Business Intelligence Initiative – KPI Customization

KPI Import and Customization Instructions

Pamela Clippard, Senior Data Architect

March 2011
Contents

Contents .................................................................................................................................................. 0

Known Customization Issues When Using Shared Argos Exports ....................................................... 3
  Updating the Security on the Datablock After Importing ..................................................................... 4
  ODS Instance Named Differently ......................................................................................................... 6

Key Performance Metric (KPI) Naming Conventions ........................................................................... 7
  Creating Argos Datablock ...................................................................................................................... 7
  Creating Argos Export files .................................................................................................................. 7

Uploading KPIs to the TBR BI Shared Repository .................................................................................... 7

Quality Assurance .................................................................................................................................... 7
  Argos Banded Report Option Requirements ....................................................................................... 8

Chart and Graphics Preferences ............................................................................................................. 9

Noteworthy – Adding Notation to the Argos Datablock .......................................................................... 10

Key Performance Indicators – Definitions & Customization ................................................................. 11

  Key Performance Indicators Released To Date ..................................................................................... 11
    KPI Metric ID: A6 & A7 Freshmen SAT and Freshmen ACT ............................................................... 12
    KPI Metric ID: A8 New Freshman High School GPA ......................................................................... 13
    KPI Metric ID: A10 Mean Transfer GPA ............................................................................................. 14
    KPI Metric ID: AE1 Online Education Enrollment .............................................................................. 15
    KPI Metric ID: B1 Revenue from Tuition ............................................................................................ 16
    KPI Metric ID: B1 * Tuition Revenue by Term .................................................................................... 17
    KPI Metric ID: D1 Alumni Donations and Gift Summary .................................................................... 18
    KPI Metric ID: E3 Percentage of Graduate to Undergraduate Students ............................................ 19
    KPI Metric ID: E4 New Freshman Enrollment .................................................................................... 19
    KPI Metric ID: G5 Degrees Awarded by Level or Field of Study ....................................................... 20
Common BI Functions ............................................................................................................................................ 21
Contact Information ............................................................................................................................................ 28
Known Customization Issues When Using Shared Argos Exports

You may have difficulty editing or running the imported Argos exports for the Business Intelligence KPIs (key performance indicators) that are contained in the BI downloads. There are two known modification points to be aware of when using an Argos datablock which comes from other campuses.

Security

Each campus may have a different Argos User security methodology. For example if at the Tennessee State University campus the Argos users are name TSU_USER1 and the Motlow State Community Collage the Argos users are named MSCC_USER1, when the Argos datablock is imported to a receiving school, the import will generate an error message. This is because Argos User name is different.

Steps for Importing and Using the Business Intelligence KPI’s Argos DataBlocks

1. Import the Argos export file to your Argos projects to review the logic in the datablock. See the Updating the Security on the Datablock After Importing section in this document.

2. Review the KPI chart creation graphics notes in the Chart and Graphics Preferences section of this document. Make the necessary changes to reflect your campus’ preferences.

3. Note that the KPI logic in Argos may need to be modified at each school to represent their specific codes. Instructions for modifying each the KPIs can be found in the Key Performance Indicators – Definitions & Customization Notes section of this document.

4. Common Functions have been written and shared in this document and in the downloaded files for each release of newly created KPIs. See the Common Functions section of this document.

5. All errors found in the sql code and shared scripts should be reported to the BIDWTech@tbr.edu as soon as they are discovered so that corrections and clarifications can be published in a timely manner.
**Updating the Security on the Datablock After Importing**

Because not all schools have Argos security set up similarly, after importing the Argos export for any given KPI, you will need to modify the security group – or change the security group properties within Argos.
1. Right click the datablock after importing it.
2. Select Security from the dropdown
3. Click Add... a security group
4. Select the user or group from the Choose group or user window
5. Check the Allow and Deny options as required.

For example, the TBR has a FI_Designer group in active directory so each TBR Finance staff who are datablock designers are added to Argos FI_Designer group in active directory and can then use their regular NT account and password when logging into Argos.
ODS Instance Named Differently

In the connection string of the Argos datablock the Operational Data Store (ODS) database as a different name that from where the Argos export originated. For example, TSU may call their production ODS database ODSP while the another campus may call their production ODS database ODSPB.

