
Data Warehouse

Project Process
&
Project Documentation

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Introduction

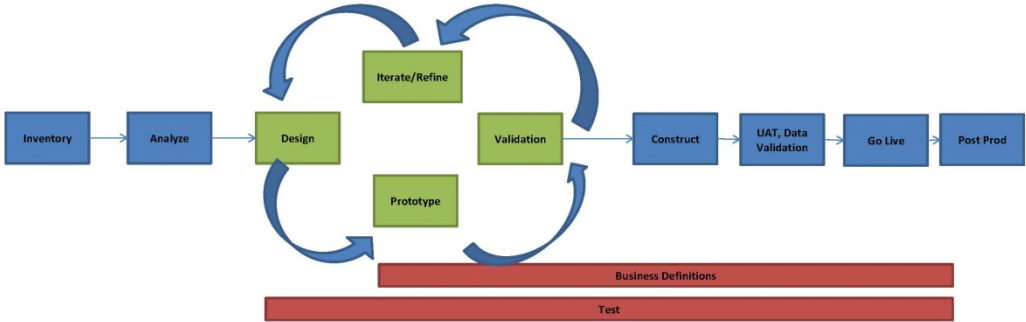
The purpose of this document is to define the Project Process and the set of Project Documents required for each Project of the Data Warehouse Program.

This document will outline the different processes of the project, as well as the set up project document templates that will support the process.

Project Process

Process Diagram

Universe Process Flow and Documentation



Define Scope

Scope should be defined by the Business Owner. A scope statement should be created and reviewed and signed off by all core team members.

Inventory

Once the project scope has been defined and agreed upon, the Business Owner will create an inventory of the data elements and reports required to support the defined scope. The Business Owner should try to identify the source system and data domains as well as the needs and the gaps of the project.

Analyze

Review all of the data elements and the reports. Engage in detailed discussions to profile the data and determine the business rules around the data. Identify any data issues, challenges and try to identify any risks. Document and define the business and data requirements in the Business Requirements Document. Determine the security requirements as well; who should be able to view the data, and who should not.

The Business Requirements document should be reviewed and signed off by the core team so everyone is aware of the actual requirements.

Design

Develop the Conceptual Data Design, the Logical Models, the Security structure, and the BOE layout.

Prototype

Construct the physical database structures, and load sample data. Build the BO Universe prototype, (note: this step skips a mature ETL step).

Prototype Validation

Validate the data model with the customer by visually displaying the model in BO. Determine if the model works as expected, it comprises all of the required data. Review the BO Universe layout, design and data quality with the customer to ensure it meets their expectations.

This validation is strictly for the design of the data model, and not the actual data. The data will be validated during User Acceptance Testing (UAT)

Iterate/Refine

If the prototype did not get approved by the customer, go back to the Analyze step to ensure there is a common understanding on the business requirements. Follow the next steps in sequence until the Prototype has been validated by the customer; Analyze, Design, Prototype, Prototype Validation.

Business Definition and Data Source

The business owner will create business definitions for all data elements that are being added to BO. The technical team will provide the data source. At a minimum, both the business definition and the data source will be added in BO as a reference tool for the users. The users will be able to hover over any data element to display the business definition and data source.

Test

There is a test strategy document that outlines the test strategy in further detail.

Functional Testing

This testing is done by the Data Orchestra and the Data Modeler does prior to UAT. It is done to ensure that the system works as defined in the business requirements. The specific test cases will be logged in the System Test Template and stored on the shared drive so the team can review what had been tested.

UAT (User Acceptance Testing)

This phase entails the user validating the data and business requirements as outlined in the Data Inventory Document and the Requirements Document. The user will use the UAT Test document to plan and document the test scenarios to ensure that BO is functioning as required.

Go Live

Prepare the production environments, migration BO content, reports, and universes. Migrate ETL. The Go Live Checklist will be used to ensure all steps were done to support the move to production.

Post Production Support

This is a four week post-production period to finish up non-critical loose ends, and to address any unforeseen issues.

Project Documentation

The Core Project Team has deemed the following project documents as required project artifacts for each phase of the project. These documents will be maintained during the project phases, and will be stored as project artifacts once the phase has been completed.

Scope Statement

This document defines the project scope determined by the Business Sponsor. This document should be reviewed and signed off by all team members so everyone is aware of the project goal(s). This will be used to create the high-level project plan, data inventory list, report list and business requirements.

Document Name: Project Scope Statement

Data Inventory List

This is an excel spreadsheet that lists all of the data elements that are required to be brought over to Business Objects. The business creates this list based on the Scope Statement.

