

The background features a dynamic, abstract design. It consists of flowing, wavy lines in shades of red and blue. Overlaid on these waves is a fine, grid-like pattern of small dots or lines, creating a textured, digital effect. The overall color palette is dominated by deep reds and blues, with the text providing a high-contrast white and red element.

# DATA EXPLORATION SERIES



University Analytics  
& Institutional Research

# EXPLORE ARIZONA THROUGH DATA

Financials Modernization: Data Warehousing & Analytics



## Who We Are & What We Do

UAIR is committed to providing data that empowers campus decision makers, informs policy and practice, and tells the Arizona story.

**Data  
Warehouse**

**UAccess  
Analytics &  
Reporting**

**External  
Reporting &  
Rankings**

**Interactive  
Fact Book**

**Customer  
Experience &  
Support**

**Data Science**

**System  
Performance**





# ACKNOWLEDGEMENTS

## TODAY'S PRESENTERS

- Christopher Cherry, IT Training & Support Specialist
- Eddie Caratachea, Assistant Director, Administrative Reporting & Analytics
- Venkata Pavan Desiredy, Data Architect
- Steve Patterson, Huron Consulting Managing Director, FinMod Workstream Lead
- Tessa Boukal, Huron Senior Associate, FinMod Workstream lead

## UAIR Team Members

- Casey Miller, Middleware Analyst
- Jeff Schwarz, Business Intelligence Developer
- Abraham Silva, Program Manager, Administrative Data

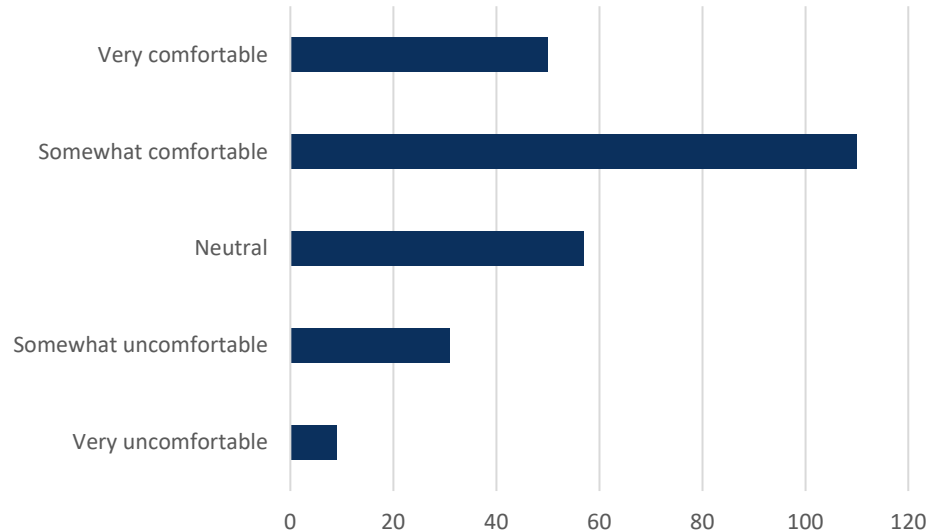
## FinMod Team Members

- Subhodip Pal, Architect
- JD DeCristofaro, Data Modeler
- Carlos Mendez, Pipeline Developer
- Ravi Subbaroyan, Pipeline Developer
- Kavita Sharma, Pipeline Developer



# WELCOME | Who is here today?

**Question:** Please rate your comfort level with UAccess Analytics.



# WELCOME | Who is here today?

**Question:** Have you attended a Data Exploration Series before?



# WELCOME | What do you want to know?

What are the reporting changes that are going to happen?

Will my reports be affected?

How will UAccess Analytics change?

What is the status of the Financials Modernization project?

Can we still modify reports if needed?

How will it affect the data I frequently use?

# Financials Modernization Prep & Discovery Recap



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# How the Impact was Discovered



## Regular Communication

- 15 Wednesday Workstream Meetings to Address Different Topics
- 35 DW & Analytics Discovery Meetings



## DW & Analytics Review

- 32 Subject Areas
- 216 Views
- 94 Dimensions
- 49 Facts
- Rationalized 6000+ report population down to 770
- Reviewed 770 UAIR Managed Analyses & Dashboards in Detail



## Special Topic Discussion

- EPM Impacts
- Labor Encumbrance & Distribution
- Glue & ETL Practices
- BICC File Extract
- Oracle ERP Data Flows & Reporting Tools
- Embedding Reports in ERP

August 2022-November 2022



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# Overall Impact by Subject Area

