

MANAGEMENT DIRECTIVE

Commonwealth of Pennsylvania Governor's Office

Subject: Information Reporting from the Commonwealth's Enterprise SAP Business Information Warehouse System	Number: 205.35 Amended
Date: May 2, 2011	By Direction of:  Kelly Powell Logan, Secretary of Administration
Contact Agency: Office of Administration, Office for Information Technology, Bureau of Integrated Enterprise System, Telephone 717.705.9801	

This directive establishes policy, responsibilities, and procedures for employees and other authorized users of information reporting resources for all agencies utilizing the commonwealth's enterprise Systems Application Products (SAP) Business Information Warehouse or Business Warehouse (BW) system. Changes are indicated by marginal dots.

- 1. PURPOSE.** To establish policy, responsibilities, and procedures for the guidelines and standards that pertain to the planning, management, and utilization of information resources supported by the commonwealth's enterprise SAP BW system.
- 2. SCOPE.** This directive applies to all departments, boards, commissions, and councils (hereinafter referred to as "agencies") who have access to or utilize information resources from the commonwealth's enterprise SAP BW system.
- 3. OBJECTIVE.** To ensure that information resources made available through the commonwealth's enterprise SAP BW system are utilized in an effective and efficient manner.

4. DEFINITIONS. The following definitions apply specifically to this directive.

- a. **Agency Report Coordinator (RC).** The primary agency knowledge source for data, queries, and reports in the commonwealth's enterprise SAP BW system for any business area. The RC will be the only commonwealth staff, other than the Bureau of Integrated Enterprise System (IES), BW Team, authorized to create a detailed BW query specification.
- b. **Business Information Warehouse or Business Warehouse (BW).** The repository of data for the commonwealth's enterprise strategic and decision-support business information reporting for the commonwealth's enterprise SAP system.
- c. **R/3 System.** The commonwealth's enterprise SAP on-line transaction processing system. The R/3 system serves as the processing system for all business transactions in support of enterprise business processes. With respect to this directive, the R/3 system is the source for reports of a transactional, non-strategic nature.

5. POLICY. It is the policy of the commonwealth to ensure that all employees and other authorized users of information from the commonwealth's enterprise SAP BW system are made aware of and comply with the standards set forth for the efficient and effective utilization of information reporting resources. The standards shall:

- a. encourage effective use of the commonwealth's information resources;
- b. provide a framework to minimize duplicative effort; and
- c. encourage a consistent, effective approach in the delivery of information to agency users.

6. RESPONSIBILITIES.

- a. The **Secretary of Administration**, in conjunction with the **Deputy Secretary for Information Technology**, shall promulgate and be the sole interpreter of all enterprise information reporting policy and procedures governing the planning, management, and utilization of information resources supported by the commonwealth's enterprise SAP BW system.
- b. The **Office of Administration, IES, Project Management Office**, shall be responsible for developing procedures, guidelines, and standards for all reporting from the commonwealth's enterprise SAP BW system. The IES, Project Management Office, through the BW Team, shall also authorize all new agency RC assignments in the commonwealth's enterprise SAP BW system.
- c. The agency **Report Coordinator**, in collaboration with the **IES, Business Warehouse Team member**, shall be responsible for assisting agency management and end-users in identifying and satisfying business information reporting needs within their agency. The RC will be responsible for the definition of agency-specific queries and reports in the commonwealth's enterprise SAP BW system.

7. PROCEDURES.

a. Agency Business Information Users.

- (1) Determines that a new report is needed to perform their job more efficiently and effectively, and no existing report in R/3 or BW, to their knowledge, will fulfill their need.
- (2) Contacts agency RC to discuss the reporting need and/or makes a formal request for a new report.

b. Agency Report Coordinator.

- (1) Receives approved report request from the agency business information user.
- (2) Reviews established BW queries and workbook reports to determine if the existing queries or reports will fulfill the requested need.
- (3) Assists the user in the creation of the appropriate favorite workbook report if an existing BW query can satisfy the reporting need. If there is no existing BW query that fulfills the user's reporting need, determines the optimal source of the data for the report requested (R/3 or BW). As necessary, the RC will work with the IES, BW Team to make this determination.
- (4) Works with the BW team to create a technical BW query specification (if needed) to define the reporting requirements if the request is to be satisfied through the development of a BW query.
- (5) Inputs the formal request document as identified by the BW team member:
 - (a) remedy ticket; or
 - (b) IES Engagement Request Process (IERP) Form.

c. IES, Business Warehouse Team.

- (1) Receives and reviews the new BW query and workbook report specifications created by the RC for the reporting requirement.
- (2) Notifies the agency RC if the query and workbook report(s) specification(s) is acceptable and understandable. Recommends the appropriate formal agency request process for their specific agency:
 - (a) remedy ticket; or
 - (b) IES Engagement Request Process (IERP) Form.
- (3) Developments and configurations are made to create the query and workbook report(s).

- (4) Upon receiving the approved formal request notification from the agency assigns the workbook reports to the appropriate BW role and transports the query and workbook reports to the BW quality environment for further testing by the RC.

d. Agency Report Coordinator.

- (1) Completes further quality testing of the query upon notification from the BW Team that the query has been transported to the BW quality environment.
- (2) Notifies the IES, BW Team by sending an email to mailbox ra-imaginepabwsupport@pa.gov upon satisfactory completion of quality testing, or of need to make additional modifications to the query and workbook report(s).

e. IES, Business Warehouse Team.

- (1) Transports the completed query and workbook report(s) to the BW production environment.
- (2) Notifies the agency RC that the new query and workbook report(s) are in production.
- (3) Monitors performance and usage of the new query to evaluate technical efficiency and impact on system resources.
- (4) Works with the agency RC to make necessary modifications if the new query requires technical modification to improve performance or efficiency.

- f. Agency Report Coordinator.** Notifies the user of report availability and ensures that the user understands the report, BW role location, and navigation capabilities of the workbook report.

This directive replaces, in its entirety, *Management Directive 205.35*, dated July 5, 2002.