

# IST Data Services - FY11 Goals

## IST Data Services FY11 Goals

The following represents a core set of themes, principles and goals for IST, Data Services and the units within Data Services.

- Context: IST Focus Areas
  - IST areas of focus
  - IST strategic directions/activities
- FY11 Goals for Data Services
- Unit Goals: Data Repository Management
  - Content Management
  - Informatics
  - Tools & Services Registries
  - Program Management
- Unit Goals: Architecture and Development
- Unit Goals: Enterprise Data Warehouse and Database Services
  - Enterprise Data Warehouse Services
  - Database Services

### **Context: IST Focus Areas**

#### **IST areas of focus**

*Areas of focus represent key thematic elements around which IST will organize activities. Strategic directions and activities will be evaluated within the context of these key areas.*

- Management
- Efficiency
- Engagement
- Partnership

#### **IST strategic directions/activities**

##### **M - Good management**

*Ensure the success of each person within the organization; exercise our responsibility and opportunity to affect positive change within the organization.*

##### **Examples**

- Align the skills of our professional staff with our strategic directions.
- Match compensation to broader equity considerations.
- Apply sound financial practices to business operations.
- Manage services against multiple time scales (short term, long term).
- Invest in and apply basic project management.
- Leverage accessible and practical portions of existing frameworks (eg. ITIL).
- Benchmark internal service cost against external offering.
- Invest only where we bring the highest value.
- Appropriately secure digital assets.
- Identify and acknowledge positive actions.

### **FY11 IST Goals**

- Pursue multiyear budgeting.
- Complete service portfolio.
- Generate roadmaps for each service.
- ITIL Certifications

### **Y - Efficiency**

*Improve organizational value (benefit/cost), productivity and alignment based on institutional direction; Drive services to appropriate scale or eliminate niche products.*

### **Examples**

- Increase impact (broader demographic, higher dollar value).
- Increase standardization (common solutions/components).
- Scale solutions.
- Prune niche solutions.
- Leverage external providers/resources (eg. services, labor, etc).
- Simplify and rationalize processes.
- Control development, operating and support costs.
- Fully support campus Operational Excellence initiative.

### **FY11 IST Goals**

- Operational Excellence

### **E - Engagement**

*Provide a positive customer experience from beginning to end; ensure that the portfolio of services is relevant, cohesive and rational to our community.*

### **Examples**

- Focus on the customer perspective.
- Promote financial transparency.
- Differentiate internal products.
- Meet all delivery commitments (scope, schedule, resources).
- Make decisions based on community considerations.
- Maximize positive results; minimize negative impacts.
- Production outages receive highest priority.

#### **FY11 IST Goals**

- Communications initiatives
- Public forums
- Cross area process streamlining

#### **P - Partnership**

*Provide IT knowledge and direction so that the community can be successful in pursuit of the university mission of research, teaching and service; IST will be generous with their time and knowledge.*

#### **Examples**

- Advance scholarship through technology.
- Cultivate data as a campus asset.
- Foster community and collaboration.
- Support open source initiatives.
- Support IT at the campus and system level.
- Work with other IT Groups to provide services.
- Engage campus technology thought leaders.

#### **FY11 IST Goals**

- Emphasize solutions from available components
- Engage functional partners at multiple levels
- Structure services as elements of department plans

## **FY11 Goals for Data Services**

### **M - Good management**

- Improve and implement new tools and processes for DS project prioritization, staff assignments, tracking and skills planning so that each staff member has clear, high-value assignments across multiple projects.
- With Application Services, develop shared development infrastructure, including common stacks, shared build and middleware support staff.
- Through IST's DCAT group, implement cross-group security projects: 2-factor authentication and logging standards and secure shipping.

### **Y- Efficiency**

- Extend new database change control access process to Database Services customers.
- Develop and implement the new SQL Server 2008 database service for campus customers. Deliver more features, improve the infrastructure and security and maintain costs.
- Release CollectionSpace 1.0 and deploy it at 3 campus museums as part of the first phase of campus and national deployments.
- Deliver a series of new content management platform and consulting services to campus in coordination with the campus's Operational Excellence project.

