

Business Intelligence Implementation at Harvard University IT Department

ABOUT THE CLIENT

Harvard University is a private Ivy League research university in Cambridge, Massachusetts, established in 1636. Its history, influence and wealth have made it one of the most prestigious universities in the world. Harvard University is a non-profit organization with billions of funds in endowments contributing to research and various educational programs. Financial Systems Solutions (FSS) is one of the divisions of Harvard University Information Technology. FSS provides product support and user access/security for the University's financial, human resource, sponsored and reporting administrative system with a user base of over 15,000 people.

HUIT is in the middle of its 5-year plan. Vision is to deliver

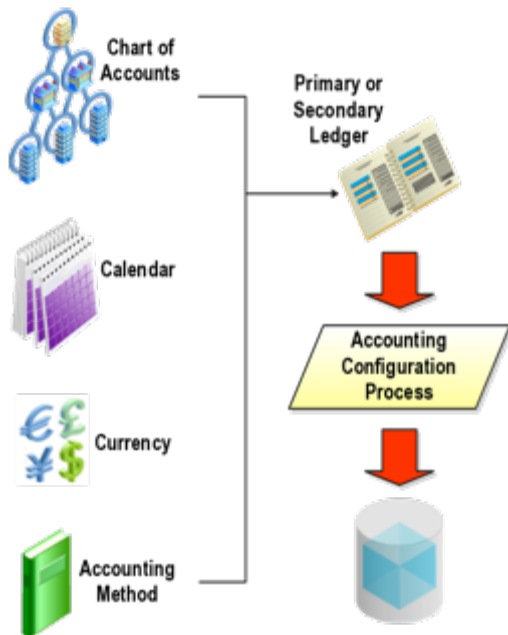
- new applications and services rapidly & seamlessly through greater maturity in
 - ITIL
 - Agile
 - Project Management
- all new applications and 75% of existing applications in the cloud
- simple financial model to improve decision-making
- robust people plans to enable a nimble, embedded, and empathetic workforce

BUSINESS CHALLENGE

There is significant effort being put in to migrate all financial and non-financial reports to Business Intelligence (BI) space from the existing Enterprise Resource Planning (ERP) and Enterprise Data Warehouse (DW) space. SigmaSoft has been brought in to work on one such initiative to breakdown a massive complex report and identify ways to make it better in terms of reporting in the BI space.

HOW DO WE GO ABOUT SOLVING THIS?

1. Understand the Company's Chart of Accounts (CoA) Structure



Decoding something needs keen insight and thorough knowledge of the reasoning behind its existing form and structure. Understanding the CoA of every organization is important for understanding the core structure of its financial reports.

Harvard University being a non-profit organization has its CoA structured accordingly and understanding it is a key and preliminary step before looking into the reports.

2. Determine the source of information for the report

The data on the reports should be part of a database from where it is being fetched. Identify the schema and the tables related to the data. Some data listed might be associated with multiple tables in which case it is important to identify the base tables that contain the data shown on the reports.



3. Identify the elements of the source being used for the report



The fields listed on the report have to be identified. The name of the fields and the back end name of the fields on the tables from where it is sourced should as well be identified to get the whole picture. It has to be analyzed by breaking it down brick-by-brick.

4. Understand the structure of the report

Report structures form an important part of the discovery and analysis process. Reports come in different formats and based on browser capabilities might also come in with a restrictive view or expanded display. Based on the responsibility/ security access or the person running the report, certain fields might grey out. Certain fields might also not be in



the final report owing to the nature of security access owned by the Individual running the report. All these elements are key pieces to understanding the form and structure of a report.

5. Identify the various provisions/ options the report has on offer



Some reports might come in .pdf format, some in .csv or .xls format. It is important to know if a report comes in different formats and if all formats provide the same piece of information. For example, a .pdf format might provide only the key elements that it could display on 8.5" * 11" piece of paper whereas a .csv might be able to provide more fields of information and thereby more data for analysis.

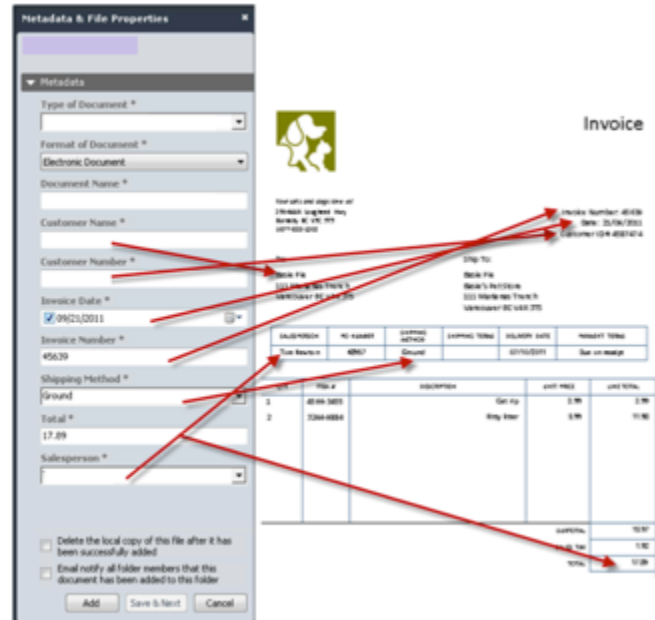
6. Run the report and map the final output to the information from source

Once the understanding of the details is accomplished, it is down to running the report and seeing how the source information gets displayed on the report. Covering the first five steps makes the sixth step easier and hence this progressive understanding helps not to miss any important piece of information while going about solving this.

7. Prepare a mapping documentation to identify a pattern

Now we have a good understanding of

- all the base elements of the report
- source information
- format in which source information is displayed



It is solid a foundation to prepare a mapping documentation with source elements from where the data is fetched to plotted on the column set and the display on report on the row sets. Prepare a grid pattern and map

the source information to the information displayed on the reports. Identify a pattern if any exists. The best way to do it is to identify the key piece of information based on which the data is segregated.

8. Breakdown of the key details of the report according to the pattern identified in source-to-target mapping documentation

Once a pattern is identified, breakdown the report and identify how to make it suit as a report in BI space. Talk to the Users, the Solution Architects and the Developers to further extrapolate on the design and put a concrete plan of action in place to go about implementing the new reporting structure in BI Space.

KEY BENEFITS TO THIS APPROACH

- Better understanding of the issue at hand
- Strong grasp of knowledge on the key elements involved
- Better insight to extrapolate on why certain things have been designed a certain way
- Familiarity with data to better orchestrate future design discussions
- Good foundation to bank on in case if required to go back to the drawing board

OUR COMPANY

Sigma Software LLC, an IT Consulting Company, built to help your enterprise innovate and optimize business processes by crafting your IT investment portfolio for business growth. We enable CIOs and Technology heads to meet their strategic IT ROI by collaborating with them as a trusted IT partner.

OUR FOCUS

- Healthcare
- Finance
- Government
- Technology
- Insurance
- Airlines
- Telecom
- Ecommerce

OUR RESOURCES

Our team includes Industry leading Consultants in Oracle, IBM, SAP platforms along with various other IT Implementation tools. We strive to ensure that they have best tools and facilities to help resolve problems for our clientele.

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