Data Warehouse - FILExxDW
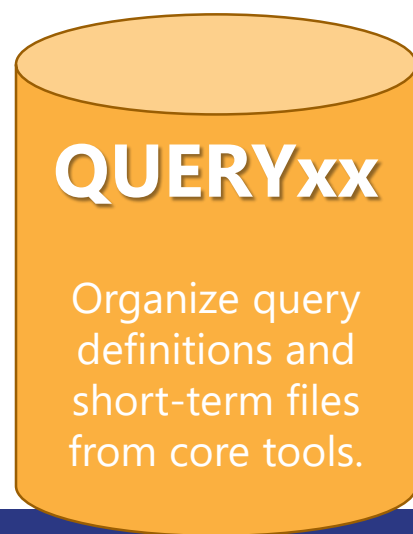
DATA STORAGE FOR ANALYSIS

Data Warehouse in CU*BASE

The Data Warehouse is a shared-resource solution for connecting multiple data sources to the rich core data already in CU*BASE. The Data Warehouse and its toolset is built into CU*BASE and accessed via a normal CU*BASE login.

NEW

- **FILExxDW** (connect new data to the core & store core data longer)

- **QUERYxx** (store queries & custom short-term files from core tools)

QUERYxx is not changing….YET

FILExxDW

Data storage from multiple sources to feed analysis and reports

QUERYxx

Organize query definitions and short-term files from core tools.

People Who Like a DW

Marketers
IT Staff
Business Intelligence
Database Adminstrators
Data Analysts
CEO/COO/CIO

Data Warehouse – Key Points

Shared-resource solution
Ideal for anyone who wants a Data Warehouse but may not want to pay for hardware, software, IT, and new tools.

Build on existing CU*BASE infrastructure shared by all credit unions, and uses tools credit union staff are already familiar with today.

Tools are familiar, and free
Data in the DW is accessed and worked with the free IBM Query tool (Tool 100). Importing/downloading data is via the free IBM iAccess tool (Tool 1375). Other tools to manage the DW environment are native to CU*BASE.

Administration
An entirely user-controlled and defined space – governance, management, procedures, and processes that utilize the Data Warehouse are controlled by the credit union.

Quick facts:
- Simple buy-in. Simple exit if necessary.

- Someone at the CU needs to be the database administrator.

- Training and tool support is provided by Asterisk Intelligence

Data Warehouse – Ready to Buy

Ordering a Data Warehouse is a solid step in building or expanding a data warehousing strategy.
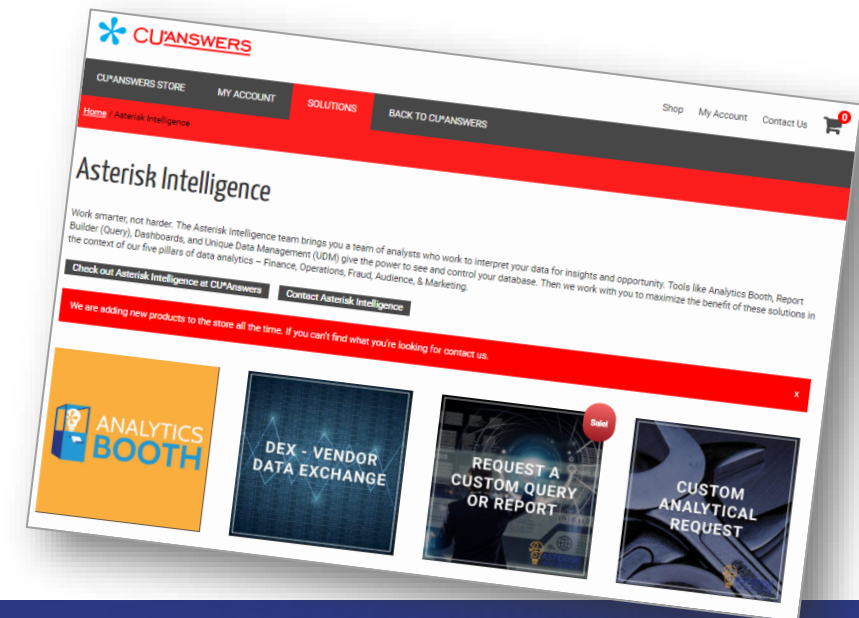
The CU*BASE Data Warehouse can complement an existing external data warehouse, or it can become a one-stop shop for connecting and storing multiple sources of data to enrich analysis efforts.