Non-KFS Subject Area	KFS Subject Area
Bud – HCM – KFS Budget Balance Summary	KFS – Account Actors
Bud – HCM – KFS Budget Book	KFS - AMCA
Bud – HCM – KFS Department Line Budget Balance	KFS - Axiom
CSW – Student Financial Aid	KFS – Accounts Receivable
CSW - Student Financials	KFS – Capital Asset Management
HCM – Census Data	KFS – Direct Database
HCM – Employee Job Detail	KFS – Encumbrances
HCM – Leave Accrual	KFS – Labor Ledger Entries
HCM – KFS – Compensation – Payroll Accounting	KFS – Ledger Entries
IA – Research Awards and Summary Expenditures	KFS - PCard
IA – Space & Workforce Activity	KFS - Security
IA – Workforce Activity	KFS – Shipping & PDP
KC – Negotiation	KFS Views
KC – Proposal Route Log	KFS –Snapshots
KC – Proposals	KFS - Purchasing and Accounts Payable
KC - Subawards	KFS – Effort Certification

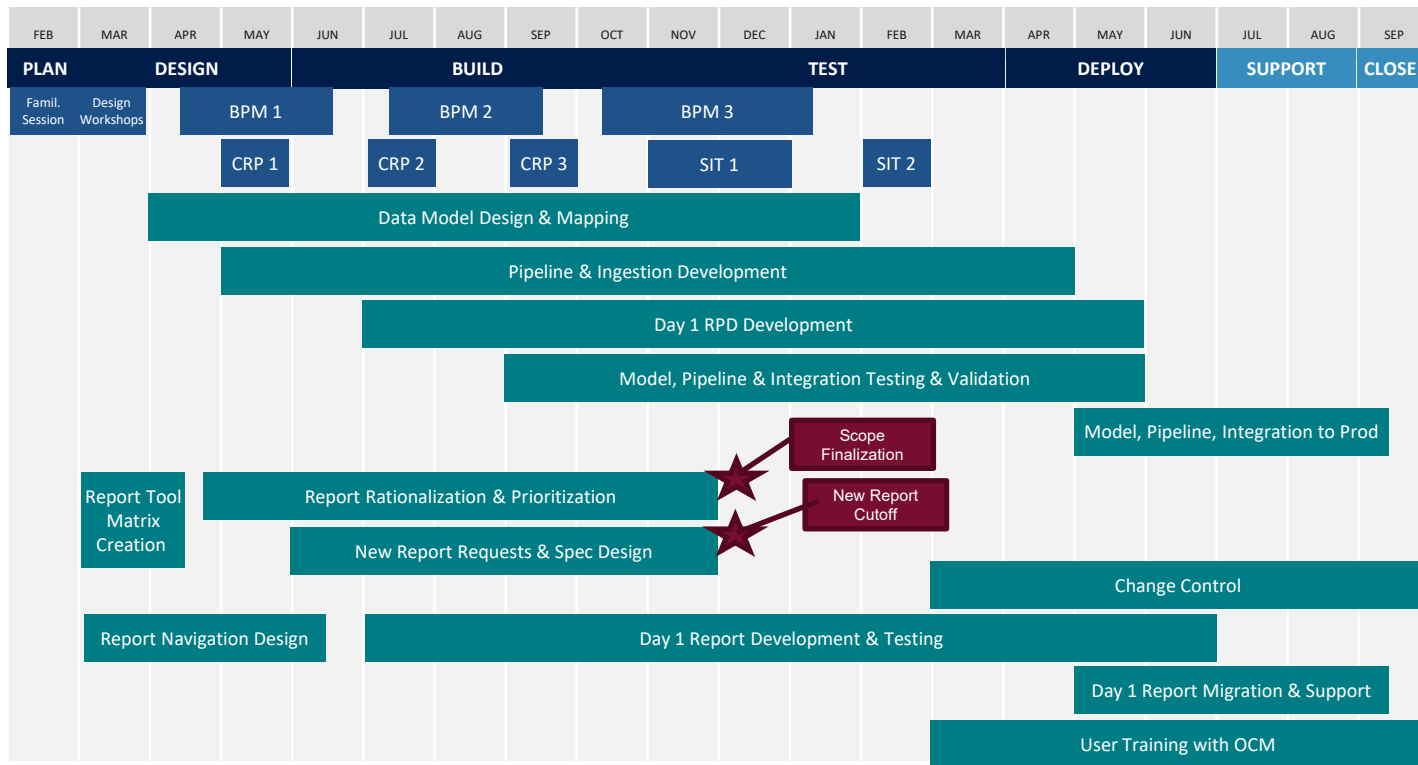
# Financials Modernization Plan Recap



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# Data Warehouse & Analytics Detailed Timeline



