# Table of Contents

Section A: ODS Overview ..........................................................................................................4  
  Overview ..................................................................................................................................4  
  The Information Pyramid .........................................................................................................5

Section B: Developing a Reporting Strategy ............................................................................7  
  Developing a Strategic Reporting Plan ....................................................................................7

Section C: What is the ODS? ...................................................................................................10  
  ODS Introduction ...................................................................................................................10  
  ODS Architecture and Design ...............................................................................................11  
  Exercise – Tracking a Data Column .......................................................................................12  
  Oracle Warehouse Builder .....................................................................................................13  
  ODS Naming Conventions .....................................................................................................15  
  Tables and Views ...................................................................................................................16  
  De-normalized Database .........................................................................................................17  
  Interactive Metadata ...............................................................................................................19

Section D: Why use an Operational Data Store .....................................................................23  
  Why use an Operational Data Store? .....................................................................................23

Section E: ODS Administrative User Interface ....................................................................24  
  ODS Administration ...............................................................................................................24  
  Setting Up User Accounts ......................................................................................................25  
  Maintaining Fine-Grained Access Rules .................................................................................26  
  Setting Metadata Preferences .................................................................................................27  
  Setting Up Data Display Rules ...............................................................................................28  
  Setting Up Data Display Rules (continued) ...........................................................................29  
  Setting Up Data Display Rules (continued) ...........................................................................30  
  Managing the ETL Process .....................................................................................................32  
  Managing the ETL Process (continued) ................................................................................33  
  Managing the ETL Process (continued) ................................................................................34  
  Why is my Data out of Sync? .................................................................................................38

Section F: New in ODS 3.1 .......................................................................................................39  
  New List of Values View ...........................................................................................................39  
  Self-Service Reporting ..........................................................................................................40  
  Changed Data Model ERD .......................................................................................................41  
  End User Layer Updates .........................................................................................................42

Section G: Related Documentation .........................................................................................43  
  Related Documentation ..........................................................................................................43

Section H: Notes ........................................................................................................................44  
  Three Things You Learned Today .........................................................................................44
Workbook goal
The objective of this workbook is to provide the participants with an understanding of information within the ODS, and enough introductory experience using it so that they are able to successfully support ad hoc operational reporting needs as appropriate from the ODS.

Workbook objectives
Upon completion of this course, you will be able to:

- answer the question “What is the ODS and how does it get built?”
- understand the relationship between ODS administration and report writing
- navigate knowledgeably through the ODS metadata
- develop a reporting strategy.

Intended audience
- Department Functional/Technical Staff - Internal designated report writers
- Department Managers, IT Department Support Staff - responsible for report writing.
Information: The Common Component
Information is needed to address performance obligations. Information and institutional intelligence is also required for measurable performance improvements.

<table>
<thead>
<tr>
<th>Information is needed by</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>monitor progress towards institutional priorities</td>
</tr>
<tr>
<td>Administrators</td>
<td>monitor daily operations</td>
</tr>
<tr>
<td>IT</td>
<td>provide enterprise intelligence and production reports</td>
</tr>
<tr>
<td>IR</td>
<td>monitor institutional trends, compliance</td>
</tr>
</tbody>
</table>

In order to achieve their institutional mission, colleges and universities must define their business objectives to address and combat these pressures, such as:

- increase operational efficiency – maintain costs
- maximize funding – respond timely and appropriately to ensure revenue opportunities, i.e., governmental reporting, grant applications, etc.
- optimize accountability – legislative reporting, accreditation, budgetary reporting
- increase competitive positioning – institutional rankings, align curriculum to constituents’ demands

The common component to these and other objectives is timely access to the information that is needed to achieve these objectives.
The information pyramid

- Information needs to reach all levels of campus.
- Data from lower levels must be transformed to upper levels.

EXECUTIVES:
Need visibility into progress towards our goals, objectives

MANAGEMENT:
Need timely trends, summaries, analytics of our operations

STAFF:
Need detailed reports in many formats and ad-hoc access
Section B: Developing a Reporting Strategy

Lesson: Developing a Strategic Reporting Plan

Strategic Reporting Team

The strategic reporting team is responsible for managing the expectations of the reporting community. They will make recommendations on who should have access to “what” data, who the department/school experts are, etc. This team manages the decision-making process and is the conduit between executive needs and end-user supplying those needs. It is typically chaired by institutional research head.

