

Note: This document provides a high-level overview of the training and education plan for the Banner Enterprise Data Warehouse. It assumes that the Banner Operational Data Store is installed, appropriately populated, and tested.

EDW Implementation Overview and Planning Meeting (Remote)

Purpose

This remotely-delivered activity provides a forum for:

- Review of the Banner Performance Reporting and Analytics Strategic Assessment in order to address any concerns
- Confirming the functional purpose of the EDW and its role at the College
- Confirming the technical requirements for the implementation
- Setting the expectations, roles, and responsibilities of all parties for the implementation and maintenance of the EDW
- Identifying and addressing concerns related to technical and functional dependencies associated with the implementation of the EDW and other related implementation activities
- Providing an introduction to the concepts of Extract Events and Cleansing as implemented in the EDW so that those preliminary discussions can begin

Recommended Participants

- The SunGard Higher Education Implementation Team for the EDW
- Power report writers with current responsibility for providing information to the executive team and cross-enterprise reporting specialists
- Technical staff responsible for support of the ODS and the EDW
- The Executive Sponsor for implementation of reporting assets

Date

October, 2009

Pre-installation requirements and implementation activities

- Installation of the ODS and the population and validation of data with information appropriate for the initial population and testing of the EDW
- Acquire and install the required hardware and supporting software (**Note:** The EDW is generally installed in the same Oracle instance as is the ODS, and the reporting tool is already installed on an application server so there may in fact be no need for additional hardware or software.)
- Identify the ODS instance in which the EDW will be installed and the initial extract events for the various business areas

EDW Combined Technical and Functional Training (On Site)

Purpose and Agenda

Because of the particularly close relationship between functional requirements and technical implementation for the EDW, and because of the straightforward nature of the related user interface, this training and education plan is focused on understanding the data migration process supporting the EDW, and validating the information presented in the Stat Schema.

The training and education plan includes:

- A high-level overview of the processes that populate the ODS
- A high-level overview, as well as detailed walk-through of the processes that populate the EDW
 - Load processing, to include consideration for extract events
 - The views that read the ODS
 - Cleansing processes
 - Creation of the supporting Star Schema
 - Preparation of the reporting environment for display of the EDW data. Details of the tasks vary dependent upon the selected report writer.
- General maintenance tasks
 - Installation and Upgrade tasks
 - Load scheduling tasks
 - Security administration
- Customization choices and processes
- Hands-on training and related to the use of the selected report writer
- An introduction to testing processes for the EDW
- The SunGard Higher Education Implementation Team for the EDW
- Power report writers at the College with current responsibility for providing information to the executive team and cross-enterprise reporting specialists
- Technical staff responsible for support of the ODS and the EDW

Recommended Participants

Date

- November 17, 2009 – November 19, 2009

Pre-requisites

- Installation, population, and validation of the ODS
- Installation and sample population of the EDW
 - Installation of the required software that will be supporting the EDW
- The availability of the Handbook for the Enterprise Data Warehouse on the Banner Bookshelf and the EDW Metadata

Post-training and pre-testing activity

- Preparation of the environment for Data Testing and Validation
 - Implement security (if any) and access as required for testing
 - Monitor the population/refresh of the EDW
 - Identify Banner and ODS reports to use as testing support
- Maintain currency of patches and upgrades as required

EDW Testing Support and Roll-out Preparation (On Site)

(Note: Testing is continued until the College is satisfied with the quality of the data in the EDW.)

Purpose and Agenda

The testing process for the EDW involves the comparison of output from the Star Schema with Banner forms or validated reports from Banner or the ODS.

If and as discrepancies are identified the information transformation processes, and interim staged data stores are examined to reconcile and address the differences.

This testing process is generally best served by the 'power reporters' identified earlier.

In addition, the testing provides the opportunity to create default reports for each of the cubes. It also prepares those staff involved for the task of training, generally in an individual environment, members of the executive and management teams in the use of the EDW environment.

Recommended Participants

- Power reporting users and staff with cross-enterprise reporting responsibilities
- DBA and System Administrators as required.

Date

- Week of February 15, 2009
- Week of March 1, 2009

Pre-requisites

- Installation and population of the ODS
- Installation and population of the EDW Star Schema and the related Multi-Dimensional Database ("Cube") structures
- Reporting tools as required by the testing staff
- The availability of the Banner Bookshelf and the appropriate documentation for the EDW and the related business areas

Post-engagement Activity

- Continued development of additional business information in support of management and executive needs
- Other activities as identified and noted throughout the training and testing