Budget DataMart (BDM) Basics

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BDM History

1996 Chancellor formed Management Information Systems Task Force
Created to provide accurate data needed for budgeting needs

1997 First rollout of 12 BDM reports to Fiscal managers at the Unit/School/College level
Started with 60 copies of the Brio software and BDM Brio training began

1999 Development, upgrade and rollout of BDM Brio V6 web version

2000 BDM rollout begins and made available to all areas of the university

2001 Increase of BDM users, training, new report creation

2002 Move original 60 users to the BDM Brio web version

2003 Rollout completed, new BDM homepage

2004 Very first BDM/Brio Users group meeting

2005 BDM updated to receive next day data

2006 Additional elements added to BDM

2007 Decision made to upgrade the Brio software

2008 Install and rollout of Brio software upgraded to Hyperion
All users moved to Hyperion software, using NetID, new BDM homepage, training

2009 Brio sunset and taken offline, new workshop and document development
Understanding how the Budget DataMart (BDM) works

Hyperion – software used to access data
- Software on a server
- IR web client software (Plugin)

BDM - a datamart (data warehouse)
- Housing data to help with budgeting

Source systems – where the data comes from
- FRS data
- Genesys (HCM coming soon)
- MUD
- Your

How do you get to the data?
- Webpage
  - BDM – [www.bdmhyperion.uconn.edu](http://www.bdmhyperion.uconn.edu)
- Browser
  - Internet Explorer (IE)
    - Version 6
    - Version 7
  - FireFox
    - Not tested for use at this time
- Computer operation system
  - XP
  - Vista
  - 2000 – must upgrade
- Hyperion Server
  - BDM homepage
- Logon Hyperion Workspace
  - NetID/password
What is in the datamart? A collection of data tables is found in the datamart.

- Aggregate tables
- Transactional tables
- Standard set of Documents
- Focus on Budgeting
- Not All FRS, Genesys, MUD table data

MUD - Master University Department Table Structure

11 Exlevels
46 Units, Schools, Colleges
376 Departments
127 Subdepartments

GENESYS (HCM) data table
- Employee Num
- Pn Number
- Name
- Status Current
- Pay Type
- Gender
- Eeo Classification
- Handicap Indicator
- Veteran Indicator
- Uconn Hire Date
- Birth Date Pers
- Citizenship Code
- Work Loc
- Dept Work
- Dept3 Affiliated
- Pay Plan
- Pay Group
- Step

FRS data table
- Load Date
- School
- Department
- Sub Department
- Fiscal Yr
- Campus Code
- Account Num
- Subcode
- Update Num
- Batch Ref
- Batch Dt
- Seq Num
- Amt Sign
- Tran Code
- Account Num A
- Subcode A
- Ref
- Ref 2

29,668 Accounts
**What is Hyperion?** Software used to access the data, documents and reports.

**BDM Hyperion Documents**

Hyperion Documents have sections:
- Query
- Results
- Tables
- Reports
- Pivots
- Charts

**What you can do with the data:**
- Filter (Query and Results)
- Compute Elements (Query & Results)
- Import (e.g. Excel table)
- Export (e.g. Excel table)

**Review**
- Get your computer setup
  - IE settings
- Open BDM homepage [WWW.BDMHyperion.UCONN.EDU](http://WWW.BDMHyperion.UCONN.EDU)
- Click the BDM logo box
- Sign-on to Hyperion Workspace
  - Using NetID/password
- Download the IR web client (plugin)
  - Tools/Install/Interactive Reporting Web Client
- Open Budget DataMart folder
- Select a BDM document
- Complete the filter box selections
- BDM Hyperion IR document opens in a report section