- **Strategic Reporting Team Members**
  - ODS Administrator – usually from IT
  - Reporting Tool Administrator
  - Key Report Writers
  - End Users
  - Key Administrators – The people who have a broad knowledge of the university and the ability to make or escalate key decisions regarding reporting on campus
  - IT Representative

- **Strategic Reporting Team Responsibilities**
  - Manage expectations of reporting community
  - Make recommendations on access
  - Assist IT group with decision-making involving end users and executives

ODS Administrators

This is a role of someone at the institution who manages the Operational Data Store. This person reviews the logs to make sure no errors were encountered in the nightly refresh or load. The institution may decide that this is a role of their DBA, but it is not normally an end-user activity. In some instances, this person is responsible for data freezing, or managing the data as it goes to outside agencies, such as the state. Usually, this is an IT position.

The Administrator should be familiar with the technical aspects of the Banner system as well as the Oracle Warehouse Builder. The end user should have a basic understanding of the Banner system, the ODS, and their third-party reporting tool.

- **ODS Administrator Responsibilities**
  - Manage the ODS (loads, refreshes, security, metadata)
  - Review logs and checks for errors
  - Freeze views
Identifying Experts
Organizational Experts are responsible for data and assist with design of reports. When developing your reporting strategy, you need to ask the following questions:

- Who has responsibility for reporting tool expertise?
- Who do the users call to get help designing a report?
- Who do they call to get training in the product?
- Who are the experts that will do the following:
  - Develop the business requirements?
  - Information content experts
  - Report Writer experts

Department training
SunGard Higher Education does not provide reporting tool training as a part of the ODS Training since it is tool independent. The purpose of this training workbook is to show the reports, not to teach them how to write them.

Note: SunGard Higher Education can provide specific tool training, but that is a separate request.

- **Department Training**
  - Who will be responsible?
  - When will training occur?

Planning for Upgrades
SunGard HE ODS Clients on maintenance will get periodic/upgrades. Scheduled upgrades will be tracked on the Banner Performance Reporting and Analytics Product Calendar and may include new composite tables and or columns, new reporting views, new report templates. It may, also, include technical upgrades.

Enhancements can come from these areas:

- Client Enhancements
- Technical upgrades related to Oracle enhancements
- Internationalization
- Third Party Products
- Banner Product/Database enhancements
Identifying Users

Your strategic reporting plan should also identify specific user groups, their reporting needs and ability to generate their own reports. While IT team members can do many reporting tasks, each functional area should develop their own power user for ad hoc reporting. This strategy makes the functional area less dependent on IT resources.

- **Who are the users?**
  - Power users – ad hoc
  - Business users - managed
  - Casual users – directed
  - IT – complete

Report Writing 101

1. All Report Requests Should Be In Writing. (This forces the requestors to organize their thoughts. They should include the following information in their requests. You determine the format!)
2. How often will this report be used and by whom? (routine vs. ad hoc)
3. Is the person authorized to have this information? (security)
4. What’s the true “drop-dead date” it’s needed by? (deadline)
5. How will the information be used? (purpose)
6. What data should be on the report, in both rows and columns? (specifications)
7. How are the data to be selected? (criteria)
8. How should the data be sorted and grouped? (filter)
9. How should the final output be displayed? (format)
**Introduction**

The Operational Data Store (ODS) allows your institution to accumulate vast amounts of data that, when properly aggregated, contain valuable information on institutional performance. Ideally, your institution would transform this data into information and knowledge that can be used to support your decision-making processes.

The Operational Data Store (ODS) gathers information from existing data sources, creates consistent reporting definitions and reports, and presents the information. Using this solution, your institution can take full advantage of the data stored in your source system by turning it into applied knowledge that can help you make informed decisions, guide strategic institutional planning, forecast based on analysis of historical trends, and enhance institutional performance.

ODS key features include:

- ODS tables are constructed specifically for reporting.
- ODS resides on a separate reporting Server.
- ODS is populated from the source system (s) using composite views.
- ODS has de-normalized* tables called composite tables.
- Interactive Metadata.
ODS Architecture and Design

This diagram shows how to extract information from administrative systems, reorganize information into a simplified format, and then store the information in a separate database instance where end users can create and deploy operational and ad hoc reports.