**Business Process Mapping (BPM)**  
Setting our configurations, business processes, and making adjustments

**Conference Room Pilot (CRP)**  
Testing the system and setups

**System Integration Testing (SIT)**

View the entire FinMod Timeline at [finmod.arizona.edu/timeline](https://finmod.arizona.edu/timeline)



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# New Application Impact Details

*As part of the Impact Analysis, the impact associated with integrating, modeling, and reporting for non-Oracle ERP Cloud applications was estimated. These impacts remain in the plan with the following assumptions.*

## Planning

*Current data warehouse has models, reports, and processes that rely on planning data which makes the inclusion of planning data a requirement. Planning is changing due to new decisions around budgeting.*

## Labor and Labor Encumbrances

*Like Planning, the warehouse includes Labor. Labor and the associated reports will remain in scope unless the future design eliminates that requirement.*

## Travel (Concur)

*Concur will have self-contained reporting. We are still determining the full scope of reporting from the data warehouse.*

## ECC (Huron) - **Currently Out of Scope**

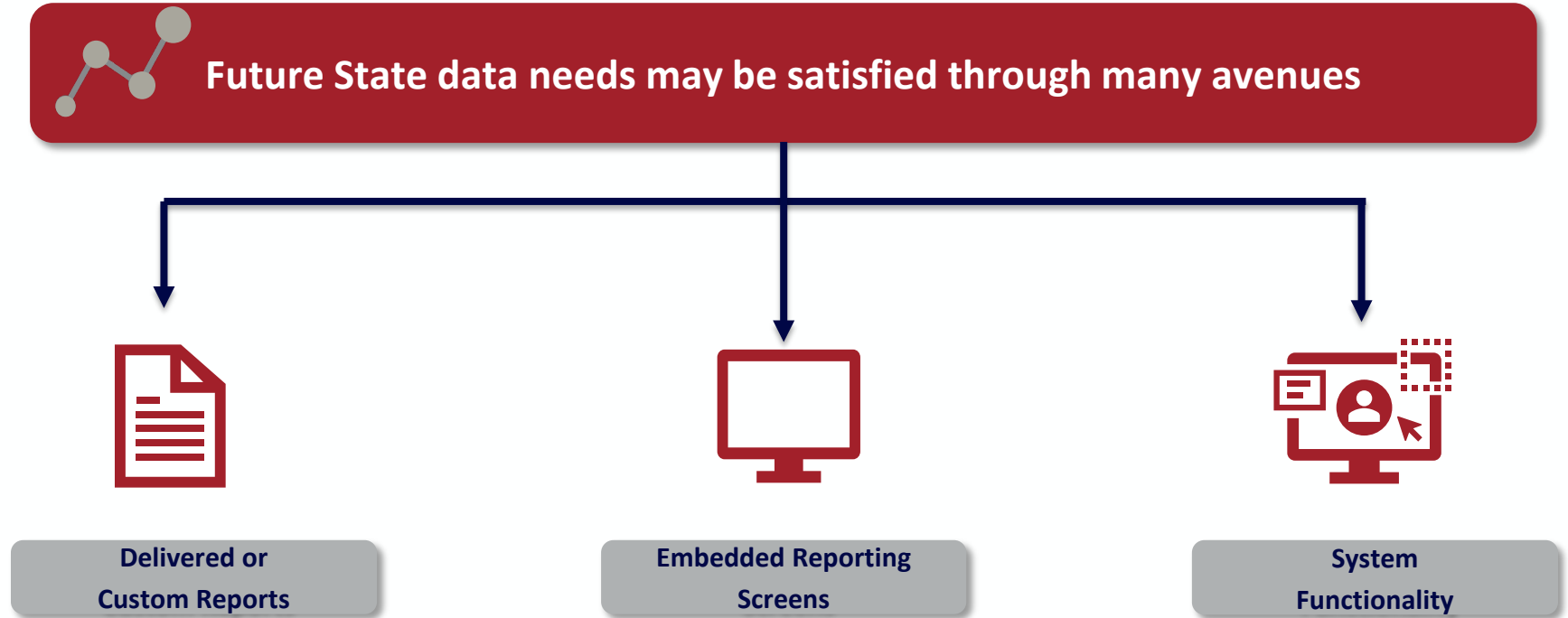
*ECC will have self-contained reporting and the warehouse has minimal existing models and no reports on this.*



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# Reporting Fit-Gap & Prioritization

