

BI PROJECT GOVERNANCE TIPS

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BO/BW Roles & Responsibility

Task	Role	Region	UK	Germany	France
Run reports & queries by Domain	Local BO/BW users		Users by domain	Users by domain	Users by domain
Create/modify local BO reports, queries, dashboards; Data Quality Monitoring	Local Key User by Country		Reporting UK	Reporting Germany	Reporting France
Create/modify Regional BO reports, queries, dashboards	Region BO support (query)	BO Support			
Launch & monitor jobs, Process Chains or data loads.	Region BW support (loads)	BW Support			
Root cause analysis for incidents	Region BW analyst	BW Support			
Create/change data flow in BW	Region BW Developer	Region Developers			
Analyze, Review & Approve Design	Region Architect	Region Architects			
Database administration, security	BASIS BW	BASIS			
BOE Administration	BASIS/BOE Admin	BASIS			



BO/Bex Reporting Roles

Organization	Report+Query Prefix	Execute Role	Modify Role
Region	REG_	Region BO user	Region Key user
Company Code	REG_	Region/CompCode	
UK	UK_	UK BO user	UK Key user
Germany	GE_	GE BO user	GE Key user
France	FR_	FR BO user	FR Key user



Roles by Function

Functional Area	Region	UK	Germany	France
FIGL	X	X (CC)	X (CC)	X (CC)
Treasury	X	X (CC)	X (CC)	X (CC)
Controlling	X	X (CC)	X (CC)	X (CC)
P&L	X	X (CC)	X (CC)	X (CC)
Working Capital	X	X (CC)	X (CC)	X (CC)
CCA	X	X (CC)	X (CC)	X (CC)
PCA	X	X (CC)	X (CC)	X (CC)



Typical Scenarios: Example

Function	BO/BW Role	1. Front end	2. Backend + Frontend
Business users	Local BW users	Request a new report or functionality	
Local BO	Local Key User by Country	Check if the report exists; Analyze complexity, identify regional or local. If Local Create/modify Local Bex query + Local BO reports If Regional report or complex task send request to Region BO	
Region BO/BW	Region BO/BW support (query)	Create/modify Region Bex query + BO reports	If complex for the frontend only describe requirement; Check with Region architect
Region Architects	Region Architect		Analyze scope and advise if backend development is needed (transactional vs. Masterdata). Provide estimates to business.
Business Approval			Analyze business need vs. effort; Approve or Disapprove
BW developer/analyst	Region BW Developer		Develop/modify data flow in line with standards and guidance from architects. Adjust process chains if needed. UAT with business.
Region Architects	Region Architect		Approval Step: review design & evaluate performance prior to release in production
Data Loads team	Region BW support (loads)		Load history;
Local/Region BO			Create/modify Bex query + BO reports
Business users	Local BW users	Validate Solution/ Report	



Data Retention Policy

- Finance
 - FIGL
 - COPA
 - CCA
 - PCA
- Warehouse inventory
- Warehouse performance
- Stock Management (stores)
 - Movements & Balances
 - Promotion articles
 - Margin by article
 - Out of shelf
- Indirect procurement
- Supplier Relationship
 - Turnover, contract, profitability by supplier
- Sales
 - Consumer ticket level
- Human Resources
- Pricing (against competitor)
- Shelf planification
- Marketing events (campaigns)

	Reporting Layer	EDW Layer Faster Access	NLS Slower Access
	Current + last 2 years	5 years	10 years
	Current + last 2 years		
	Current + last 2 years 6 months	3 years	6 years
			6 years





BW Development Cycle

- All BW objects have to go through the cycle:
 - Dev -> Test -> Prod
- Exceptions will be possible for:
 - Queries, query views & workbooks
 - Process Chains
 - DTPs
 - Infopackages



Interaction with BASIS

- Server Performance
 - Memory Issues
 - Short Dumps
 - Disk space
 - HW capabilities
- BW Authorizations
 - Queries & other objects follow naming conventions
 - Template for new reporting area & user group
- Follow up on Early Watch (EWA)
- Implement EP, plugins, ...
- System Copies (annual)
- Set up Archiving and Near Line Storage
- Install HW & SW
- Database monitoring & Reorganization



Support Tasks

Task	BW team	BO team	Basis team	Frequency
Early Watch Report	X		X	Monthly
Support Package & Patches			X	Quarter
Backup Strategy			X	Daily
Transport Window	BW pre-prod daily	BO pre-prod daily	BO&BWProd twice p week	
Monitoring - Basis <ul style="list-style-type: none"> • Delete outdated jobs • System log • ABAP runtime errors • Operation System Monitor • Tune Summary 			X	Daily
Monitoring – Application <ul style="list-style-type: none"> • Process Chain Overview • Open Hub Monitor • Upload Monitor • Changerun Monitor 	X			Daily
Monitor Query Performance	X			Weekly
Performance <ul style="list-style-type: none"> • Compression • Calculate Statistics • Index maintenance & monitoring • Report SAP Infocube Design • Prefilling Cache • Create/Delete Aggregates 	X			Daily / Monthly
Data Management <ul style="list-style-type: none"> • Archive data • Delete PSA, Changelog, 	X		Assist	
Data Management – Basis <ul style="list-style-type: none"> • Delete DTP temp storage - W • Delete BW Statistics Tables – Q • Archive/Delete Administration Tables - W • Delete tRFC Queues - W • Delete unused Queries/Workbooks – Q • Delete Temporary Query Views – M • Schedule RSRV checks - W 			X	Weekly / Monthly / Quarterly



