



**New Mexico State University**

## **AiM IQ Reporting Process**

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# Table of Contents

<b>1.</b>	<b><i>System Overview</i></b> .....	<b>1</b>
<b>2.</b>	<b><i>Purpose</i></b> .....	<b>1</b>
<b>3.</b>	<b><i>Execution Flow Diagram</i></b> .....	<b>2</b>
<b>4.</b>	<b><i>Process Roles &amp; Responsibilities</i></b> .....	<b>3</b>
	<b>4.1 Report Requestor/Owner</b> .....	<b>3</b>
	<b>4.2 Report Writer</b> .....	<b>3</b>
	<b>4.2 Report Tester (May also be the Report Writer)</b> .....	<b>3</b>
	<b>4.2 Report Manager (May also be the Report Writer)</b> .....	<b>3</b>
<b>5.</b>	<b><i>Files and Storage</i></b> .....	<b>4</b>
	<b>5.1 Data Source Naming Convention</b> .....	<b>4</b>
	<b>5.2 Folder Creation</b> .....	<b>4</b>
	<b>5.3 Report Naming Convention</b> .....	<b>4</b>
<b>6.</b>	<b><i>Report Standards</i></b> .....	<b>5</b>
<b>7.</b>	<b><i>Required Documentation</i></b> .....	<b>5</b>
	<b>7.1 Version Control</b> .....	<b>5</b>
	<b><i>Appendix I – Documentation and Forms</i></b> .....	<b>6</b>
	<b>Report Specification</b> .....	<b>7</b>
	<b>Report Writer Checklist</b> .....	<b>8</b>
	<b>Quality Review Form</b> .....	<b>9</b>
	<b>Reporting Manager Checklist</b> .....	<b>10</b>
	<b>Report Approval/Modification Form</b> .....	<b>11</b>

## **1. System Overview**

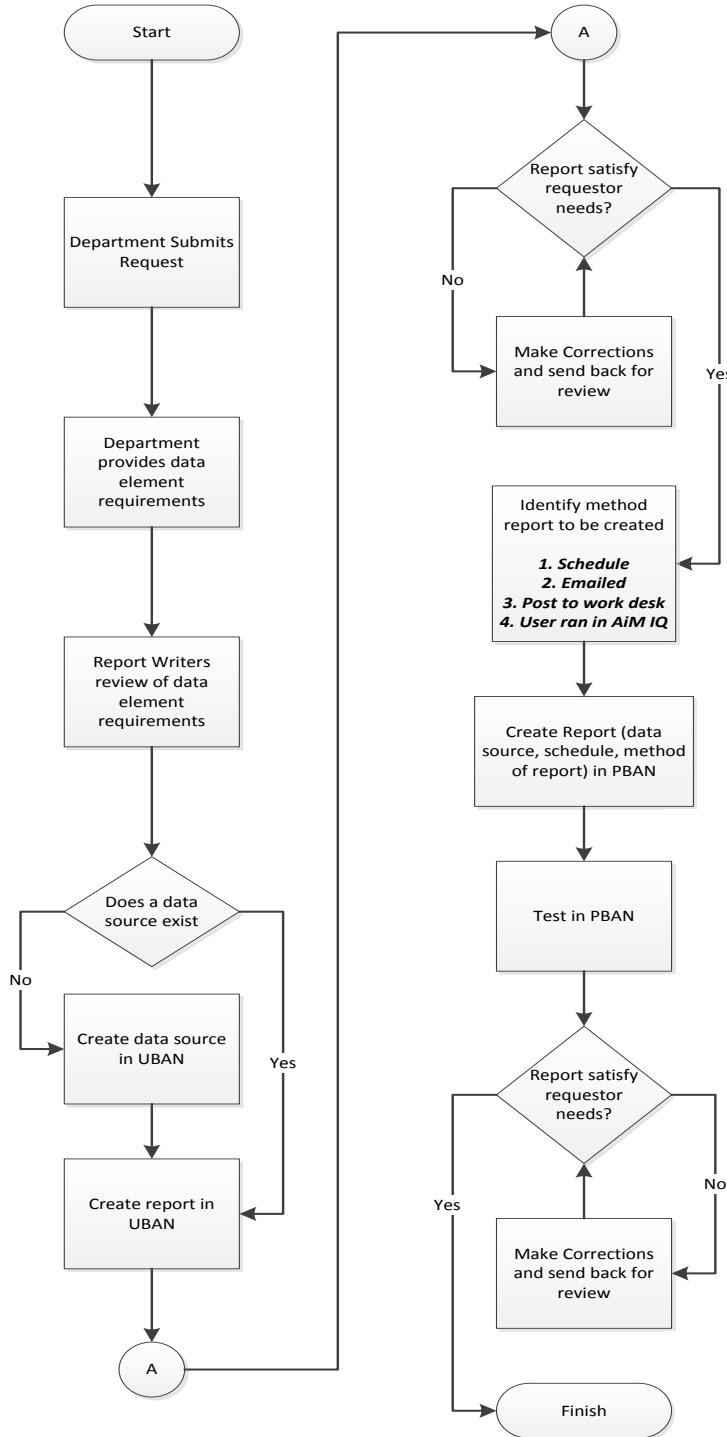
The AiM IQ Business Intelligence Suite is the new AiM Enterprise reporting system. The tool is used to create and maintain Data Sources, Interactive Reports, Analytic Reports, and Dashboards. You can also use the Pentaho tools to set up scheduling. NMSU Campus departments using AiM can submit requests to FSA for the creation or updating data sources. FSA will be responsible for granting permission to AiM IQ to users to schedule reports, working with ICT to define schedules, assisting users that can create their own reports with creating their own data sources, and creating some of the interactive and analytic reports along with dashboards in DBAN, UBAN, and PBAN.

