

Financial Affairs Data Mart (GUARD) Implementation Project Team Kickoff Meeting Agenda

Financial Implementation Team Introduction

- Purpose & Goals
- Approach
- Team Roles and Responsibilities
- Composition

Project Management

- Project Milestones
- DRAFT Project Plan
- DRAFT Project Scope

Questions and Answers

Next Steps

- Define group to finalize initial scope, deliverables, and users in rollout by the next meeting;
- Define group to finalize detailed task plan & agreement on dates



GU's EDW documentation and web pages are located at <http://www.georgetown.edu/uis/ia/dw> The Financial Affairs Implementation project (GUARD) will have it's own page(s) as a means of communication for interested parties.

EDW Implementation Team Overview

Implementation Team's Purpose

Georgetown is launching its "kickoff data warehouse project" building the first phase of a Financial Affairs Data Mart. The kickoff project's goal is to empower financial analysts around the University with accurate and up-to-date financial data to manage the University's resources more efficiently. The project will involve implementing and exploiting the web functionality of Cognos's tool set, and incorporating the lessons learned from Georgetown's previous pilot projects.

The implementation team will be critical to the project's success. It will be responsible for defining, building, and deploying the first phase of the data mart in a three-month timeframe. During the project's lifecycle, the implementation team will require a variety of skill sets from the business and information technology communities. In some cases, the same people may fill multiple roles on the implementation team to define, build, and deploy the first phase of the Financial Affairs data mart.

The criteria used in determining the financial data mart priority included:

- Existing data model; gain financial intelligence of GUESS (FoxPro Database)
- Quick win needed for financials reporting
- Business rules are defined for data translation
- Reports are defined and/or in production
- Mandatory need to create a data warehouse
- End user resources are available

Goals for "Kick Off"

General project info

- Agree upon weekly project meeting time
- Roles & Responsibility; team composition
- Tool training for Cognos

Financial Affairs Data Mart "Working Parameters"

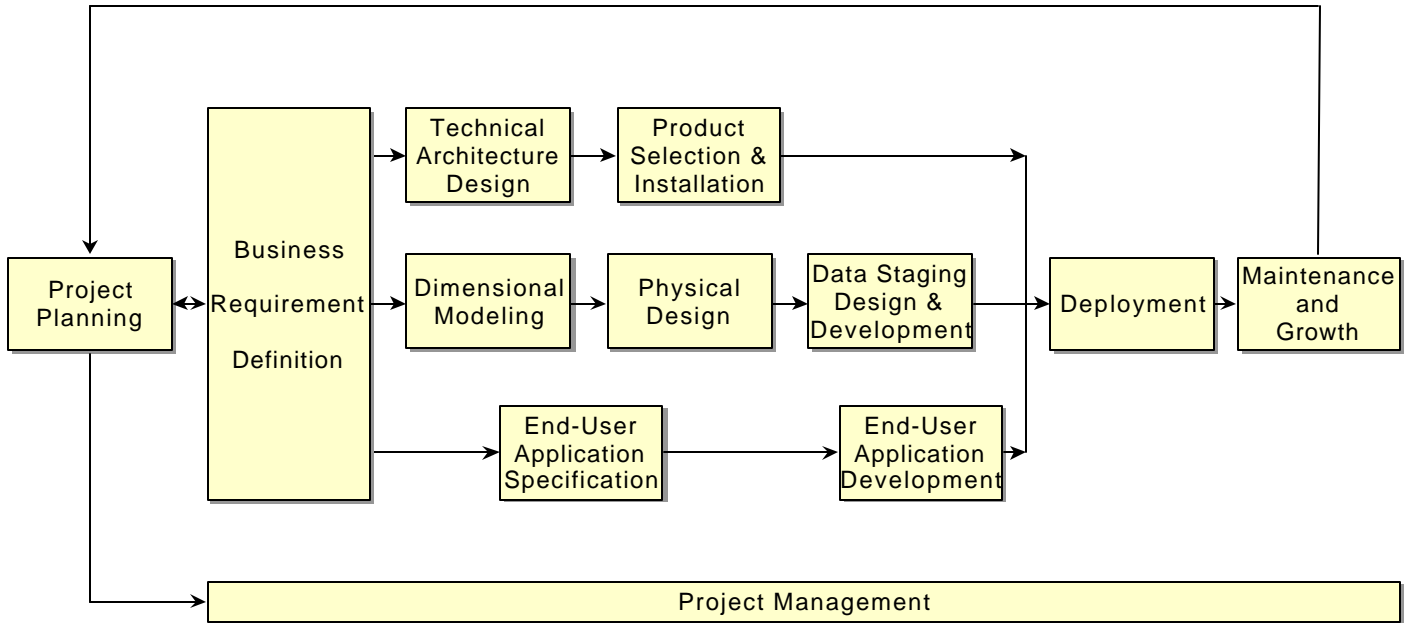
- Time boxed for 3 month delivery
- Deliverable will "exercise" Cognos web tools – Impromptu & PowerPlay
- Security understanding & delivery is a must (ie – use of GTFUD)
- Roll out will be limited to approx. 50 Financial users (define)
- Project deliverables include data architecture and built functionality of "Cubes and Web Reports"

