

BI & DASHBOARDS WITH SHAREPOINT 2007

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Leveraging SharePoint to Deliver Business Intelligence Solutions

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About BlueGranite

- ◎ Profile: Microsoft Gold Partner, Business Intelligence Solutions
- ◎ Focus Areas:
 - Dashboard/BI Portal Design with SharePoint
 - Data Integration/Warehouse/Analytics
 - SQL Server Platform
- ◎ Services:
 - Strategy & Architecture
 - Implementation Services
 - Training & Mentoring



Data Management Solutions
Information Worker Solutions
Custom Development Solutions

About the Presenter

- Principal Consultant, Blue Granite
- 15 years with BI technology implementation
- Microsoft BI Virtual TS, Heartland



SQL Server 2005
Microsoft® SQL Server™ 2005 Business Intelligence Development
Office PerformancePoint Server 2007, Applications

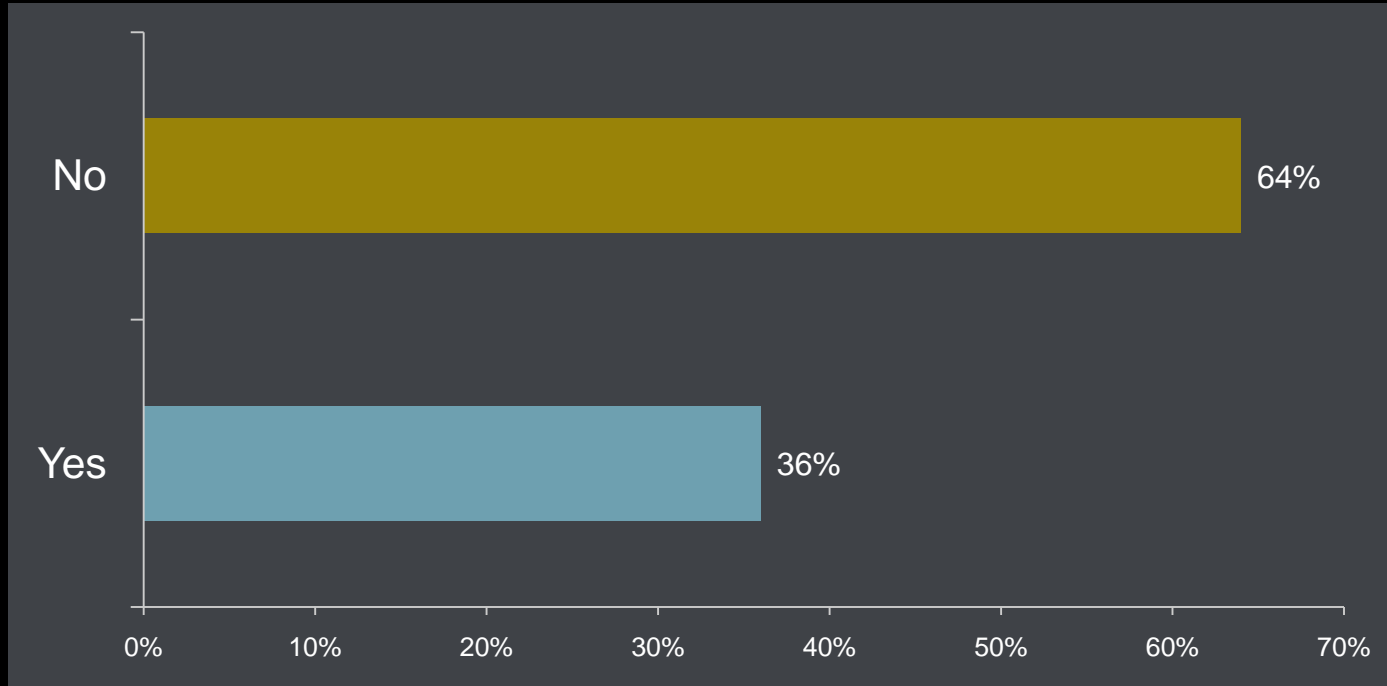
Agenda

- ⦿ BI Portal Business Case
- ⦿ Microsoft BI Architecture
- ⦿ MOSS BI Technologies
- ⦿ Real-World Example
- ⦿ Technology Demonstration
- ⦿ Getting Started