PRICING

- **$1000 Implementation (one-time)**
- **$100 Base (monthly)**
- **$10/GB Utilization (monthly)**

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New Data ← 2 STRATEGIES → More data

Connect new data with core data!

MIX 3RD PARTY DATA WITH CORE DATA

- Import any outside source of data to connect with rich Core data on members, transactions, and products.
- Vendor reports, campaign engagement data, survey form answers, HPSA zip codes, State/County/City economy stats.

CONNECT INTERNAL EXCEL REPORTS TO CORE DATA

- Import home-grown internal Excel tracking or reporting sheets that are member-level. In the DW, the data is now available to use in future reports or analysis of those members.
- Ex. List of members/loans targeted for Write-Off review, List tracking TDR loans, e

ASTERISK INTELLIGENCE

New Data ← **2 STRATEGIES** → **More data**

Keep core data longer!

KEEP CORE DATA THAT IS OTHERWISE PURGED

- CU*BASE is a transaction processing core. Data has defined retention periods to keep the system clean and relevant for processing actions quickly.
- Store copies of data scheduled to be purged in the DW for future access and reference.

KEEP MARKETING SEGMENTS (Custom Lists) LONG-TERM

- The DW is the only place in CU*BASE that won't purge or change data files on a routine basis.
- Store lists of targeted member segments for long-term studies on ROI and campaign success.

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More Data = Phone Optics

(available today)

Data Warehouse is Required Pre-requisite
Phone Optics is a rich set of *optional* data that records features used by staff in Phone Operator.

Phone Optics is designed for fixed-period analysis of phone support interactions to analyze the *non-transactional* reasons members engage with the credit union, and how staff are assisting.

Data Collection = Free
Turn it on for free and choose how long to collect the data.

Data Analysis = DIY or Hire AI
Asterisk Intelligence offers an analysis of Phone Optics data which is produced off the data once the collection period concludes.

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Data Warehouse – Is NOT...

...a Data Lake

Data Warehouse = structure and format the data <u>before</u> storing it. All data in storage follows consistent rules with effort to apply those rules handled by user or importing tools.

Data Lake = store data without changing any structure and format of data. The effort to structure and format is handled on the fly for use by query or presentation tools as needed.

...a replacement for an existing External Data Warehouse

Instead, the Data Warehouse can be a complement to an existing Data Warehouse owned by the credit union. Some have DWs in-house, some are online via a vendor. But any CU with an existing DW may still find value in the CU*BASE Data Warehouse for maintaining access to data within the core that otherwise would have been archived, or simply the ease of bringing external data alongside core member data without needing to arrange a way to regularly export member data out of the core.
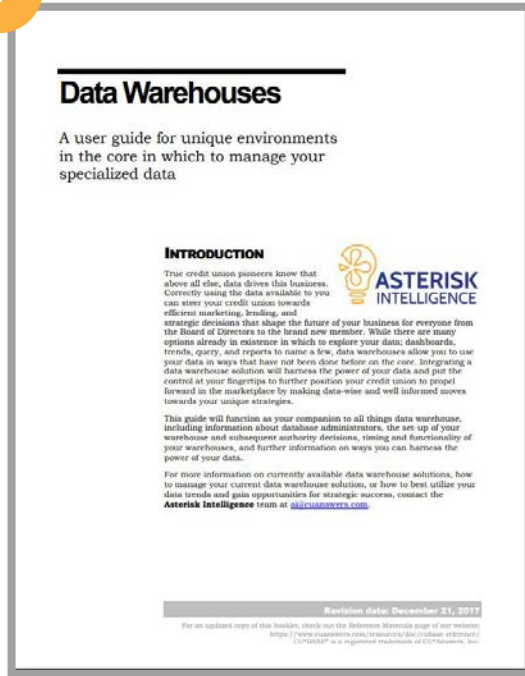
...a presentation or analysis tool

Instead, the Data Warehouse is the infrastructure that supports and enables the pursuit of data analysis and presentation/visualization. The DW is a meeting point for the storage of multiple sources of data that were previously unconnected, or previously unavailable.

