

# **Digital Systems**

3.1 Digital Product Management & Max Lab 1a|1b



#### ROADMAP



#### Business Systems Innovation Labs Lab 1a Pre-flight Checklist

"I did it! Check this OUT!"

Today, you'll pick up where you left off with the story of Max, the SJSU student blogger. Just follow along as she describes what she did in her new job with a startup company.

Prep: What do you need to start?

# Max Labs 1

Max's Distinctive, Impressive BizTech Student Blo

### **DUE by EOD Sunday**



#### **Creating Databases (objects)**

- Why do we need these lists?
- Why not just use Excel?
- What are we tracking?
- Unique ID?

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Source: https://developer.salesforce.com/blogs/developer-relations/2017/04/salesforce-data-security-model-explained-visually.html





#### **Getting Started**

- Get a Salesforce account
- **DO NOT** get the 30-Day Free Trial Account
- **DO NOT** use an AOL, Hotmail or Yahoo account
- Do use a new Gmail account you create for this project.

Explore Lightning Platform, the fastest way to create enterprise cloud apps



Build apps Lightning fast with drag and drop tools Customize your data model with clicks Go further with Apex code Integrate with anything using powerful APIs Stay protected with enterprise-grade security Customize UI with clicks or any leading-edge web framework



Get your very own Developer Edition A full-featured copy of Lightning Platform, for FREE.

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Source: https://developer.salesforce.com/signup



#### **Determining Data Needs**

- What are Max's needs for creating the "Pitch"
- What data are we capturing?
- What are we tracking?
- How will this data be used?

The Good CRM 🛛 🕁 🖿

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Source: https://www.softwareadvice.com/resource/lice/updatet/bs///atdnoisesglossglorse/liceacne/addetyiong-businterse/licebjerets/



#### Page Layouts

- What information do we want to show.
- Why are aesthetics important?
- Creating cleaner data?

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https://gilliansplayground-dev-ed.lightning.force.com/one/one.app#/sObj...

Source: https://admin.salesforce.com/learn-lightning-compact-layouts





### Mobile App

- What information do we want to show.
- Why are aesthetics important?
- Is this an API, ERP, Both?
- What exactly is an API?
  - An application program interface (API) is a set of routines, protocols, and tools for building software applications. Basically, an API specifies how software components should interact.



Source: https://www.salesforce.com/eu/learning-centre/crm/mobile-crm/





#### **Digital Business Models.**

- Share & Communicate
- Revise and Redesign
- 3<sup>rd</sup> Party Products (APIs)

#### FEATURED SOLUTIONS TOP CATEGORIES SHOW MORE > Secure **Cloud Contact Center Software †** Finance accountingseed Data for Sales and Service Collection Accounting on Salesforce NNN NewVoiceMedia FORMASSEMBLY Human Resources \*\*\*\* PAID \*\*\*\*\* PAID APP \*\*\*\* PAID APP APP ★ Enterprise Resource Planning **AInGenius HELLOSIGN F** formstack Native Form Builder for Salesforce Screen pop · Click-to-dial · Call logging ★ Sales \*\*\*\* PAID \*\*\*\* PAID \*\*\*\* PAID APP APP APP ★ Customer Service D&B Optimizer Contracts, quotes, proposals and more Deliver first-class Automated customer onboarding. TT & Admin Accelerate Sales with Clean Lead, TASKRAY MORE THAN PROJECT MANAGEMENT TRY IT C nintex Get a free trial Contact & Account Data \*\*\*\* PAID \*\*\*\* PAID APP \*\*\*\* PAID LIGHTNING DATA APP **★** Marketing conga Composer **†** Integration SurveyMonkey slalom ingaging documents, presentations, Make customer feedback strategy, technology, transformation, actionable in Salesforce Try it free ★ Salesforce Labs \*\*\*\* PAID APP \*\*\*\* PAID APP \*\*\*\*\* CONSULTANT

Source: https://appexchange.salesforce.com/

FOX MIS

★ Analytics



#### Monetize Max's Blog

- Do Not Close Your Browser
- Buy Now
- Click Confirmations
- Install (Launch Process)
- Max's Pitch Package



Source: https://www.themaxlabsprojectshop.com/





#### **Pitch Data File**

- CSV files
- Organization
- Viewing the Data
  - Customization



Source: https://www.salesforce.com/ca/blog/2016/09/sales-search-cheat-sheet.html



#### **Generating Reports**

- CSV files
- Organization
- Viewing the Data
  - Filtering
  - Integration

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Source: https://admin.salesforce.com/learn-lightning-create-reports



#### **Dynamic Dashboards**

- Database
- Monitoring
- Collaboration
- Customization



C Phone 39 Macros

Source: https://admin.salesforce.com/learn-lightning-create-reports



#### Business Systems Innovation Labs Lab 2a Pre-flight Checklist



"No Sh\*\*, Sherlock - The Case of the Lost Integrity"

Halloween's approaching & Max is back with another episode and a mystery to solve.

