

Data Request Process

Overview

This procedure provides the steps required to obtain data from the Credit Management Data Mart (CMDM) or the CMDM data archive. All requests will be made to the Student Channel CMDM Data Requester Administer.

The request types are:

- (1) A one-time request not to be shared by entire CMDM community,
- (2) A continuous request not to be shared by entire CMDM community,
- (3) A one-time request to be shared by the requester and the CMDM community, or
- (4) A continuous request to be shared by the requester and the CMDM community.

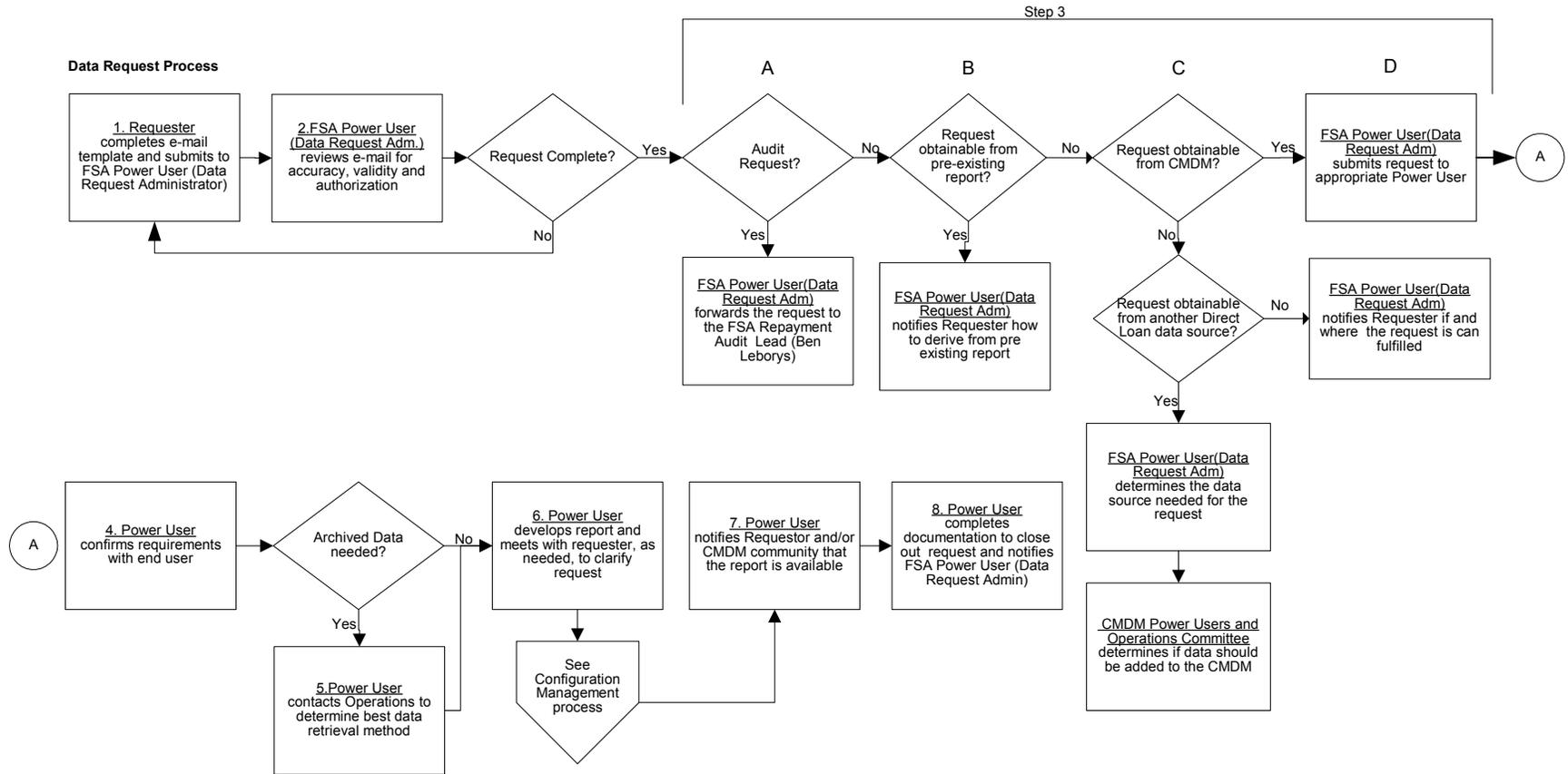
The Schematic/Detailed Process Flow entitled 'Data Request Process' outlines the steps as they pertain to CMDM Web Users and CMDM Extended Web Users. The Schematic/Detailed Process Flow entitled 'Configuration Management Process' outlines the steps as they pertain to CMDM Power Users and CMDM Operations.