The ODS instance is name in the Argos MAPS server in the ADO Connection string as in the example below.
Key Performance Metric (KPI) Naming Conventions

Creating Argos Datablock
When creating the KPIs datablock using Argos, the recommended naming convention is:

MetricID_MetricName

Such as

    BI_Total_Tuition_Revenue

Creating Argos Export files
When creating the Argos export for uploading to the TBR staging area, the recommended naming convention is:

MetricID_MetricName_SchoolIDYYYYMMDD.defaultArgosExportExtension

Such as

    BI_Total_Tuition_Revenue_APSU20110204.argosexport

Uploading & Downloading KPIs - TBR BI Shared Repository

Upon completion of a KPI, its accompanying .argosexport files and associated documentation should be uploaded to the TBR BI stage folder.

In the campus’ stage server under the home directory is a link to the TBR_BI staging area. Within the TBR_BI link there is a BI Projects directory for receiving your .argosexport files and documentation.

Do not delete the TBR_BI directory which has been placed as a link under your stage area home directory.

<table>
<thead>
<tr>
<th>TBR_BI</th>
<th>BI_PROJECT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stage area for delivery of KPIs from the TBR central KPI repository to the campuses. Campuses have read access only.</td>
<td>Stage area for delivery of KPIs from the campuses to the TBR central KPI repository. Campuses have write access only.</td>
</tr>
</tbody>
</table>
Quality Assurance

Every effort has been made to clean-up any testing codes or links during the roll-out process. However, you may occasionally find a bit of test garbage forgotten and left behind, our apologies for such housekeeping mistakes.

For instance, if you run into a forgotten bit of test code please notify the BiDWTech@tbr.edu contact that such an error was found as all documentation and associated instructions will need to be corrected and reissued.

Argos Banded Report Option Requirements

What may appear to be remnants of queries built for testing may actually be a functional requirement of the reporting Argos tool.

Please note that the Report Query – Free Type edit window may have a statement which should remain because we need to select something in the Report Query in order for the Argos banded report option to appear.
Chart and Graphics Preferences

Graphic and preferences are left up to each school participating, the following is an example.

1. Main header titles were consistent with the KPI inventory Category. The Metric Name from the KPI inventory was used as the chart title. Working with the campus web-developer, a school header was created and agreed upon using official school colors. The header was saved into the Argos Library for re-use.

2. A color palette was decided upon so that all KPI graphic were of a common ‘look and feel’ – this reduces ‘noise’ in the visual impact and allows decision makers to focus on the information being delivered.

3. A watermark is added in the upper right corner (just above the date) to identify which Argos Datablock was used to generate the data to create this graphic. The watermark is the Metric ID from the KPI Inventory listing. If multiple reports use the same datablock, the Metric ID is used for all reports and charts.
Noteworthy – Adding Notation to the Argos Datablock

Each Argos datablock will have three notes added to inform the users of 1) the requested schedule to produce the chart or report and 2) the detailed documentation regarding dimensions or calculation statements taken directly from the original KPI Inventory list and 3) the contributing school BI Team information.

These should be modified as necessary at each school when customizing the datablock for local considerations.
Key Performance Indicators – Definitions & Customization

The following KPIs are defined below and represent only the KPIs that have been released as of the most recent date of this document. New KPIs will be added to this document as they are released.

The following KPIs have been released to the campuses for testing and/or production implementation. In this document you will find the Metric Category, Metric Title, Metric ID, Metric Description, Metric Calculation, requested Unit of Measure, Metric Source, Metric Dimension, Metric Frequency and Related Objective if one was given in the original KPI Repository Listing created by Tennessee State University and the Deloitte Consulting firm.

Additionally, the KPI definition also contains the ODS source used to extracted the KPI information form the data warehouse.

Any issues found during testing should be reported to the BIDWTech@tbr.edu address.