BI PORTAL BUSINESS CASE

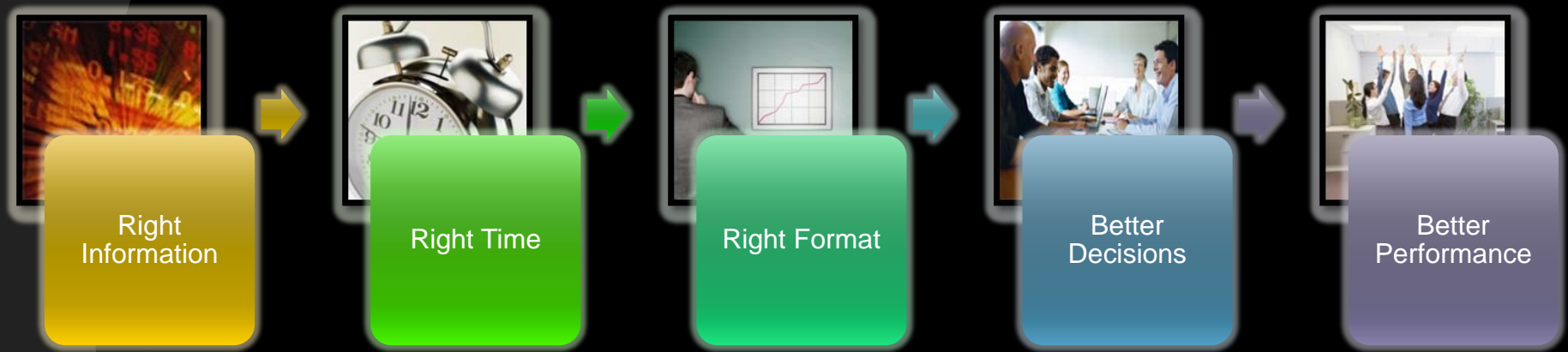
BI PORTAL BUSINESS CASE

A Question to CIOs: Is Management Using the Right Information to Run the Business?