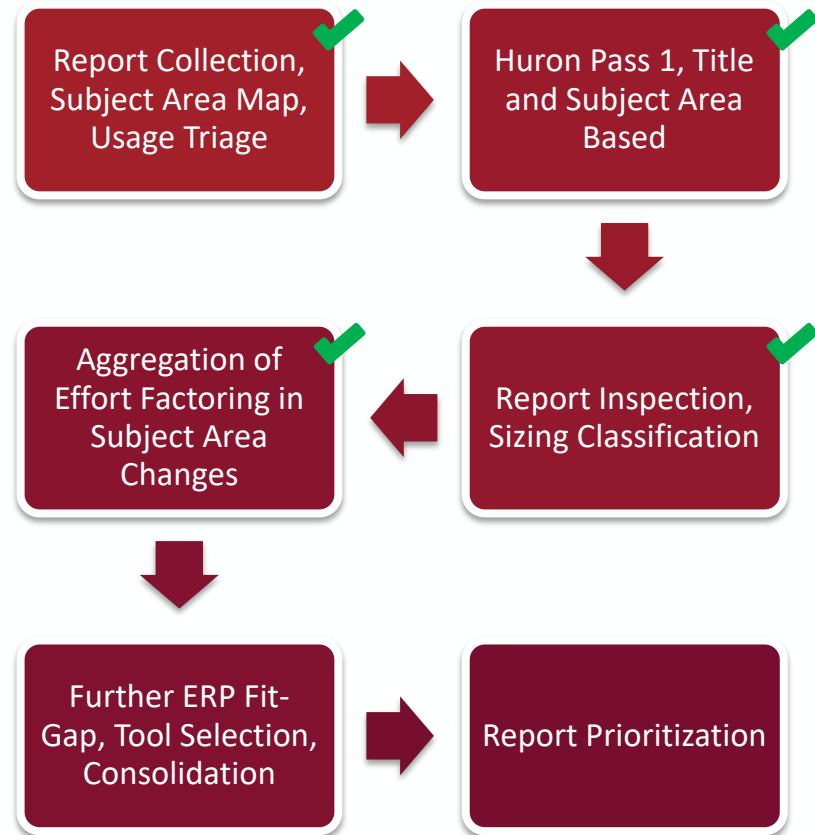




# University of Arizona Report Rationalization

The report rationalization process is designed to identify reports and dashboards that need to have a similar report or dashboard as part of the financial modernization process.

Along with the identification of reports, this effort will establish an estimated effort for rebuilding the report and dashboard against the new model.



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# Reporting Fit-Gap & Prioritization



Day 1-90

- Business Critical to support a process
- Used to provide campus with data and is the only source of that data
- Internal Control/Audit Report
- Regulatory Report

Ready for Go Live

Day 91-180

- Needed to support a business process that may occur at the end/mid-year
- Process Independent Reports but provides value to the University Business Offices
- Provides campus with insights but not their only source of data

Ready After Go Live

Nice to Have Enhancements

- 'You know it would be great to have x' reports
- Reports dependent on future functionality

Ready 6 Months + After  
Go Live

# What about my reports?



DW&A Roadshows



Open Office Hours



Instructor-Led Trainings



DW&A Crosswalk



Community of Reporting Representatives

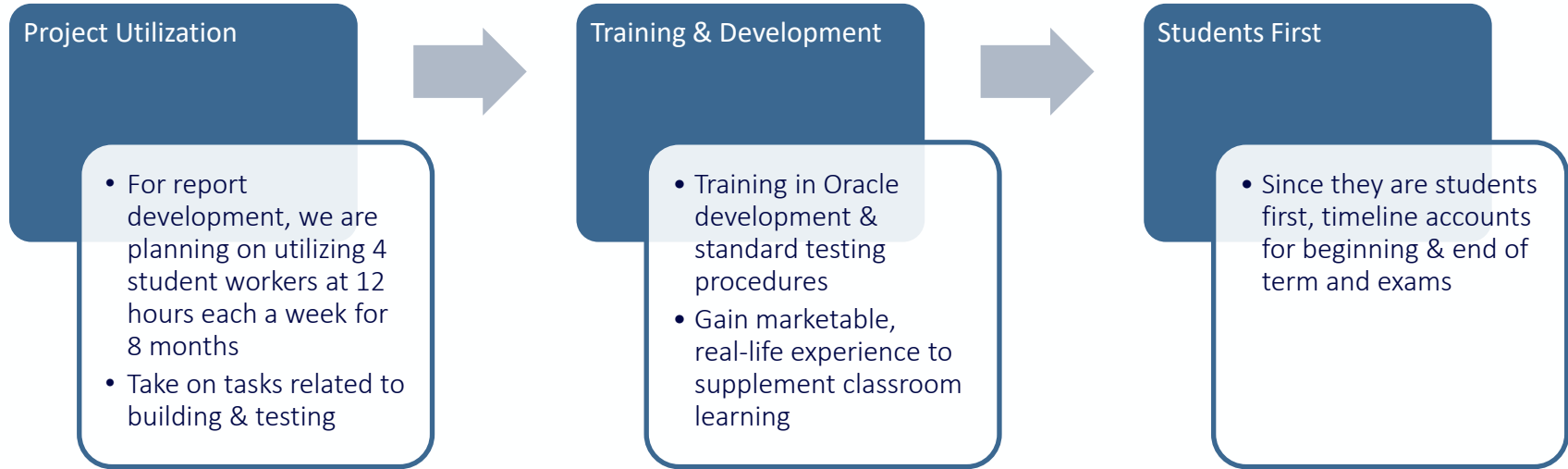
- While the Financials Modernization team will be focused on redesigning & retrofitting the UAIR Managed Reports & dashboards, the UAIR team will be here to help
- Over the course of the next 18 months, we will be working with the Financials Modernization Management Team to ensure we communicate changes in an effective & timely manner
- If you are interested in helping redesign and rebuild, please reach out to [FinancialsModernization@email.arizona.edu](mailto:FinancialsModernization@email.arizona.edu)