Understanding of project milestones and ETA (estimated time of arrival)

Approach

A combination of methodologies will be used to help assure the success of this project. They include Data Warehouse Life Cycle Methodologies (see below) developed by Ralph Kimball and Project Management

The Business Dimensional Lifecycle



Methodologies being adopted by GU's Senior Vice President, Jack DeGioia. Because this is the first data warehouse phase to use these methodologies, we will be revising these approaches as we move through the implementation to create a proto-type plan for subsequent EDW implementations.

In accordance with these approaches, the implementation team will be composed of four components:

◆ Coaches

Sponsors/Business Drivers- Those who are really interested in seeing the project succeed for the purposes of reputation, profit, and the sake of pride.

Co-Implementation Project Managers:

Project Manager: "Plans the work & works the plan", communicates to team and directs communication to team. Keeps technical team motivated. Responsible for overseeing design, construction and deployment of the warehouse, use of tools to map out plans and tasks, quality control from a task point of view, work in concert with the university's direction, coordinates external activities from consultants, customers, and others, revises plans as necessary, and is responsible for the success of that team.

Business Project Leader: Keep team motivated and moving on plan, communicates to team and directs communication to team, deals with "political" issues, advises on approaches, devises a solution for particular aspects of operation. Assists in keeping and maintain business communities focus on the deliverable.

Producers- communicates/ involves consumers, assists leaders in communication both internally and externally, coordinates PR efforts, assists in all team effort processes (training strategy, liaison to help desk, etc.), assists in data administration in concert with data administration working groups for that system, and assists in web oriented documentation.

◆ Core Project Team

Architects- In charge of designing a Data Warehouse structure to support business requirements. Some roles include: data modeling, ETL processing, maintaining data integrity, referential integrity, DB design, DB optimization, security, scalability.

Builders- Executes architectural plans, database, and ETL plans. Responsible for items like: Cognos Tool set development, quality control assurance, turnover, resolving punch list, define business requirements, participates in architectural discussions, assist in construction discussions, perform testing, being the guinea pigs of testing, and in concert with the “architects”, are the primary members of the *core team*.

◆ Business User Community

Consumers- Direct recipient of data warehouse project. This group has much interest in what is delivered because it impacts their daily work lives. Reviews and agrees to data models (proof of concept) and assists in designing report requirements (specs).

Peer Review- comprised of other Universities using BI tools (mostly Cognos) to deliver EDW solutions

◆ Special Teams

Specialists- Technical Security Architect, Data Administration, Tool Trainer, installation specialist.

Group	Coaches	Core Implementation Team	Business User Community*	Special Teams*
Roles	Sponsor Project Manager Business Project Leader Producer	Architects Builders	Consumers	Specialists
Members	N. Mandeville, K. Murphy Mark Jim Charlie	Kim, Barbara, Wayne Kim, Dave, Wayne	Mary, Meike, Linda, Pim U. Minn. UT @ Austin MIT	Ron Allan (modeling), Michael Gettes & Rich Kogut (Security), Lori Briggs & Debbie Dailey (Training), John Ott (Systems group), AITS – help desk & installation support

Implementation Milestones

Initiation - The first milestone will be to develop & agree upon a project scope that can be easily understood and enable the implementation to deliver a product in a reasonable timeframe.

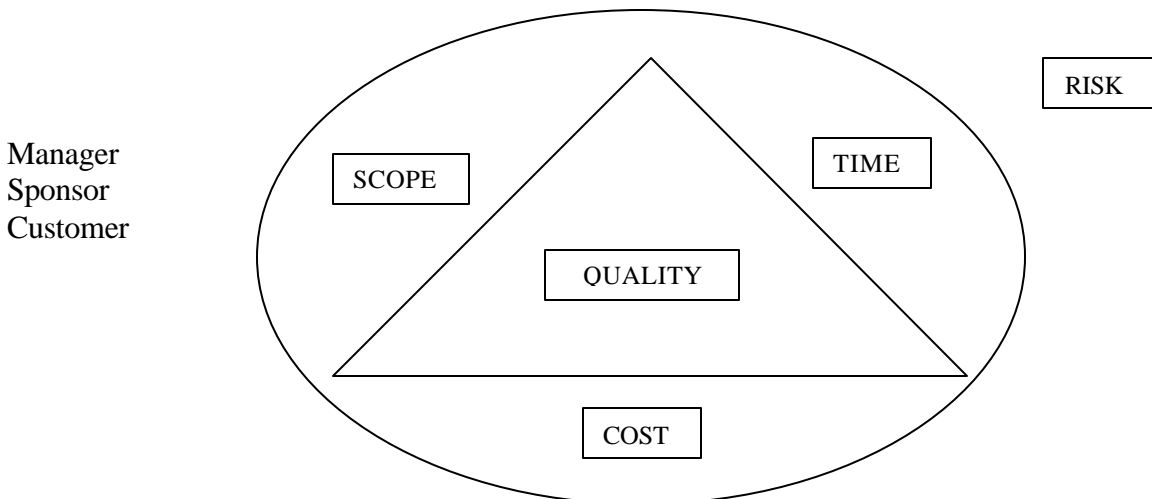
Data Design & Architecture - Once the deliverables are known, the architects will analyze the deliverables and determine the correct model to deliver the needed data sets. During this period, the team will be trained on Cognos's functionality and administration requirements.