### **E - Engagement**

- Install and configure OBIEE and BI Apps for Procurement to support business intelligence analysis of procurement data for the campus. Work with sponsors to scope deliverables for this fiscal year and then successfully implement.
- Install and configure Hyperion Planning so that campus units can better forecast and manage their budgets. Work with sponsors to scope deliverables for this fiscal year and then successfully implement.
- Develop Phase 1 Bamboo Scholarly Work Spaces for the Arts and Humanities and the supporting shared infrastructure for scholarly services and collections.

### **P – Partnership**

- Develop a framework for a future IST / academic co-facilitated e-research center. Help campus and IST staff understand and be able to participate in the development of shared, data-driven e-research technologies.
- Develop a multi-campus (including multi-UC) foundation to support the on-going development and support of CollectionSpace. Align this with other higher education open source consortia.

## Unit Goals: Data Repository Management

### Content Management

<u>Goals</u>	<u>Responsible</u>	<u>Completion</u>	<u>IST Focus Areas</u>
Deliver a series of new content management platform and consulting services to campus in coordination with the campus's Operational Excellence project. (e.g. Drupal, Media Hub, CalShare, etc.)	Patrick M. Noah W.	June 2011	Y (Efficiency)
Develop and pilot easy-to-use scholarly work spaces for the Arts and Humanities and the supporting shared infrastructure for scholarly services and collections. (Bamboo)	Noah W. Rich M.	June 2011	E (Engagement)

### Informatics

<u>Goals</u>	<u>Responsible</u>	<u>Completion</u>	<u>IST Focus Areas</u>
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<p>Release CollectionSpace 1.0 and deploy it at 4 campus museums as part of the first phase of campus and national deployments.</p> <ul style="list-style-type: none"> <li>• PAHMA</li> <li>• UC Botanical Gardens</li> <li>• UC and Jepson Herbaria</li> <li>• History of Art Visual Resource</li> </ul>	<p>Chris H. Marlita K.</p>	<p>June 2011</p>	<p>Y (Efficiency)</p>
<p>Service and deployment models developed for CollectionSpace delivered to the campus community (and potentially beyond).</p>	<p>Chris H. Patrick M.</p>	<p>Jan 2010</p>	<p>Y (Efficiency)</p>
<p>Engage the broader community of campus stakeholders to form the governance structures needed for sustainable collections management and collections-based research at UC Berkeley</p>	<p>Chris H. Patrick M.</p>	<p>June 2011</p>	<p>E (Engagement)</p>

<p>Platform consolidation: Transition systems to a more robust infrastructure platform and take advantage of system administration and database administration skills in other units.</p>	<p>Chris H.</p>	<p>June 2011</p>	<p>Y (Efficiency)</p>
<p>Develop team through training, mentoring, and additional resources to support strategic goal related to CollectionSpace deployments and ongoing support</p>	<p>Chris H.</p>	<p>June 2011</p>	<p>M (Management)</p>

**Tools & Services Registries**

<u>Goals</u>	<u>Responsible</u>	<u>Completion</u>	<u>IST Focus Areas</u>
Develop a UC Berkeley Tools and Services Registry for use by campus to describe, rate and discuss tools and services	Rich M.	June 2010	P (Partnership)
Develop a humanist friendly Tools and Services Registry prototype that can be accessed from Work Spaces (Bamboo)	Rich M.	June 2010	E (Engagement)

## **Program Management**



<u>Goals</u>	<u>Responsible</u>	<u>Completion</u>	<u>IST Focus Areas</u>
Closure of Bamboo Planning Project including publication of multiple documents to the funder and the community	Rich M.	Dec 2010	P (Partnership)
Improve and implement new tools and processes for DS project prioritization, staff assignments, tracking and skills planning so that each staff member has clear, high-value assignments across multiple projects.	Patrick M. Marlita K.	Dec 2010	M (Management)

