Understanding and Evaluating the BI Platform

by Cindi Howson

Module 0. About the Course (10 min)

- *About the Author*
- *Course Objectives*
- *Audience and Pre-requisites*
- *Course Structure*
- *Additional Resources*

Module 1. Strategic Considerations (42 min)

- *Major BI Events and Industry Trends*
  - Mega-Vendors Pursue BI
  - Predictive Analytics and In-Memory
  - New Major Releases and Upgrades
  - Visual Discovery and Other Recent Innovations
- *Challenges in BI*
  - Overview
  - BI Adoption and Appeal
  - Time to Insight
- *Financials and Market Strategy*
  - Assessing Market Leadership
  - Query, Reporting, OLAP Revenues
  - Market Focus and BI Lifecycle
  - Market Strategies
  - Points to Consider

Module 2. Tool Segments and Portfolio Management (35 min)

- *Which Users Need Which Tools*
- *Core BI Modules*
- *Other BI Modules*
- *Core BI Modules Differentiators*
- *Self-Service BI Continuum*
- *Example: Vendor Solutions Mix and Match*
- *Example: SAP Business Objects*
- *Example: Microsoft BI*
- *Example: IBM Cognos*
- *Why do Companies Have Multiple BI Tools*
- *2012 Degree of BI Standardization*
- *What is the Scope of Your BI Selection*
- *BI Buying Approaches*

Module 3. Pricing, Packaging, and Evaluation Process (49 min)

- *Pricing, Packaging, and Cost of Ownership*
  - Main Approaches to Pricing and Packaging
  - Maintenance and Support
  - Packaging (as of mid-2013)
  - BI Buying Recommendations
- *Evaluation Process*
  - Tool Selection and Standardization Process

- o Tool Upgrade and Re-Assess Process
- o Maximizing you Scripted Demos
- o Ways to Identify Criteria
- o Translate Requirements to Features
- o Prioritize Requirements
- o Sample Business Query Scorecard
- o Sample Detailed Frameworks
- o Points to Consider

Module 4. Business or Ad-Hoc Query (21 min)

- *Strategic Questions*
- *Business Query Modules*
- *Business View*
  - o Example without a Business View
  - o Example with a Business View
  - o SQL Generated Behind the Scenes
- *Prompting*
  - o MicroStrategy Hierarchical Prompts
- *Support For Multiple Data Sources*
  - o User Cases
  - o Complex Business Questions
  - o Multiple Schemas in a Single Data Base
  - o Distributed or Federated Query
  - o Departmental Data Sources
  - o Key Considerations
- *Review*

Module 5. Reporting (30 min)

- *Strategic Questions*
- *Production Reporting Modules*
- *Report Structure and Layout*
  - o IBM Cognos Report Studio: "Production Report"
  - o SAP Business Objects Crystal Reports: Banded Reports
  - o Crystal Reports: Design Mode
- *Charting Capabilities*
  - o Information Builders WebFOCUS: Stacked Y Axis
  - o Oracle BI EE: Bubble & Trellis
- *Report Interactivity and Navigation Features*
  - o MicroStrategy: Interactivity Example
  - o Microsoft Reporting Services: Drill Down
  - o Information Builders: Active Reports
- *Other Reporting Evaluation Criteria*
- *Spectrum of Reporting Tools*
- *When to Use Which Tool*
- *Review*

Module 6. OLAP and In-Memory (32 min)

- *Online Analytical Processing]*
  - OLAP – Strategic Questions
  - Before: Differences in Reporting & OLAP
  - Today's Ideal: Fluid Reporting & OLAP
  - Biggest OLAP Differentiators
  - OLAP Platform Architectures
  - OLAP Architecture Differences
- *In-Memory Analytics*
  - Benefits of In-Memory Analytics
  - Approaches to Fast BI
  - Traditional vs. In-Memory Query
  - In-Memory Evolves to Enterprise
- *OLAP Viewer*
  - Oracle OLAP Viewer
  - Microsoft PowerPivot
- *Review*

Module 7. Dashboards and Visual Data Discovery (48 min)

- *Definition*
- *Dashboards vs. Scorecards*
- *Big Picture Questions*
- *Dashboard Evolution*
- *Databoard vs. Visual Data Discovery*
- *Which Should You Use?*
- *Dashboard Product Segments*
  - BI Platform Dashboards
  - BI Platform Dashboard Vendors and Products
  - Pureplay Dashboards
  - Pureplay Dashboard Vendors and Products
  - Visual Data Discovery Dashboards
  - Visual Data Discovery Dashboard Vendors and Products
- *Dashboard Constructs*
- *Key Dashboard Features to Evaluate*
- *Dashboard Layout and Presentation*
  - MicroStrategy Dashboard with Advanced Visualizations
  - QlikView Tabs and Heat Map
  - Actuate BIRT 360 KPI List
  - Actuate BIRT 360 Strategy Map
- *Dashboard Consumption: Interactivity*
  - Tableau Dashboard with Map as Filter
  - Faceted Search: A Way of Navigating Data
  - Oracle Endeca: BI Dashboard with Search

- o IBM Cognos 10 Active Reports Dashboard
- *Dashboard Design*
    - o Oracle Dashboard
    - o Oracle Dashboard Designer
    - o SAP BusinessObjects Dashboard Designer
    - o TIBCO Spotfire: Business User Assembled
    - o SAS Visual Analytics Explorer
- *Visual Data Discovery*
- *Visualization vs. Visual Data Discovery*
- *Visualization Speeds Insight*
- *Review*

Module 8. Architecture & Administration (18 min)

- *Architecture Criteria*
- *Multiple Tools Often Mean Multiple Architectures*
- *Ideal Architecture*
- *Scalability*
- *Scalability Recommendations*
- *Security*
- *Business View Administration*
    - o SAP BusinessObjects Designer
    - o SAP BusinessObjects Information Design Tool
- *Usage Monitoring: MicroStrategy Example*
- *Session Management: Oracle BI EE Example*
- *Other Administration Features*
- *Review*
- *The Final Word*