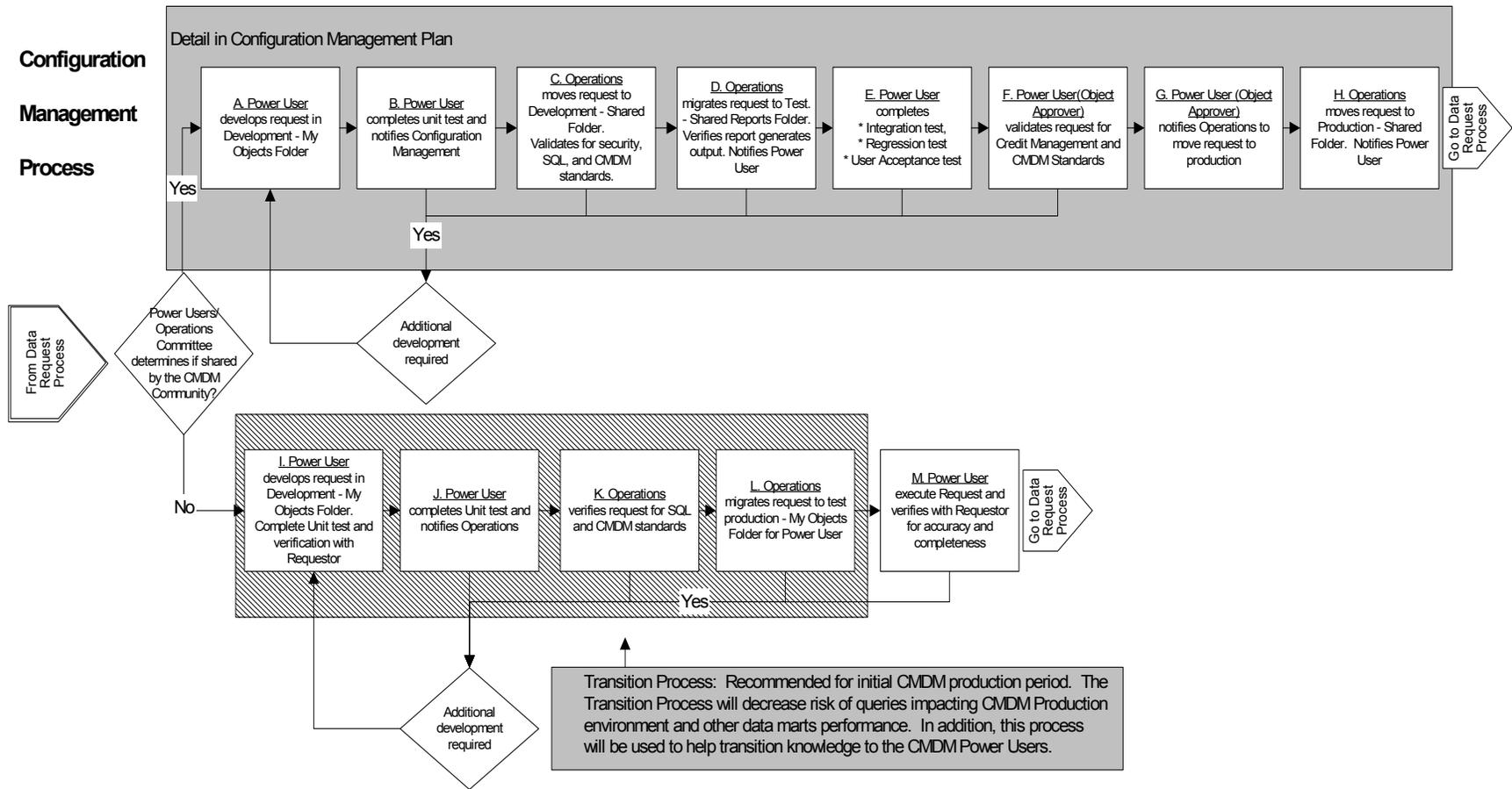
As referenced in the Schematic/Detailed Process Flow entitled 'Data Request Process,' the request to modify existing or add new data elements will be determined by a committee of CMDM Power Users, CMDM Operations, and other necessary SFA management personnel.

Also referenced are several ways to reload archived CMDM data. They include:

- (1) Reloading data directly to the CMDM
- (2) Reloading data directly to the Test Region
- (3) Providing raw data to requestor

Schematic/Detailed Process Flow





Responsibilities

Job Title	Organization	Tasks
Requester	Various	<ul style="list-style-type: none"> Completes request for data Provide additional clarity on request requirements with FSA Power User and/or MIS Power User as necessary Reviews and confirms final request output
FSA Power User (Student Channel Data Request Administrator)	Students Channel	<ul style="list-style-type: none"> Receives, reviews, and authorizes requestors request Notifies requester how to derive from pre existing report, when appropriate Submits request to appropriate group (Audit Group, Power User, Direct Loan data source, or committee) Notifies Requester if and where the request is can fulfilled
FSA Power User (Object Creator) or MIS Power User	Students Channel or MIS	<ul style="list-style-type: none"> Confirms, and reconfirms as needed, requirements with requester Contacts Operations to upload archived data Develops new request Notifies requestor appropriate CMDM Users that the report is available Completes documentation to close out request and updated the CMDM Request database Notifies Data Request Administrator that the request is complete
FSA Power User (Object Approver)	Students Channel	<ul style="list-style-type: none"> If shared object, validates request for Credit Management and CMDM Standards Notifies Operations to move request to production
FSA Power Users	Students Channel	<ul style="list-style-type: none"> Serves on the Task Order/Design Modification Request committee
CMDM Operations	CMDM Operations Team	<ul style="list-style-type: none"> Completes Development Life Cycle Serves on the Task Order/Design Modification Request committee

Procedure Trigger

This activity is performed when a request for data from the Credit Management Data Mart (CMDM) or the CMDM data archive is made.