Key Performance Indicators Released To Date

Admissions
A6 & A7    A6 Freshmen SAT and A7 Freshmen ACT
A8    New Freshman High School GPA
A10    Mean transfer GPA

Access to Education - Distance Education
AE1    Online Education Enrollment

Business & Finance
B1    Tuition Revenue
B1    Tuition Revenue by Term (Additional metric found during development)

Development
D1    Alumni Donations and Gift Summary

Enrollment
E3    Percentage of Graduate to Undergraduate Students
E4    New Freshman Enrollment

Graduation
G5 Degrees Awarded by Level or Field of Study
KPI Metric ID:  A6 & A7 Freshmen SAT and Freshmen ACT

Metric Category:  Admissions

Metric Title:  A6 Freshmen SAT and A7 Freshmen ACT

Metric Description:  Measures the average SAT and ACT score for the new freshman class

Metric Calculation:  Average SAT and ACT score for incoming freshman class

Unit of Measure:  SAT scores and ACT scores

Metric Source:  Best Practice Analysis (G)

Metric Dimension:  Gender, Race, Student Type (PT/FT), Zip Code

Metric Frequency:  Annually

Related Objective:  Admit and retain qualified and motivated students

ODS Source:  ADMISSIONS_APPLICATIONS, ADMISSIONS_DECISION, PRE_STUDENT, PERSON, ENROLLMENT

Argos DataBlock:  A6-A7_New_Freshman_SAT_ACT

Datablock points for possible modification include the following:

The datablock will require the Argos user security to be modified for your campus.
KPI Metric ID: A8 New Freshman High School GPA
Metric Category: Admissions
Metric Title: New Freshman High school GPA
Metric Description: Measures the average Grade Point Average for incoming freshmen class
Metric Calculation: Average high school GPA of graduating class
Unit of Measure: GPA
Metric Source: Best Practice Analysis (G)
Metric Dimension: Gender, Race, Student Type (PT/FT), Zip Code
Metric Frequency: Annually
Related Objective: Admit and retain qualified and motivated students

ODS Source: ADMISSIONS_APPLICATIONS, ADMISSIONS_DECISION, PRE_STUDENT, PERSON, ENROLLMENT

Argos DataBlock: A8_New_Freshman_Highschool_GPA

Datablock points for possible modification include the following:

The datablock will require the Argos user security to be modified for your campus.
KPI Metric ID: A10 Mean Transfer GPA
Metric Category: Admissions
Metric Title: Mean transfer GPA
Metric Description: The mean grade point average of fall new transfer students
Metric Calculation: Sum of all donation dollars
Unit of Measure: Number
Metric Source: Best Practice Analysis (I)
Metric Dimension: Gender, Race, Student Type (PT/FT), Zip Code
Metric Frequency: Annually

ODS Source: ADMISSIONS_APPLICATIONS, PRE_STUDENT, PERSON, ENROLLMENT, GPA

Argos DataBlock: A10_Mean_Transfer_GPA

Datablock points for possible modification include the following:

The datablock will require the Argos user security to be modified for your campus.
KPI Metric ID: **AE1 Online Education Enrollment**

**Metric Category:** Access to Education - Distance Education  
**Metric Title:** Online Education Enrollment  
**Metric Description:** Measures the amount of students that are enrolled for online courses  
**Metric Calculation:** Number of students that are enrolled in online courses  
**Unit of Measure:** Count students  
**Metric Source:** NACUBO, Academic Master Plan  
**Metric Dimension:** Academic Level, Student type (FT, PT), Zip Code, Programs  
**Metric Frequency:** Semester  

**ODS Source:** STUDENT_COURSE, ENROLLMENT

**Argos DataBlock:** AE1_Online_Education_Enrollment

**Datablock points for possible modification include the following:**

1. **Argos variable SQL_College**
   
   The variable will require the function TBRCREMGR.F_BI_CURTERM or similar to calculate current term. See the addendum to this document for a discussion on the common functions created for the Argos BI datablocks.

2. **Argos variable SQL_Department**
   
   The variable will require the function TBRCREMGR.F_BI_CURTERM or similar to calculate current term. See the addendum to this document for a discussion on the common functions created for the Argos BI datablocks.