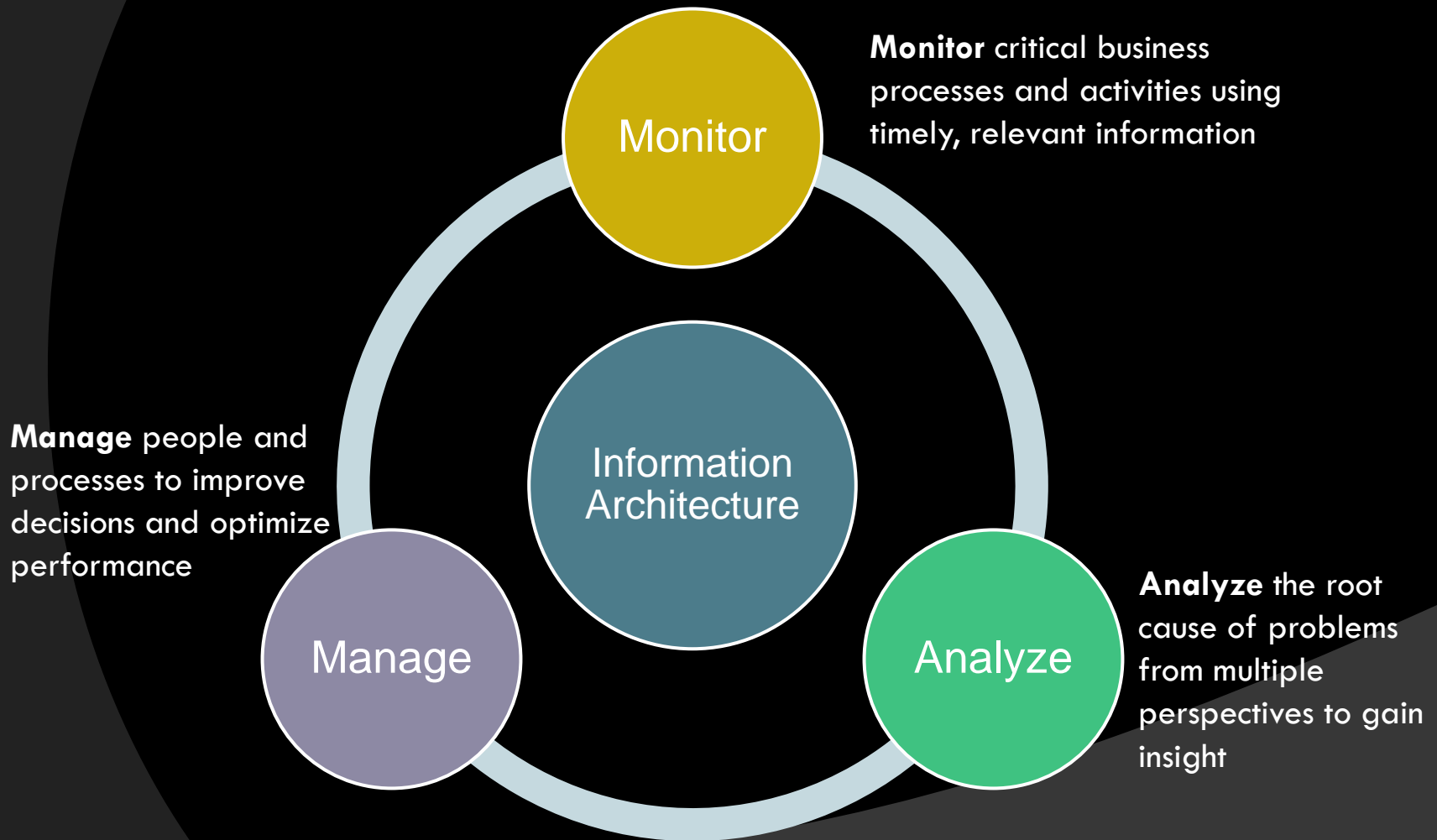


Source: Gartner EXP CIO report *Creating Enterprise Leverage: The 2007 CIO Agenda*, Feb 2007

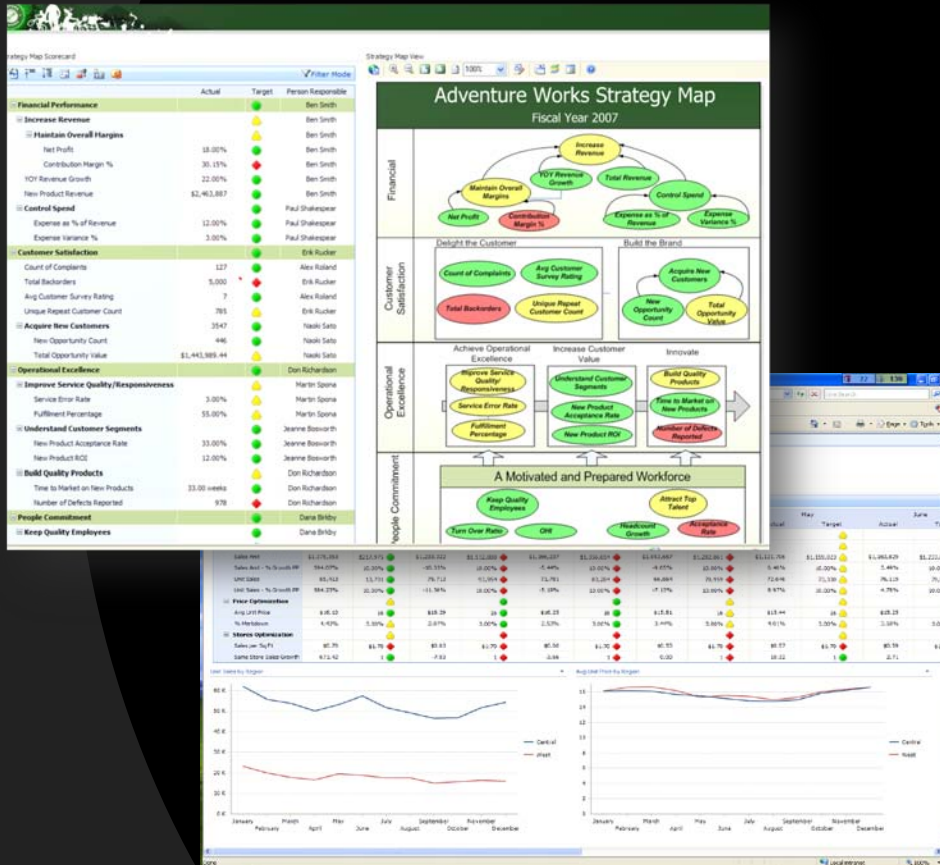
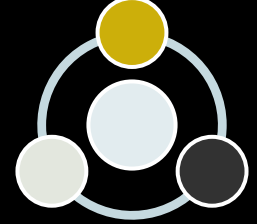
How Do People Achieve Better Performance?