### Unit Goals: Architecture and Development

<u>Goals</u>	<u>Responsible</u>	<u>Completion</u>	<u>IST Focus Areas</u>
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Bamboo (BSP) development, Coordinate consortial development efforts, complete core deliverables.	PatrickS, SteveM, DAG.	Mar 31, 2012	E (Engagement)
CSPACE 2.0 development. Coordinate consortial development efforts, deliver new features.	PatrickS	Nov 30, 2012	P (Partnership)
CSPACE deployments and Foundation work, including deployment of SaaS model here at UCB, transitioning off legacy systems onto new platform, working with campus and external partners to build a sustaining model for CSPACE.	ChrisM, PatrickS	Rolling projects through 2015	Y (Efficiency)
Shared development infrastructure, including common stacks, shared build and middleware support staff. Goal is to model standards and shared resources with AS.	PatrickS, SteveM	Ongoing	M (Management)

## Unit Goals: Enterprise Data Warehouse and Database Services

### Enterprise Data Warehouse Services

<u>Goals</u>	<u>Responsible</u>	<u>Completion</u>	<u>IST Focus Areas</u>
APPSCAN run process to identify potential security holes.	Michael Leung	October 2010	Y (Efficiency)
Automate BAIRS monitoring – develop scripts to replicates customer submitted reports to help identify service problems.	Michael Leung	March 2011	Y (Efficiency)
BFS Archive – move BFS 8.8 tables off mainframe to oracle database	Cheryl Kojina	January 2011	E (Engagement)
BI Apps/OBIEE - Deliver new Procurement data, reports and dashboards in support of OE initiatives.	Boshin Lin, Cheryl Kojina, Greg Hamilton,  Michael Leung, Peter Cava Radha Karichedu Janet Chin	March 2011	P (Partnership)

EDW ETL production support (Backend) - Maintain and provide minor enhancements to the production EDW service.	Boshin Lin Cheryl Kojina Greg Hamilton Max Michel Peter Cava Radha Karichedu	Ongoing	E (Engagement)
Hyperion IR upgrade – install latest supported version of reporting software, providing support of latest Browsers and meeting Campus minimum security standards.	Janet Chin	March 2011	E (Engagement)
Budget Planning tool - Hyperion Planning - install new campus budgeting tool.	Janet Chin, Boshin Lin, Cheryl Kojina Greg Hamilton Max Michel Peter Cava Radha Karichedu	March 2011	P (Partnership)
DS-EDW Informatica Upgrade - install latest supported version of ETL software.	Boshin Lin	Dec 2010	E (Engagement)

BAIRS Reporting production support (Frontend) – Maintain BAIRS service providing minor prioritized reporting enhancements.	Janet Chin Greg Hamilton Michael Leung Peter Cava	Ongoing	E (Engagement)
Student Data Warehouse – add new student data to the EDW providing campus community analytical capabilities related to applicant, degree, enrollment and ethnicity through new reporting software (OBIEE).	Janet Chin Greg Hamilton Max Michel Peter Cava Radha Karichedu	Feb 2011	P (Partnership)
EDW PPS conversions – replace mainframe Cobol programs with Informatica ETLs.	Cheryl Kojina Max Michel	June 2011	Y (Efficiency)
Load HCM data into the campus enterprise Person party model.	Radha Karichedu Max Michel	June 2011	E (Engagement)

Begin building business rules for the merging of HCM, Student and Donor person party data.	Greg Hamilton	June 2011	E (Engagement)
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## Database Services

<u>Goal</u>	<u>Responsible</u>	<u>Completion</u>	<u>IST Focus Areas</u>
All DB Services – Analysis of impact to service of changing to silos for customers	Quin Bligh Paul Rivers	December 31, 2011	M (Management) E (Engagement)
All DB Services – Clean-up FWSM rules and FWSM conversion	Kellie Hobbs Paul Rivers	June 30, 2011	M (Management)
All DB Services – Create capacity / performance reports for each platform	Ken Marrs Susana Parker	June 30, 2011	M (Management) E (Engagement)
All DB Services – DBA script and configuration control	Frances Kendall	June 30, 2011	M (Management)

