

ETL Process Definitions and Deliverables

- **1.0 Define Requirements** – In this process you should understand the business needs by gathering information from the user. You should understand the data needed and if it is available. Resources should be identified for information or help with the process.
 - **Deliverables**
 - A logical description of how you will extract, transform, and load the data.
 - Sign-off of the customer(s).
 - **Standards**
 - Document ETL business requirements specification using either the ETL Business Requirements Specification Template, your own team-specific business requirements template or system, or Oracle Designer.
 - **Templates**
 - ETL Business Requirements Specification Template
- **2.0 Create Physical Design** – In this process you should define your inputs and outputs by documenting record layouts. You should also identify and define your location of source and target, file/table sizing information, volume information, and how the data will be transformed.
 - **Deliverables**
 - Input and output record layouts
 - Location of source and target
 - File/table sizing information
 - File/table volume information
 - Documentation on how the data will be transformed, if at all
 - **Standards**
 - Complete ETL Business Requirements Specification using one of the methods documented in the previous steps.
 - Start ETL Mapping Specification
 - **Templates**
 - ETL Business Requirements Specification Template
 - ETL Mapping Specification Template
- **3.0 Design Test Plan** – Understand what the data combinations are and define what results are expected. Remember to include error checks. Decide how many test cases need to be built. Look at technical risk and include security. Test business requirements.
 - **Deliverables**
 - ETL Test Plan
 - ETL Performance Test Plan

- o **Standards**
 - Document ETL test plan and performance plan using either the standard templates listed below or your own team-specific template(s).
- o **Templates**
 - ETL Test Plan Template
 - ETL Performance Test Plan Template
- **4.0 Create ETL Process** – Start creating the actual Informatica ETL process. The developer is actually doing some testing in this process.
 - o **Deliverables**
 - Mapping Specification
 - Mapping
 - Workflow
 - Session
 - o **Standards**
 - Start the ETL Object Migration Form
 - Start Database Object Migration Form (if applicable)
 - Complete ETL Mapping Specification
 - Complete cleanup process for log and bad files – Refer to Standard_ETL_File_Cleanup.doc
 - Follow Informatica Naming Standards
 - o **Templates**
 - ETL Object Migration Form
 - ETL Mapping Specification Template
 - Database Object Migration Form (if applicable)
- **5.0 Test Process** – The developer does the following types of tests: unit, volume, and performance.
 - o **Deliverables**
 - ETL Test Plan
 - ETL Performance Test Plan
 - o **Standards**
 - Complete ETL Test Plan
 - Complete ETL Performance Test Plan
 - o **Templates**
 - ETL Test Plan Template
 - ETL Performance Test Plan
- **6.0 Walkthrough ETL Process** – Within the walkthrough the following factors should be addressed: Identify common modules (reusable objects), efficiency of the ETL code, the business logic, accuracy, and standardization.
 - o **Deliverables**
 - ETL process that has been reviewed

- o **Standards**
 - Conduct ETL Process Walkthrough
 - o **Templates**
 - ETL Mapping Walkthrough Checklist Template
- **7.0 Coordinate Move to QA** – The developer works with the ETL Administrator to organize ETL Process move to QA.
 - o **Deliverables**
 - ETL process moved to QA
 - o **Standards**
 - Complete ETL Object Migration Form
 - Complete Unix Job Setup Request Form
 - Complete Database Object Migration Form (if applicable)
 - o **Templates**
 - ETL Object Migration Form
 - Unix Job Setup Request Form
 - Database Object Migration Form
- **8.0 Test Process** – At this point, the developer once again tests the process after it has been moved to QA.
 - o **Deliverables**
 - Tested ETL process
 - o **Standards**
 - Developer validates ETL Test Plan and ETL Performance Test Plan
 - o **Templates**
 - ETL Test Plan Template
 - ETL Performance Test Plan Template
- **9.0 User Validates Data** – The user validates the data and makes sure it satisfies the business requirements.
 - o **Deliverables**
 - Validated ETL process
 - o **Standards**
 - Validate Business Requirement Specifications with the data
 - o **Templates**
 - ETL Business Requirement Specifications Template
- **10.0 Coordinate Move to Production** - The developer works with the ETL Administrator to organize ETL Process move to Production.
 - o **Deliverables**
 - Accurate and efficient ETL process moved to production
 - o **Standards**
 - Complete ETL Object Migration Form

- Complete Unix Job Setup Request Form
 - Complete Database Object Migration Form (if applicable)
 - **Templates**
 - ETL Object Migration Form
 - Unix Job Setup Request Form
 - Database Object Migration Form (if applicable)
- **11.0 Maintain ETL Process** – There are a couple situations to consider when maintaining an ETL process. There is maintenance when an ETL process breaks and there is maintenance when an ETL process needs updated.
 - **Deliverables**
 - Accurate and efficient ETL process in production
 - **Standards**
 - Updated Business Requirements Specification (if needed)
 - Updated Mapping Specification (if needed)
 - Revised mapping in appropriate folder
 - Updated ETL Object Migration Form
 - Developer checks final results in production
 - All monitoring (finding problems) of the ETL process is the responsibility of the project team
 - **Templates**
 - Business Requirements Specification Template
 - Mapping Specification Template
 - ETL Object Migration Form
 - Unix Job Setup Request Form
 - Database Object Migration Form (if applicable)