3. **Argos variable SQL_OnlineStudent_Enrollment**
   
   The variable will require the function TBRCREMGR.F_BI_CURTERM or similar to calculate current term. See the addendum to this document for a discussion on the common functions created for the Argos BI datablocks.

4. **Argos variable SQL_Subject**
   
   The variable will require the function TBRCREMGR.F_BI_CURTERM or similar to calculate current term. See the addendum to this document for a discussion on the common functions created for the Argos BI datablocks.
**KPI Metric ID:** B1 Revenue from Tuition  
**Metric Category:** Business & Finance  
**Metric Title:** Tuition revenue  
**Metric Description:** Revenue from tuition  
**Metric Calculation:** Total dollars in tuition  
**Unit of Measure:** Dollars  
**Metric Source:** Document provided by Dr. Burch-Simms.  
**Metric Dimension:** Term, Department, Academic Level, Course Section, Credit Hour, Program, In-State students, Out of State Students  
**Metric Frequency:** Semester  

**ODS Source:** RECEIVABLE_ACCOUNT_DETAIL  
**Argos DataBlock:** B1_Total_Tuition Revenue  

Datablock points for possible modification include the following:  

1) Argos variable SQL *revenue_by_tuition*  

The DETAIL_CODE column values may change from school to school. Please review the following values and modify the Argos datablock as necessary. Please verify the correct code and values with your functional offices and data owners.  

<table>
<thead>
<tr>
<th>Datablock author value</th>
<th>Modified to/interpreted as</th>
</tr>
</thead>
<tbody>
<tr>
<td>'TUGM'</td>
<td>decoded as 'UG In State</td>
</tr>
<tr>
<td>'TUSM'</td>
<td>decoded as 'UG In State</td>
</tr>
<tr>
<td>'TUGO'</td>
<td>decoded as 'UG Out State</td>
</tr>
<tr>
<td>'TUGS'</td>
<td>decoded as 'UG Out State</td>
</tr>
<tr>
<td>'TGRM'</td>
<td>decoded as 'GR In State</td>
</tr>
<tr>
<td>'TGSF'</td>
<td>decoded as 'GR In State</td>
</tr>
<tr>
<td>'TGRO'</td>
<td>decoded as 'GR Out State</td>
</tr>
<tr>
<td>'TGRS'</td>
<td>decoded as 'GR Out State</td>
</tr>
<tr>
<td>'TER1'</td>
<td>decoded as 'eRate UG</td>
</tr>
<tr>
<td>'TER2'</td>
<td>decoded as 'eRate UG</td>
</tr>
<tr>
<td>'TER3'</td>
<td>decoded as 'eRate GR</td>
</tr>
<tr>
<td>'TER4'</td>
<td>decoded as 'eRate GR</td>
</tr>
</tbody>
</table>
KPI Metric ID: B1 * Tuition Revenue by Term
Metric Category: Business & Finance
Metric Title: Tuition Revenue by Term- additional metric found during development
Metric Description: Measures revenue from tuition (by term)
Metric Calculation: Total dollars in tuition
Unit of Measure: Dollars
Metric Source: Document provided by Dr. Burch-Simms
Metric Dimension: Term, Department, Academic Level, Course Section, Credit Hour, Program, In-State students, Out of State Students
Metric Frequency: Semester

ODS Source: RECEIVABLE_ACCOUNT_DETAIL
Argos DataBlock: B1_Total_Tuition_Revenue_by_Term

Datablock points for possible modification include the following:

The datablock will require the Argos user security to be modified for your campus.
<table>
<thead>
<tr>
<th>KPI Metric ID:</th>
<th>D1 Alumni Donations and Gift Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metric Category:</td>
<td>Development</td>
</tr>
<tr>
<td>Metric Title:</td>
<td>Alumni Donations and Gift Summary</td>
</tr>
<tr>
<td>Metric Description:</td>
<td>Total alumni donation $'s</td>
</tr>
<tr>
<td>Metric Calculation:</td>
<td>Sum of all donation dollars</td>
</tr>
<tr>
<td>Unit of Measure:</td>
<td>Dollars</td>
</tr>
<tr>
<td>Metric Source:</td>
<td>NACUBO/Interview</td>
</tr>
<tr>
<td>Metric Dimension:</td>
<td>New Donors, Repeat Donors, Type of Gift</td>
</tr>
<tr>
<td>Metric Frequency:</td>
<td>Quarterly</td>
</tr>
<tr>
<td>Related Objective:</td>
<td>Increase the three year money average of gift income by 400% by fiscal year 2010</td>
</tr>
</tbody>
</table>

**ODS Source:** GIFT

**Argos DataBlock:** D1_Alumni_Donations_and_Gift_Summary

**Datablock points for possible modification include the following:**

The datablock will require the BI Common Function TBRCREMGR. F_BI_DiffFiscalYr or similar to calculate the two Fiscal years back and the current year as well. See the addendum to this document for a discussion on the common functions created for the Argos BI datablocks.
KPI Metric ID: E3 Percentage of Graduate to Undergraduate Students

Metric Category: Enrollment

Metric Title: Percentage of graduate to undergraduate students

Metric Description: Measures the percent split between graduate and undergraduate students

Metric Calculation: Graduate Students/Graduate + Undergrad class

Unit of Measure: Percentage

Metric Source: Academic Master Plan

Metric Dimension: Gender, Race, Student Type (e.g. Full Time, Part Time), Zip Code, Distance Education

Metric Frequency: Annually

ODS Source: MST_ENROLLMENT, MST_GENERAL_STUDENT

Argos DataBlock: E3_Percent_of_GR_To_Undergraduate

Datablock points for possible modification include the following:

The datablock will require the function TBRCREMGR.F_BI_CURTERM or similar to calculate current term. See the addendum to this document for a discussion on the common functions created for the Argos BI datablocks.

KPI Metric ID: E4 New Freshman Enrollment

Metric Category: Enrollment

Metric Title: New Freshman Enrollment

Metric Description: Measures the fall new freshmen enrollment number

Metric Calculation: Total number of freshman enrolled

Unit of Measure: Number

Metric Source: Best Practice Analysis

Metric Dimension: Gender, Race, Student Type (e.g. Full Time, Part Time), Zip Code, Distance Education

Metric Frequency: Annually

ODS Source: ADMISSIONS_APPLICATION, ADMISSIONS_DECISION, ENROLLMENT, PERSON

Argos DataBlock: E3_New_Freshman_Enrollment

Datablock points for possible modification include the following:

The datablock will require the function TBRCREMGR.F_BI_CURTERM or similar to calculate current term. See the addendum to this document for a discussion on the common functions created for the Argos BI datablocks.
KPI Metric ID: G5 Degrees Awarded by Level or Field of Study

Metric Category: Graduation
Metric Title: Degrees Awarded by level or field of study
Metric Description: Measures the degrees granted by program
Metric Calculation: Number of Degrees Granted to Students
Unit of Measure: Number
Metric Source: NACUBO
Metric Dimension: Gender, Race, Student Type (e.g. Full Time, Part Time), Zip Code, Distance Education
Metric Frequency: Semester

ODS Source: ACADEMIC_OUTCOME

Argos DataBlock: G5_Graduation

Datablock points for possible modification include the following:

The datablock will require the function TBRCREMGR.F_BL_CURTERM or similar to calculate current term. See the addendum to this document for a discussion on the common functions created for the Argos BI datablocks.


Common BI Functions

Custom Functions have been scripted and modified for generic use. They are in the notepad document **BI_CommonFunctions.txt** which can be found in the BIDW file gallery at the TBR IT-Info Wiki page.

The following functions were created in the process of designing and coding out the key performance indicators used in the TBR-TSU Business Intelligence project.

The functions are being offered for use where appropriate in creating additional performance metrics. They are also offered as a point of communication so that all schools creating performance metrics may test the functions and begin dialog on these and other required common functions so that all TBR institutions report performance measurement in a consistent fashion.

