

# BI PROJECT DESIGN CHECKLIST

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By Sergei Peleshuk

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# Design Checklist

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- List of target reports (top 10)
- List of KPIs with exact definitions
- Chart with reporting dimensions (Spider)
- Data Flow Diagram with data sources
  - Level of detail available by source
  - Frequency of updates for each source
  - Data volumes
  - Archiving approach
- List of user roles with access levels
- Preferred media for report delivery (spreadsheet, PDF, dashboard, iPad, broadcasting, ad-hoc analysis tools)



# BI Project Phases

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- Analyze Requirements, complete design checklist
- Select Platform, allocate resources & vendors
- Develop backend solution
  - Connection to source systems
  - Data modelling (staging, EDW, reporting layers)
  - ETL to deliver business logic required
  - Data archiving & clean up procedures
- Implement Frontend
  - Design Logic & Layouts for:
    - Queries, dashboards, web templates
  - Authorizations by user & user group
- Test solution
- Move to Production
  - Historical data loads
  - Automate regular loads
- Establish production support
  - Platform (hardware, software: upgrades & patches)
  - Application (1st, 2nd, 3d level)
  - Authorizations (new users)
- Application Evolution: corrections & enhancements



# Agile Project Management

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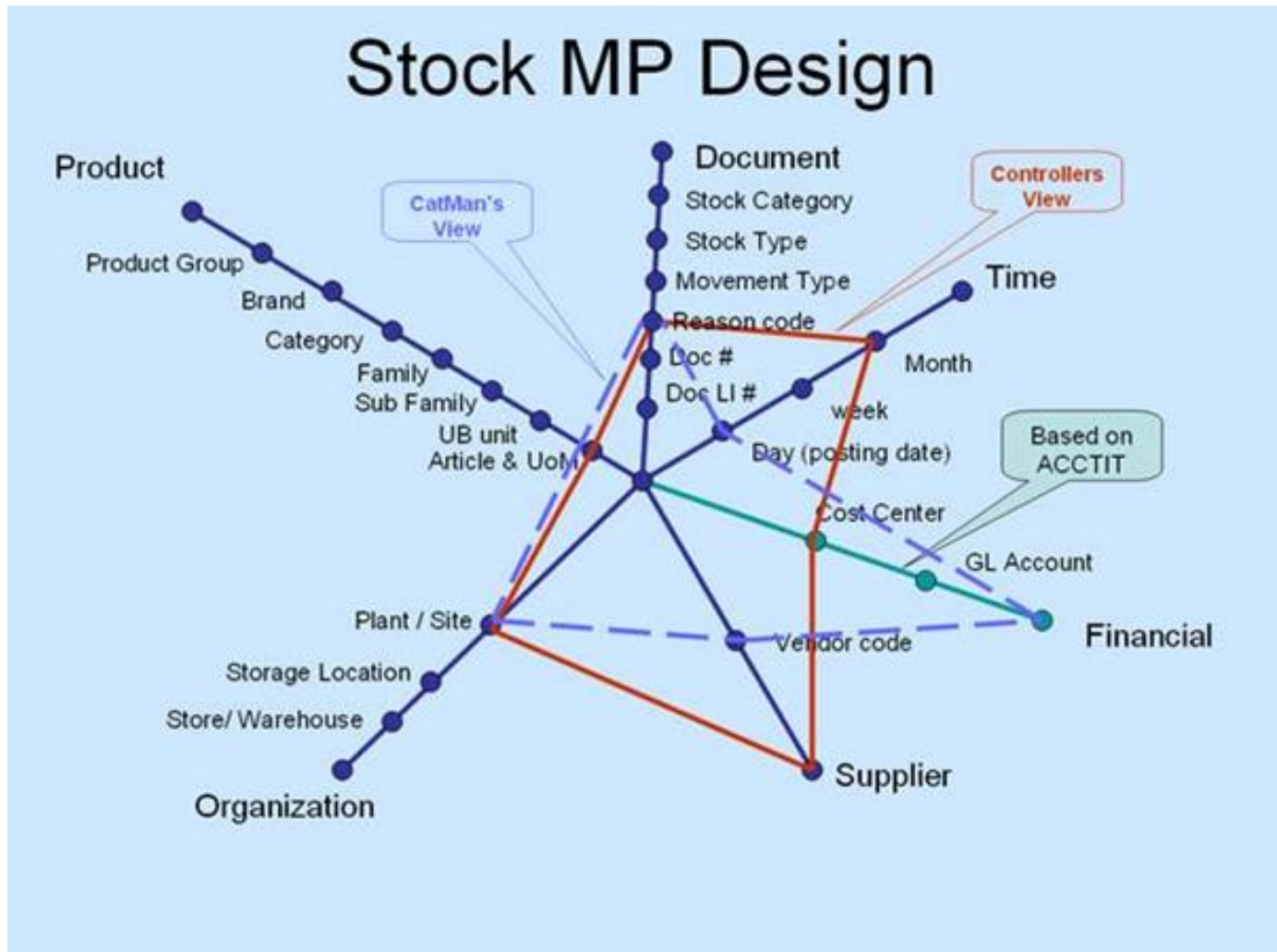
- Planning is done at the beginning of each cycle, rather than once.
- "Lessons learned" sessions are done at the end of each cycle, not just at the end of the project.
- Scope can be changed during development--yes, agile allows and, to some extent, even welcomes scope creep and manages it by reprioritizing deliverables.