Performance Dashboards

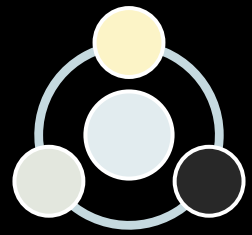


Monitor Business Performance

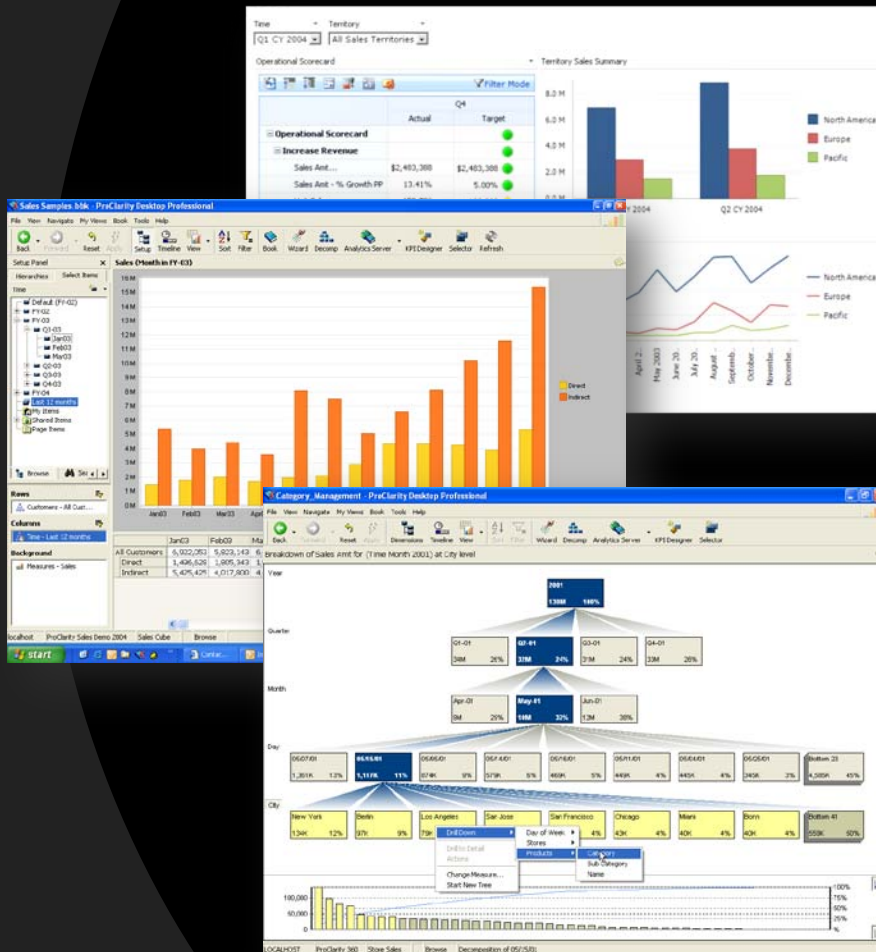


- Information at a glance
- Performance status and trends
- Scorecards and graphical views

