Rensselaer Data Warehouse

Brio User Group Meeting @ Cornell University
June 10, 2003

Agenda

- RPI Data Warehouse Team Introduction
- Demonstrations of the Financial Analysis Data Mart – Executive Information Systems
- Rollout Strategy
- Training Approach
- User Acceptance Testing
- Support Strategies
- Architecture
- Building Executive Dashboards
- Q & A
## Potential Opportunities

- **Endowments**
- **Capital Project Tracking**
- **Budget Forecasting**
- **Finance Enhancements**
Data Warehouse Implementation Structure

Sponsorship Group
- Set strategic direction & guidance
- Forming implementation groups
- Defining scope & deliverables

Steering Committee
- Implementation issues

Implementation Groups
- e.g. Business Intelligence Selection Committee
- Financial Analysis Implementation Group
- Financial Analysis Reviewer Group
- Data Policy Group

Data Warehouse Group

Status

- Financial Analysis
  - Released in October ’02
  - Currently is being rolled out to the campus

- Human Resources (Position Control & Labor)
  - In testing
  - Delivery to campus will start in early June ’03

- Graduate Financial Aid and Student Enrollment
  - In Development
  - Delivery to campus by August ’03
Campus Rollout Assumptions

- Who will have access to the Financial Data Mart:
  - Cabinet, Deans, Center Directors, Department Chairs, Portfolio Financial Managers, Department Financial Managers, Finance Administration, other interested Fund owners.

- Training is mandatory at all levels.
  - Several levels of training will be offered to campus in Brio tools, Data, and Data Policies.
  - Joint effort between DW Group and Finance

- Portfolio Financial Managers responsibilities:
  - Rollout within Portfolio
  - Training within Portfolio

Data Warehouse Cascaded Rollout Strategy

1. Finance Administration
2. Portfolio Level (Cabinet, Deans, Portfolio Financial Managers)
3. Department Level (Directors, Center Directors, Department Chairs, Department Financial Managers)
4. Other Fund Owners
Initial Tiered Access – Who will have access to what

- Cabinet; Deans; Department Chairs; Center Directors
- Department Financial Managers
- Finance Administration Portfolio Financial Managers

Data in the Warehouse
- Information published in Brio documents

Low
- Dash Board

High
- Training Program Topics
- Training Program Overview
- Methodology
- Curriculum
- Metrics
- Challenges
Training Program Overview

- The Data Mart rollout strategy is synonymous with the Training Program
- Users gain Data Mart access only after completing Brio Insight training and submitting their homework

The Training Audience:
- Portfolio Financial Managers
- Department Financial Managers
  - Other Department users will receive training on pre-built documents by the Portfolio Financial Manager with DW team assistance
- Executives (Deans, Department Chairs, Vice Presidents, Directors)

Training Methodology

<table>
<thead>
<tr>
<th>Training Required</th>
<th>Track 1</th>
<th>Track 2</th>
<th>Track 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Brio 101</td>
<td>Level 1: Data Mart Basics</td>
<td>Dashboard &amp; Portal training</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Level 2: Advanced Brio Documents</td>
<td>One-on-one or small group format</td>
</tr>
<tr>
<td>Medium</td>
<td>Brio 101</td>
<td>Level 1: Portfolio/Dept-Specific Pre-Built Docs</td>
<td></td>
</tr>
<tr>
<td>Low</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
Training Methodology

Training methodology is designed to be *adaptable* across Portfolios and Data Marts
- However, it is not a one-size-fits-all program

The approach is to *partner* with each Portfolio Financial Manager
- The Portfolio Financial Manager is encouraged to take *ownership* of the rollout within his or her portfolio. This means…
  - Identifying users and assigning them to training tracks
  - Assigning security profiles
  - Developing Brio Documents for Department Financial Managers

The goal of the training program goes beyond teaching the mechanics:
- Need to *sell* the Brio tool and the project
- Need to *educate* on the benefits of the DW
- Need to *emphasize* that Banner and the DW are complementary systems, i.e.,
  - Banner = Data Entry Transactions
  - DW = Read Only Reporting, Analysis, Decision Support
Training Curriculum
Finance Data Mart

Brio 101 Training
Required for data training, i.e., Tracks 1 and 2 (8 hours)
• What is a Data Warehouse?
• Brio concepts and mechanics
• Brio Portal Overview
  This course is taught with sample data

Financial Manager Data Training

Executive Dashboard Training
Track 3
• Assigned Portal login
• Data Mart Overview
• Brio Portal Overview
• Dashboards
• 1-2 hours, one-on-one or small group

Overall satisfaction with program content is very high: 91% gave the highest survey rating.

