## Name: DWSales Database

**Description**: Data Warehouse for Sales analytics and trend reporting

**Target audience/users for the DWSales database:**

* Sales Managers
* Global Sales Operations
* Sales Leadership
* Sales Executives
* Account Management (possibly)

## Technical Info

**Database Type:** SQL Server

**Driver (JDBC):** SQL Server(jTDS)

**Database Server:** chq-gs.bi01.chq.ei

**Database Port**: 1433

**Database**: DwSales

## Analytic Requirements

1. Tracking Sales Opportunities created in the last 2 years by opportunity contacts, GCI, Customer Account, Duns #, branch, salesperson, creation date, and close date.
2. Tracking Sales Meetings created in the last 2 years by meeting contacts, opportunity, GCI, Customer Account, Duns #, branch, salesperson, creation date, and close date.
3. Tracking Sales Service Items linked to Sales Opportunities created in the last 2 years by opportunity, GCI, Customer Account, Duns #, port, branch, salesperson, creation date, and close date
4. Tracking Internal Contact information and history
5. Tracking current Sales Personnel information from the most recent revenue month
6. Tracking current Branch information
7. Tracking current Client information

## Contents

**Business Data Owner/SME:** Global Sales Operation

**List other Visibility data stores which contain the same primary business objects:** Data is sourced from VIZCRM which gets refreshed every 3 hours.

**If other sources contain the same data, list any differences between the same data in these stores:** VIZCRM collects event data from CRM and found in RO\_CENT, CDB, EAD, the GDS Sandbox and Customer Account. The VIZCRM source should be considered the most accurate representation of AM and Sales analytic and trending data.

## Schemas/Tables

Please see the DWSales MetaData Worksheet for more details on related tables, jobs, and packages

* Sales schema
  + OPPORTUNITY
  + OPPORTUNITY\_CONTACTS
  + OPPORTUNITY\_MEETING\_BRIDGE
  + MEETING
  + MEETING\_CONTACTS
  + OPPORTUNITY\_SERVICE\_ITEM
* Dbo schema
  + BRANCH\_DIMENSION
  + CLIENT\_DIMENSION
  + DATE\_DIMENSION
  + INTERNAL\_CONTACT\_DIMENSION
  + SALESPERSON\_CURRENT\_DIMENSION
* Stage schema
  + STAGE\_MEETING
  + STAGE\_OPPORTUNITY\_MEETING\_BRIDGE
  + STAGE\_OPPORTUNTY\_SERVICE\_ITEM

## Load Frequency

* Daily at 3:15 AM (SSIS - Daily - DwSales database load job)

## Related Documentation

* DWSales MetaData Worksheet
* DWSales Data Model
* DWSales Data Flow
* DWSales SSIS ETL Flow

## Service Level Agreement

**Overall Timeliness** *(maximum guaranteed time from data sources):* 24 hours (refreshed daily)

**Expected Downtime for Regular Maintenance:** NA

**Retention Expectations:** NA

**Capacity Projections:** NA

**Workflow/Data Failure:** Can tolerate up to ***3*** days of stale data due to an emergency overnight or over the weekend

## Hardware Failure/Recovery/Backups:

**Fail Over (Disaster Recovery):** NA

**Server monitoring and recovery:** System Administration Team

**Database monitoring and recovery:** Database Administration Team

**Database Backups:** SQL scripts to create, backup, and restore database can be found here

## Workflow/Data Issues

**Tier 1 support:** Global Sales Operations Coordinator - Initial investigation and resolution based on the type of issue in Azure DevOps

**Tier 2 & 3 support:** Global Sales Operation Data Analysts – Escalation, Data issues, and Report issues

Security/Access

**Security:** All Expeditors employees have read access to the database if connected directly to the database. Further security restrictions can be applied by using GRP security via Power BI.

**Process to request (regular) access:** Access is granted by Global Sales Operations and can be requested by submitting a SAR in IDM.

**Additional requirements to have direct DB Access:** See Global Sales Operations for approval – direct email to Nichole Purfeerst or Whitney Strauss who will submit an IDM SAR. [Job Aid](https://collaboration.expeditors.com/IS/VisibilityFDG/VizButterfly/Shared%20Documents/Requesting%20a%20VIZCRM%20Named%20User.docx?Web=1)

## Reporting

**Expected Reporting tools to use:** Inetsoft and Power BI Desktop

**Officially Supports the data for:** *list reports here*

**Requests for changes/enhancements:** See Global Sales Operations

## Change History:

|  |  |  |
| --- | --- | --- |
| **Change:** | **Date** | **Name:** |
| Document Created | 4/1/2020 | Jimmy Nguyen |
|  |  |  |
|  |  |  |
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# VIZCRM Database

## VIZCRM Service Level Agreement

**Overall Timeliness** *(maximum guaranteed time from all data sources):* 3 hours

**Expected Downtime for Regular Maintenance:** 30 minutes/quarter. 99.9% uptime, Informatica maintenance may be up to 4 hours

**Retention Expectations:** 5 years

**Capacity Projections:** The initial estimate for capacity through 2020 for PERF, PROD (and DR) is 2 TB each

**Workflow/Data Failure:** Can tolerate up to 3 days of stale data due to an emergency overnight or over the weekend

## VIZCRM Hardware Failure/Recovery/Backups:

**Fail Over (Disaster Recovery):** Not implemented (in progress)

**Server monitoring and recovery:** Automated, SOP on file

**Database monitoring and recovery:** Automated, SOP on file

**VIZCRM Database Backups:** Weekly, removed when new one is created

**VIZCRM Archive Logs:** Daily, removed weekly at backup

## VIZCRM Workflow/Data Failure

**Tier 1 & 2 support:** Visibility Systems Team - Initial investigation and resolution based on type of failure in session log, manual job restart/job recovery

**Tier 3 support:** Visibility Butterfly Team – Escalation, Data issues