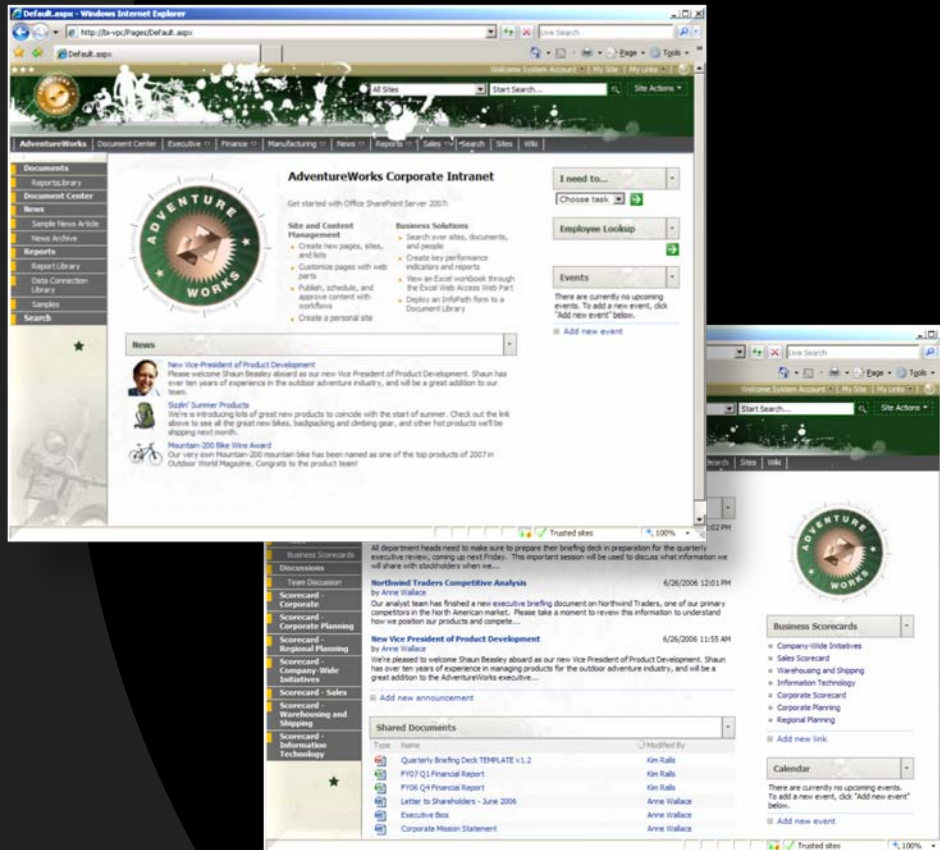
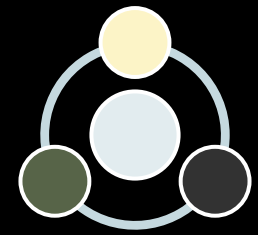
Analyze Performance Drivers



- Powerful visual exploration
- Guided navigation
- Self-service analytic reporting



Manage Business Initiatives



- Collaborative decision-making
- Track issues and capture discussions
- Communicate and coordinate activities