The information is restructured to provide a more extensive and flexible data store. The ODS provides business organized reporting views with fewer columns and improved performance. These reporting views offer a more compact alternative to the existing Object:Access views.
Exercise: Tracking a Data Column from Banner to the ODS

The purpose of this exercise is to demonstrate the ODS architecture.

10 signs are printed on 8 ½ X 11 card stock with two holes punched at the top. String is fed through the holes so that each sign can be hung around a person’s neck.

An example of what is on the10 signs for the Student module is:

1) Mission: Track a Student’s Major from Banner to the ODS
2) Banner Form Name: SGASTDN
3) Banner Column Name: SGBSTDN_MAJR_CODE_1
4) Banner Table Name: SGBSTDN
5) Banner Composite View Name: Academic Study
6) Oracle Warehouse Builder: Extracts, Transforms and Loads Banner Tables to produce:
7) ODS Composite Table Name: Student
8) Security and Display Rules Applied via ODS web administration
9) ODS Reporting View Name: Academic Study
10) ODS View Column Name: Major

One sign is given to 10 participants. They are then asked to stand up and read what’s on their sign. Signs are numbered at the bottom so correct order can be maintained.
Introduction
The Oracle Warehouse Builder allows you to design a complete logical model of your warehouse. It helps to plan how to EXTRACT data from the source, TRANSFORM the data, and configure the data for LOADING into the data warehouse. That’s what we call it ETL – Extract, Transform, Load.

When to load and update data
- Initial Load

- Refresh data in ODS on a regular basis
  - Nightly? Weekly?

- Update specific area as needed when there is a data change in source system.

Note: SunGard Higher Education recommends that the ODS be updated on a daily basis.

ODS load process flow
ODS incremental refresh process flow
Introduction
Use the following ODS naming conventions.

- **SunGard Higher Education Banner**
  - Composite view – Ax_name
  - Object:Access view – Ax_name

- **SunGard Higher Education Operational Data Store**
  - Database tables – MxT_name
  - Reporting views – English name reports
  - Subset of Reporting views – English name_SLOT
  - Object:Access view – Ax_name

Note: x = Module identifiers are (T) Accounts Receivable, (A) Advancement, (G) General, (F) Finance, (R) Financial Aid, (P) HR, (S) Student
Section C: What is the ODS?
Lesson: Tables and Views

Introduction
The Operational Data Store is a database of de-normalized tables called composite tables. These composite tables store data contents from the administrative systems and are constructed specifically for reporting. De-normalizing combines data from many smaller tables into fewer, larger tables. This enhances data extraction and query access by eliminating the need to perform excessive table joins.

Populated from source system (Banner)
Data is retrieved from the source system(s) using composite views. These views utilize the existing business logic on the source system and provide the extraction logic for the composite tables that reside on the reporting server.

Separate server
An ODS typically resides on a separate server in order to take advantage of the performance benefits associated with a query-only system. Business logic does not reside on the reporting server to ensure that the ODS model can support all SunGard Higher Education products. Because the ODS is a query-only system, the data in the ODS flows only one way — from Banner, PowerCAMPUS, Plus, and Matrix to the ODS, never from the Operational Data Store to the administrative system.

The ODS standard composite tables were created with your business needs in mind. This enables you to create your own reporting views and/or reports based on the delivered tables. The ODS also includes Reporting (presentation) views. Reporting views are the final views that you will use to create reports.

Additional features

- ODS reporting views provide access to the data and allow the creation of operational and ad hoc reports.

- Through the Administrative Interface
  - Data security can be set
  - Display rules can be maintained

- ODS tables and reporting views were constructed with the business needs of higher education administration in mind.
Section C: What is the ODS?

Lesson: De-normalized Database

Normalized database
Banner is an example of a normalized database. Normalized databases are great for data entry.

Some features of normalized databases include:

- Eliminate duplicative columns from the same table.
- Create separate tables for each group of related data and identify each row with a unique column or set of columns (the primary key).
- Remove subsets of data that apply to multiple rows of a table and place them in separate tables.
- Create relationships between these new tables and their predecessors through the use of foreign keys.
- Remove columns that are not dependent upon the primary key.