Note: If there are more data elements added to BO that were not on the Data Inventory List, there needs to be a process in ensuring the Business is aware of these data elements.

Document Name: Data Inventory Template

Report List

This is the list of reports that the business would like to produce in BO after the implementation.

The business owner should list the names of the reports as well as provide electronic examples of each report. The business owner should also cross-reference all data elements in the reports to ensure they are captured in the Data Inventory List.

Document Name: *Should be included in the Business Requirements and Data Inventory. There is no pre-defined template for this item. An annotated list with samples will suffice.*

Business Requirements

The business owner should specify WHAT they want in regards to the defined project scope. These include any specific use cases, or calculations. It details what the business owner expects the data will function in BO.

NOTE: Once a security plan has been defined, the business requirements document needs to be updated to include a security section that defines the type of security required for the specific project.

Document Name: Data Warehouse Requirements Template

Data Dictionary

This is an excel spreadsheet that is used to build the data model. The data elements in the Data Inventory list should be included in the dictionary. Any new data elements added to the dictionary that were not in the Data Inventory List need to be communicated to the business.

Document Name: Enterprise Data Dictionary

Functional Specification Document

This document specifies HOW the defined project scope will be achieved. This document is meant to be used as an aid to the business so they understand what was developed so they know what needs to be tested in UAT.

Examples:

- Newly created BO objects – the purpose and the logic behind them
- Measures – what the data element is measuring, the grain, and any specific calculations
- Joins – What universes join together, specify inner and/or outer.
- Traceability Matrix - ties back to the data inventory list to ensure all required data elements were captured with any specific ETL rules that were created for the data element.
- Tracking - What data elements are being tracked
- PIT of tracking, critical dates

Document Name: *There is no pre-defined template for this item. An annotated list will suffice.*

Functional Test Document

This is a test document used by the Data Modeler and Data Orchestra to define what they tested prior to UAT. It lists specific test cases that were tested; detailing the test data used and test condition with the expected and received results.

Document Name: *There is no pre-defined template for this item. An annotated list will suffice.*

UAT Document

This is an excel spreadsheet that outlines what needs to be tested. It should be reviewed by the team prior to UAT to ensure that it captures all that needs to be tested. Once testing begins, the document tracks the specific test cases. Any issue found, it will be assigned to the correct person to review. A description of the issue will be logged in the comment field by date. Once the issue was reviewed and resolved by person it was assigned to, it will then be re-assigned to the business to re-test, with a description of the issue and resolution.

Document Name: DDM UAT Template

Go Live Checklist

This is a check list that is created at an implementation meeting to ensure all proper steps were done to support the move to production.

Document Name: Go Live Checklist Template though items may be added or deleted as appropriate.

High-Level Project Plan

The high-level project plan will show the major milestones with estimated dates of completion. This document is to be used to display a high-level summary of the project. It is created and maintained by the Data Warehouse core project team and is typically used in presentations and other project communications.

Document Name: Data Warehouse High-Level Project Plan

Short-Term Project Plan

The short-term action plan will be used to manage the detailed tasks of the plan. Tasks will be assigned and reviewed in two week increments at the Business Owner's scheduled working meeting.

Document Name: Short Term Project Plan

Issue Log

A log will be maintained by the Data Warehouse core project team of all outstanding issues. Business Owners should send an email containing the issue that they would like to have addressed to the mailing list: dwtechhelp-l@mtholyoke.edu

Document Name: Issue Log

Bug Tracker

This log will track all bugs the users have encountered. The purpose of the tracker is to ensure we are fixing all of the bugs in a timely manner to avoid disruption to the testing and production environment. The bug tracker will also be used to look for specific patterns of issues that can be used when logging issues with SAP.

Document Name: A bug tracking log will be maintained by the Data Warehouse core project team of all outstanding issues. Business Owners should send an email containing the program bug that they would like to have addressed to the mailing list: dwtechhelp-l@mtholyoke.edu

Enhancement Requests

This log will track all requested enhancements.

Document Name: A Enhancements Request Log will be maintained by the Data Warehouse core project team of all outstanding enhancement requests. Business Owners should send an email containing the enhancement request that they would like to have addressed to the mailing list: dwtechhelp-l@mtholyoke.edu

Security Request

When a customer or staff member of the Business Owner's department needs access to some aspect of the data warehouse or its functionality, the Business Owner should send a request specifying the nature of that access. The request will be logged for audit purposes.

Document Name: Business Owners should send an email containing the name of the user and the nature of the access (typically report developer or report runner) to the mailing list: dwtechhelp-l@mtholyoke.edu