Prep: What do you need to start?

✓ If you didn't do Lab 1a and 1b, that's ok. Just do Steps 6-33 & 102-114 of Lab 1b and you're good for this one.

✓ If you didn't get the Average Amount & Equity by Type report created successfully in Lab 1b, that's ok. When you hit Step 57 in this one, just refer to the screen cap of that report embedded after that step. No worries.



### **DUE by EOD Sunday**



#### **Managing Data Corruption**

- What's the Issue?
  - Error Messages?
- Mitigation
  - Best Practices?
  - Validation Rules?



Source: http://techgenix.com/tgwordpress/wp-content/uploads/2018/06/data-corruption-Shutterstock.jpg





#### **Data Redundancy**

- Root Causes?
- Misrepresentation of Facts:
  - Corrupted Reports & Dashboard
- Solutions
  - Creating a Plan



Source: https://news.bitcoin.com/wp-content/uploads/2016/02/fl00.jpg





### **Data Integrity**

- Velocity & Veracity
- Principles



Source: http://www.rightpatient.com/wp-content/uploads/2015/05/Data-Integrity-2.jpg





#### **Entity Relationship Diagrams (ERD's)**

- Cardinality & Crow's Feet
- Data Modeling Requirements
  - Understanding Users Needs
  - Preventing Redundancy



Source: https://sites.google.com/site/dracvbms/entity-relationship-diagram



#### **Importing Data**

- Creating Tables
- Avoiding Redundancy



Source: https://nebulaconsulting.co.uk/wp-content/uploads/2014/04/pexels-photo-1179800.jpeg



#### **Avoiding Redundancy**

- Data Normalization
- Understanding Relationships
- ERD's

**Use Cases** 



Source: https://www.salesforce.com/blog/2015/11/3-steps-to-the-proper-care-and-handling-of-your-data.html







# **Digital Systems**

3.2 Data Modeling with Entity Relationship Diagrams (ERD)



## What is an "Entity Relationship Diagram"?



#### Data Model Entity = Noun | Attribute = Adjective | Relationship = Verb

Source:https://www.conceptdraw.com/How-To-Guide/picture/SOFTWARE-DEVELOPMENT-ERD-Crows-Foot.png

### What is an Entity Relationship Diagram?

An Entity Relationship Diagram (ERD) is a visual representation of different data using conventions that describe how these data are related to each other.



Source:https://d2slcw3kip6qmk.cloudfront.net/marketing/pages/chart/examples/li braryerdiagram.svg





### Primary ERD Symbols: Chen's Database Notation



- Entity = noun
  ex: shopper, item
- Attribute = adjective/characteristic ex: item price
- Relationship = verb ex: buys





### Translating

A shopper walks into a store to buy an item. When the shopper makes a purchase, the system is updated with information about the person, including their name, loyalty card id and zip code. The store also records which items were purchased, including details like item name, price and item source.



### Entity Relationship Diagram

### **Chen's Database Notation**







### Entity Relationship Diagram: ERD tables



#### **Crow's Foot Database Notation**





### Entity Relationship Diagram: recap



A shopper walks into a store to buy an item. When the shopper makes a purchase, the system is updated with information about the person, including their name, loyalty card id and zip code. The store also records which items were purchased, including details like item name, price and item source.



#### **Crow's Foot Database Notation**

#### **Chen's Database Notation**





Cardinality describes a fundamental characteristic of the relationship between two entities.

- 1:1 = a <u>one to one</u> relationship
- 1:m = a <u>one to many</u> relationship
- m:m = a many to many relationship



F**o**x Mis



Below is an example of a 1:m relationship between *customer* and *transaction*.

These entities have a 1:m relationship because a customer can book multiple transactions but a transaction belongs to one and only one customer.







Crow's foot notation can include a little circle, indicating a null value. This means that the related entity is not mandatory.

- 1:1 = a <u>one to zero or one</u> relationship
- 1:m = a <u>one to zero or many</u> relationship
- m:m = a many to zero or many relationship





Let's review our example of the relationship between *customer* and *transaction*.

These entities now have a 1:0m relationship because a customer can book one, many, or zero transactions, but a transaction still belongs to one and only one customer.