MICROSOFT BI ARCHITECTURE

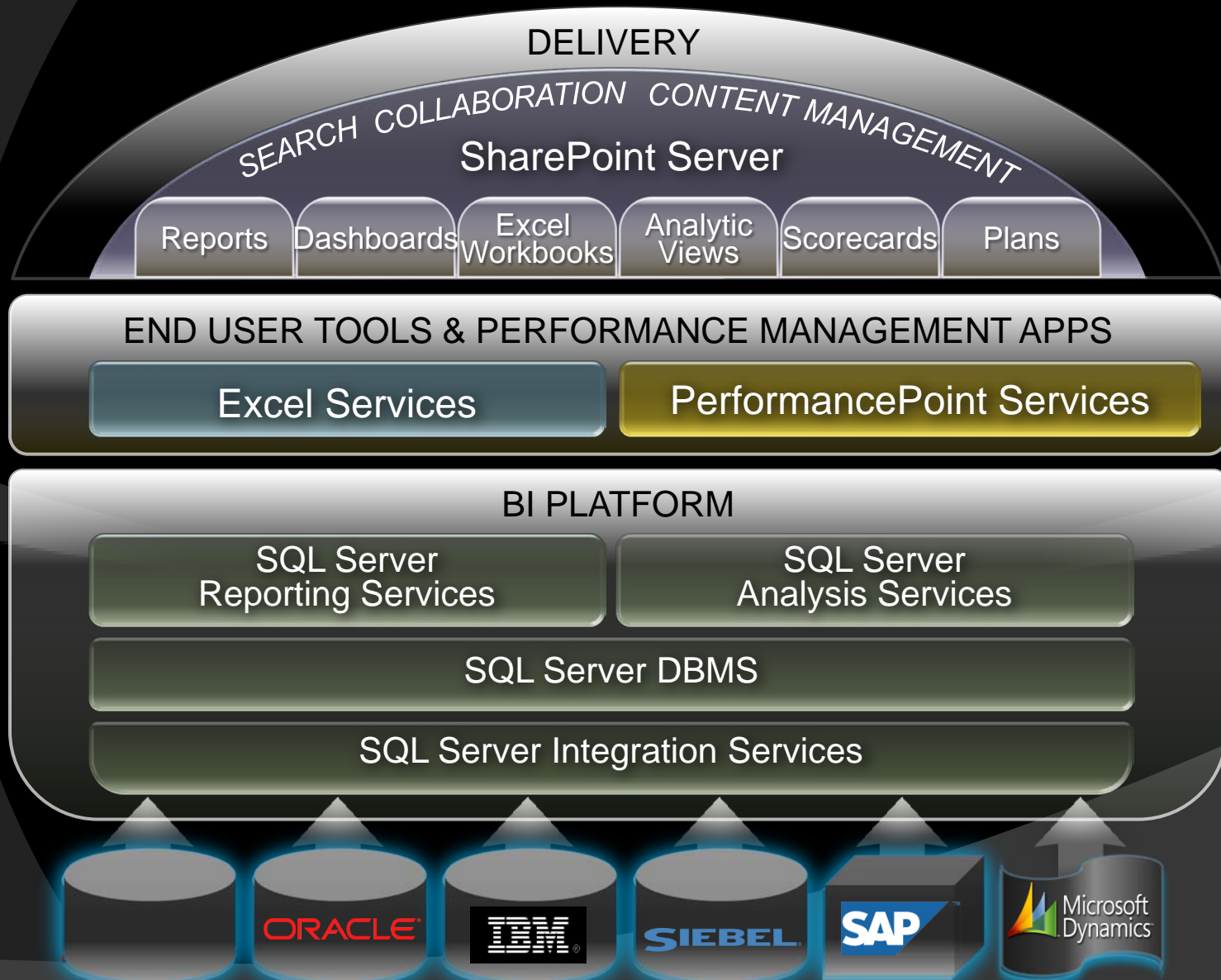
MICROSOFT BI ARCHITECTURE

Microsoft Business Intelligence

- ⦿ Increase the business performance of organizations
- ⦿ Increase the impact of information workers
- ⦿ Reach every employee
- ⦿ Add value to every decision
- ⦿ Bring BI into collaboration and business process



