

2019-20 INVESTMENT FUNDS FULL APPLICATION ▶ #152

PROPOSAL SUMMARY

Project Lead Name	Sandra Almekinder
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Project Lead Division	Academic Affairs
Project Lead Department	LITS
Proposal Title	Campus Information Advanced Analytical Reporting

A. PROPOSAL DESCRIPTION**A-1. Describe the proposed project/initiative**

In Spring of 2018, Evisions' Argos Basic Reporting software was purchased and installed to replace the outdated campus information reporting tools (Hyperion and SQR), which were about to be de-supported by the vendor. During the conversion process of preexisting reports from the old tool to the new tool, it became apparent that the basic software package doesn't meet all of our advanced analytical reporting needs. The creation/conversion of the more complex reports is challenging due to the lack of robust data structures, and the basic tool does not have the ability to schedule and electronically deliver reports to our users. Robust data structures can more easily be built and maintained using an OLAP tool and automatic scheduling would increase efficiency and streamline business processes to allow reports to be delivered to a user's desktop.

Fortunately, Evisions offers a software add-on called Argos Advance Features that contains these highly beneficial elements plus a few more:

1) Scheduling & Delivery

This will allow us to automate the process of running Argos reports. We'll gain the ability to schedule reports on certain days, at specific times, and with a specified frequency. Additionally, the scheduler has the capability of performing additional tasks following a given report's execution such as emailing the report to multiple recipients, copying the report to a network drive, or running another executable program that exists outside of Argos (ex. running a Banner report or process, auto-indexing Argos-created letters within our document management system, etc.)

2) OLAP (On-Line Analytical Processing)

OLAP cubes are data structures that have been called "a million spreadsheet in a box" because of how easily they can be arranged to convey completely different information. They are optimized to answer complex analytical queries quickly and are often used to gain greater insight, uncover relationships, and identify key patterns and trends. In this way, OLAP cubes are ideally suited for the types of questions campus decisions makers ask of Institutional Research & Analysis.

3) Interactive Charts and Dynamic Real-Time Dashboards

This will allow for the graphical representation of data in the form of gauges, pie charts, bar graphs, etc. that users can interact with to access greater levels of detail quickly and effectively. For example, a bar graph showing annual data can be clicked on to reveal monthly data, weekly data, etc.

4) API (Application Programming Interface)

This will allow third-party applications, web pages, and portals to make secure calls to Argos to generate reports for users on-demand. Rather than logging into the Argos product, users would be able to run Argos reports, OLAP cubes, and Argos dashboards from Banner job submission (via Banner 9 Admin Pages), Web Banner, etc. This will allow Argos to

be integrated with our existing campus information system and increase the product's usability.

B. TYPE OF FUNDING

B-1. What type of funding have you been invited to apply for?

Core Needs, Facilities & Alterations - to provide one-time temporary funds to support pressing unbudgeted or under-supported academic/operational/administrative needs, facilities and alterations, and initiatives that build long-term capacity, such as staff development, investment in infrastructure, and risk management initiatives.

B-2. Applications for Strategic Priorities funds must indicate which ONE of the following measures of success the project/initiative addresses:

C. STRATEGIC ALIGNMENT

C-1. Outline the ways in which the proposed project will contribute to the College Strategic Plan, and the specific Measure of Success you selected in question B-2.

Your narrative must:

- (1) Identify the measure of success you selected in question B-2 above, and
- (2) Be explicit in describing *how* the project contributes to that measure.

D. OBJECTIVES & ASSESSMENT MEASURES

Successful applications must include well-defined assessment plans that include clear measurable objectives and specify the measures/data that will be used to determine if each objective has been met.

D-1. Short-term Goals/Objectives:

What measurable goals or objectives do you hope to achieve with this project in the short-term, meaning within the one-year time frame for which funds are available (fiscal year 2019-20)?

- a) Installation and configuration of the new Evisions Software Module
- b) The Evisions On-Site Training completed by appropriate staff
- c) Replace 50% of the current complex Hyperion reports with Argos reports, dashboards, and/or OLAP cubes
- d) Replace 25% of the current SQR reports with Argos reports, dashboards, and/or OLAP cubes

D-2. In the previous question, you identified the measurable short-term objectives you hope to achieve with your project. For each objective listed, explain what measures or data you will use to determine if that goal has been met.

