0204: Implementing A Business Objects Self Service Platform And Still Support Data Governance

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Learning Points

• What does Data Governance and Self Service have in common

• What is Reporting Metadata

• Using a Report Repository to help your Self Service and Data Governance efforts
What is Data Governance

• Knowing and controlling who is reporting sensitive data

• Working toward “one version of the truth” in regard to reporting

• Setting and controlling common data display formats and definitions

• Ensure that mission critical calculations are consistently used and under corporate control

• Establishing best practices and reporting standards
What is Self Service

• Users creating their own reports instead of a centralized report group

• Users having a tool set by which they can build accurate reports
  • Ability to know what data is available
  • Ability to know where to find the data
  • Ability to know how data is related to other data

• Users given guidance and support in creating accurate reports

• Users having confidence in the accuracy of their reports

• A robust in-house reporting user group
What is Self Service

It may not be intuitive, but many of the same functions/services that help a Self Service platform, also will help your Data Governance activities.

Data Governance:
I need to know what I am managing.
How do I know what I have?

Self Service:
I need to know what data I can report on and where to find it.
How do I learn about the data?

Similar questions, same answer: Metadata Repository
Our Reporting Platform

- SQL Server
  - BIR
  - Non-BIR
- Other DBMS
  - Non-BIR

Data Extract

Team Workspace (customized list of team reports)

BOE 4.0

Web Based Interface

- USER-A1
- USER-A2
- USER-A3
- USER-A4
Core Of All Knowledge .... Metadata Repository

The Core Of All Knowledge Supporting Our Self-Service Report Platform

Report XYZ1 is broken, who owns the report?
Which BOE Universe has ABC data?
DBMS Object is changing, what reports will be effected?
I want to see the Dimensional model supporting ABC report.
I want to see all the reports used by Finance business area.
I want to see a data model of the BOE’s Finance Business layer.
I looking for a report containing Loan Amounts and who I need to ask for access to that information.
What is the definition of the Column Application Date, on report ABC2?

List of all Web-I reports, by business area, that are scheduled daily.

Ed wants access to a Finance report, who needs to approve Ed’s access to that information?

Data governance inquiries

SQL Server Mgt Studio & BOE Web-I Queries, Procs & Reports

Table & Column Metadata
- Server
- Subject Area
- Table Definition
- Column Definition
- Column sample data

Universe Metadata
- Business Owner
- Business Area
- DBMS Info
- Universe description
- Calculation descriptions and owner

Report Metadata
- Business Owner
- Business Area
- Schedule
- Column Definition
- Report Identifier
- Rpt Description

Metadata Repository

PowerDesigner Proprietary tables
SQL Server Custom tables

ASUG SAP BusinessObjects
USER CONFERENCE
1. Report metadata may start as report requirements in an Excel spreadsheet.
2. Excel data is loaded into a report data model.
3. Report data model information/metadata is loaded into the metadata repository.

Report developers, viewers and Data Governance analysts, can view and search for report information via the metadata repository’s web portal.
Step 1: Gather Report Requirements

Excel Report Metadata / Requirements … Input

Entities/Reports Report requirements

Attributes/Columns Report requirements
Step 2: Load Requirements Into Report Model

Data Model Image of the reports used by the “Branches” business area

Last Updated 05/23/2013 by MCS

**BRANCH REPORTS**

**DELINQUENCY_NOTES_REPORTS_BY_BRANCH**
- BRANCH ID
- BRANCH NAME
- OFFICER ID
- OFFICER NAME
- ACCOUNT NO.
- LOAN TYPE
- RISK CODE
- LST REN 30/60/90
- SHORT NAME
- HOME PHONE
- BUS PHONE
- FACE AMT
- CURR BAL
- PRI BAL
- UNAPPL FNDS
- PAY OFF BAL
- PMTS PAST
- LATE FEES
- NOTE DT
- MAT DT
- LST ACT
- PRN RED
- INT PWD

**HOLDSREGCC_DAILY**
- ACCOUNT NUMBER
- SHORT NAME
- TRANSACTION AMT
- CURRENT BALANCE

**CURRENT_NEW_LOAN**
- OFF ID
- ACCOUNT NUMBER
- SHORT NAME
- FACE AMOUNT OF NOTE
- CURRENT BALANCE
- INT RATE
- DATE OPEN
- MATURITY DATE
- TERM MON
- TOTAL DIR LIABILITY
- TOTAL IND LIABILITY
- COLLATERAL
Step 3: Load Metadata Repository

For a given business area, view available reports and what information is contained in each report.