Microsoft BI Platform Architecture



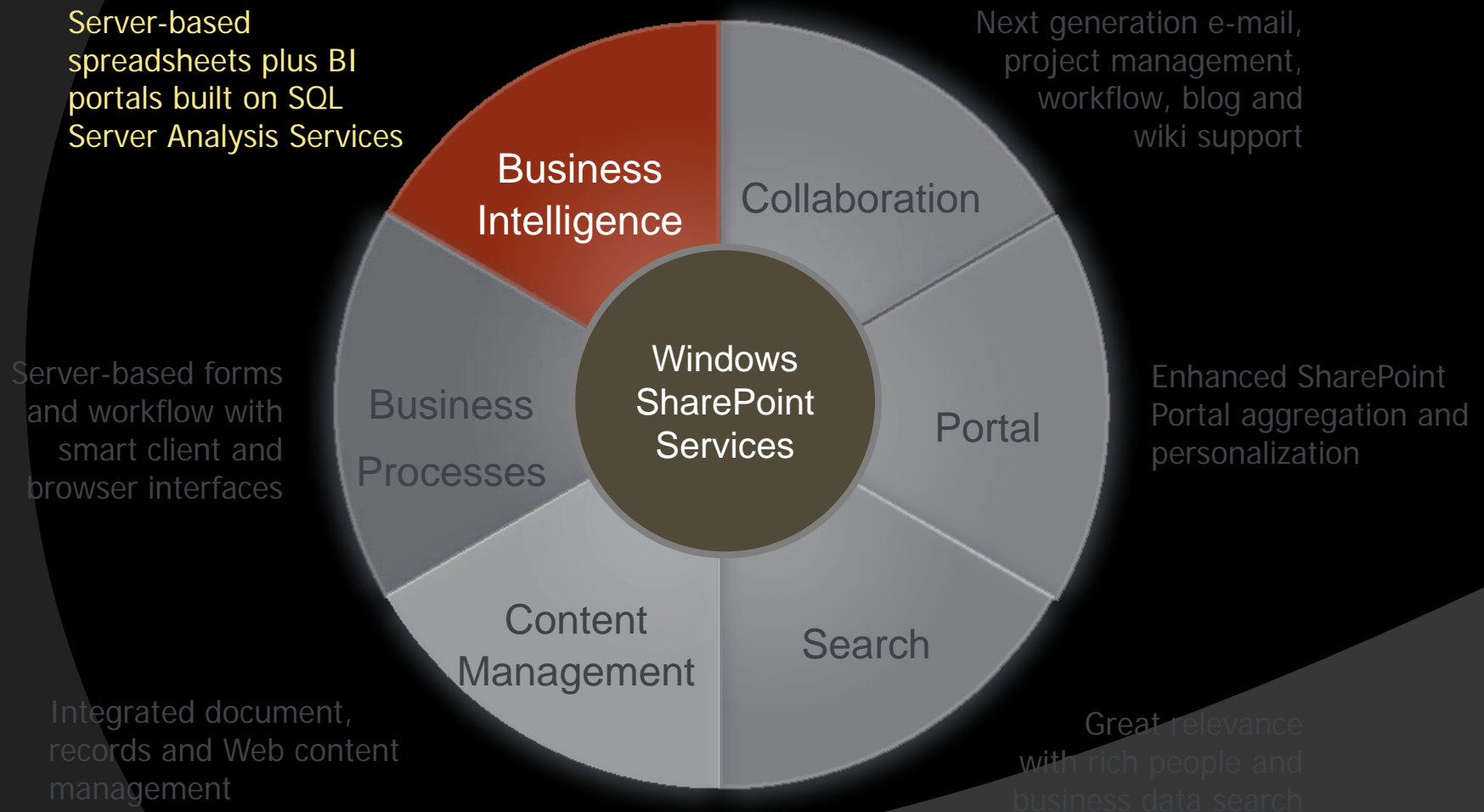
SHAREPOINT 2007 BI CAPABILITIES

SHAREPOINT 2007 BI CAPABILITIES

Microsoft SharePoint Server 2007



Microsoft SharePoint Server 2007



Why incorporate BI in SharePoint?

- ⦿ Easily communicate and track goals
 - How is my sales pipeline?
 - How are inventory levels?
- ⦿ Make BI available to information workers
 - Everyone needs to make better decisions
 - Everyone needs better information
 - In the tools they already know
- ⦿ Reuse and enhance existing spreadsheets, reports and scorecards
- ⦿ Bring Business Intelligence, Collaboration and Enterprise Content Mgmt together

SharePoint BI Technology Matrix

Technology	Value	Deployment
Excel 2007	End-user tool for unstructured analysis	Desktop application
Excel Services	Centralized, web-page presentation of Excel output	SharePoint service; HTML rendering within SP Pages; Web Service
BDC	Seamless integration of enterprise data into the SharePoint Portal	Woven into the MOSS infrastructure
Reporting Services	Predesigned, production-oriented reporting	SharePoint Integrated RS – reports surfaced as documents
KPI Lists	Simple KPI presentation from Excel, SP Lists, Data sources	User-accessible web parts
PerformancePoint Services	Enterprise-class Scorecard/Dashboards	Publish to SharePoint using Dashboard Designer
Report Center	Hub for organizational BI	Specialized site template shipped with MOSS 2007

PerformancePoint Services

- ◎ PerformancePoint Monitoring & Analytics “merged” into SharePoint 2007 February 2009
- ◎ Part of MOSS Enterprise CAL w/SA
- ◎ Enables highly-interactive (slice & dice) dashboards
- ◎ Dashboard designer for authors
- ◎ SharePoint Web Part Deployment Architecture