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# Utilizing Student Interns



If you have any students who you think would be a great fit for this internship, please reach out to Eddie Caratachea at [eddiec@arizona.edu](mailto:eddiec@arizona.edu) or Tessa Boukal at [tboukal@arizona.edu](mailto:tboukal@arizona.edu).



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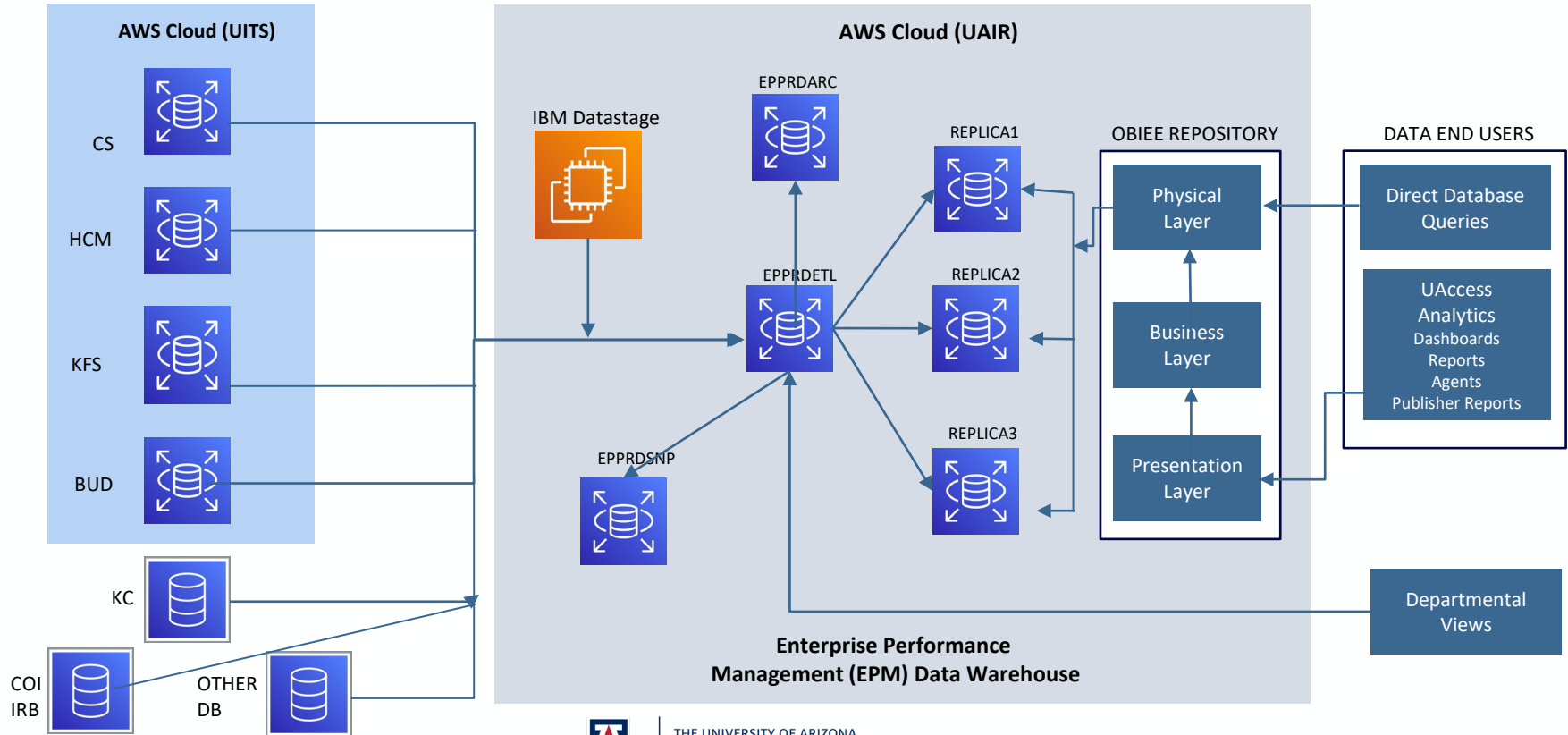
# What's Changing?



