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**Welcome
to the
Inaugural Meeting
of the
Budget DataMart/Brio
Users Group**

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Possible Items for Discussion

Sharing Ideas

Learning from your peers

How do you use the reports?

What reports do you like best?

What workshops would you like to see offered?

Budget Call and BDM reports

What direction would you like to see the report development going?
(Transactional)

Canned reports vs. build your own data models

What other resources are you using?

- FRS
- FOCUS
- Control D
- Other

The presentation for the first Budget DataMart User's Group meeting was a history of the Budget DataMart. That presentation is what follows...


Budget DataMart and Brio


The History
1996 - present


1996

 February - Management Information Systems (MIS) Task Force formed by the Chancellor.

 Establish accurate numbers of commonly used data.


 Develop definitions for frequently used data items.

 Define the user view of the systems that support the University's data in a manner that ensures consistency and maximizes access and sharing.

 Establish a technical philosophy for the University's Management Information Systems.

1997

- ✿ The MIS Committee was charged with investigating ways to access administrative data.
- ✿ The committee members included a cross section of the University Community
(Chancellor's office, Admissions, Financial Planning & Budget, Office of Institutional Research, Computer Center, Graduate School, VC Business & Admin, Residential Life, Registrar's Office)

 The MIS committee recommends the Consulting firm of Coopers and Lybrand be hired to assist in the process. The “Prototype Data Warehouse Project” was undertaken with the expressed intent of providing support to assist Deans and Unit heads who have been delegated the responsibility of managing their budgets under the new decentralized budget model.

- ❁ Coopers and Lybrand conducted interviews with Dean's, Department Heads and Directors about what their needs were and how they currently were getting information, as well as, how they were keeping this information.
- ❁ C & L spent time understanding the computing processes that were in place.
- ❁ **May 1997**, C & L recommends a Data Model to be used.

- ❁ **June 1997**, C & L presents the MIS committee with three “data browser” choices for their review.
- ❁ Brio Query is chosen and 60 Brio Query copies were purchased for distribution.
- ❁ The Office of Financial Planning and Budget selects a training team.

- ❁ **September 1997**, a computer center staff member is assigned to the Office of Financial Planning and Budget to design and implement a Brio training program through cultivation of information from workshops, other universities and hands-on experience.
- ❁ A “train the trainers” session was held with a representative from Brio during October.


- ❁ The first 12 Budget DataMart/Brio reports are developed by C & L and tested by the Office of Financial Planning & Budget and the training team throughout November.
- ❁ A prototype “Simple Guide” is developed for training on the software browser (Brio Query), the use of the reports and the data. The first official training sessions were held **November 17 & 19 and December 15, 1997.**
- ❁ Throughout training development, program errors were researched and, working directly with Brio technicians, issues were resolved.

1998

- ❁ One-on-one site visits were conducted from **9/97 through 9/98** with the 60 key Brio Query users to accumulate feedback data on software functionality. As a result of this feedback, additional detailed Budget DataMart/Brio reports were created.
- ❁ At the same time, the prototype simple guide was expanded, updated and additional specialized training material was developed.

❁ Throughout the spring and summer months of 1998, 4 specialized training workshops, the main menu and nine additional specialized reports including revenue, fund balance, personal services and permanent / one-time Budget DataMart reports were developed.

❁ During September, the Budget DataMart / Brio Version I manual was produced and implemented in a training session with the original 60 key Brio users.

 The first specialized training sessions were held during October and November. This manual referenced FAQ's, the new A-1 form, and the published list of the 60 key Brio users.

1999

- ❁ Use of the Budget DataMart continued while the prototype Brio V5 Web version was being developed.
- ❁ During March, April and May a Brio consultant was hired to help with the web implementation of Brio which included re-formatting of reports, assisting with the establishment of a security system, and testing and training of two Brio web versions.

- ✿ During July, the prototype of web Budget DataMart/Brio.Insight was implemented and training was conducted with CANR and CLAS.
- ✿ By October, security issues were finalized by the computer center and program errors were resolved.
- ✿ Throughout October, the prototype of Budget DataMart/Brio.Quickview was implemented and training was conducted with Engineering and Fine Arts.

- ❁ Performance issues required that the Brio Web version be upgraded during November.
- ❁ Departments were re-visited and got an upgrade.
- ❁ The roll-out of web version (V5) Brio Quickview continued to all departments.

2000

- ❁ Completed rollout to all Brio web users by end of fall semester.
- ❁ All areas of the University had access to the Budget DataMart/Brio reports to facilitate preparation for the upcoming budget season.
- ❁ Provided many training sessions, individual and group.
- ❁ Documentation creation, revisions/updates.

2001

- ❁ On-going adds/deletes and moves of Brio software and users.
- ❁ Training, training and more training.
- ❁ March – May Brio Query refresher training classes.
- ❁ Summer/Fall – creating new reports for the web in Brio version 6

2002

- ❁ First ever training session using PicTel for Stamford.
- ❁ Introduced new & temporary BDM homepage with access to both V5 and V6.
- ❁ Conversion of Brio Query users to web & Brio Insight .
- ❁ ***The Big Day*** - Fall rollout of Brio V6 for Insight and Quickview user.
 - ❁ Updated reports with new look and feel.
 - ❁ Created & Introduced new reports.
 - ❁ Year to Date Expense report.
 - ❁ Open Commitments report.
- ❁ Overall Enhancement of the Budget DataMart.

2003

- ❁ ***Rollout completed!*** Last training session given 4/25/03 just in time for the Budget Call.
- ❁ 35 training sessions, 23 Quickview, 12 Insight, 2 special request and many 1:1.
- ❁ June 1, 2003 Brio V5 was taken off line.
- ❁ Continued to create new reports.
- ❁ Created Budget Hearing Reports with web access.
- ❁ New Homepage design.
- ❁ All BDM training documentation available online in PDF format.

- ❁ Introduced online training evaluation form.
- ❁ Created new fall workshops series, “The Next Step”.
- ❁ ERIP hits us hard. Many leave and many more to train and introduce to the Budget DataMart and Brio.

2004

**The Very First
Budget DataMart/Brio Users
Group Meetings!**

Current Brio User Stats

 Brio Query client users = 11
(58 in 2001)

 Brio Insight web users = 87
(53 in 2001)

 Brio Quickview web users = 172
(184 in 2001)

The Future

Budget DataMart/Brio

- ❁ Add more data elements to the Budget DataMart.
- ❁ Add new reports.
- ❁ Create & present new workshops.
- ❁ Hold more BDM/Brio Users Group Meeting
- ❁ You Tell Me!