*All custom Business Intelligence functions should be created in the TBRCREMGR schema in the ODS instance.*

By placing the BI functions in the custom schema (TBRCREMGR), any future patching or upgrades to the ODS for the baseline product or enhancements by the vendor to the baseline product will not impact the Tennessee modifications to the ODS at our institutions.

**SAFE TO NUMBER FUNCTION**

**Purpose:**

To prevent an error from occurring when utilizing aggregate functions on an invalid number.

And to identify the records which contain invalid numbers.

**Description:**

The to_number function throws an error when passed an invalid number.

The safe_to_number function catches the error and returns a null.

```sql
create or replace function safe_to_number(txt varchar2) return number is
begin
    return to_number(txt);
    exception when value_error then return null;
end safe_to_number;
```
**Current FISCAL YEAR**

```sql
create or replace FUNCTION F_BI_CurFiscalYear RETURN VARCHAR IS fyear varchar(10);
begin
    select
        case when to_char(sysdate,'MM/DD/YYYY') >= '07/01/' || to_char(sysdate,'YYYY') then
            to_number(to_char(sysdate,'YYYY'))+1
        else to_number(to_char(sysdate,'YYYY'))
        end into fyear
    from dual;
    return fyear;
END;
```

**DEGREE AWARD YEAR**

```sql
create or replace FUNCTION F_BI_DEG_AWARDYEAR RETURN VARCHAR IS AWARDYEAR varchar(10);
begin
    select
        case when (select to_char(sysdate, 'MMDD') from dual) < '0701' then
            (select (to_char(sysdate-770, 'YY')) || (to_char(sysdate-365, 'YY')) as "PreviousAcademicYear" from dual)
        else (select (to_char(sysdate-365, 'YY')) || (to_char(sysdate, 'YY')) as "CurrentAcademicYear" from dual)
        end into AWARDYEAR
    from dual;
    return AWARDYEAR;
END;
```
DIFF ACADEMIC YEAR (without STVTERM imported into the ODS) F_BI_Diff_AcYear('MM/DD',0)

**Purpose:**
To calculate academic year x number of years from the current academic year without STVTERM having been imported into the ODS.

**Description:**
The function accepts an integer value x and the month and day for the beginning of the fall semester. Where x represents the number of years from the current academic year and -x represents a year in the past.

create or replace
FUNCTION F_BI_Diff_AcYear(fall_begin_date varchar,yrsBack int) RETURN VARCHAR IS  calc_year varchar(10);
BEGIN
    select case
        when sysdate+365*(yrsBack) > = 
            to_date(concat(fall_begin_date,concat('/',to_char(sysdate+365*(yrsBack),'yyyy'))),'mm/dd/yyyy') 
        and 
            sysdate+365*(yrsBack) < to_date(('01/01/'||to_char(sysdate+365*(yrsBack+1),'yyyy')),'mm/dd/yyyy') 
        then 
            to_char(sysdate+365*(yrsBack),'yy')||to_char(sysdate+365*(yrsBack+1),'yy')
        else 
            to_char(sysdate+365*(yrsBack-1),'yy')||to_char(sysdate+365*(yrsBack),'yy')
        end
        into calc_year from dual;
    return calc_year;
END;
DIFF ACADEMIC YEAR (with STVTERM imported into the ODS) F_BI_DiffAcademic_year(yrsBack int)

Purpose:
To calculate academic year x number of years from the current academic year with STVTERM imported into the ODS.

Description:
The function accepts an integer value x where x represents the number of years from the current academic year and –x represents a year in the past. If the current date falls between semesters add two months to current date and then calculate the current academic year.

Dependencies:
This function depends on the existence of STVTERM in the ODS. We had imported it from PROD.