Build - With these first two milestones complete the team will be able to physically build the ODS and data mart, and load the areas. The group will also begin work on the cubes and reports to be delivered.

Test & modify – working from a test environment the implementation team and a group of end users will test and validate the information contained in the data mart. Validation will be a critical step in obtaining the green light for deployment.

Deployment - The final milestone will involve the coordinated deployment of the centralized tool set and review of the project's success criteria.

There are topics that require coordination from start to finish across many of these milestones and they include: Cognos Developer & End User Training, security, and communication plan.



ID	Task Name	Duration	Start	Finish
1	PROJECT PHASE MANAGEMENT AND REQUIREMENTS	21 days	Wed 8/30/00	Wed 9/27/00
2	PROJECT PHASE DEFINITION	1 day	Wed 9/6/00	Thu 9/7/00
6	PROJECT PHASE PLANNING & MANAGEMENT	13 days	Wed 8/30/00	Fri 9/15/00
20	USER REQUIREMENT DEFINITION	8 days	Mon 9/18/00	Wed 9/27/00
35	DATA DESIGN	8 days	Thu 9/28/00	Mon 10/9/00
36	DIMENSIONAL MODELING	4 days	Thu 9/28/00	Tue 10/3/00
53	ANALYZE DATA SOURCES	4 days	Wed 10/4/00	Mon 10/9/00
59	ARCHITECTURE	46 days	Wed 9/6/00	Thu 11/9/00
60	TECHNICAL ARCHITECTURE DESIGN	8 days	Wed 9/6/00	Mon 9/18/00
69	CREATE SECURITY IMPLEMENTATION GROUP	46 days	Wed 9/6/00	Thu 11/9/00
70	DEFINE TECHNICAL AND END USER SECURITY OBJECTIVES AND TA	5 days	Mon 9/18/00	Fri 9/22/00
71	IMPLEMENT TACTICAL SECURITY MEASURES	22 days	Mon 9/18/00	Tue 10/17/00
88	DEVELOP STRATEGIC SECURITY PLAN	46 days	Wed 9/6/00	Thu 11/9/00
96	DATA MART IMPLEMENTATION	50 days	Wed 9/6/00	Wed 11/15/00
97	PHYSICAL DATABASE DESIGN	9 days	Thu 9/28/00	Tue 10/10/00
105	PHYSICAL DATABASE IMPLEMENTATION	3 days	Wed 10/11/00	Fri 10/13/00
114	DATA STAGING DESIGN & DEVELOPMENT (TEST)	19 days	Tue 10/10/00	Fri 11/3/00
129	POPULATE & VALIDATE DATABASE	4 days	Mon 11/6/00	Thu 11/9/00
136	PERFORMANCE TUNING	2 days	Fri 11/10/00	Mon 11/13/00
142	END USER (EAU) APPLICATION SPECIFICATION	8 days	Thu 9/28/00	Mon 10/9/00
151	COGNOS TOOL DEVELOPMENT	50 days	Wed 9/6/00	Wed 11/15/00
152	Review 1	27 days	Wed 9/6/00	Fri 10/13/00
160	Review 2	12 days	Fri 10/13/00	Tue 10/31/00
167	Final Review	11 days	Tue 10/31/00	Wed 11/15/00
173	DEPLOYMENT AND REVIEW	92.88 days	Wed 9/6/00	Fri 1/12/01
174	DEPLOYMENT PLANNING	53.88 days	Wed 9/6/00	Mon 11/20/00
190	COMPLETE SYSTEM TEST	26 days	Mon 10/23/00	Mon 11/27/00
206	DEPLOYMENT (ALPHA, BETA & PROD'N)	34 days	Tue 11/28/00	Fri 1/12/01
231	DATA WAREHOUSE REVIEW	92.88 days	Wed 9/6/00	Fri 1/12/01
232	EDW Steering Committee Review	92.88 days	Wed 9/6/00	Fri 1/12/01

DW Infrastructure

Basic Graphical Warehouse Data Flow

