



CMS Project Team — Reference Guide

Title: Reporting Strategy
System(s) Impacted: Strategies

High Level Description	
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System(s) Impacted	Strategies
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Preface

Historically there have been separate data warehouses for financial and student related data. Each warehouse had its own reporting tool set. Access to the warehoused data was fairly limited from an SJSU employee standpoint (though students had access to a limited set of data). The Administrative Databases department maintained both warehouses.

Within the CMS Project there are a number of places from which administrative data can be reported. Additionally, there is a variety of reporting methods.

Philosophy

The reporting philosophy at SJSU is that of decentralization with access typically granted by the data “owners”. Access has always been limited to the data elements that were relevant to the person creating the reports. Many departments have their own technical staffs while others expect their functional staff members to be capable of writing their own reports.

This philosophy will be carried forward to the warehouses created as a result of the CMS Project. Data owners will be established based on areas of responsibility. Requests for access must be submitted to the Administrative Technology department and will be granted only upon approval of the data owner(s) and after appropriate training has been completed.

Purpose

The purpose of this document is to detail the reporting strategy as it relates to the CMS Project.

Since there are multiple places in which the data is being stored it, is important to understand where particular reporting should occur and who is responsible for the reports in each of those areas (indicated in parentheses).

Production instances:

- Baseline delivered SQR's (SOSS)
- PS delivered SQR's (SOSS/PS)
- SJSU approved SQR's (Administrative Applications and technical staff from the Functional areas)
- PS delivered Crystal Reports (SOSS/PS)

Reporting instances

- Queries when up to the minute data is required (Functional area staff)
- Queries to research customer or employee questions (Functional area staff)
- Queries to research data problems/issues (Functional area staff)
- SJSU public queries (Administrative Applications)

Warehouses

- Delivered SJSU Reports (Administrative Databases)
- Ad hoc reports (Functional area staff)

The tool sets available are as follows:

Production instances

- SQR's
- Query (limited to Administrative Applications and CMS Project staff)

Reporting Instances

- Query (limited to 5 table joins) Reports requiring more than 5 table joins require a completed SJSU Enhancement Request form be submitted to the CMS Help Desk (Administrative Applications will decide the best reporting tool set).

Warehouses

- Finance – Discoverer
- SA – Brio

Scope

The scope of this reporting strategy document includes the production and reporting instances of Finance and HRSA. It also includes the CMS Financial Data warehouse and the RDS (Student Data warehouse). At such time that an HR warehouse is created, it would fall under the scope of this document.

FAQ's

1. How do I learn to use the reporting tool sets?

Query – The CMS Training team offers basic query classes. Please go to www.sjsu.edu/depts/cms to view the training schedule and other related information. Additionally, PeopleSoft offers Query training. However, it is quite expensive, is not specific to SJSU and is limited to technical staff approved by the Director of Administrative Applications.

SQR – Limited to technical staff. PeopleSoft offers both SQR and Advanced SQR courses. Please contact Jill Gran for requests to attend PS SQR training.

Discoverer – Creation of new reports is limited to Administrative Databases staff. End users can run the delivered reports.

Brio – Brio Software offers training at their San Francisco site. Departments wishing to have staff trained should contact Brio directly.

2. Why isn't CMS training on Brio?

Historically, SJSU has not provided training for reporting tool sets. Additionally, the CMS Project is not funded to support this function. If there are sufficient requests to make it cost effective to have on-site training, the CMS Project will organize the training.

3. How do I let you know I've completed the appropriate training?

If you take training outside of that offered by CMS, please submit a copy of your certificate of completion to the Training Coordinator who will ensure that the training is recorded appropriately. The Administrative Technology group will verify the completion of training when they review your access request form.

4. Will you provide training on running delivered Discoverer and Brio reports?

Hands-on training on how to run delivered reports in the data warehouses will be provided by the CMS Training Team.

5. What if I am having problems running the delivered reports?

Contact the [CMS Help Desk](mailto:cmshelp@sjsu.edu) (cmshelp@sjsu.edu) or 924-1530.

6. What if I am having problems with my Query report?

Contact the [CMS Help Desk](mailto:cmshelp@sjsu.edu) (cmshelp@sjsu.edu) or 924-1530.

7. What if I want to use reporting tools other than Discoverer or Brio?

Use of tools other than Discoverer and Brio are neither recommended nor supported.