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# Current Data Warehouse Architecture



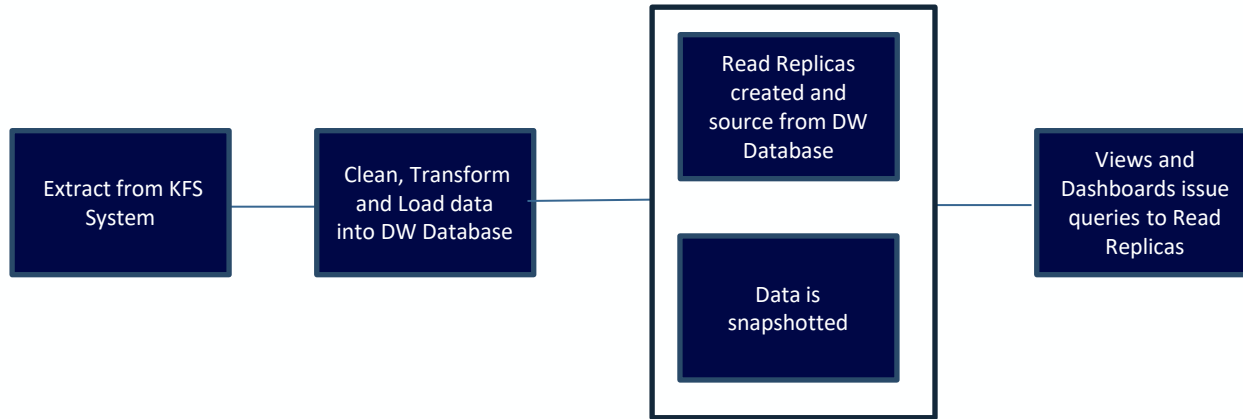
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# Current State Financials BI Process Flow

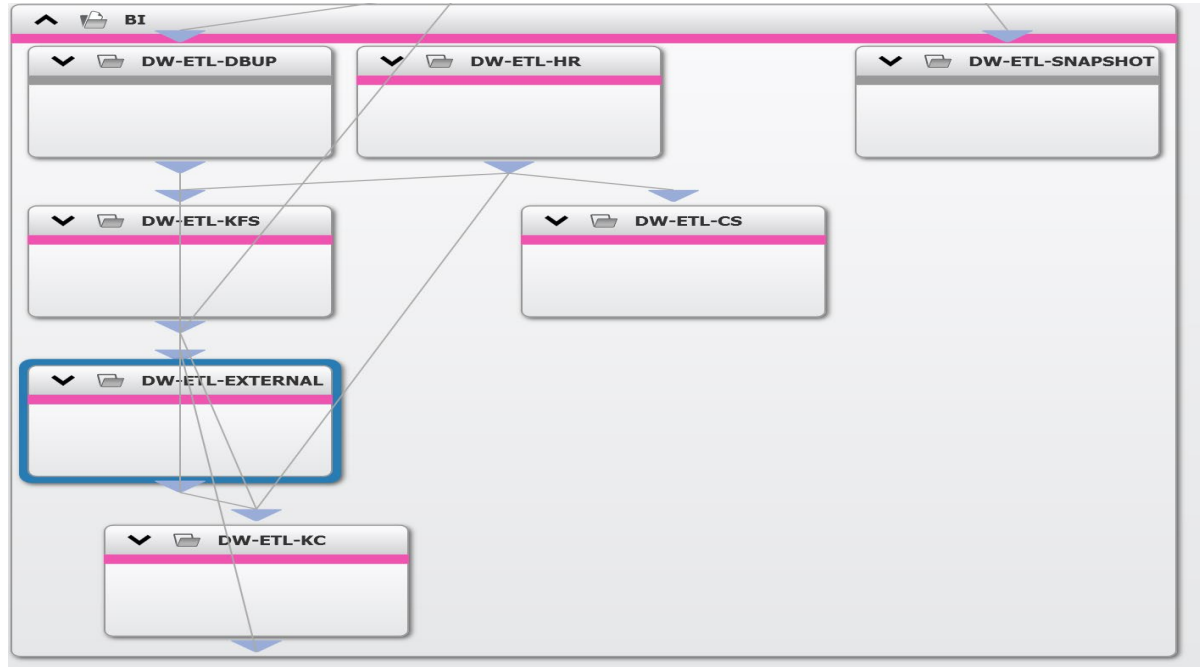
IBM DataStage is used to fetch data from different source systems like Peoplesoft Campus Solutions, Peoplesoft HCM, Kuali Research, Kuali Financials, Interactive Floorplans etc. to cleanse and transform the data by applying business rules and load into Data warehouse for further consumption by campus users through OBIEE reports and dashboards.