Process

1. Requester submits e-mail request to FSA Power User (Data Request Administrator).
2. FSA Power User (Data Request Adm.) reviews e-mail for accuracy and validity. If the request is incomplete, the request is returned to the requestor with an explanation of additional details required. They also analyze the request to verify the requester has authority to request the data. If the requestor does not have authority, they will be notified why the request was denied.
3. FSA Power User (Data Request Admin) analyzes request.
 - a. If it is an audit request, FSA Power User (Data Request Adm) forwards the request to the FSA Repayment Audit Lead (Ben Leborys). Process Ends.
 - b. If the request is obtainable from pre-existing report, FSA Power User (Data Request Adm) notifies Requester how to derive from pre existing report. Process Ends.
 - c. If the request is not obtainable from CMDM, the FSA Power User (Data Request Adm) determines if it is available from another Direct Loan data source.
 - If it is not obtainable from another Direct Loan data source, the FSA Power User (Data Request Adm) notifies Requester if and where the request is can fulfilled
 - If it is obtainable from another Direct Loan data source, the FSA Power User (Data Request Adm) determines the data source needed for the request then the request is forwarded to the CMDM Committee (Power Users, Operations, CMDM DBA, and SFA Leadership as needed) to determine if data should be added to the CMDM. If yes, an associated Task Order and /or Design Modification Request would be approved and created.
 - d. If the request is obtainable from CMDM, FSA Power User (Data Request Adm) submits request to the FSA Power User. If required, the FSA Power User would forward the request to the MIS Power User team.
4. Power User confirms requirements with requester. If the Request is non-FSA, then the Power User confirming the requirements must be FSA.

5. If archived data is needed, the Power User contacts Operations to determine best data retrieval option Operations will provide data to Power User.
6. After the Power User develops the request (seeking clarity from requester as needed), they forward the request to CMDM Operations. The report is created using the configuration management process. See Configuration Management steps outlined below.
7. Power User notifies appropriate CMDM Users that the report is available.
8. Power User updates Request ED LAN CMDM Request database to close out the request and notifies FSA Power User (Data Request Admin) that the request is closed. Process Ends.

Configuration Management

This section provides high-level steps required to develop a request and migrate the request into production. Detailed steps are outline in the Data Mart Configuration Management Plan.

Power User Privileges

During the first two months of production, power users will only have access to create new objects (metrics, filters, reports, etc) in their own "My Objects" area in development. Power users will not be able to create or modify schema objects in any environment.

Environment	Create Objects in "My Objects"	Create Objects in "Shared Folders"	Create or Modify Schema Objects	Run Reports against Production Data
Development	Yes	No	No	No
Test	No	No	No	Yes
Production	No	No	No	Yes

After this initial two-month period, power users will have access to create objects in test and production, but still not in the shared objects folders. Power users will still not be able to create or modify schema objects in any environment.

Environment	Create Objects in "My Objects"	Create Objects in "Shared Folders"	Create or Modify Schema Objects	Run Reports against Production Data
Development	Yes	No	No	No
Test	Yes	No	No	Yes
Production	Yes	No	No	Yes

* Schema objects refer to core project objects in MicroStrategy such as attributes, facts, tables, hierarchies, etc.

Steps I – L are a transition process that will be followed for the initial CMDM production period. The transition process will decrease the risk of queries impacting CMDM production environment and other data mart performance. In addition, this process will be used to help transition knowledge to the CMDM Power User.

If request is a Shared Report:

- A. Object Creator develops request in Development using My Objects Folder.
- B. Object Creator completes unit test and notifies Operations (Configuration Management).

- C. Operations (Configuration Management) moves request to Development - Shared Folder and validates for security, SQL, and CMDM standards.
- D. Operations (Configuration Management) migrates request to the Test region Shared Reports Folder using Production data, verifies report generates output, and notifies Object Creator.
- E. Object Creator completes Integration test, Regression test, and User Acceptance test.
- F. Object Approver validates request for Credit Management and CMDM Standards.
- G. Object Creator notifies Operations (Configuration Management) to move request to production.
- H. Operations (Configuration Management) moves request to Production - Shared Folder. Notifies Object Creator.

If request is not a Shared Report:

- I. Object Creator develops request in Development - My Objects Folder. Complete Unit test and verification with Requestor.
- J. Object Creator completes Unit test and notifies Operations (Configuration Management).
- K. Operations (Configuration Management) verifies request for SQL and CMDM standards.
- L. Operations (Configuration Management) migrates request to test production - My Objects Folder for Power User.
- M. Power User executes Request and verifies with Requestor for accuracy and completeness.