

November 4, 2009



# Business Intelligence Tools

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# Richard Pickens – WVFIMS Project Manager

## WVFIMS Business Intelligence Project – Overview and Where We Were



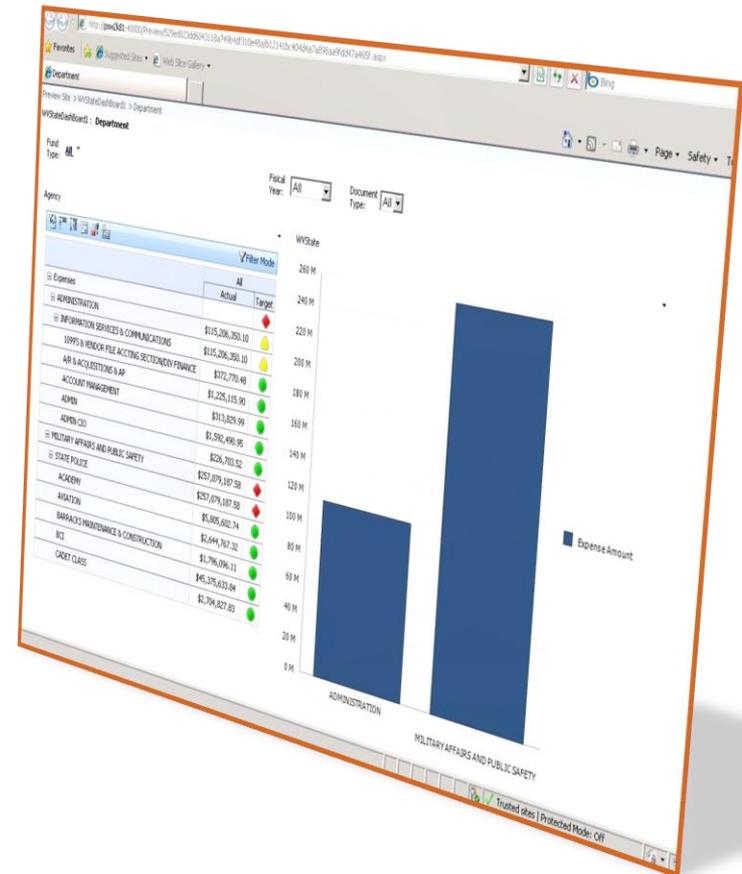
# Business Intelligence: Project Development

- Initial scope was a pilot program to demonstrate the Microsoft Business Intelligence tools.
  - Initial delivery was only based on a small snapshot of expense information - two years and two departments' worth
- The project tools and people involved were so successful that we were able to expand the project to a fully-functional data warehouse, encompassing **six** years of historical revenue and expense information, totaling **14.5 million records** of data.
  - ☑ Microsoft Excel
  - ☑ Microsoft SQL Server & Microsoft Analysis Services
  - ☑ Microsoft SQL Server Reporting Services
  - ☑ Microsoft SharePoint and Performance Point



# Business Intelligence: Pilot Program Goals

- ✓ Provide user-friendly tools:
  - ✓ Enable self-service reporting and analysis
  - ✓ Execute advanced queries
  - ✓ Access business ad-hoc reporting tools
- ✓ Analyze expenditure and revenue data
- ✓ Enable Performance Point **Dashboards**





# Business Intelligence: The Team

- Richard Pickens – WVFIMS Project Manager
- Wilma Garbett – WVFIMS Database Administrator
- Matthew Barger - SharePoint Administrator
- Ken Ammann – Business Intelligence Architect



# Business Intelligence: A Look Back...

## Where WVFIMS' Business Intelligence is:

- WVFIMS DB2 Data Warehouse  
Since April, 1996
- Crystal Reports
- Excel & other ODBC-compliant Tools

## Challenges WVFIMS' Business Intelligence Faced:

- Crystal Reports requires knowledge of the database
- Analysis required knowledge of the database and SQL



# Ken Ammann – Business Intelligence Architect

Business Intelligence: Where the project went...