All DB Services – Email abatement	Frances Kendall	June 30, 2011	M (Management)
All DB Services – Implement bastion host / 2- factor for access to db servers	Paul Rivers	June 30, 2011	M (Management) E (Engagement)
All DB Services – Implement customer change access	Frances Kendall	March 31, 2010	Y (Efficiency)
All DB Services – Implement Dataguise inventory /notification	Paul Rivers	March 30, 2011	M (Management) E (Engagement)
All DB Services – Implement log shipping	Ken Marrs	June 30, 2011	M (Management) E (Engagement)
All DB Services – Implement new reduced recharge rates	Frances Kendall	August 31, 2010	Y (Efficiency)
All DB Services - Review Standard Customer Implementation for each platform and update documentation	Frances Kendall	December 31, 2011	M (Management) E (Engagement)
All DB Services – Setup secure website for file transfers	Paul Rivers Kellie Hobbs	March 30, 2011	M (Management) E (Engagement)
All DB Services – Storage forecasting	Susana Parker	November 31, 2010	M (Management)

Customer Projects – Advance, Pinnacle, BFS	Frances Kendall	June 30, 2011	P (Partnership)
Customer Projects – Disaster recovery site for BFS	Quin Bligh	August 31, 2010	P (Partnership)
Customer Projects – Disaster recovery site for KualiReady	Paul Rivers Ken Marrs	December 31, 2010	P (Partnership)
Customer Projects – Grad Div JAZZEE	Quin Bligh	June 30, 2011	P (Partnership)
Customer Projects – Student Data Warehouse & BI Apps	Quin Bligh	March 30, 2011	P (Partnership)
DB2 - Decommission DB2 gateway	Nancy Fan & Bill Welch	October 31, 2010	Y (Efficiency)
DB2 - Move remaining databases to UCOP	Nancy Fan	December 31, 2011	Y (Efficiency)
Open Source & Basic – Complete migration to VMs	Kellie Hobbs	October 14, 2010	M (Management) E (Engagement)
Open Source & Basic – Upgrade MySQL to 5.1.3.1 and PostgreSQL to 8.3	Kellie Hobbs	June 30, 2011	M (Management) E (Engagement)
Oracle - Complete 11g Upgrade	Quin Bligh Susana Parker	June 30, 2011	M (Management) E (Engagement)



Oracle – Evaluate and implement more OEM functionality	Ken Marrs Susana Parker	June 30, 2011	M (Management)
Oracle - Evaluate P-series vs Linux vs Oracle VM for Oracle platform (include ASM in eval)	Quin Bligh	October 31, 2010	Y (Efficiency)
Oracle – Evaluate support for APEX	Quin Bligh	June 30, 2011	M (Management) E (Engagement)
Oracle - Implement Datapump	Quin Bligh	August 31, 2010	M (Management) E (Engagement)
Oracle - Implement response to DSR audit	Quin Bligh	December 31, 2010	M (Management)
Oracle – RMAN catalog and cloning databases	Susana Parker	June 30, 2011	M (Management) E (Engagement)
Oracle – Upgrade OEM on new VM	Ken Marrs Susana Parker	October 31, 2010	M (Management) E (Engagement)
SQL Server – Create 2008 Enterprise Edition install template & upgrade	Paul Rivers Ken Marrs Kellie Hobbs	June 30, 2011	M (Management) E (Engagement)
SQL Server – Evaluate and implement new 2008 features	Paul Rivers Ken Marrs	June 30, 2011	M (Management) E (Engagement)

SQL Server - Implement dedicated SQL Server ESX cluster	Paul Rivers	October 31, 2010	M (Management) E (Engagement)
SQL Server – Migrate to locally run SQL Agent jobs	Paul Rivers	June 30, 2011	M (Management)
SQL Server – Setup SSIS /SSRS service	Paul Rivers Ken Marrs	June 30, 2011	M (Management) E (Engagement)

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