### Cardinality in Data Modeling: Recap







### Cardinality in Data Modeling: Example

Assets are purchased from Vendors and assigned to Employees.





### Swim Lane Diagrams – Order to Cash (O2C)

The process starts when the customer contacts Sales to place an order. The person in Sales creates the sales order. As part of doing this, the person in sales first checks to see if the customer has enough available credit to cover the order. They do this by looking up the customer's credit on a report that is generated by Accounting and sent to Sales every Monday morning. If the customer doesn't have enough available credit then the person in sales notifies the customer who can then either update or cancel their order. Next the person in sales checks to see if the items being ordered are in stock. They do this by checking a report on inventory that the Warehouse created at the end of each day. If the items being ordered are not in stock then the person in Sales notifies the customer who can then update or cancel their order. If the report indicates the items are in stock then the order goes to the Warehouse where the workers there will pick the order. Since Sales is looking at a report that is only updated at the end of each day, there is a chance that they accepted an order for an item that is not really in stock. If that is the case the Warehouse notifies Sales who then notifies the customer who can update or cancel their order...



### Swim Lane Diagrams – Order to Cash (O2C)

...Once the people in the warehouse pick the order, the people in Accounting have to make sure that the customer actually has enough credit to cover the order. Since the people in Sales use a credit report that is generated on Monday morning, there is a chance that the information on the credit report is old. If the customer doesn't have enough available credit then Accounting notifies Sales who then notifies the customer who can then choose to update or cancel their order. If the customer has enough available credit then their available credit is reduced by the total cost of the order and the warehouse is notified and they pack and ship the order. As soon as the order is shipped the people in the warehouse notify accounting and accounting generates and sends the invoice to the customer. When the customer pays the invoice the people in Accounting increase the customer's available credit by the amount of the payment, they post the payment and we're done.




FOX MIS

## ERD: tables

- Relationship, i.e. verb is written on the arrow
- Entity listed at the top of the table
- Attributes are listed under the entity

Legend :

• PK : Primary Key







# **Digital Systems**

Entity Relationship Diagrams - 1 In-Class Activity



## Entity Relationship Diagrams - 1

What:

- Interpret an entity relationship diagram
- Construct a simple entity relationship diagram from provided story
- Add the attributes you would expect to be needed for each entity Why:
- ERDs model the *information* required for a process
- ERDs supplement swim lane diagrams and complete a bigger picture
- ERDs are in the first 2 exams!



- Reference the entity relationship diagram shown on screen.
- Prepare 3 questions that can be answered with the diagram:

Inter	ompleting this activity you will be able to: oret an entity relationship diagram truct a simple entity relationship diagram
	Step 1: Individually Reference the entity relationship diagram shown on screen.
	Question 1 0 pts
	Prepare 3 questions that can be answered with the diagram: HTML Editorial $HTML Editorial $ $HTML HML HML HML HML HML HML HML HML HML H$
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### **ERD: Advertising Campaigns**



 Construct an ERD diagram by identifying the entities, attributes and relationships in the following scenario Step 3: In small groups, construct an ERD diagram by identifying the entities, attributes and relationships in the following scenario

Mike is the HR manager at Playwicki Financial Services. They need to hire a new systems analyst. The job has been posted on the company's web site and a few people have applied for the position. The hiring process starts when Mike reviews the applications and matches them up with the job requirements to identify the best candidate. Once the best candidate has been identified, their resume is sent to the hiring manager to review. If the hiring manager is not interested they ask Mike for another candidate and Mike starts looking for another candidate. If the hiring manager is interested in interviewing the candidate, they let Mike know and Mike schedules a phone interview with the hiring manager. The hiring manager conducts the phone interview with the hiring manager is not happy with the candidate, they ask Mike for another candidate and the process starts over again. If the hiring manager is happy with the candidate, they let Mike know and Mike schedules a face-to-face interview for the candidate with the hiring manager. The hiring manager conducts the interview. If the hiring manager is not happy with the candidate, they let Mike know and the process starts over again. If the hiring manager is not happy with the candidate, they let Mike know and the process starts over again. If the hiring manager is not happy with the candidate, they let Mike know and the process starts over again. If the hiring manager is not happy with the candidate, they notify Mike that they'd like to hire the candidate. Mike calls the candidate to offer them the position over the phone. If the candidate is interested, Mike assembles the formal offer and mails it to the candidate. The candidate signs the offer, returns it to Mike and the new employee is officially hired.

