

# Ferris State University

## Reporting Solutions Team

Meeting Notes from May 7, 2009

1. The group reviewed the testing procedures for WebFocus upgrades. Rick provided several post meeting items. Kathy will compile these into a checklist that can be stored on the Banner drive for future reference. Test items include:
  - Test a couple of Banner reports from each area (Finance, HR, Student, etc.)
  - Test a couple of ODS reports from each area
  - Test ReportCaster for both email and library distribution
  - Review and test each new feature
  - Test the dashboard to ensure proper functioning
  - Test any reports that are FTP'd (i.e. HEAT extract)
  - Test chaining of input parameters
  - Create a new ReportCaster schedule with accompanying access list and run it
  - Test writing a file to the WebFocus Reporting server.
  - Test Deferred Reports
  - Test accessing the Pixel Precision Report Painter and running a report
  - Test access to and running a report from the Report Assistant/InfoAssist
  - Test creating and running a graph
2. ETS was asked for an installation date for the ODS Self-service Reporting (SSR) feature. Jim Cook indicated that Kris was currently reviewing the documentation and that an installation date would be communicated to the group next week.
3. The group reviewed procedures for testing and modifying reports for the new race/ethnicity fields. Searching found one sql script that references race/ethnicity, but no Appworx or Banner jobs. A spreadsheet for tracking changes and other documentation can be found at **\\fsunw5\shared1\Admin\_Finance\Everyone\Ethnicity Reporting.**
4. There are several fields being expanded in Banner 8.0. Similar testing and report modifications will need to occur to accommodate the expanded fields. Kathy will compile a list of the new and/or changed fields introduced in Banner 8.0. Domains will need to be searched for these changes and reports modified as needed. Rick will check into the ability to search for multiple strings. It was determined that the table and field changes for Banner 8.0 should be on the agenda for the next WebFocus Tips and Techniques session, along with a plan for ensuring that reports are modified and tested accordingly.
5. Kathy asked about automated procedures for updating WebFocus metadata. It was recently discovered (after a significant amount of effort was expended) that the MFDs in the SAND instance were not updated after General release 7.5. Our understanding is that this is currently a manual process and should be automated if possible. Kathy will follow-up on what possibilities are available.
6. Rick developed two new Reporting Objects for Sandy Britton and will ask for feedback on how those are working out for her.

*Submitted by Kathy Fisher*