## **2. Purpose**

The purpose of this document is to lay out the process for submitting requests to FSA to create data sources, interactive and analytic reports, and dashboards and to define the roles and responsibilities of all involved parties. This document will also provide the approved standards for shared folder space, report filenames, data source file names and structure, and folder creation.

### 3. Execution Flow Diagram

The Execution Flow for creating AiM IQ reports is as follows:



## **4. Process Roles & Responsibilities**

### **4.1 Report Requestor/Owner**

The Report Requestor/Owner will be the principle user in each department that has reports being written. The Report Requestor/Owner will have the following responsibilities:

- Review report overlap and approve report deletions
- Provide the requirements and data specifications for reports to the Report Writer
- Perform final testing of reports
- Approve reports for production

### **4.2 Report Writer**

The Report Writer will create the reports assigned to them by the Report Manager. The Report Writer will have the following responsibilities:

- Review report overlap with Report Requestor/Owner
- Create report specifications
- Create report according the report specifications in AiM IQ and using the guidelines set forth in this document
- Conduct final review of the completed report
- Coordinate final testing with the Report Requestor/Owner
- Gather and bind all report documentation
- Complete all tasks on the Report Writer Checklist

### **4.2 Report Tester (May also be the Report Writer)**

The Report Tester will have the following responsibilities:

- Perform all testing to ensure the report meets specifications
- Complete the Quality Review Form

### **4.2 Report Manager (May also be the Report Writer)**

The Report Manager will have the following responsibilities:

- Complete the Report Specifications form
- Assign report writing tasks to Report Writers
- Ensure consistency and quality in the reporting and review processes

## 5. Files and Storage

All reports should be developed in DBAN or UBAN. After the Report Requestor/Owner approves the report and any data sources, the reports and data source shall be moved to PBAN.

### 5.1 Data Source Naming Convention

Customized and newly created AiM IQ Data Sources will follow this naming standard:

**[Dept-Data Source]**

**Example: FS-WO Phase Cycle Times**

The creation of new data sources requires that we evaluate existing data sources to determine if we are duplicating data sources. As new data sources are created, the Report Writer shall notify the FMS Leads.

### 5.2 Folder Creation

Folders will only be created by the Super AiM IQ Admin. Each Entity in AiM shall have a development folder in UBAN and Production folder in PBAN for final reports

Customized and newly created Folders will follow this naming standard:

**[Dept -Environment]**

**Examples: FS – Dev; FS – Production**

Reports developed for each unit should be stored in the following locations:

- FS – *Facilities Services Reports*
- PSL – *PSL Reports*
- Shared – *Shared Reports*

### 5.3 Report Naming Convention

Customized and newly created AiM IQ Interact and Analytic Reports will follow this naming standard:

**[Dept-ReportTitle.mm.dd.yyy]**

**Example: FS-WO Phase Cycle Times.10.22.2015**

## 6. Report Standards

Currently there is a lot of room for customization in AiM IQ. Different reports give the Report Writers different views. As we move forward with the development of reports, we shall define standards.