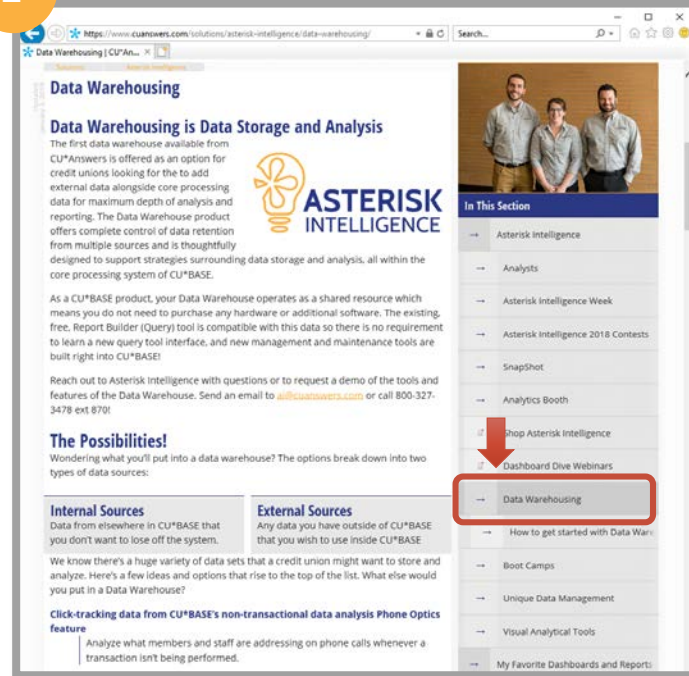# Data Warehouse – A Few Technical Details

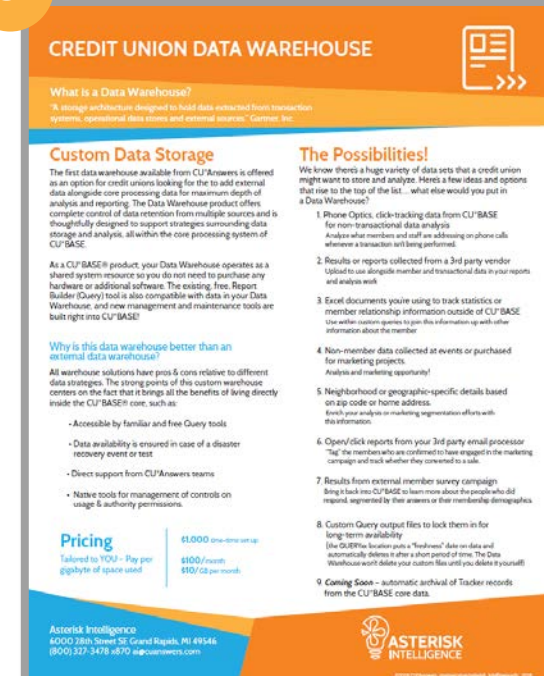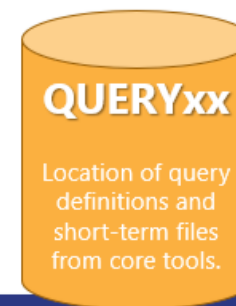| Data Warehouse - FILExxDW		
What data lives here?	→	1) Custom uploads manually processed by CU Users (external data) 2) Query outputs (data files) manually placed in DW by CU users from elsewhere in CU*BASE (internal data) 3) Tracker Archives automatically placed in DW by CU*BASE system (internal data - 48054 in 19.05) 4) Phone Optics automatically placed in DW by CU*BASE for optional data collection programs offered by CU*Answers (internal data – future optional data sets TBD)
Replication for High Availability?	NO	The Data Warehouse and any data inside it will not be available when CU*BASE is performing a High Availability test or in a failover situation. Access will be restored once CU*BASE returns to processing on it's primary servers.
Back-Ups?	YES	CU*Answers processes these.
Data Uploads?	YES	By CU User only with iAccess Database Design feature + iAccess File Upload software (Tool 1375 or tool 374)
Data Downloads?	YES	By CU User only with iAccess File Download software (Tool 1375 or Tool 373)
Data Transfers?	NO	No vendor access or to feed automated file transfer programs.
Data Mining?	YES	By CU Users and Data Center Staff (if authorized) with Report Builder/Query (Tool 100)
Data Presentation?	NO	CU User can choose to print data, display data on-screen in CU*BASE, or download to their PC to work with it further from there. There is no CU*BASE tool designed for data presentation or visualization.
Library Authority Controls?	YES	By CU User with Library Authority Management tools (Tool 1981)
Retention Rules	Unlimited	No automatic purge schedule will be established. All data will remain in storage unless CU user chooses to delete it. It is the responsibility of the CU to decide when to delete.
Purge/Delete Controls?	YES	By CU User via manual processes with Library Dashboard (Tool 1980)

Data Warehouse – Resources

1) https://www.cuanswers.com/wp-content/uploads/DataWarehouses.pdf
2) https://www.cuanswers.com/solutions/asterisk-intelligence/data-warehousing
3) PDF – sales 1-pager