# OBIEE DISTRIBUTED DEVELOPMENT & PUBLISHING: ROLES and RESPONSIBILITES

Revised 4/12/11 – for Users webpage

One of the key success factors of an enterprise deployment of OBIEE is a structured distribution of certain roles and responsibilities previously managed and carried out by CIT staff. This concept of growing an "**eTeam**" or extended team will in turn provide more flexibility for campus developers, giving them more power over development and publishing. Procedures, guidelines and best practices for Distributed Development, Publishing, Training and **Support** are being developed by the OBIEE Project Team, all of which will be approved by the Data Stewards. The goal is to promote consistency across the university and across Subject Areas or Data Marts, for ease of use, and to minimize **end user Support**.

Responsibilities for each of these Roles are detailed on subsequent pages. Ideally, each Role would be assumed by a different person, but is subject to available resources, as well as authorization and oversight by the pertinent Data Steward of each major Subject Area / Data Mart.

Training crosses all areas, and must be tailored to several different audiences. During 2010, the OBIEE Customer Liaison coordinated a Training Core Team made up of CIT Report and Dashboard Developers/RADDevs, plus several functional representatives involved in existing or planned OBIEE pilot projects. Using a "Train the Trainer" (T-T-T) strategy, the group defined training modalities and methods of delivery.
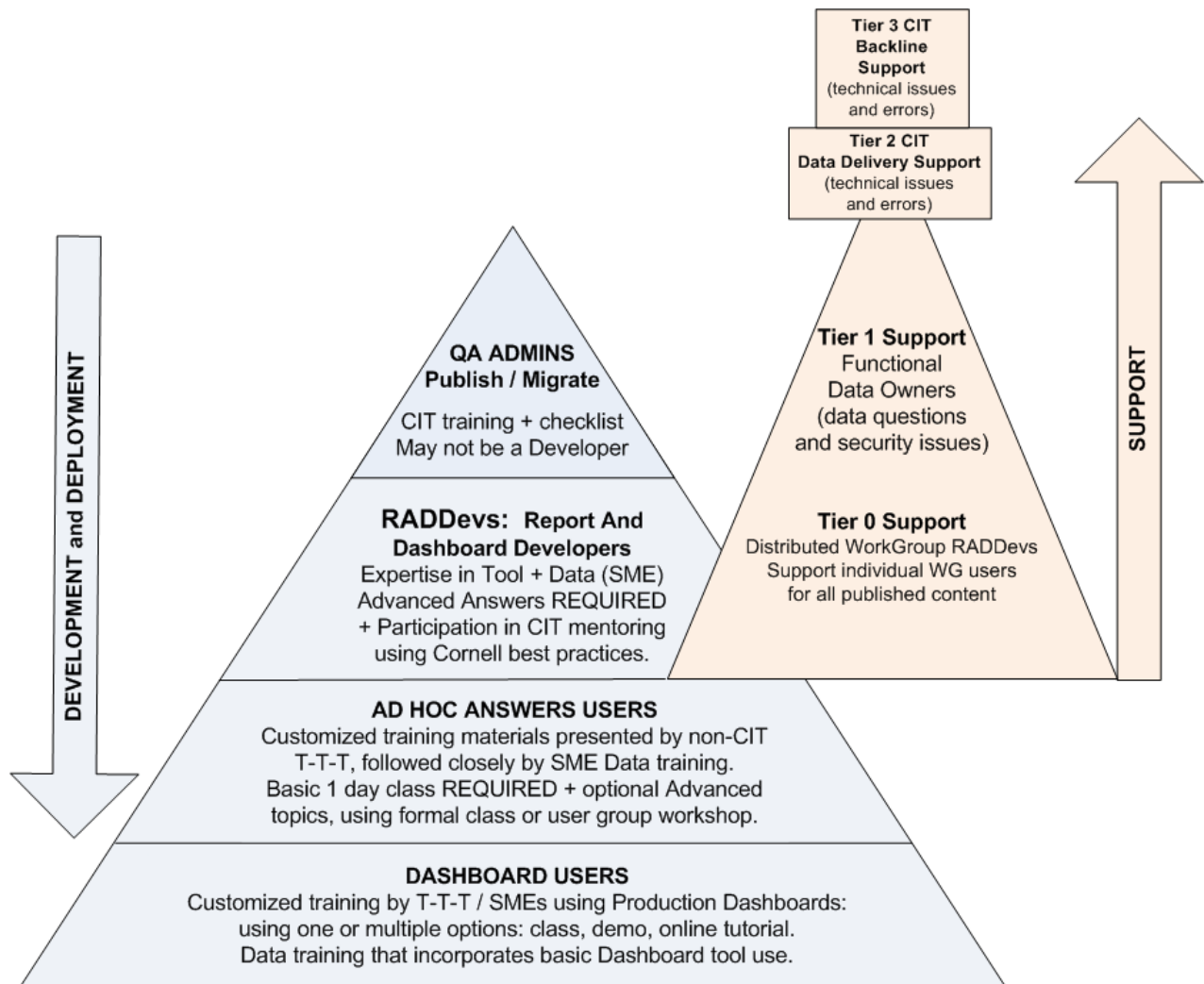
QA ADMINS