## 7. Required Documentation

The following documents will be created for all Reports; samples are attached in Appendix I:

Document Name	Purpose	Responsible Person
Report Specification	To completely define the report that will be written; used by Report Writers	Reporting Manager
Report Writer Checklist	To ensure consistency and quality in the reporting and review process	Report Writer
Quality Review Form	To ensure the report is complete and correct and validated	Report Tester
Report Manager Checklist	To ensure consistency and quality in the reporting and review process	Reporting Manager
Report Approval/Modification Form	To document report approvals or modifications needed	Report Requestor/Owner

In addition to the documents listed above, the following documentation should be included in each report:

### **7.1 Version Control**

***Version Control will be researched and instructions will be provided in the future.***

## **Appendix I – Documentation and Forms**



### Report Specification

Requester Name	Requesting Department	Requesters Phone Number	Date Needed

Report Number	
Report Title	
Description / Purpose	
Report Frequency	
Page Layout (Portrait or Landscape)	

**Details Section**

Report Label	Derived from (Calc or Database)	Table and Field Name or Calculation

**Filter Options**

Report Label	Derived from (Calc or Database)	Table and Field Name or Calculation

**Totals and Grouping Fields**

<b>Grouped By</b>	<b>Sub-Total Fields</b>	<b>Grand Totals</b>

**Sort Fields / Sequence**

Sort by	Order (Ascending or Descending)	<b>Reporting Manager Only</b>
		Assigned To:  Date Assigned:

Data Selection Criteria	
Output (e-mail, hard copy, etc.)	
Special Instructions	

**Attach a layout of what the report should look like, markups of existing reports that will be modified and/or any other information as appropriate.**

### Report Writer Checklist

Report Name:	
Location:	

<b>Task</b>	<b>Initials</b>
Review Report Specification	_____
Communicate reporting issues to Report Manager	_____
Write Report	_____
Test Report	_____
Requested fields are being pulled	_____
Manually verify calculated fields	_____
Ensure that proper fields are shown	_____
Check Groupings	_____
Check Filter options	_____
Check Sorts	_____
Verify sub-totals and grand-totals	_____
Ensure column width is adequate	_____
Verify that the proper accounts are being pulled (if applicable)	_____
Verify Headers/Footers	_____
Verify Report colors	_____
Read the report specification comments to ensure completeness	_____
Compare to existing report (if applicable)	_____
Verify file naming convention	_____
Time report from pushing the run command to printing it out	_____
How long did the report take to write?	_____
Route report to Tester with Report Specification and Report Writer Checklist	

Report Writer Signature	Date

### Quality Review Form

Report Name:	
Report Writer:	
Review Date:	

Criteria	Pass/ Fail	Comments:
Check Header and footer to ensure they are within the B&F guidelines		
Check to ensure that all the fields required are in the report		
Check the grouping		
Check the sorting		
Check calculations		
Check the report specifications form to ensure completeness		
Check the report file name to ensure they are within the B&F guidelines		
Review Report Writer Checklist		
Route Report to Reporting Manager with all documentation		

Does the report or the report specification form need to be adjusted?	Yes	No
If Yes, what is the date the report was returned to the report writer?		

Quality Reviewers Signature	Date

### Reporting Manager Checklist

Report Name:	
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Task	Initials
Create and Review Report specification form	
Assign Report to Report Writer	
Review final report	
Review Quality Review Form	
Obtain sign off from Report Requestor	
Document report execution procedure (with screen shots)	
Move Report to production	
Revalidate Report	
File hard copy of report documents: Report Specification Report Writer Checklist Reporting Manager Checklist Quality Review Form Report Approval/Modification Form Sample of final report	
Send the report execution procedure and notification of the final completion of the report to the Report Requestor	

Report Managers Signature	Date