De-normalized database
A de-normalized database like the ODS is a copy of the source database that has been optimized for reporting. Remember, de-normalizing combines data from many smaller tables into fewer, larger tables. This enhances data extraction and query access by eliminating the need to perform excessive table joins.

For instance, the Banner User ID, First Name, Middle Name, and Last Name may appear in a single table in Banner (a normalized database) but it would appear in every view in the ODS that uses that information so that fewer joins are required. The advantage of de-normalized data is that columns of data can be found in more than one view.
Primary and foreign keys

Each Entity Relationship Diagram (ERD), known in the ODS Metadata as a Business Concept Diagram, contains a central or 'driver' reporting view that is the primary focus of each business concept. For each reporting view, only the primary keys are included in the ERD in order to make the diagrams simpler to read. These keys represent the columns that uniquely identify a row or rows in a reporting view. A yellow key symbol indicates a primary key. An (FK) beside a column name in the key designates the columns that are common between associated reporting views.

In the example of an Entity Reporting Diagram, can you identify the primary keys? the foreign keys?
Section C: What is the ODS?

Lesson: Interactive Metadata

Introduction
Metadata is information describing the data in tables. Metadata consists of information such as the source and targets of the data.

Metadata Reports
There are many metadata reports for both common and product-specific data. You can also choose to view the information in an ODS Business Concept Diagram, which graphically shows the relationships of the data within a view.

SCT Information Access
Operational Data Store Reporting View Meta Data Reports

Accounts Receivable
Advancement
Common
Finance
Financial Aid
Human Resources
Student

ODS Business Concept Diagrams

Ver. 3.0
Section C: What is the ODS?

Lesson: Interactive Metadata (Continued)

Metadata report example

<table>
<thead>
<tr>
<th>Reporting View</th>
<th>Description</th>
<th>Key &amp; Frequency</th>
<th>Recommended Search Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY</td>
<td>Contains all the activity and leadership combinations recorded for the person by the institution, including academic period related activities when the person was a student as well as subsequent activities stored for an alumni of the institution.</td>
<td>One row per person per activity and leadership role or per activity and academic period.</td>
<td>ENTITY_UID</td>
</tr>
<tr>
<td>ADDRESS</td>
<td>Contains all addresses for an entity, person, institution, or organization.</td>
<td>One row per entity per address type per address number per address start date and address end date.</td>
<td>ENTITY_UID, ADDRESS_TYPE, ADDRESS_S</td>
</tr>
</tbody>
</table>
Interactive metadata

By clicking one of the metadata links, the report will run and appear on screen. The example below shows the ADDRESS report. When creating ad hoc reports, you can use the metadata to research the source table name and source column of the data you want to include.

SCT Operational Data Store
Reporting View Target: ADDRESS

<table>
<thead>
<tr>
<th>Description</th>
<th>Key &amp; Frequency</th>
<th>Recommended Search Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains all addresses for an entity, person, institution, or organization.</td>
<td>One row per entity per address type per address number per address start date and address end date.</td>
<td>ENTITY_UID, ADDRESS_TYPE, ADDRESS_START_DATE, ADDRESS_END_DATE, ADDRESS_STATUS_END</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Target Column</th>
<th>Business Definition</th>
<th>Database Data Type</th>
<th>Source Name</th>
<th>Source Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS_END_DATE</td>
<td>Calendar date when this address becomes inactive.</td>
<td>DATE</td>
<td>SPRADDR</td>
<td>SPRADDR_TO_DATE</td>
</tr>
<tr>
<td>ADDRESS_NUMBER</td>
<td>Sequence used to identify different addresses within the same address type.</td>
<td>NUMBER</td>
<td>SPRADDR</td>
<td>SPRADDR_SEQNO</td>
</tr>
<tr>
<td>ADDRESS_SOURCE</td>
<td>The source or means by which this address detail was received (modeled by addresssee, room assignment, etc.).</td>
<td>VARCHAR2 (63)</td>
<td>SPRADDR</td>
<td>SPRADDR ASRC_CODE</td>
</tr>
</tbody>
</table>
Section C: What is the ODS?
Lesson: Interactive Metadata

Business Concept Diagram - example
You can also click on the interactive Business Concept Diagram to find the same information. The Business Concept Diagram gives a broader graphic representation of how the data in the view works together.

Note: See the product-specific ODS Training Workbooks for more information.
Section D: Why use an Operational Data Store

Lesson: Why use an Operational Data Store?