Question 2				
Step 4:	Upload your ERD here			
Upload	Choose a File			





Mike is the HR manager at Playwicki Financial Services. They need to hire a new systems analyst. The job has been posted on the company's web site and a few people have applied for the position. The hiring process starts when Mike reviews the applications and matches them up with the job requirements to identify the best candidate. Once the best candidate has been identified, their resume is sent to the hiring manager to review. If the hiring manager is not interested they ask Mike for another candidate and Mike starts looking for another candidate. If the hiring manager is interested in interviewing the candidate, they let Mike know and Mike schedules a phone interview with the hiring manager. The hiring manager conducts the phone interview with the candidate. If the hiring manager is not happy with the candidate, they ask Mike for another candidate and the process starts over again. If the hiring manger is happy with the candidate, then they let Mike know and Mike schedules a face-to-face interview for the candidate with the hiring manager. The hiring manager conducts the interview. If the hiring manager is not happy with the candidate, they let Mike know and the process starts over again. If the hiring manager is happy with the candidate, they notify Mike that they'd like to hire the candidate. Mike calls the candidate to offer them the position over the phone. If the candidate is interested, Mike assembles the formal offer and mails it to the candidate. The candidate signs the offer, returns it to Mike and the new employee is officially hired.



### From last week...

#### Playwiki Financial Services – Hiring Process





- How many entities do we have? (start with actors)
- What is the document being created? i.e. we capture information to create it....
- What do we need to know about each entity? (ie attributes)
- How do each entity relate to each other? (ie interaction between entities)





Steps #3-4

- Draw diagram and discuss as a class
- Upload your diagram to Canvas
- Students called upon at random to help draw the diagram on the board and discuss



Source: https://i1.wp.com/www.nationalreview.com/wp-content/uploads/2016/12/school-bans-students-raising-their-hands-answer-questions-2.jpg?fit=788%2C460&ssl=1





• Individually rate this activity

1	Question 3	0 pt
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	1. This is an engaging activity [Select]	
	2. I learned a lot completing this activity [Select]	
	3. This activity should be used again in future semesters [Select]	
•	Question 4	0 pt
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# **Digital Systems**

Entity Relationship Diagrams - 2 In-Class Activity



## Entity Relationship Diagrams - 2

What:

- Construct a more complex entity relationship diagram from provided story Why:
- ERDs model the information required for a process
- ERDs supplement swim lane diagrams and complete a bigger picture
- ERDs are in the first 2 exams!



- Identify the entities, attributes and relationship
- Construct an ERD based on the provided narrative





### **Students Registered for Courses**

Students at Temple University register for courses each semester. Temple needs to track information on the students, including name, TUID number, major and year of study. When students register for courses, Temple tracks the course information including the course name, number of credits, school which offers the course and the course ID number.

Temple also needs to track the faculty member who teaches the course, including their employee ID number, name, email address and office location. Faculty members can have multiple office locations on the various campuses that Temple owns. The offices are noted by a building, room number and key number.



## Step #2: Discussion

- How many entities do we have?
- Are we updating a system? Creating a document?
- What do we need to know about each entity? (ie attributes)
- How do each entity relate to each other? (ie interaction between entities)



Source: https://i1.wp.com/www.nationalreview.com/wp-content/uploads/2016/12/school-bansstudents-raising-their-hands-answer-questions-2.jpg?fit=788%2C460&ssl=1





• Upload your ERD

6	Quest	on 1	0 pts
	Step 2: I	Draw and Upload your ERD here:	
	Upload	Choose a File	
21	Step 3: 5	tudents called upon at random to help draw the diagram on bo	pard and discuss





• Individually rate this activity

	Question 2	0 pts
	Rate this activity from 1 (completely disagree) to 5 (completely agree) 1. This is an engaging activity [Select]	
	2. I learned a lot completing this activity       [Select]         3. This activity should be used again in future semesters       [Select]	
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# Exam 1 using Proctorio

Opens Friday (1/29) at 6PM Close Sunday (1/31) at 11:59PM

## Exam Will Cover Discussions: week 1 & 2

- Readings, Videos and Lectures (35%)
  - What is MIS?
  - Systems Analysis & Systems Architecture
  - Swim Lane Diagrams
  - ERD
- Max Labs 1a/1b & 2a/2b (25%)
  - Digital Product Management
  - Concepts of Max Labs
- Mini-Case Demonstrate your ability to apply (40%)
  - Swim Lane Diagram
  - ERD





Source: https://ccesnews.org/opinion/2018/04/23/10-tips-for-exam-preparation/#photo



## To do: Exam Prep

- Practice Swim Lane (let's review answers!)
- Review slide deck "MIS 2101 Exam 1 prep"
- Practice ERD (will send email)



# More to Come

Prepare with Readings & Videos before our next class!!!