Date: December 11, 2013

Attendees:
Jacob Chandler, Donna Artho, Somer Franklin, John Hitzeman, Karyl Horn, Aaron LeMay, Diane McCormick, Matt McKnight, Chuck Mize, Paige Smith

Agenda:

1. **Enterprise Services Work Flow (Chuck Mize)**
   Chuck presented some PowerPoint slides regarding changes to the way in which requests are completed within Enterprise Services as we transition further from an implementation approach to a mindset of stability of the system. Some clarification is needed surrounding:
   - How work is requested
   - How work is classified
   - How work is specified
   - How work is prioritized

   **How work is requested**
   Work requests for Enterprise Services should be submitted through the Cherwell system so that they can be tracked and classified correctly.

   **How work is classified**
   Work requests can be classified into four high-level buckets:
   1. **Incidents** – Incidents are unplanned interruptions or reductions in the quality of an existing service.
   2. **Service Requests** – Service Requests consist of requests for access or some pre-existing deliverable.
   3. **Projects** – Requests for functionality or other service that does not currently exist. Projects are typically larger in scope.
   4. **Unknown** – This unknown category indicates that we need to further definition.

   **How work is specified**
   Incidents and Service Requests are addressed as they are placed. Projects also have an existing process by which the project is managed. Unknown requests need additional clarification or specification to be classified as either an Incident, Service Request, or Project. Unknown requests will be reviewed and assigned to a Business Analyst to work with the requestor and other pertinent people to further specify the request to the point that it can be classified appropriately. Once appropriately defined, the work is then reassigned to the appropriate Tier 2 or Tier 3 staff to be fulfilled. The net result to be achieved is a better understood request and a faster fulfillment.

   **How work is prioritized**
   Generally, work requests are prioritized first by issues affecting data integrity which have the highest potential of affecting the campus as a whole; secondly by issues affecting whole application systems which typically affect one or more divisions; lastly, by issues affecting a
single department or individual. In all cases it is expected that assigned business analysts or technical staff will communicate and coordinate work appropriately with those making requests.

**How are Business Analysts being trained to understand business processes?**

Business Analysts are being trained regarding proper business analysis techniques based on standards established by the International Institute of Business Analysis (IIBA). Staff to fill the Business Analyst role will receive formal training through online courses and workshops, but will also be cross-trained for multiple functional areas on the job. The goal will be for BAs to have a strong understanding of functional process needs from the university perspective.

**Will ERP Analysts reduce the number of meetings they attend?**

During the Banner implementation, it was expedient to have ERP Analysts attending meetings in force to deal with the technical issues being experienced as changes were taking place. As the university moves past implementation and looks toward process improvement, the need for technical staff attending functional area meetings is lessened. For ongoing functional meetings a business analyst will be assigned to work with each area and help align the business needs of functional areas and ITS. ERP Analysts will always be available when needed to address technical specifications and requirements.

After the first of the year, a transition to this method of handling meetings will begin where Business Analysts will take an active role in attending standing meetings and ERP Analysts will attend fewer meetings and in less numbers. For meetings dealing with specific projects or needs, the appropriate Business and ERP Analysts will be available as needed.

**Conclusion**

The following decisions were made:

1. All work requests should be placed through Cherwell
2. Enterprise Services will begin a transition in which Business Analysts take a more prominent role in attending meetings and developing solutions with departments. Technical ERP Analysts will begin a transition in which they attend fewer meetings permitting them to work on well-defined requests.

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<th>ACTION ITEMS</th>
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<td>Meeting attendance adjustments – Chuck will work with appropriate personnel to assign Business Analysts and adjust meeting attendance for standing functional area meetings.</td>
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| Chuck Mize |

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2. **Reporting Process (Jacob Chandler)**

Jacob presented thoughts surrounding the existing reporting function of the university and described improvements to be made. Primary changes will be to empower functional area data owners with the ability to quickly address reporting needs while maintains a consistently reliable and secure reporting system.

Organizationally the reporting function will be such that each functional area will have report writers that will be able to develop reports for the particular area. IE will work with report writers to assist with definitions and data consistency. Finished reports will be verified and promoted to the production reporting system and linked to the Data Cookbook. Campus personnel will have access to appropriate verified reports through the Data Cookbook.

IE, ITS and others will work to develop efficient procedures for developing and verifying reports, issuing permissions to data and reports and making new report requests. The need for a solid
test and development environment to aid the implementation of these procedures was discussed. This test and development environment is currently in the planning stages and will be implemented as part of the ODS/Cognos upgrade to occur during the spring 2014 semester.

The following decisions were made:

1. Donna and Jacob will initiate discussions of procedures for the development and verification of reports.
2. ITS will refine planning of the reporting system test and development environment to support reporting procedures.

3. **Next Meeting**
   AB1 Room 307, 01/08/2014 at 2:00PM