Introduction
An ODS can produce standard and custom reports without the typical overhead associated with a transactional system. An ODS system is built specifically to manage the complex queries associated with institutional report generation.

An ODS also provides the ability to select point-in-time, or frozen data. For example, many institutions close the course refund period three weeks from the start of an academic period; you can select specific data as of this date and use the data from this timeframe in your reports. This provides an accurate count of full-time enrollment, or the amount of revenue generated to this point in time.

The performance advantages associated with the ODS are perhaps the greatest benefit not only on the ODS system, but also for the administrative system. An ODS is designed and built specifically for query purposes. This design results in faster query times in addition to increased load balancing on the administrative system.

Most upgrades to the administrative system do not affect the ODS.

If changes are made in Banner that have an effect on the reporting views, the changes will be reviewed to determine if the ODS needs to be updated.

Summary of advantages
In summary, the advantages of an ODS are:

- built to address reporting queries not for efficiency of data capture.
- produce reports without the overhead of a transactional system.
- provide for the freeze of data to accommodate point in time reporting.
- most upgrades to the administrative system do not affect the ODS.
Introduction

ODS Administrators can do the following tasks in the Administrative User Interface:

- **Preferences and Security**
  - Define the appearance of the meta data
  - Create and maintain Users
  - Create and maintain Data Display Rules
  - Create and maintain Security Rules

- **Information Access Options**
  - Set up Parameters
  - Schedule processes
  - View Control Reports
  - View/Remove Scheduled Processes
  - Freeze Data maintenance

- **Information Access Meta Data**
  - View the meta data
  - Update/edit/publish the meta data

- **Web Tailor Administration**
Introduction
You can use the ODS Administrative Interface to set up user accounts.

Procedure
Follow these steps to set up a User Account.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Preferences and Security link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the Set Up Users and PIN link.</td>
</tr>
<tr>
<td>4</td>
<td>Check the Create button</td>
</tr>
<tr>
<td>5</td>
<td>Fill in the user information.</td>
</tr>
<tr>
<td>6</td>
<td>Click the Save button.</td>
</tr>
</tbody>
</table>
Introduction
You can create and maintain fine-grained access rules that define values each user can view.

Screen Image
![SUNGARD HIGHER EDUCATION](image)

Set Up an ODS Security Rule
Click: Create to add a new ODS Security Rule.

Procedure
Follow these steps to create a security rule.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Set Up ODS Security Rules link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the Set Up an ODS Security Rule link.</td>
</tr>
<tr>
<td>4</td>
<td>Check the Create button</td>
</tr>
<tr>
<td>5</td>
<td>Fill in the Information</td>
</tr>
<tr>
<td>6</td>
<td>Click the Save button.</td>
</tr>
</tbody>
</table>
Introduction
You can set global preferences that define the appearance of metadata.

Screen Image

Procedure
Follow these steps to set metadata preferences.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the <strong>Preferences and Security</strong> link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the <strong>Institutional Preferences</strong> link.</td>
</tr>
<tr>
<td>4</td>
<td>Click the <strong>ODS Publishing Preferences</strong> link</td>
</tr>
<tr>
<td>5</td>
<td>Check the data information to publish.</td>
</tr>
<tr>
<td>6</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>
Introduction

Data Display Rules control which data values to retrieve and how to display various types of data. For example – test scores or address types. You should set up Display rules at the “Institution” level. Data display rules are stored in the MGRSDAX table which has predefined delivered values. This matches external (user-defined) codes with internal (SunGard-defined) codes.

Important concepts

i) MGRSDAX in the ODS is copy of the Crosswalk validation table (GTVSDAX) in Banner
ii) MGRSDAX specifies the display rules that define code values loaded into the ODS
   (1) Internal Groups, Internal Codes, and Sequences set by SunGard ie. Address, ADMSADDR, 1
   (2) External Codes set by users ie. PR
iii) MGRSDAX controls hierarchy of data columns in Slotted Tables/Views in the ODS

Note: You need to review all delivered Display Rules and edit them to reflect your institution’s specific code values used by your ODS reporting users.
Section E: ODS Administrative User Interface

Lesson: Setting Up Data Display Rules (continued)

