ASTERISK
INTELLIGENCE

GETTING STARTED

CU*BASE DATA WAREHOUSE

The First 5 Steps

1. Assign an administrator

Is this you? If it isn't, let's find out who will be taking on this responsibility and share this guide with them.

Administrator Tips - See the Admin Only section!

2. Get onto the Authorized User list

Who can do this: The administrator of the Data Warehouse.

1. Submit request to Administrator to add your CU*BASE login ID to the authority list for your Data Warehouse

2. Once processed, confirm your authority by either of the following tests:
    a. Use Query (Tool 100) to create any database file to the location FILExxDW (xx = your CU ID).
    b. Use the Library Dashboard (Tool 1980) to access the Data Warehouse option.

3. Get access to the Tools

Who can do this: Any person authorized to grant tool authority per your credit union's policies.

1. Submit request to a person authorized to grant tool authority. The tools to request are:
    a. 1980 – Library Dashboard
    b. 1310 – Library Stats Dashboard
    c. 1375 – Data Transfers (Uploads and Downloads)

2. Get in and play around with these! You can begin using all except Tool 1375 immediately (a special upload/ download authority is required before Tool 1375 will work with your Data Warehouse)

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Welcome to your Data Warehouse!

This document will help guide you through common first-time decisions and tasks to begin using your Data Warehouse in CU*BASE.

Is this guide for you?

There are two types of users. The first is the person who get hands-on to work directly with the Data Warehouse and manage or process the files inside it. This will include the person(s) with the responsibility of being the database administrator of the Data Warehouse.
The second is the person who only interacts with files stored in the Data Warehouse by using them within custom reports in the Query tool.

This guide is intended for the first type of user – the hands-on person who manages and populates data within the Data Warehouse.

4. Request special upload and download permissions

Who can do this: The person in the role of your Security Officer should sign and submit the security authorization form to Asterisk Intelligence

1. Provide the Data Warehouse Security Request form to your Security Officer
    a. Request only the access you personally will need. Not everyone needs both upload and download permissions.

2. Security Officer submits the signed Data Warehouse Security Request form to Asterisk Intelligence

3. Asterisk Intelligence provides confirmation once the request is processed

5. Put your first database table in the Data Warehouse

Who can do this: You!

Use Query – there is no way to get this going

1. Create a custom Query configure the output database table to be stored in the FILExxDW location.
2. Run the Query
3. Review the new table and its contents via the Library Dashboard (Tool 1980)

Use an Excel File

1. Choose an Excel file to upload (recommended file types are .xlsx, .xls, .csv)
2. Create a database table and corresponding FDFX file using the Database Design Tool via Tool 1375 to map the Excel

A Few Words...

Review this terminology guide to familiarize yourself with the database terms and labels used on the majority of our Data Warehouse documentation and tools.

Library/Warehouse

A Library (referred to as "Location" on most Report Builder screens and "Warehouse" in some documentation) is a storage location for tables (files), and sometimes custom queries that you create.

For CU*BASE users, the Data Warehouse library name is FILExxDW - Custom Data Warehouse, a location supporting long-term storage for analysis and reporting.

A Library can contain tables and queries.

Table

A data table (referred to as "File" on most Report Builder screens) is a storage location for data in CU*BASE. It will hold rows and columns representing the details of any specific topic. For example, one table holds member name and address information, while another stores loan account information, and yet another stores your current dividend processing configurations. This term does not apply to files stored on your computer such as Excel files.

A table will contain records and columns.

Record

A Record is a complete row of data in any table (file) that is all related to a specific item. For example, the MASTER table is structured to store one row per membership so the record is the entire set of data found in each column for that single member's row/record.

Column

A Column (referred to as "Field"' on most Report Builder screens) is any individual piece of data stored in a record. For example, the MASTER table contains membership information so columns include First Name, Last Name Address Line 1, Address Line 2, Date Opened, Birth Date, etc.

