Applied A.I. Solutions
Foundations of Data Management

Final Project
Applied Governed Data Management Framework

Definitions

- **Operational Report** is instrumental to follow-up and report operational **activities on a daily, weekly, biweekly, or monthly basis**. It contains key performance indicators (KPIs) to help monitor and control business processes.

- **Executive Report** is a summarized operational report with layers of **aggregated data, and comparisons** between different periods of time. It contains key performance indicators (KPIs) to facilitate decision-making and performance improvement enhancements.

- Reporting is instrumental to a governed data management framework. A report can be an input to a specific subdomain or produced by a subdomain as an outcome to support a governance program.

- Operational and Executive Reports examples:

Operational Report - <mark>example</mark>

Sales Team Operations by Quarter
01/01/22 - 03/31/22

EXAMPLE

Region	Province	City	Sales person	Item	Unit Price ($)	Quantity Sold	Quantity Quota	Quantity Sold / Quantity Quota (%)	Discount Applied (%)	Discount Cap (%)	Gross Sales ($)	Gross Sales Quota ($)	Gross Sales / Gross Sales Quota (%)
	New Brunswick	Moncton	S1	Chair	350	50.00	45.00	11%	10%	10%	$15,750	$15,750	0%
				Desk	750	28.00	30.00	-7%	-5%	5%	$22,050	$22,500	-2%
				Bookshelf	1,200	32.00	30.00	7%	5%	7%	$36,480	$36,000	1%
				Subtotal							$74,280	$74,250	
	Newfoundland and Labrador	St. John's	S2	Chair	350	30.00	30.00	0%	10%	10%	$9,450	$10,500	-10%
				Desk	750	18.00	20.00	-10%	-3%	5%	$13,905	$15,000	-7%
				Bookshelf	1,200	10.00	16.00	-38%	5%	7%	$11,400	$19,200	-41%
				Subtotal							$34,755	$44,700	-22%
Atlantic	Nova Scotia	Halifax	S3	Chair	350	50.00	45.00	11%	10%	10%	$15,750	$15,750	0%
				Desk	750	35.00	30.00	17%	-7%	10%	$28,088	$22,500	25%
				Bookshelf	1,200	32.00	30.00	7%	5%	10%	$36,480	$36,000	1%
				Subtotal							$80,318	$74,250	8%
	Prince Edward Island	Charlottetown	S4	Chair	350	40.00	30.00	33%	10%	10%	$12,600	$10,500	20%
				Desk	750	20.00	25.00	-20%	0%	4%	$15,000	$18,750	-20%
				Bookshelf	1,200	10.00	10.00	0%	5%	9%	$11,400	$12,000	-5%
				Subtotal							$39,000	$41,250	-5%
	Total										**$228,353**	**$234,450**	**-3%**
	Ontario	Toronto	S5	Chair	350	50.00	45.00	11%	10%	10%	$15,750	$15,750	0%
				Desk	750	28.00	30.00	-7%	-5%	5%	$22,050	$22,500	-2%
				Bookshelf	1,200	32.00	30.00	7%	5%	7%	$36,480	$36,000	1%
				Subtotal							$74,280	$74,250	0%
		Ottawa	S6	Chair	350	30.00	30.00	0%	10%	10%	$9,450	$10,500	-10%
				Desk	750	18.00	20.00	-10%	-3%	5%	$13,905	$15,000	-7%
				Bookshelf	1,200	10.00	16.00	-38%	5%	7%	$11,400	$19,200	-41%
				Subtotal							$34,755	$44,700	-22%
				Total							$109,035	$118,950	-8%
Central	Quebec	Montreal	S7	Chair	350	50.00	45.00	11%	10%	10%	$15,750	$15,750	0%
				Desk	750	35.00	30.00	17%	-7%	10%	$28,088	$22,500	25%
				Bookshelf	1,200	32.00	30.00	7%	5%	10%	$36,480	$36,000	1%
				Subtotal							$80,318	$74,250	8%
		Quebec City	S8	Chair	350	40.00	30.00	33%	10%	10%	$12,600	$10,500	20%
				Desk	750	20.00	25.00	-20%	0%	4%	$15,000	$18,750	-20%
				Bookshelf	1,200	10.00	10.00	0%	5%	9%	$11,400	$12,000	-5%
				Subtotal							$39,000	$41,250	-5%
				Total							$119,318	$115,500	3%
	Total										**$228,353**	**$234,450**	**-3%**
TOTAL											**$456,705**	**$468,900**	**-3%**

Notes:
1. Breakdown by region, province, city, salespersons, items
3. Note all subtotals and grans totals
3. The operational report can be transformed based on the stakeholders' needs.
4. Breakdown is possible by items / salespeople / region / etc.
5. It is only an example of the details that an Operational report should have
6. For distribution best practice use PDF formatting, letter size to facilitate printing it.
7. It is a best practice to assess users' needs to incorporate additional details along with comparisons and KPIs that can facilitate business process monitoring and controlling.