Program Metrics
Finance Data Mart – As of June 10, 2003

Brio 101 Training
• Approximately 151 users need this session
• 134 users have completed Brio 101 (89%)  
• 112 users have been trained in-house (84%)
• Note: The In-house training program began in March, 2003

Financial Manager Data Training

Track 1
Level 1 (4 hours):
• Assigned DM login
• Intro to Data Mart
• Query building with stars and meta topics
• Dashboards
• Published BQY's

Level 2 (4 hours):
• Data Analysis
• Free-form reports
• Workshop

Track 2
Level 1 (4 hours):
• Assigned DM login
• Intro to Data Mart
• Overview of published BQY's
• Data analysis with published BQY's
• Dashboards

Level 1 (4 hours):
• There are 38 Track 1 users

Level 2
• 9 users (24%) have completed the program (i.e., Brio 101, Level 1, and Level 2)

Track 2
Level 1
• There are 113 Track 2 users
• 45 users (40%) have completed the program (i.e., Brio 101 and Level 1)

Executive Dashboard Training
Track 3
• There are 75 Track 3 users
• 12 users have completed the program (16%)
Challenges

💡 Logistics:
- Departments are owned by Portfolios
- However, Department Financial Managers DO NOT report to Portfolio Financial Managers

Therefore:
- Each Portfolio is handled differently
- We offer different ways for Portfolio Financial Managers to involve users
  - For example, assigning users to specific training sessions or Web sign-up via our training site

Challenges

💡 Culture Change
- In the past, Portfolios and Departments operated independently relying on separate systems for reporting and analysis
- Conversely, the Data Warehouse aims to centralize information and provide “one version of the truth”
Training Program Information

Visit our Training Page on the Data Warehouse site:

- [http://www.rpi.edu/datawarehouse/dw-training-schedule.html](http://www.rpi.edu/datawarehouse/dw-training-schedule.html)

Or, contact Keith Cushing

- Phone: 518-276-4038
- Email: cushik@rpi.edu

Prior To User Acceptance Testing

- Identify Testing Candidates
- Train Users in Brio
- Transfer of Knowledge from Developer to Testing Group
  - Sample Reports
  - Document Data Mart Description
  - Document Standard Naming Conventions
  - Document Common Uses for Each Star Schema
  - Meta Data (i.e. Show Remarks)
- User Set-Up
User Set-Up

- Portal Profile & Login
- Database Profile & Login
- Security Profile
- Brio User Distribution Email List
- Keeping Track of Training Classes and Homework

User Acceptance Testing

- Rapid Application Development
- Identifying Report Requirements
- End-Users Creating Reports
- Collecting and Updating Meta Data
- Identifying Defects and/or Enhancements
Defect/Enhancement Log

- Date Reported
- Priority Level (i.e. High, Medium, Low)
- Defect and/or Enhancement Description
- User Reporting Defect and/or Enhancement
- Defect/Enhancement Status
  - Incoming
  - Pending
  - Work In Progress
  - User Acceptance Testing
  - Closed
  - Focus Group
- Assigned To
- Resolution
- User Assigned To Test Resolution

User Support

- Support Email Distribution List
- Maintenance Log
- Installations
- One-on-One Training Sessions
- On-Line Help Documentation
  - Getting Started with Brio Portal
  - Change Your Production Database Password
  - Open a Brio Query File
• Very few desktop users: Brio Explorer for local databases, Brio Designer for development and subsequent publishing to Brio Portal.

• Lots of portal users: Brio Insight for viewing & analysis, SQR output for report viewing.
Developing Dashboards Without QiQ

Keep the design simple!
- Reduce your maintenance costs.
- If you need to contact Brio Tech Support, try a simpler design!

Save and create new versions often.
- Remember there’s no undo!
- Watch out for BQ*.tmp files!
  
  Rename file as necessary.

Questions ????