Query

A Query (referred to as a custom report in some documentation) is a set of rules and definitions that you use to perform inquiries on data tables and organize, display, or print the results. The CU*BASE Query tool (referred to as Report Builder in most documentation) is the IBM Query program integrated into CU*BASE and accessed via Tool 100.

Authority

An Authority setting is a configuration which controls a user's ability to interact with objects or features in the database system.

Object

An Object is a general term for any database element that contains data – Library, Table, Query, Program.

Administrator Only

Manage Library Authorities

Use the Library Authority Management tool to maintain a list of CU*BASE users who can interact with the Data Warehouse library and its tables. This authority is a pre-requisite to any potential use or access to the Data Warehouse. It is an all-or-nothing type of authority.

There are no levels of permissions to manage with this type of authority. Simply add a CU*BASE user ID to the list to grant authority, or remove a CU*BASE user ID to retract authority. The impact on access to tools and interactions with tables is immediate.

Tip: You can add a user to this list without risking harm to your data tables as long as you do not grant the person further tool access or upload permissions.

Tip: Keep in mind - any person on this list with concurrent access to Tool 100 can technically overwrite any data table in the Data Warehouse.

Manage Tool Authorities

Use the standard CU*BASE security tools to manage which tools a user has access to for interacting with or analyzing the Data Warehouse. The tool is the gatekeeper to various features for working with data and tables within the DW.

Example - If you want a user to run queries that use files from the DW (requires Library Authority) but don't want certain that person to have the power of deleting a table, then only provide them tool authority to the query processing tool (Tool 100) and do not grant access to the table management tool (Tool 1980).

Remember: A prerequisite to any actions with the Data Warehouse is Library Authority.

Manage Upload/Download Authorities

Submit the request to add or remove a specific user's ability to upload to and/or download from the Data Warehouse. This is an additional set of controls which allows you to be sure only properly trained and responsible individuals can perform uploads to introduce new data into the Data Warehouse. Upload authority with full rights includes the ability to map an Excel file in order to create a compatible database table in the Data Warehouse.

Choose to grant either upload, or download, or both.

Choose to grant full rights (any table), or limit a user's upload or download rights to only a select list of table names.

Remember: A prerequisite to any actions with the Data Warehouse is Library Authority.

Resources

Videos - ondemand.cuanswers.com

Our library of video resources is published on the website – ondemand.cuanswers.com – Including tutorials and recorded educational webinars. Start with these ones:

Welcome to the Data Warehouse

ondemand.cuanswers.com/welcome-to-the-data-warehouse

Mapping an Excel File to Create a Table in the Data Warehouse

ondemand.cuanswers.com/mapping-an-excel-file-to-create-a-table-in-the-data-warehouse

Uploading to a Table in the Data Warehouse

ondemand.cuanswers.com/uploading-to-a-table-in-the-data-warehouse

Reference Booklet – cuanswers.com

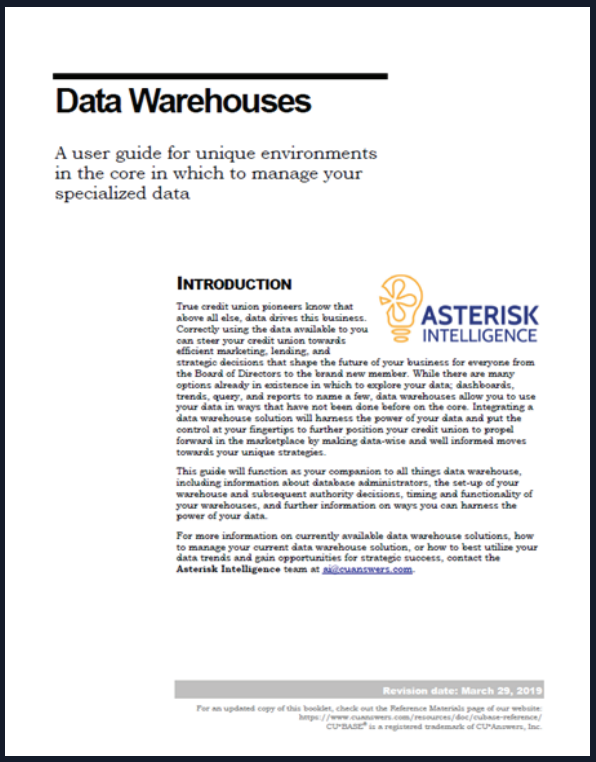
The reference booklet is the most comprehensive and detailed set of information about the Data Warehouse, it's tools, it's specifications, and its role in the family of data storage locations of CU*BASE. It's a large document, but very valuable as a reference and it's simple to search for specific topics whenever necessary.