Executive Report - ==example==

Sales Team Monthly Executive Report
Gross Sales ($)

EXAMPLE

Province	Jan-22	Feb-22	Feb 22 vs Jan 22 (%)	Feb-21	Feb 22 vs Feb 21 (%)	KPIs: Participation Ratio AVG 2021	KPIs: Particpation Ratio Feb 22 (%)
New Brunswick	$51,250	$56,000	9.3%	$55,500	0.9%	30.0%	32.6% ⬆
New Foundland and Labrador	$32,560	$35,000	7.5%	$34,958	0.1%	25.0%	20.4% ⬇
Nova Scotia	$65,900	$68,456	3.9%	$55,650	23.0%	35.0%	39.8% ⬆
Prince Edward Island	$15,984	$12,365	-22.6%	$10,500	17.8%	10.0%	7.2% ⬇
East Region	$165,694	**$171,821**	**3.7%** ⬆	$156,608	**9.7%** ⬆	**100.0%**	**100.0%**

Notes:
1. mainly aggregated data to facilitate decison-making
5. It is only an example of aggregation that any Executive Report should have
6. For distribution best practice use PDF formatting, letter size to facilitate printing it.
7. It is a best practice to assess users' needs to incorporate additional details along with comparisons and KPIs that can facilitate business process monitoring and controlling.

FINAL PROJECT

Applied Data Management Framework: Operational and Executive Reports Development

- Each group must develop **two reports**, **an operational report and an executive report** based on a series of specifications, rules and constraints detailed below.

- Groups must use Exercise 1, 2 and 3 as **building blocks** for the development of this Project.

- **Business Assumptions**: reporting always requires a thorough enterprise needs assessment (business, audience and stakeholders, technology, processes, report objectives).
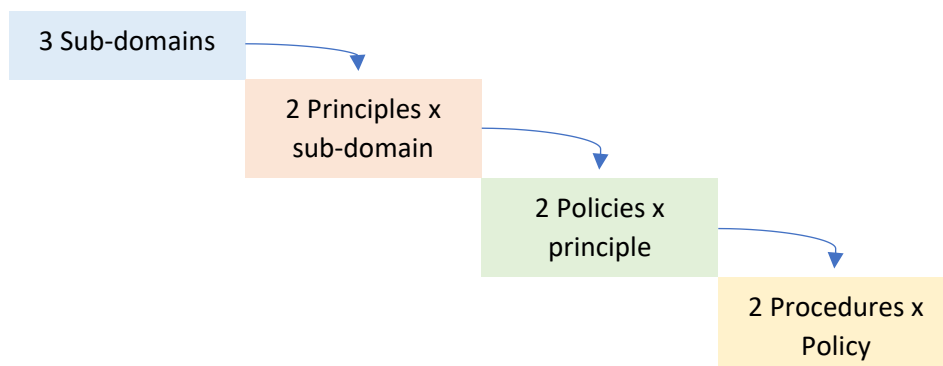
  However, for this Project you do not need to perform an assessment. Instead, you must formulate **business assumptions** to understand data within a well-defined and clear **context**.

- The reports should **clearly** and **efficiently** present the right information and facilitate the correct interpretation of it to the target audience.

For this Project you must:

 Apply a Data Governance Framework to your project**: Using your own words**, elaborate on how you have applied **theory into practice**.

 a. Use the Dama Wheel to identify 3 (three) core Applied Data Governance **sub-domains.**

 b. Write 2 (two) Applied Data Governance **principles** for each sub-domain you identified on a.)

 c. For each defined sub-domain, write 2 (two) **policies** aligned to your principles, to enforce oversight of the reporting process. The objective is to achieve a well-controlled, transparent, efficient, and quality-driven activity.

 d. For each defined policy, write 2 (two) **procedures** that you would implement, and under which you will generate the operational and executive reports **on an ongoing basis**.

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3 Sub-domains

        2 Principles x
        sub-domain

                2 Policies x
                principle

                        2 Procedures x
                        Policy
```

Project Submission: use only one PDF file to produce the following document maintaining the structure indicated below:

1. Cover Page (Indicate group # and team members)
2. Index
3. Doc's main body:
   a. Project a
   b. Project b
   c. Project c
   d. Project d
   e. Lab Exercise 3's Operational Report
   f. Lab Exercise 3's Executive reports
4. Annex (exercises)
   a. Lab Exercise 1 – submission A
   b. Lab Exercise 2 – submission B
   c. Lab Exercise 3 – submission C (additional information submitted with the reports)

<div align="center">Submit as Group#_P.pdf</div>

Excerpt from the College Policy on Academic Dishonesty:

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