The smallest group of users who will almost always be a **central office functional lead** (not a Data Steward). In rare cases may be a member of CIT Data Delivery. They are sanctioned by the Data Steward of the functional area(s), and are trained and mentored by CIT DD staff, to carry out the responsibilities listed below.

This role is critical to the success of OBIEE's distributed development strategy, and optimally is carried out by someone other than the primary **RADDev**, but is subject to resource constraints.

- Identify, define, analyze and prioritize **business requirements** for enhancements to their Subject Area.
  - Manage the entire OBIEE report & dashboard inventory for your area, as appropriate to functional requirements. Determine use of pre-existing or new ID numbers, and appropriate naming.
  - Determine when any individual Canned Report will be moved into a Dashboard.

- **Review and approve content and functionality** of Reports and Dashboards created by your **RADDevs**.
  - Monitor **RADDev** use of best practices, to promote consistency, and minimize end user support.
  - Assure that prior to migration out of DEV, all new Dashboards undergo a comprehensive Design Review for functionality and overall best practices & naming conventions.
  - Conduct abbreviated reviews for Dashboard updates, and for any standalone Canned Reports.
  - Participation in RADDev meetings would be valuable.

- **Govern migration of all new and modified content into OBIEE Test and Prod.**
  - Use Migration Checklists provided by CIT to determine readiness prior to migrations, as well as confirm accuracy after migrations, particularly into Production.

  - *Migrations are conducted by CIT staff (CMs and/or OMAs-OBIEE Migration Admins).*

- **Provide Tier 1 Support to End Users or Tier 0 Developers**
  - Questions related to tables, models, fields, data, reports and dashboards.
  - Refer unresolved problems to **CIT Tier 2 Support** using established procedures.
  - Provide input to OBIEE Troubleshooting documentation when pertinent.

- Coordinate **test plans**, and do **data analysis** as needed for **database and OBIEE upgrades**.

- **Facilitate a functional developer group** comprised of **RADDevs** (and possibly some **Answers** users) from your business area, for the purpose of understanding how they use OBIEE (and other tools) against your data.

- **Communications to RADDevs, Answers** and **Dashboard users** of your business area, for:
  - Standard and consistent usage of data
  - Database availability and load status
  - Managing expectations, etc.

- Coordinate **Provisioning**, using established procedures and reference materials.
  - Assure that people are adequately trained prior to granting **Answers** access.

- Work with other QA Admins on development and testing of **cross-functional content**.

- Maintain and support **metadata** for their business area.

- Review and analyze **usage** of published content.

- ***EXAMPLE: Lisa Clark might be the QA Admin for O.U.R. (analogous to her role for Brio-Hyperion)***

REPORT and DASHBOARD DEVELOPERS – RADDevs

A relatively small group of staff, primarily from central offices and CIT, who are sanctioned by Data Stewards to create new official content for Production.

- **Attend required training classes or use provided materials** to gain advanced expertise in Answers and the basics of Dashboard Development.

  o Answers Training materials use a Cornell-customized Training database with comprehensive manual that covers all Answers functionality plus basics of Dashboard development.
  o There are Answers tutorials available, but RADDevs are expected to have pre-existing Answers experience, plus expertise in the data they will be working with.

- **Attend Design Reviews** and other **mentoring** sessions to learn CU best practices and standards for Answers and Dashboard development. See also Design Review Checklist.

- **Participate in RADDev user group meetings and online discussions.**

  o These forums are intended for exchange of ideas and tips, sharing questions, problems and solutions, and covering special topics prioritized by the group.
  o **CIT's Lead OBIEE RADDev** will hold periodic RADDev meetings and moderate the discussion.
  o All RADDevs will also be subscribed to **OBIEE-Forum-L** for communications between meetings.

- **Develop content in OBIEEDEV:**

  o Conforms to established best practices and standards
  o Follows approved development procedures to facilitate migrations.
  o Effectively meets **end user requirements** *(typically compiled & coordinated by the QA Admin)*
  o Performs **data validation, regression testing, and security 'act as' testing**.