Agile project management delivers great benefits to both IT and the business. Requirements are precise and clear. The risk of underdelivering is reduced, as each cycle delivers new sets of usable functionality. Quality becomes part of development as bugs are discovered and fixed early.

Agile project management takes the monolithic and structured documentation and approval approach and skins it to the bare essentials: Single-page charters and verbal sign-offs after demos are good enough.

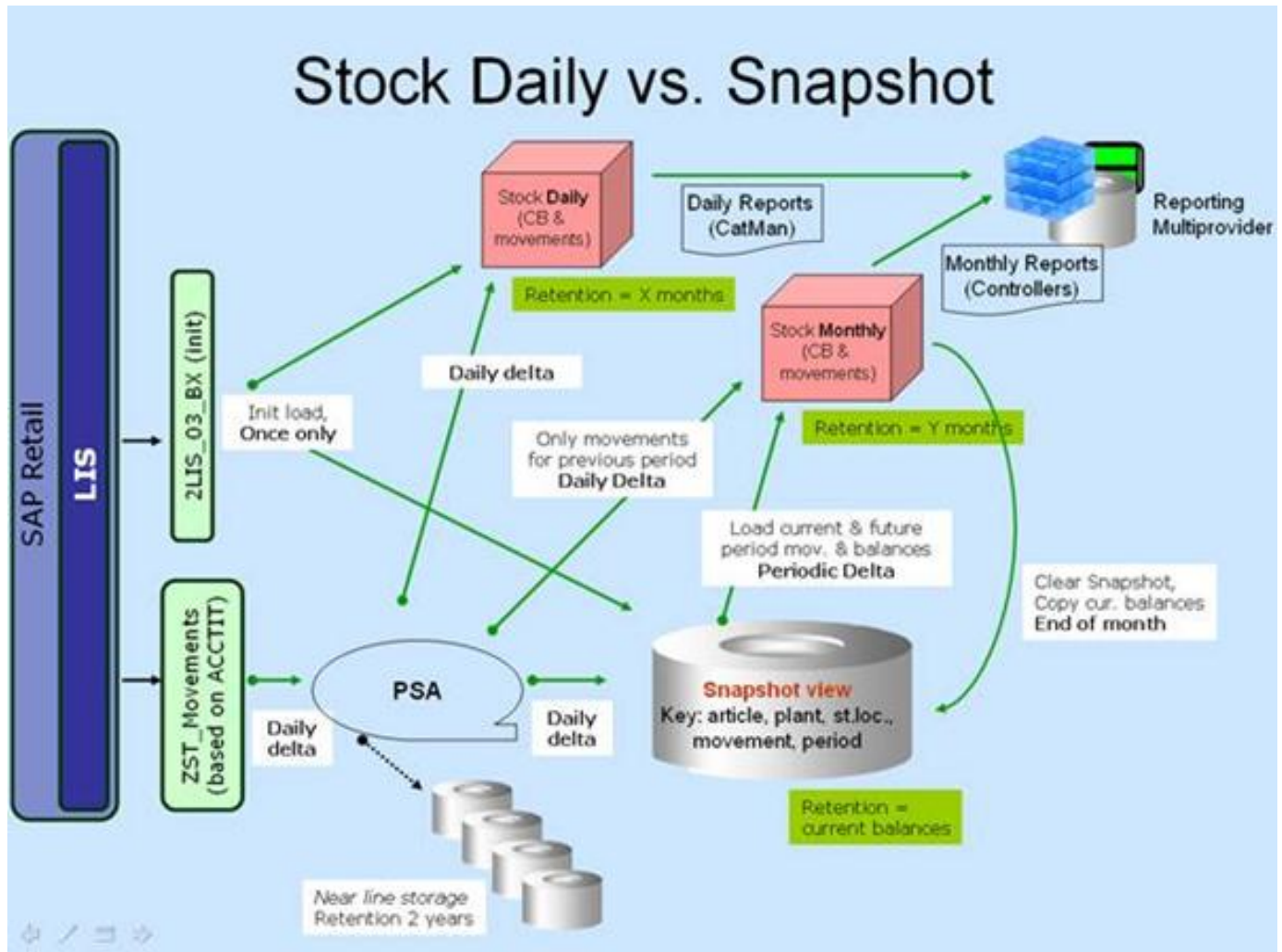


# Spider Example





# Data Flow Example





# Indicators Granularity Example

## INDICATORS

### Order Related

- Qty ordered in logistic unit
- Qty ordered in base unit
- Volume ordered in M<sup>3</sup>
- Weight ordered in Kg
- Value ordered PA2
- Value ordered PF
- Value ordered (tied) empties
- Number of PO's
- Number of PO lines
- Number of PO articles

### Shipment Related

- Qty shipped in logistic unit
- Qty shipped in base unit
- Volume shipped in M<sup>3</sup>
- Weight shipped in Kg
- Value shipped PA2
- Value shipped PF
- Value shipped (tied) empties
- Number of Pallets : article based
- Qty shipped Pallets

## CUBE Granularity

### Order Related

- Article
- Day
- Receiving Party / Storage Location
- DC warehouse/ site / Storage Location
- Order Type
- Process Method

### Shipment Related

- Article
- Day
- Receiving Party (Site)
- DC warehouse / storage Loc.
- Order Type
- Process Method
- Distribution nature
  - Reason