BI Project Documentation

- Project charter OR Enhancement/Change Request
 - Business Requirements
 - Design document
 - Reporting Dimensions (Spider)
 - Indicators
 - Data flow
 - Project plan with milestones & resources
- Test plan & scripts
 - Unit & system test
 - User Acceptance test
 - Reconciliation reports
- Cutover plan & activities
 - Transports & dependencies
 - History load plan
 - Set up of regular loads, archiving and maintenance
- System Solution Document
 - Technical configuration of the solution, interfaces, processes, reports

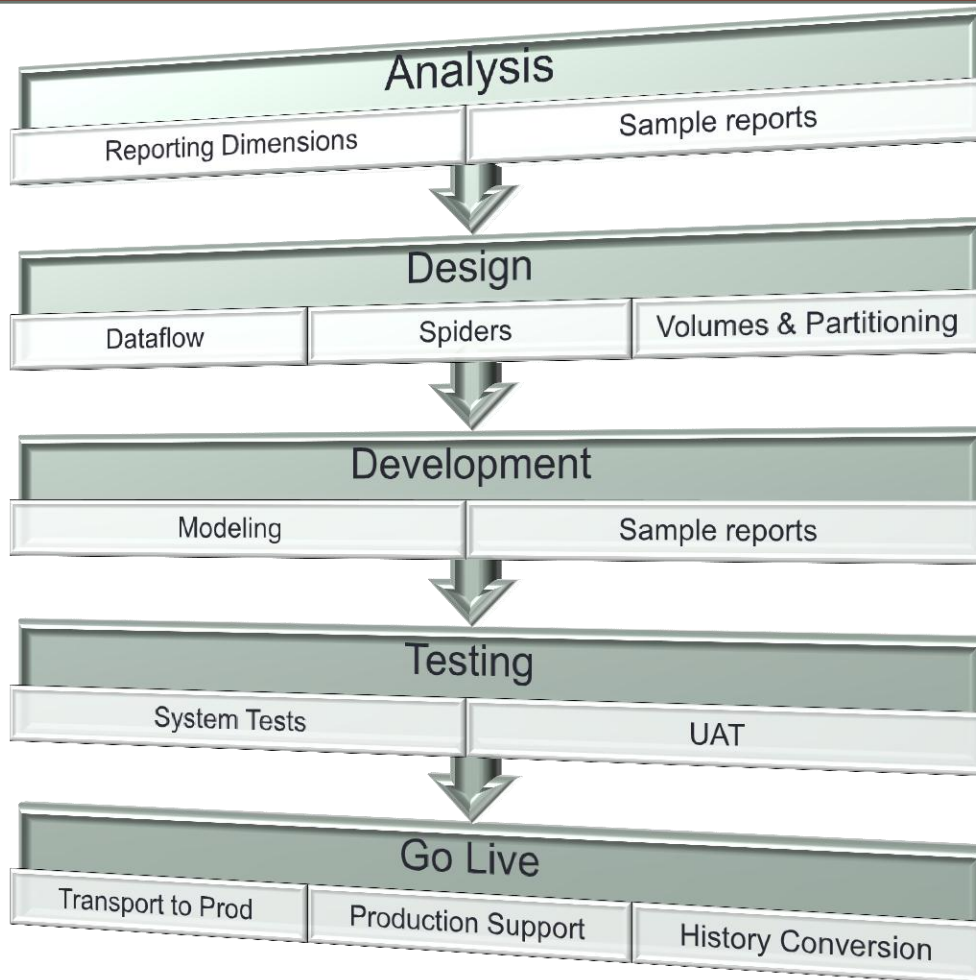


System Solution Document

- Project Requirements
 - Project Description, target user base
 - In scope / Out of Scope
 - Related Projects
- Reporting Dimensions – Spider (if applicable)
- KPIs with descriptions
- Data flow
- Data sources
- Master data
 - Describe special logic project related
- Staging layer DSOs
- EDW layer DSOs & related transformations
- Infocubes & related transformations
 - Aggregates
- Multiproviders
- Reporting Layer
 - Queries, Workbooks, Web templates, Crystal reports, Dashboards
- Archiving approach
- Process automation – process chains
- Authorizations
 - Roles & user groups
- Maintenance & Support Activities



BI Project Phases



Deliverables

- Approved requirements
- Committed Resources
- Approved design and dataflows
- Dataflow configured in Dev
- Sample reports in Dev
- Flow & reports are transported to Q
- Test data loaded in Q
- Sign off on UAT
- Flow & reports are transported to Prod
- History converted
- Regular jobs scheduled
- Users are trained
- Support is in place