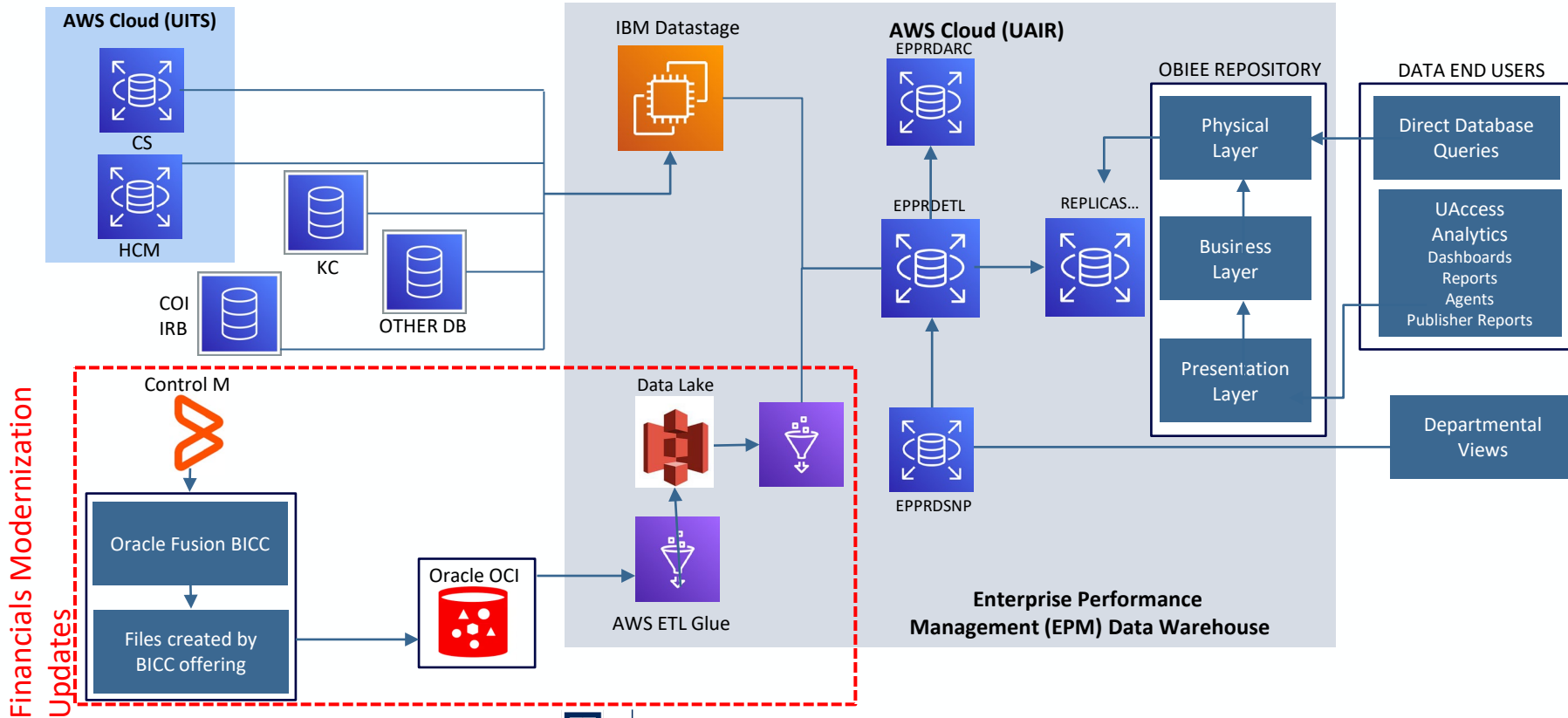
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In the current state, we are using Control M to schedule daily BI loads.



# Future Data Warehouse Architecture



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# Future State Financials BI Process Flow

- In the future stage all the financial related data pipelines will be built using cloud tools like AWS ETL Glue.
- For scheduling we are planning to use combination of Control M, AWS Event bridge, Step Functions etc.