- a) The software is installed on both the Development and Production servers and is operational
- b) The Evisions on-site training has been scheduled and training of appropriate staff completed
- c) 50% of the targeted Hyperion reports have been converted and deleted from the system
- d) 25% of the targeted SQR reports have been converted and deleted from the system

D-3. Long-term Goals/Objectives:

What measurable long-term goals or objectives (if any) do you hope to achieve with this project in the long-term, meaning beyond the one-year time frame for which funds are available (fiscal year 2019-20)?

- a) Convert the remaining Hyperion Reports to Evisions Argos
- b) Retire/decommission the Hyperion server
- c) Improve on-campus reporting capabilities (i.e. ease of use, convenience, etc.)
- d) As an outcome of the SICAS Initiative project, the collaboration will result in sharing meaningful and useful advanced analytical reports that enhance business processes across SUNY campuses

E. IMPLEMENTATION PLAN

E-1. Identify the specific activities to be funded from the Investment Fund along with an estimated timeline for implementation. All activities and expenditures must occur within the stated one-year period of fiscal year 2019-20.

The activities funded through the Investment Fund will include the purchase of the Evisions Argos Advanced Features software, the on-site 3 day training and the first year of the maintenance agreement.

April 1, 2019

Begin to analyze the Hyperion/SQR reports to prioritize for conversion

April 20, 2019

Notify Evisions that we would like to sign a contract to purchase the Argos Advanced Features

May 15, 2019

Send contract to Purchasing for review and approval (Evisions already has a contract with SUNY)

July 10, 2019

Receive a fully executed copy of contract from Purchasing and notify Evisions. Purchase order will be issued based on availability of fund.

August 1, 2019

Work with Evisions to receive the license key to install Advanced Features software

August 15, 2019

Installation and configuration of software is complete

August 26, 2019

Schedule the On-Site Training with Evisions

September 2019

Finalize prioritization of reports for conversion

October 2019

On-site training (depending on Evisions availability)

November 2019

Begin development of prioritized Advanced Argos Reports

February 2020

Track progress of reports converted

April 2020

Provide Training for Administrative Users

June 2020

Track progress of reports converted

F. CONSULTATION & AUTHORIZATION FORMS

F-1. This proposal includes (check all that apply):

F-1b. Upload the signed Stipend Authorization Form here.


F-2. For requests involving technology. The Chief Information Officer (Bob Cushman or his designee) has reviewed this proposal.

Yes - please attach the signed Technology Consult Form in section F-4 of this form.

F-3. For requests involving alterations of facilities, the Vice President for Administration & Finance (Jim Wall or his designee) has reviewed this proposal.

Not Applicable

F-4. Upload the signed Technology and/or Facilities Consult Form(s) here.

 IFTechConsultForm SA.docx

G. BUDGET

G-1. Upload your itemized budget here. Use the Excel Budget Spreadsheet sent to you in your notification email.

 2019-20 Investment Fund Budget.xlsx

G-3. Please provide a narrative explanation for your budget. Provide further detail than what is included in the spreadsheet and offer a justification for expenses.

The budget includes the cost of the software, contractual services (Professional Services for the Evisions on-site training) and the first year of maintenance support.

The on-site training is a critical component of this proposal, as it will benefit the programmers by improving their knowledge and skill level using the new tool, while enhancing the development of advanced reports.

The first year of maintenance will be required to maintain Evisions support of the tool during the transition year of report conversion. LITS will support the annual maintenance fee in future years.

G-4. Does your budget include an application for an internal loan? No

G-5. Please explain why the proposed project cannot be self-funded from existing Department, School or Division resources.

The LITS budget is entirely consumed by existing financial obligations and there are no extra funds currently available for the purchase of the software. The institution's basic needs for Information Technology are absorbing the current IT budget

H. ADDITIONAL INFORMATION

H-1. Use this space to provide any additional information to assist in the review of the proposal.

The College at Brockport has been selected to participate in an Argos project with Evisions and three other SUNY campuses. This collaboration, which will be facilitated by Evisions and funded by the SUNY SICAS Strategic Initiative Fund, focuses on co-developing reports, dashboards and data cubes utilizing the advanced features in Argos. To take full advantage of this partnership, it would be beneficial for us to have Argos Advanced Features installed and available for development in our local environment. Not only would we be able to maximize our contributions to the joint project, we would also be able to maximize our takeaways as well – namely using the co-developed reports, dashboards, and data cubes here at The College at Brockport. Leveraging the collective knowledge of Evisions and these other SUNY campuses with respect to Argos' advanced features would accelerate our ability to create complex, meaningful, dynamic reports to meet the reporting needs of our own campus.

Upload up to 3 supplemental files here.

Project Lead Signature



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