



SA Reporting Inventory Agenda

California State Polytechnic University Pomona

Meeting Logistics

Title	SA Reporting Inventory
Purpose	Begin Inventory of Existing SA Reports for Possible Conversion to PeopleSoft
Date	Tuesday, October 7, 2003
Time	4:00 to 5:00 PM
Location	
Participants	Mauricio Calderon, Rose Kukla, Sheryl Cincush, Lino Barro, Irene Callaci, Pachune Herrod, Tim Raymond, Walter Kisner, Nancy Hendricks, Bob Hughes, Carol Heins-Gonzales, Cathy Bates

Agenda

At the Kick-off meeting on September 16, the Functional Module Leads were asked to begin gathering reporting requirements using a template provided by Rose Kukla. At today's meeting we will review the results of the initial inventory and talk about next steps.

Discussion

- Web CGI queries were excluded from the inventory. Assumed to be part of PeopleSoft self-service.
- The inventories received by each Module Lead were combined into a composite worksheet. An arbitrary Report Number was assigned by groups of 1000 (i.e. inventory submitted by Irene are numbered between 1000 and 1999, Bob Hughes are numbered between 2000-2999). This allows additions of more reports while still maintaining a grouping by the submitter.
- The "sample" column is meant to log receipt of report sample (first and last page) to the inventory notebook. Include report number (from the inventory log) on the submitted sample. (Sample SQL could be submitted in addition to the sample report) A "Y" should be placed in this column when you have submitted a sample of the report to ?? Note: Samples of a report should include the first page and typically the last page (if

summary totals are displayed). Use your judgment on what to include to provide the best information about the report.

- All log changes to the composite report inventory should be coordinated with Cathy Bates. The recommended method is to send the information via the listserv set up for reporting.
- A discussion was held on how to begin prioritizing this massive list of reports. , Walter requested that each Module Lead revisit their report list and add a column called Due Date which indicates the first date that this report would be produced upon cutover to PeopleSoft.
- It was agreed that Admissions reports and any reports determined to use admission data should be given priority
- Discussion of adding three more columns was discussed: Report Refresh, Report Delivery, Report Format.
 - Report Refresh is the frequency that the report is produced or refreshed. Possible choices are: On Demand, Daily, Weekly, Monthly, Each Term, or Other Set Schedule.
 - Report Delivery is the means by which a report is currently delivered: (i.e. e-mail, web, paper, or user's choice)
 - Report Format – the format or type of file (i.e. Excel, Text, Paper, PDF)
- An e-mail listserv will be set up for use in communicating questions and issues on reporting. This should become the primary communication method outside of the Reporting Meetings. Refer anyone who wants to be added to the list to Cathy Bates.
- Review of the list should also begin to determine like reports that could be combined or are potential duplicates. Enter the generic report number of the duplicate in the Xref Rpt column or notify Cathy of duplicate reports through the listsrv.

Action Items

- Review report inventory results.

Identify and group duplicates (Everyone). Notify Cathy of any of noted duplicates by report number.	Entire Reporting Group
Add due date/priority for reports for first-run after going to PeopleSoft. Assuming Admissions and admissions-dependent data is first priority with a given due date.	Reporting Group
Populate "refresh schedule" column.	Reporting Group
Provide sample (first and last page) for each report w/the related report number.	Reporting Group
Provide SQL if you have it w/the related report number.	Reporting Group
Document current report delivery.	Reporting Group
Identify any reports that are missing and notify missed groups to begin collecting their inventories.	Reporting Group
Notify Cathy and the group of any changes. Mark and additions/deletions/changes in color for ease of maintenance.	Reporting Group
Submit changes to Cathy by October 21, 2003	Reporting Group
Ex Ed reports still need to be added.	Walter
Present an overview of reporting tools and capabilities at next meeting	Mauricio
Develop and communicate a listsrv for reporting	Cathy

Next meeting is scheduled for Tuesday, October 28, 2003, 4pm.

At the next meeting, we will discuss the results of our off-line analysis.