www.cuanswers.com/wp-content/uploads/DataWarehouses.pdf

Data Warehouse Security Request Form – cuanswers.com

This is an operational resource – a form your Security Officer must complete, sign, and submit to Asterisk Intelligence for processing. It is only necessary to fill out this form for staff you wish to grant special permissions of uploading and downloading data between the Data Warehouse and their PC or your shared drive.

www.cuanswers.com/wp-content/uploads/Data-Warehouse Security-Request-Form.pdf



Data Warehouses

A user guide for unique environments in the core in which to manage your specialized data

INTRODUCTION

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True credit union pioneers know that above all else, data drives this business. Correctly using the data available to you can steer your credit union towards efficient marketing, lending, and strategic decisions that shape the future of your business for everyone from the Board of Directors to the brand new member. While there are many options already in existence in which to explore your data; dashboards, trends, query, and reports to name a few, data warehouses allow you to use your data in ways that have not been done before on the core. Integrating a data warehouse solution will harness the power of your data and put the control at your fingertips to further position your credit union to propel forward in the marketplace by making data-wise and well informed moves towards your unique strategies.

This guide will function as your companion to all things data warehouse, including information about database administrators, the set-up of your warehouse and subsequent authority decisions, timing and functionality of your warehouses, and further information on ways you can harness the power of your data.

For more information on currently available data warehouse solutions, how to manage your current data warehouse solution, or how to best utilize your data trends and gain opportunities for strategic success, contact the **Asterisk Intelligence** team at ai@cuanswers.com.

Revision date: March 29, 2019

For an updated copy of this booklet, check out the Reference Materials page of our website: https://www.cuanswers.com/resources/doc/cubase-reference/

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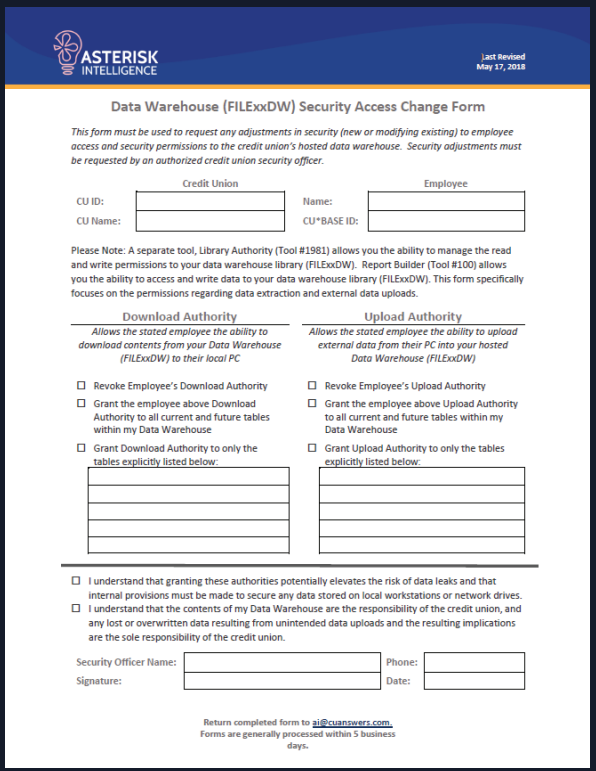
Reference Booklet – cuanswers.com



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Last Revised May 17, 2018

Data Warehouse (FILExxDW) Security Access Change Form

This form must be used to request any adjustments in security (new or modifying existing) to employee access and security permissions to the credit union's hosted data warehouse. Security adjustments must be requested by an authorized credit union security officer.

