Rensselaer Data Warehouse

Sponsorship Committee update
June 2002
Agenda

• Status report – 10 min.

• Demo of the Financial Analysis Data Mart – 15 min.

• Campus rollout strategy – 15 min.

• Approve the implementation of the next data marts – 10 min.

• Data Policy – 10 min.
On Oct 18, 2001 The Sponsorship Group unanimously selected Financial Analysis as the initial implementation phase of the data warehouse project.

Nominated members for the Business Intelligence (BI) Tool Selection Committee and tasked the committee to choose the enterprise-wide BI tool for the Rensselaer data warehouse environment.
Status of the Data Warehouse Initiative

**November 2001**
- **Rensselaer Data Warehouse** web site is developed.
- BI selection Committee is formed.
- Informatica Corporation is selected as the vendor that will provide the Extraction, Transformation, and Loading (ETL) component of the Rensselaer data warehouse architecture.

**December 2001**
- **Brio Software** is selected by the Business Intelligence (BI) Tool Selection Committee as the vendor that will provide the generic end-user BI tool for the Rensselaer data warehouse environment.
  - Thirteen campus representatives.
  - RFP sent to seven vendors, six responded and were invited to demonstrate their products.
  - The Committee selected final three to come back;
  - Cognos, Brio, Hyperion were asked to install their products, train the Committee;
  - Test data prepared to facilitate better product evaluation.
  - Committee tests all three products and selects Brio.
  - The selection process is documented and published
Status of the Data Warehouse Initiative

**January 2002**
- Steering Committee is formed and meets bi-weekly
- The data warehouse Steering Committee nominates members for the Financial Analysis Implementation Group, the Financial Analysis Reviewer Group, and the Data Policy Committee.
- The Data Warehouse Group meets with Institute business representatives to define information requirements of the upcoming Financial Analysis data mart.

**February 2002**
- Data Warehouse Group and Finance designing Financial Analysis logical models
- Data Audits are performed, data issues are recorded and elevated.
- DecisionWorks Consulting, Inc. returns to Rensselaer to analyze and review the Financial Analysis data models with the Data Warehouse Group. Informatica visits Rensselaer to train the Data Warehouse Group
- **Steering committee approves the scope and the deliverables of the Financial Analysis data mart.**
- **Steering committee recommends Position Control and the Research area as a subsequent Data Marts.**
Status of the Data Warehouse Initiative

March 2002

- The Development of the transformation and loading processes is under way.

- Data Warehouse Orientation Meeting is held to allow campus to learn more about the data warehouse project, ask questions, and gain a better understanding of who is working on what. Speakers included John Kolb, Jeff Miner, Sharon Kunkel, Ora Fish, Eileen McLoughlin, and Gary Gabriele.

April 2002

- The Development of the transformations and loading processes is under way.

- Members of the **Financial Analysis Implementation** group meets to brainstorm on the design of financial EIS dashboards.
Status of the Data Warehouse Initiative

May 2002

- Members of the Financial Analysis Implementation and Financial Analysis Reviewer groups meet to develop a testing strategy and to review the metadata definitions.

- Members of the Financial Analysis Implementation and Financial Analysis Reviewer groups receive training in Brio, Data Warehouse concepts, Data.

- DW Group works with Brio Consultants to install and configure the Brio server and web components.

- **Finance Administration starts testing.**

June 2002

- First draft of the EIS (Executive Information System) Dash Board is developed

- Finance and DW Group begins forming campus rollout strategy

- Data Policy committee submits its recommendations
Where are we now...

- Financial data is loaded into the data warehouse:
  Expenditures, Budgets, Revenues across Portfolios, Funds, Grants, Commitments, Priorities, Accounts...

- Finance testing is near completion. *Results are published on the web site.*

- Finance and the DW group are defining reports and documents to be published on the Portal.

- Plans for campus training and the rollout strategies are being developed
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.

“Market testing”
- Task Force on Research Financial Management Issues.
- Deans, Department chairs, Center Directors
- Incorporate feedback into information presented on the Executive Dashboards and Brio documents.

Training is mandatory at all levels.
- Several levels of training will be offered to campus in Brio tools, Data, and Data Policies.

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

1. Finance Administration

2. Portfolio Level
   (Cabinet, Deans, Portfolio Financial Managers)

3. Department Level
   (Department Chairs, Center Directors, Department Financial Managers)

4. Other Interested Fund Owners
Initial Tiered Access

Data in the Warehouse

Information published In Brio documents

Dash Board

Training

High

Finance Administration
Portfolio Financial Managers

Low

Department Financial Managers

Cabinet; Deans;
Department Chairs;
Center Directors

Data Policies
Next Steps....

**June 2002**
- Approve Data Policy
- Allow the Reviewer Committee to start testing.
- Complete data testing by Finance Administration.
- Modify data models and the ETL processes to reflect testing.
- Continue development of the Dash Boards and the standardize documents.
- Plan campus rollout as a joined effort between the DW group and Finance.
- Select and contact the ‘test market’ groups on campus
Next Steps...

**July 2002 - August 2002**

- Complete data testing by the campus representatives serving on the Reviewers committee.

- Start market testing through several campus groups

- Set up production environment and load financial data.

- Develop campus training materials as a joint effort between the DW group and Finance.

- Finalize the development of the Dash Boards and the standardized documents as a joint effort between the DW group and Finance.

- Release Financial Analysis data mart to Finance only.

- Conduct three to four campus wide orientation meetings to demo Dash Boards and the standardized documents.
Next Steps

August 2002 – October 2002

- Train Cabinet, Deans, Department Chairs, Center Directors in Dash Board. Demo the different levels and the functionality that will be available to their staff.

- Train Portfolio Manager in Brio, Data, and Data policies.

- Develop ‘train the trainer’ program and jointly with Portfolio Managers and Finance train the Financial Managers across campus.

- Start the development of the next data mart.
## Opportunity matrix

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<th>Registrar</th>
<th>Institute Adv.</th>
<th>Provost Office</th>
<th>Research</th>
<th>Finance</th>
<th>Gov't Relations</th>
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Data Policy