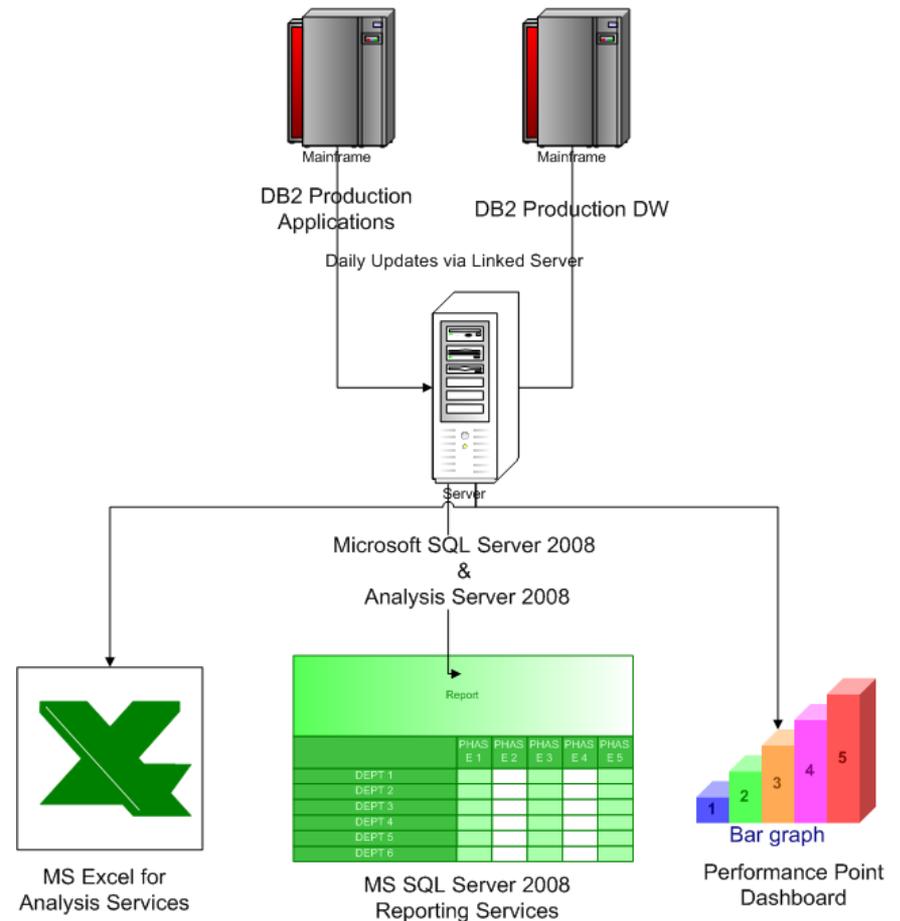
# Business Intelligence: What it used to look like

```
SELECT ER_DT_DOC_ID, ER_DT_ACT_ID, ER_DT_FIMS_FUND_ID, ER_DT_FY,  
ER_DT_MO, ER_DT_PROCESS_FY, ER_DT_ST_OBJSRC_ID, ER_DT_ST_OBJSRC_NM,  
ER_DT_ST_ORG_ID, ER_DT_TRAN_AMT, ER_DT_VENDOR_ID, ER_DT_PROCESS_FY ||  
ER_DT_MO, OU_NM, VN_NM  
FROM AHDB2ADM.WVTDETAL_EXP_REV  
  INNER JOIN AHDB2ADM.WVTOUORG ON ER_DT_ST_ORG_ID = OU_ORG_ID AND  
    ER_DT_PROCESS_FY = OU_FY  
  INNER JOIN AHDB2ADM.WVTOUREL ON ER_DT_ST_ORG_ID = OU_R_CHILD_ID  
    AND ER_DT_PROCESS_FY = OU_R_FY  
  LEFT OUTER JOIN AHDB2ADM.WVTNVNEN ON ER_DT_VENDOR_ID = VN_VEN_ID  
  LEFT OUTER JOIN AHDB2ADM.WVTODDSB ON ER_DT_DOC_ID = OD_DOC_ID  
  LEFT OUTER JOIN AHDB2ADM.WVTIGIGT ON ER_DT_DOC_ID = IG_DOC_ID  
WHERE ER_DT_DETAL_CD = 'DIS' AND ER_DT_DETAL_TYPE = 'EXP'  
  AND ER_DT_MO BETWEEN '01' AND '13'  
  AND ER_DT_PROCESS_FY = '2007'
```



# Business Intelligence: Tools available today

- Enterprise Transform and Load
- Data Validation
- Microsoft SQL Server & Analysis Services
  - Connected to Mainframe
- Microsoft SQL Server Reporting Services
- Microsoft Excel
- Dashboards - Microsoft Performance Point
- Microsoft SharePoint





# Expense & Revenue: What is available

- Six years of historical information is accessible
- New data updated and reconciled daily
- Ability to review current state expenses and revenue
  - Pivot Tables
  - Microsoft SQL Server reports
  - Dashboards
- Ability to review trends
  - Current period versus last period
- Ability to set targets
- Ad-hoc and self-service reporting with Microsoft Excel





# Business Intelligence: Empowering the Future

- Desktop Analytics with Microsoft Excel
  - **Ready and available today!**
- Publish Microsoft Performance Point Dashboards
- Microsoft SQL Server Reporting Services





# Business Intelligence: Thank You!