Credit Union

CU ID:

CU Name:

Employee

Name:

CU*BASE ID:

Please Note: A separate tool, Library Authority (Tool #1981) allows you the ability to manage the read and write permissions to your data warehouse library (FILExxDW). Report Builder (Tool #100) allows you the ability to access and write data to your data warehouse library (FILExxDW). This form specifically focuses on the permissions regarding data extraction and external data uploads.

Download Authority

Allows the stated employee the ability to download contents from your Data Warehouse (FILExxDW) to their local PC

- ☐ Revoke Employee's Download Authority
- ☐ Grant the employee above Download Authority to all current and future tables within my Data Warehouse
- ☐ Grant Download Authority to only the tables explicitly listed below:

Upload Authority

Allows the stated employee the ability to upload external data from their PC into your hosted Data Warehouse (FILExxDW)

- ☐ Revoke Employee's Upload Authority
- ☐ Grant the employee above Upload Authority to all current and future tables within my Data Warehouse
- ☐ Grant Upload Authority to only the tables explicitly listed below:

- ☐ I understand that granting these authorities potentially elevates the risk of data leaks and that internal provisions must be made to secure any data stored on local workstations or network drives.
- ☐ I understand that the contents of my Data Warehouse are the responsibility of the credit union, and any lost or overwritten data resulting from unintended data uploads and the resulting implications are the sole responsibility of the credit union.

Security Officer Name:

Phone:

Signature:

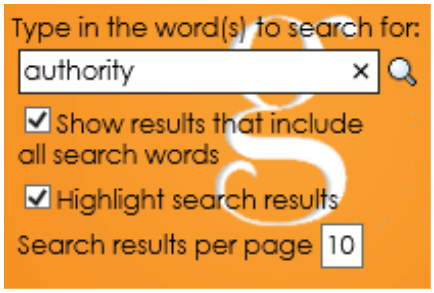
Date:

Return completed form to ai@cuanswers.com.
Forms are generally processed within 5 business days.

Data Warehouse Security Request Form – cuanswers.com

CU*BASE Help – help.cubase.org

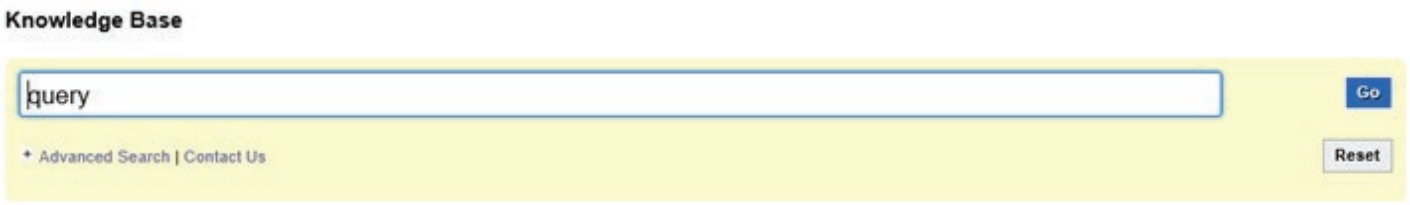
Although the Help resources are available directly through the URL of help.cubase.org. Don't forget you can always click the small button within the bottom menu of any CU*BASE screen. What will you find? A specialized help page that provides information and details relevant to the individual screen that you are currently viewing within CU*BASE.



Curious in general? Be sure to heavily utilize the search function to find any page without requiring a visit to specific CU*BASE screens first. Simply type in a keyword or two, and check through the results for helpful information.

Knowledgebase – kb.cuanswers.com

A huge library of questions and answers are posted in the Knowledgebase directory. Search a key term to find a list of options to review and research. If you don't see your question (check some even if they look close to your idea – they could be linked to other helpful pages), check the CU*BASE Help resource or the Data Warehouse Reference Booklet next.



Still stuck?

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