**MGRSDAX fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Group</td>
<td>High-level group of rows of data (<a href="#">Internal Codes</a>) that are categorized together to provide multiple entries for a single concept. The value is pre-determined by SunGard Higher Education; you should not change it.</td>
</tr>
<tr>
<td>Internal Code 1</td>
<td>Specific code relationships for source system concepts. This field is used internally within PL/SQL functions and procedures to determine which row(s) to retrieve from the MGRSDAX table. The value is pre-determined by SunGard Higher Education; you should not change it.</td>
</tr>
<tr>
<td>External Code</td>
<td>User-specified values that usually come from rules and validation tables for the production version of the product. Unless this field is delivered with the value ‘FIELD NOT USED’, you should enter the values used by your institution to define a particular code. The values are then translated to the corresponding Internal Code for that particular concept for internal processing purposes.</td>
</tr>
<tr>
<td>Note: You need to change this field so that the internal codes match your institution’s code values.</td>
<td></td>
</tr>
</tbody>
</table>
| Internal Code Sequence Number | Internal sequence number that provides either a hierarchy or positional identifier:  
  - As a hierarchy identifier, it specifies for PL/SQL functions and procedures the order in which to retrieve specific source system data. Each sequence number should be a single numeric value. Start by giving the most important code value a sequence number of 1 and continue by numbering each subsequent value consecutively (such as 2, 3, 4).  
  - As a positional identifier, it is reserved for use with the ODS reporting views where it defines the position within a view where a repeating group should appear. A sequence number is required for hierarchy type concepts. |
Section E: ODS Administrative User Interface
Lesson: Setting Up Data Display Rules (continued)

Screen Image

Procedure
Follow these steps to create a display rule.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Preferences and Security link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the Set up Data Display Rules link.</td>
</tr>
<tr>
<td>4</td>
<td>Click the Create button</td>
</tr>
<tr>
<td>5</td>
<td>Fill in the Information.</td>
</tr>
<tr>
<td>6</td>
<td>Click the Save button.</td>
</tr>
</tbody>
</table>
Section E: ODS Administrative User Interface

Lesson: Setting Up Data Display Rules (continued)

Screen image

Procedure

Follow these steps to modify a display rule.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Preferences and Security link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the Set Up Data Display Rules link.</td>
</tr>
<tr>
<td>4</td>
<td>Click the Search button.</td>
</tr>
<tr>
<td>5</td>
<td>Add or update the rule as needed.</td>
</tr>
<tr>
<td>6</td>
<td>Click the Save button.</td>
</tr>
</tbody>
</table>
Introduction
There are several steps that must be completed to manage the Export, Transform, and Load (ETL) process.

- Set up parameters
- Schedule a process
- View Control Reports
- View/Remove Scheduled Processes
- Freeze Data Maintenance

Screen Image

Information Access Options

Set Up Parameters
Define internal parameters used by various automated processes to maintain the ODS.

Schedule a Process
Schedule jobs that load, update, or freeze data in the ODS.

View Control Reports
View reports that highlight job status of recently executed processes.

View and/or Remove Scheduled Processes
View and/or remove jobs that are scheduled in the job queue but not yet run.

Freeze Data Maintenance
Define lists of related ODS tables or views to freeze at the same time.

RELEASE: ODS 3.1
Schedule a process

SunGard Higher Education recommends that when the composite tables are updated the related slotted tables are also updated. It is important to keep these synchronized.

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Composite</td>
<td>Include the main data that is extracted from the source system and stored in ODS.</td>
</tr>
<tr>
<td>Slotted</td>
<td>Store data values for a specific code related to a base table. This optimizes the speed of queries.</td>
</tr>
</tbody>
</table>

Screen Image

Select a Process

Procedure

Follow these steps to schedule a process.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Information Access Options link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the Schedule a Process link.</td>
</tr>
<tr>
<td>4</td>
<td>Click the Select a Process link.</td>
</tr>
<tr>
<td>5</td>
<td>Select a process to schedule.</td>
</tr>
</tbody>
</table>
View Control Reports

When the process runs, a control report is created to show details of the status of the process. Make sure someone is viewing these immediately each day.