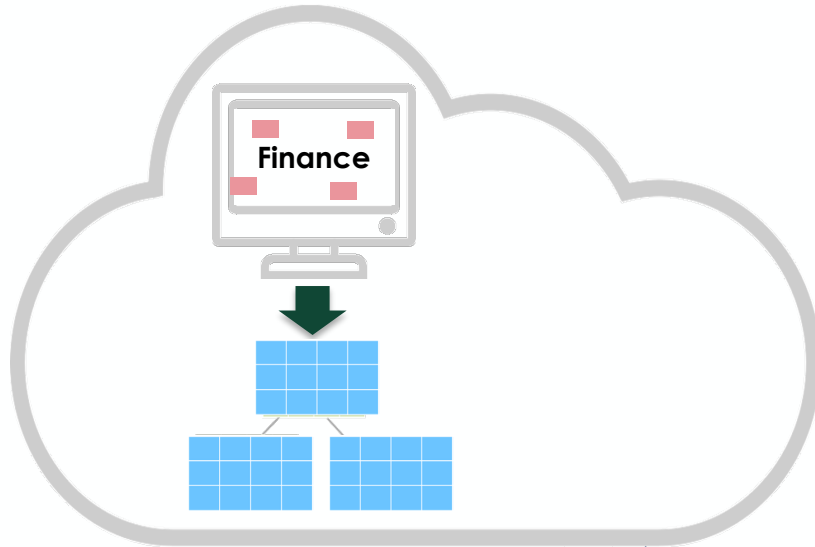


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# Oracle ERP's Delivered Reporting Capabilities

In addition to extensive embedded screens, Oracle Cloud ERP's primary reporting tools are Oracle Transactional Business Intelligence (OTBI) and Business Intelligence Publisher (BI Publisher) which report on **real time data**.



43

Delivered Finance Subject Areas

247

Delivered Finance Data Models

330

Delivered Finance Reports

## Sample Delivered Subject Areas

Finance

- Budgetary Control - Balances
- Cash Management - Bank Statements
- Expenses - Expense Transactions
- Fixed Assets - Asset Depreciation
- Payables Invoices - Withholding
- Procurement – Requisitions
- Projects – Cross Project Information



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# Difference between OTBI & UAccess

## OTBI

- Real Time Data
- Limit of 75000 rows
- Delivered, non-customizable subject areas
- Data sourced from within Financials
- Other limitations

## UAccess

- Day delay data
- Curated subject areas created by UAIR based on business needs
- Include additional measures that are needed for specific reports
- Data sourced from multiple systems, including Financials

We will be undergoing further report rationalization & reclassification to determine what tool is best to build a dashboard or report in.



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# Good Candidates for Oracle ERP Reporting



Definition of reports to be built in Oracle ERP Reporting tools will continue into the Build Phase.



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# Involvement Expectations



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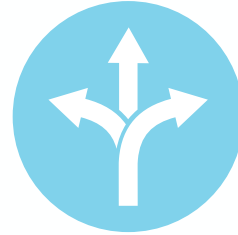
# How will users be involved?



OCM Analysts will be involved in CRP1 preview sessions to view Oracle Delivered Reports



UAccess Analytics Drop-in Session in June 2023



Feel free to reach out to your campus liaison, who can direct you to the right person if you have questions



More users will be testing dashboards & reports in SIT1, SIT2, & BPT



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# Reporting Representatives

## Identification

We will be working with the Campus Liaisons and their division leadership to identify a reporting representative from each team

## Tasks

- Assist in Requirements Gathering for Reports
- Assist in Prioritization for Reports & Dashboards
- Potentially assist in building/rebuilding analyses and dashboards

## Who?

- Reporting Representatives should have a good grasp on your unit's analytics needs and what the current reports are
- If you are interested or know someone on your team who would be a great representative, please reach out your team's Campus Liaison & your division leadership



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# Questions?



# THE VALUE OF CUSTOMER EXPERIENCE

UAIR is here to provide ongoing customer experience, training, and support. We want the campus community to have the knowledge and the know-how to take full advantage of our products and services.



# STILL WANT TO KNOW MORE?

- **FinMod Website:** <https://finmod.arizona.edu/>  
(the latest news & helpful resources from the FinMod Project)
- **UAIR Newsletter**  
(the latest news straight from UAIR)
- **UAccess Analytics Training**  
(constantly updated modules and materials)
- **Analytics Office Hours**  
(visit with our staff to have your individual questions answered)
- **UAccess Community**  
(a community of users and resources)
- **Data Exploration Series**  
(ongoing data literacy presentations)

**Visit our website for more information:** <https://uair.arizona.edu/>



# Thank you!

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Questions?