- Tests, and remediates as needed, Reports and Dashboards for **database and OBIEE upgrades**.

- *EXAMPLE: O.U.R. QA Admin may authorize a RADDev outside that office to develop official Records content.*

- *This does not include people who create ad hoc queries to share with co-workers (see **Answers** users, next).*

- **Provide Tier 0 (zero) Support**
  o **Power user/developers** will be authorized by the Director of each new **IT Service Center or WorkGroup (WG)** across campus.
  o They will create and publish **Answers Requests or Canned Reports[1] in OBIEEPROD**, specific to the business needs in their own WorkGroup/WG, in a set of folders that they create and maintain.
  o **ACCESS**: Each IT Director or delegate is responsible for provisioning 'read only' access to those who should see the one or more WG Answers Requests. This in no way overrides or changes underlying data access: users will only be able to get data from requests secured by groups they already have. For example: an individual may **see KFS and Remedy WG Requests**, but if they don't already have a **KFS OBIEE Security Group**, they will get an **access error** if they try to run a **KFS** Answers Request.

[1] *Due to the complexity of Dashboards and migrations, established development procedures and best practices must be followed, starting in DEV, by a small number of individuals who are authorized, trained and mentored.*

- **AD HOC ANSWERS USERS** – Subset of Dashboard users who can create or modify Requests/Queries.

- **Users need BASIC expertise in the ad hoc Answers TOOL, plus an in-depth understanding of the DATA.**
  - **Prior to getting Answers access**, staff will be **required** to attend a basic Answers class, or at least complete a set of online tutorials – as directed by the pertinent functional QA Admin or Data Owner.
  - **Course content** has been designed based on feedback from many functional data owners & staff, and is supported by a comprehensive and customized **Training manual** as a reference following training.
  - The Answers TOOL training and manual use a **Cornell customized Training database** that has incorporated Cornell best practices and processes, such as how to Save and Share Answers Requests.
  - *The Training Core Team agreed that it is not necessary to use Data Mart-specific data for tool training.*

- There may be **OPTIONAL ADVANCED Answers classes and/or workshops**. *(TBD by Training Core Team)*

- Answers classes will be provided using a **"Train-The-Trainer"(TTT) strategy**, using customized materials and database described above, and may be further customized by TTT members or delegate Trainers.

- Users should attend **DATA training as soon as possible after TOOL training**, to assure they get adequate understanding of OBIEE's logical models, which may be different than physical database tables in Hyperion.
  - DATA training will be provided **by functional office SMEs/Subject Matter Experts**.

- **Answers users** can save their own modified versions of published reports, and also build new Requests, for personal use, as well as sharing with others who have the prerequisite security to run them.
  - Only **RADDevs** can create or modify "published" content in the 'official' **Shared** folders, in DEV, but **Answers** users can refer new or modified content to their authorized **RADDev** and/or **QA Admin**.

- *All users have been subscribed to **OBIEE-announce-L** by using Brio-L members, plus adding new users.*

DASHBOARD USERS – This is the "default" group for all new OBIEE users, and therefore the largest group.

- All users will have access to at least one Dashboard, with optional links to any Canned Reports for particular Subject Area or specific Business Process to which they have been authorized. Although Canned Reports may have user-selectable filters, Dashboard users will not be able to modify those Reports.

- **Users need simple basics of using the Dashboard TOOL, plus understanding of the DATA**
  - Depending on the complexity of the Dashboard and size of the user population, users may attend a class or group demo, have a one-on-one session with their support provider, or may use a self-guided online tutorial. **Tool training** should cover a relatively small number of basics:
    - Dashboard Overview and Navigation
    - Use of Request Filters (query limits) and Dashboard Prompts (local limits)
    - Processing the underlying Request (Query)
    - Manipulating data with Prompts and by using "drillable" fields
    - Getting the data out by Exporting/Downloading, and Printing
    - Saving re-usable sets of customized Filters for yourself or others
    - Accessing any (optional) Canned Reports through the dashboard
    - However, **the major focus will be on the DATA** so users understand how to interpret what is contained in the Dashboard's pre-built tables, pivots and charts.

- These Training materials will be provided via a **Train-The-Trainer/"T-T-T" strategy**, using customized materials developed by the functional data owners or SMEs, using Production-ready Dashboards. The Trainer / SME may choose to customize any standard training materials that are available.

- *All users have been subscribed to OBIEE-announce-L by using Brio-L members, plus adding new users.*