CREATE OR REPLACE
FUNCTION F_BI_DiffAcademic_year(yrsBack int) RETURN VARCHAR IS

term varchar(10);

begin

    select nvl((SELECT stvterm.stvterm_FA_PROC_YR
                   from STVTERM
                   where stvterm.stvterm_start_date <= sysdate+(365*yrsBack) and
                   stvterm.STVTERM_END_DATE >= sysdate+(365*yrsBack)),
                   (SELECT stvterm.stvterm_FA_PROC_YR
                        from STVTERM
                        where stvterm.stvterm_start_date <= add_months(sysdate+(365*yrsBack),2) and
                        stvterm.STVTERM_END_DATE >= add_months(sysdate+(365*yrsBack),2))
               ) into term from dual;

    return term;

END;
**Diff Term** FUNCTION F_BI_DiffTerm(int)

**Purpose:**
To calculate academic period x number of years from the current academic period.

**Description:**
The function accepts an integer value x where x represents the number of years from the current academic period and −x represents a year in the past. If the current date falls between semesters add two months to current date and then calculate the current academic period.

**Dependencies:**
This function depends on the existence of STVTERM in the ODS. We had imported it from PROD.

```sql
create or replace FUNCTION F_BI_DiffTerm(yrsBack int) RETURN VARCHAR IS
  term varchar(10);

begin
  select nvl((SELECT stvterm.stvterm_code
               from STVTERM
               where stvterm.stvterm_start_date <= sysdate-(365*yrsBack) and stvterm.STVTERM_END_DATE >= sysdate-(365*yrsBack)),
             (SELECT stvterm.stvterm_code
              from STVTERM
              where stvterm.stvterm_start_date <= add_months(sysdate-(365*yrsBack),2) and stvterm.STVTERM_END_DATE >= add_months(sysdate-(365*yrsBack),2))
    ) into term from dual;

  return term;

END;
```
Volunteering for the TBR Business Intelligence Initiative

Mission Statement

The Business Intelligence Initiative is a collaborative project as it is a collaborative activity between the universities, the community colleges and the Tennessee Board of Regents (TBR) to promote, design and deliver data driven decision support metrics for strategic management of the higher education institutions that comprise the TBR.

Commitment

- Currently over 200 Key Performance Indicators (KPIs) have been identified during a collaborative effort between the Tennessee State University (TSU) and the Deloitte Consulting firm in Nashville Tennessee. These KPIs are the basis of the Business Intelligence Initiative project that is underway within then TBR and its member institutions.

- The list of identified KPIs is referred to as the KPI Repository List.

- All participation is on a voluntary basis but does involve a guaranteed level of commitment from schools who do volunteer.

- The level of commitment involves each volunteering school to accept an assignment of at least five different KPIs from the KPI Repository List for development, and to produce those five KPIs within a 90 day period. Extenuating circumstances at the volunteering campuses such as heavy workloads during upgrades and new system implementations are always given consideration for extending the development time beyond the 90 days.

- Priority of KPIs assigned for development can be agreed upon by the participants, or can follow the currently identified priority in the KPI Repository List.

- All KPIs created from each of the volunteering schools will be uploaded to a central repository so they can be reviewed for technical compliance with the most recent version of the Argos reporting tool. From the TBR central repository, the KPIs will be shared with associate campuses for review and quality assurance of the data and accuracy of the measurement.

Since the original research emanated from a four year school campus, the community colleges may find an analysis gap in the metrics listed. Any newly identified KPIs specific to the community colleges will be added to the KPI Repository List and worked as part of the Business Intelligence Initiative.
Access to the TBR KPI Repository

The TBR uses its Information Technology Wiki for distribution of the Business Intelligence (BI) Initiative scripts and documentation. The Business Intelligence Initiative is part of the Business Intelligence and Data Warehouse (BIDW) project.

Special areas within the web-site called File Galleries are used to store the BI scripts and documentation. The BI Initiative download files are listed in the BIDW File Gallery.

Users can create an account at the TBR ITINFO home page login screen. However, access to individual Business Intelligence and Data Warehousing (BIDW) file galleries is granted to the account via an email request.

Once you have created your TBR ITINFO account, send an email to the BIDWTech@tbr.edu with BIDW Gallery in the subject line to request being added to the BIDW Gallery group.

http://itinfo.tbr.edu/itinfo/tiki-index.php
Contact Information

Questions regarding this document should be emailed to BIDWTech@tbr.edu