- View Messages
  - View individual error messages
  - Select lines of report using Filter option
  - Save report to a CSV file

Screen Image

Display a Control Report

<table>
<thead>
<tr>
<th>Run Date</th>
<th>Job Number</th>
<th>Process</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct 03, 2007 11:00 pm</td>
<td>1181</td>
<td>REFRESH_ALL Complete</td>
<td></td>
</tr>
</tbody>
</table>

Procedure

Follow these steps to view a control report.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Information Access Options link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the View Control Reports link.</td>
</tr>
<tr>
<td>4</td>
<td>Click on a process from the list.</td>
</tr>
<tr>
<td>5</td>
<td>Click on the CSV button to extract to Excel.</td>
</tr>
</tbody>
</table>
View/Remove Scheduled Processes

Screen Image

![Screen Image of ODS Administrative Interface showing scheduled processes](image)

Select and View Scheduled Processes

| Next Run Date: | [View Control Reports | Schedule a Process] |
|----------------|------------------------|
| On or After    | 04-OCT-2007            | Select a Date          |
| Display Jobs   | Reset                  |

RELEASE: ODS 3.1

Procedure

Follow these steps to view a scheduled process.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the <strong>Information Access Options</strong> link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the <strong>View and/or Remove Scheduled Processes</strong> link.</td>
</tr>
<tr>
<td>4</td>
<td>Click the <strong>Display Jobs</strong> link.</td>
</tr>
</tbody>
</table>
Freeze Data Maintenance

Freezing ODS data allows the saving of snapshots of data tables and/or views at a point-in-time. You can do a comparison report at the same point in time.

Example: Freezing ODS data lets you see how many people registered for a specific class by the first week of September for both this year and last year. In this way you can tell if the final expected registration numbers for a class are way up or way down and can plan for adding/canceling classes as needed.

Considerations

Before you begin to freeze data, you will need to consider the following items:

- Naming convention for frozen tables and views?
- Freeze multiple related tables/views at once?
  - Create list of tables/views
  - Schedule a process to freeze them all
- Freeze single table or view?
Screen Image

Create a Freeze Data Table

To create a new Freeze Data Table, fill in the information below, then click Save.

* - indicates a required field.

List Name: *

Source Name: *

Freeze Table Name: *

Source Columns to Freeze: (All)

Where Condition:

Procedure

Follow these steps to create a freeze list.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log into ODS Administrative Interface.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Information Access Options link.</td>
</tr>
<tr>
<td>3</td>
<td>Click the Freeze Data Maintenance link.</td>
</tr>
<tr>
<td>4</td>
<td>Click the Create button.</td>
</tr>
<tr>
<td>5</td>
<td>Fill in the Information.</td>
</tr>
<tr>
<td>6</td>
<td>Click the Save button.</td>
</tr>
</tbody>
</table>
Trouble-shooting
The following table will help you trouble-shoot why your data may be out of sync.

<table>
<thead>
<tr>
<th>CHECK</th>
<th>BECAUSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency of data in the ODS</td>
<td>Currency of data in the ODS is dependent on the timing of a query against the ODS and when the ODS was last refreshed. Changes that occur in the source system after the last refresh of the ODS will not be reflected until the next refresh occurs. This will cause a variance between the two systems until the ODS is refreshed again.</td>
</tr>
<tr>
<td>Display Rule Definitions</td>
<td>Display Rules may differ between the two systems. For example, rules defined on the GTVSDAX table in Banner drive the data displayed in the Banner Object:Access views. In the ODS, Display Rules defined on the MGRSDAX table drive the ODS views created to support existing Object:Access functionality. Differences may occur based on which rules are applied to each system.</td>
</tr>
<tr>
<td>Security Rule Definitions</td>
<td>Rules may differ between two systems. Security Rules may also cause differences between the two systems. Both Banner and the ODS allow you to set up fine-grained access security at the element level. Rules in both systems are discrete, so there may be differences in the data a user can view based on the security rules defined within each system.</td>
</tr>
</tbody>
</table>
Introduction

The ODS has a database schema called ODSLOV that owns the list of value views. Most, but not all, of the views are based on the MGT_VALIDATION composite table. (At least one view is based on an MGRSDAX rule.) MGT_VALIDATION is loaded using Oracle Warehouse Builder (OWB) from validation tables (or in some cases static lists of values) in Banner.