The Repository showing that for the “Loan Servicing” business area, there are 13 reports.

If you were to expand the “TDR Status Report”, you will see the list of information displayed in that report.
Repository Portal ... Viewing metadata

From the Repository Portal, users can drill down into any object and review the object's properties. This can help report developers and Data Governance support staff, ensure developers are using the correct data to source their report.
Reporting Metadata available via the Portal

- Report name
- Report registered id *(if absent, shows if report was created outside the approved process)*
- Report short description
- Is the report critical to the business
- Report's run schedule (daily, weekly, monthly …)
- How is the run report delivered to the user (emailed, dropped to location)
- Name of the business user associated to the report
- Name of the business area responsible for the report
- Who to contact in regard to the report
- User id who last changed the report
- What reporting tool was used to create the report
- Report output format *(PDF, Excel, Web-I, Crystal Enterprise, Crystal)*
- Date the report was first created
- Date the report was last changed in production
- The location where the report *(if exported)* is placed for users
- Name of the Universe used to build the report
- Name of the Business Layer used to build the report
- Crystal stand-alone reports, name of the data source used to build the report
- The status of the report in moving though the report review and move to production process.
- For each column heading
  - Name of the column / heading
  - Does the column use a calculation
  - Short description of the column
  - Date of when the column was last changed
  - Id of the individual who last changed the column
  - If a stored procedure was used, name of the stored procedure
Report Id … Official Stamp Of Review Process

- Every report that is reviewed for best practices, receives a system generated “Report Id” automatically when it is checked into the metadata repository.

- The Report Id is placed somewhere on the report.

- The absence of a Report Id indicates the report’s content could be suspect if a data quality / data governance issue arises.

- The Report Id aids help desk personnel to route issues to the appropriate reporting group.

- Report Ids give Data Governance a management tool against individuals creating reports outside the best practices guidelines.
Our best practices, requires Universes, Reports and Databases to have an associated data model component.

The data modeling tool allows us to perform any customization of the data model to meet our needs. We have created the following customized models:
- Reporting Model
- Universe Model
- Data Model

The data model tool, loads the model’s metadata into the metadata repository / portal.

The metadata repository portal allows end users, report developers and Data Governance analyst, the ability to search and view all types of objects used in the report building process.

Knowing what reports and supporting data, are already in production, can reduce the amount reporting duplication and work toward “one version of the truth”.

A robust metadata repository, helps support Data Governance activities while at the same time give report developers greater independence.
Data Governance

Things you can do to promote Data Governance objects in your self service platform.

• Have the business layer/universe, contain mission critical calculations

• Assign and display “Report Ids” on all reports that pass best practices

• Have a known group responsible for promoting reports to production

• Make it easy for individuals to see what type of reports already exist

• Use Web-I for reporting needs, thus data must come from a universe/”trusted source”

• Make available report metadata to admins, Data Governance analysts and developers
  • Report Description
  • Owner of the report
  • Definitions of the data shown on a report
  • Detail descriptions of critical calculations

• Have a flexible development environment so developers don’t have to break best practices to meet business needs.
Data Governance & Self Service Common Goals

Data Governance

• Know what data is being reported
• Ensure data definitions are accurate
• Research existing reports
• Enforce common data display formats
• Work toward “one version of the truth”
• Resolve inconsistent report data
• Create and enforce reporting standards

Self Service

• Is the data I need available for my report?
• Is “Market Rate” what I really think it is?
• Is there a report existing that has the data I need?
• What is the format of the data I want in my report?
• How confident am I about the data’s accuracy?
• What is the standard “look” I am supposed to use?
To Put This Discussion Into Perspective

When was the last time your company replaced an enterprise application?

When was the last time your company replaced your enterprise data?

Putting the time and effort into Data Governance and a metadata repository, pays off in the long run.
To manage something, you have to know what you are managing

Having a metadata repository, allows you to know what you are managing
Thank you for participating.

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