ISDS 556 - Project Charter

**Puglia Winery Case: Data Warehouse Business Intelligence System Design**

**Project Start Date: 7/1/2024 Project Finish Date: 7/28/2024**

**Weekly Meeting Time:** Saturday/Sunday at 9am

**Weekly Meeting Locations: <https://fullerton.zoom.us/j/81264596364>**

# **Project Schedule Milestone:**

* Assessments
  + ~~Strong Sponsorship~~
  + ~~Motivation~~
  + ~~Feasibility~~
* Project Charter
* Project Planning
  + Research (What problem are we trying to solve?)
    - Understand strategic business initiatives
    - Identify key performance indicators or success metrics for each core business process
    - Determine potential impact on performance metrics with better access to improved information.
    - Research product profitability, customer analysis, and market profitability
    - Model Architecture
  + Prepare proposals
    - Financial returns and benefits
* Run simulations on top database and information system candidates
  + Dimensional modeling
  + ETL design
  + Application development.
* Pull financial reports featuring revenue profits and or potential losses
* Make Decision
* Propose implementation timeline
* Deployment

# **Project Scope:**

Data Integration

Consolidate data from the existing production system and the merchant sales system.

Timeframe

Project completion is expected within 1 month from initiation, including requirements gathering, design, implementation, testing, and training.

# **Project Deliverables:**

Data Warehouse

* Fully operational data warehouse
* ETL processes to ensure data integration and consistency.

Business Intelligence Reports

* Custom reports and dashboards for product profitability
* Key customer analysis
* Market profitability

# **Project Objectives:**

The objective of this project is to develop a comprehensive data warehousing solution for Puglia Winery to enhance decision-making and support future growth. By integrating the disparate production and sales information systems, the solution aims to provide a unified view of the winery's operations, enabling better analysis of sales trends, customer preferences, and market dynamics. This will allow Jack Gillespie and his team to make data-driven decisions regarding production volumes, target markets, and key customers. The ultimate goal is to optimize operations, improve strategic planning, and sustain the winery's growth by leveraging business intelligence tools for more informed and effective decision-making. This project will transform the winery's decision-making process from relying on “gut feeling” to utilizing solid, evidence-based insights.

# **Roles and Responsibilities:**

**Roles: Data Analyst, Data Modeler, Project Manager, Project Architect, Technical Lead**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Responsibilities** | **Contact** |
| **Keerthanaa Ellur** | Data Analyst | Explore the integrated data from the data warehouse.  Understand the structure of the data.  Identify key metrics, and perform exploratory data analysis to uncover trends, patterns, and outliers.  Create reports and dashboards that visualize key performance indicators. | kellur0@csu.fullerton.edu |
| **Kathy Espinoza** | Data Modeler | Analyze and translate business needs.  Evaluate current data systems.  Ensure that data models adhere to data governance policies and regulatory requirements.  Maintain logical and physical data models along with accurate metadata. | kaky0225@csu.fullerton.edu |
| **Sydney Horanic** | Project Manager | Oversee the milestones have been achieved.  Collaborate with various stakeholders.  Oversees day-to-day project activities.  Develop project plans, manage resources, monitor progress, and report to stakeholders. | shoranic@csu.fullerton.edu |
| **Arundhathi Roy** | Project Architect | Design the data warehouse schema and oversee ETL processes.  Define data integration strategy, develop data models, and ensure data quality and integrity. | arundhathi.roy@csu.fullerton.edu |
| **Annie Xu** | Technical Lead | Implement the data warehousing solution and BI reports.  Develop ETL scripts, configure BI tools, conduct testing, and ensure technical feasibility. | ajxu@csu.fullerton.edu |

# **Stakeholders:**

* **Jack Gillespie**: Managing Director
* **Tommy Siragusa**: Winemaker
* **Stacie Giano**: Sales Manager
* **IT Team**: Support for technical implementation
* **End Users**: Stakeholders accessing BI reports