Validation tables loaded into MGT_VALIDATION from Banner have been identified as lists of values that have views assigned to them. (Not all the MGT_VALIDATION validation tables have been created as LOV views.) Each view has the columns TABLE_NAME, VALUE, and VALUE_DESC. TABLE_NAME is the name of the Banner validation table. VALUE and VALUE_DESC are values, or codes, and descriptions for the values. Some of the views also have QUALIFIER, and QUALIFIER_DESC. QUALIFIER is used to group values by a common attribute. For example, it can be Chart of Accounts, Academic Period or a Banner PIDM. QUALIFIER_DESC is a description for the QUALIFIER. Qualifier description is only populated when the qualifier is an Academic Period.

The Cognos ReportNet model and Oracle Discoverer End User Layer have been updated to reference the list of value views for parameters and conditions. Self-Service Reporting also uses the list of value views for search criteria.
Self Service Reporting

The Self-Service Reporting (SSR) enhancement provides simple, ad hoc access to information within the ODS.

SSR is delivered with report templates that provide examples of various common data retrieval needs across your institution. Each report template is based on the functional data relationships set forth in the Business Concept Diagrams found in the ODS published meta data. The template design for SSR uses a Filter - List – Detail approach. This approach includes a Search Criteria page where you select the various filters to execute a query, a List page that displays the results of that query, and a Detail Reports page where you access additional information specific to any individual result on the List page.

The information on the List and Detail Reports pages can be viewed online or exported to a CSV file (Microsoft Excel format) or XML file for printing or additional manipulation. For some templates, you can also save the unique primary identifier(s) for your List page results to the ODS for use in custom reports developed with your reporting tool. The Email icon enables you to send email to everyone on the List page. If you select an individual address from the List page, you can send email to that individual.

Self-Service Reporting menu

- Accounts Receivable Templates
- Advancement Templates
- Finance Templates
- Financial Aid Templates
- Human Resources Templates
- Student Templates
Introduction
Data Model (Entity Relationship Diagram - ERD) changes reflect newly identified and new logical relationships between views in the ODS database for ODS Release 3.1. Those changes are reflected in the Cognos Report Studio model and the Oracle Discoverer End User Layer to correctly join new views in the reporting tools and to reflect the new business concepts.
**Changed Discoverer EUL and Cognos Report Studio**

The Discoverer End User Layer (EUL) for ODS 3.1 was enhanced by adding 51 new functional business areas. The business areas are based upon the Business Concept Diagrams. These now reflect the same relationships as the Cognos Report Studio business views.

The default date hierarchies were removed due to performance issues and replaced with new date hierarchy folders for each different date identified that we want to break down by year, month and day. All underscores from the folder names in the EUL were removed to make them more like business names and to allow for column header wrapping capabilities. However, the underscore was kept in the UID names because UID is an Oracle keyword.

All item names were replaced with the column business names from the meta data repository. This was to make the names more like the English language. Additionally, all true number items were identified as data point numbers and changed to aggregate as sums or averages. This was to ensure that the number items were aggregated the same way assuring you that numbers are accurate by not mixing details with sums. Consequently, all ID fields were redefined as non-data point items to make sure that joins between two folders would work correctly.
### Related documentation

<table>
<thead>
<tr>
<th>Documentation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Banner to the Operational Data Store User Guide</td>
<td>A user/reference manual describing the relationship between Banner and the Operational Data Store.</td>
</tr>
<tr>
<td>GTVSDAX Handbook</td>
<td>A user/technical/reference manual describing the setup and use of the Concept/Crosswalk Validation Form (GTVSDAX), which is used with the Object:Access views.</td>
</tr>
<tr>
<td>Operational Data Store Handbook</td>
<td>A user/technical/reference manual describing the setup and use of the Operational Data Store.</td>
</tr>
<tr>
<td>Operational Data Store Installation Guide</td>
<td>A technical guide to the installation of the Operational Data Store.</td>
</tr>
<tr>
<td>Operational Data Store Release Guide</td>
<td>A user/technical/reference manual describing the current upgrade/release of the Operational Data Store.</td>
</tr>
<tr>
<td>Operational Data Store Upgrade Guide</td>
<td>A user/technical/reference manual describing the steps necessary to upgrade to the current release of the Operational Data Store.</td>
</tr>
</tbody>
</table>
Section H: Notes

Lesson: Three Things You Learned Today

Write down three things you learned today.
This workbook was last updated on 10/05/2007.