warehouse (data)
- Data Mart (summary information)
- Information Repository
- Reporting Library (predefined reports)
- Functional Data Store

Karen mentioned that her boss attended the HEUG conference and discovered that there is a reporting tool within PeopleSoft called EPM, and was questioned why the University is not using it rather than going through this reporting recommendation process. EPM is not working, and the recommendation document should include an explanation of why EPM is not sufficient for the reporting needs of the University. It was noted that the budget module uses EPM. Art suggested that a statement be

included in the recommendations that “EPM is not a viable option now, but may be a tool used in the future.”

Mike Ray suggested a summary for the Findings section of the recommendations as follows:

- Current reporting strategies are not meeting information needs – from the highest level to the individual level
- Significant redundant processes
- Lack of documentation
- Lack of tools
- Lack of training

Bob will work with the academic representatives to see what information in the Academic Administration Needs portion of the draft recommendations can be moved to an appendix.

Bonita will send Bob the Draft Recommendations document with the suggested corrections that have been made to the document today, and prepare another draft to be distributed to members of the committee. Bob asked that the Draft Recommendations be shared only with members of the committee at this point.

Next Steps and May 8th Meeting

It was decided that another meeting would be needed between now and May 8th in order to meet the deadline for finalizing and presenting the recommendations. Bob will try to convene the group again in approximately two weeks.