SAMPLE DASHBOARD

SAMPLE DASHBOARD

TECHNOLOGY DEMONSTRATION

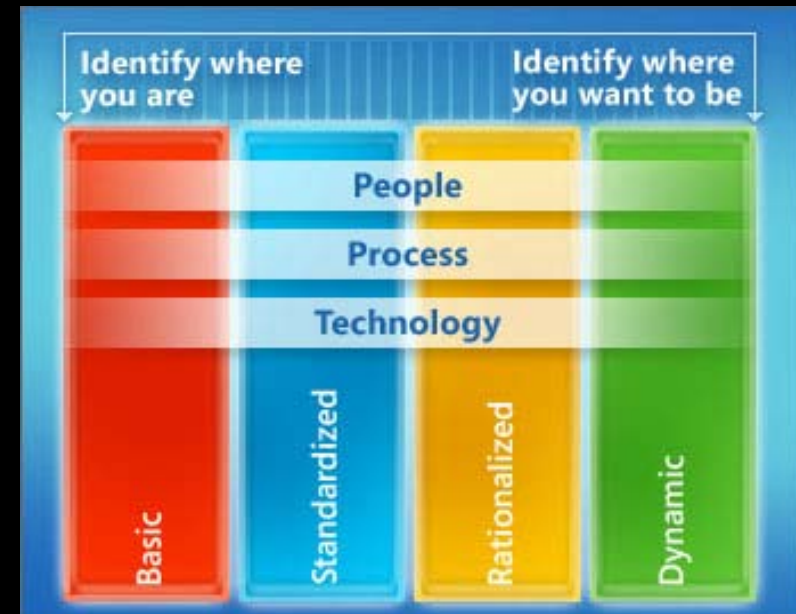
TECHNOLOGY DEMONSTRATION

GETTING STARTED

GETTING STARTED

Develop a Strategy

- Assess your current situation
- Identify candidate solution areas
- Articulate the business benefits

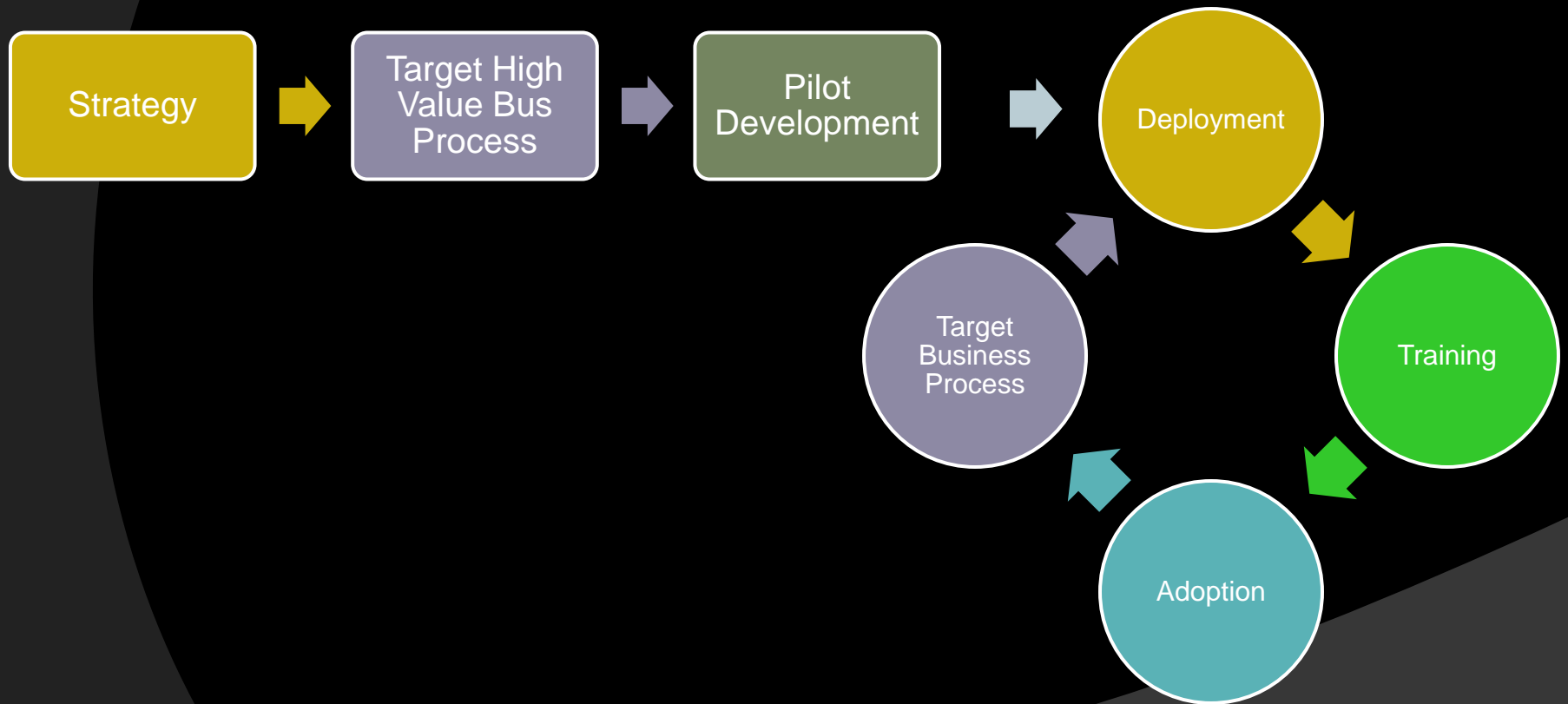


- Microsoft BPIO Model can help
- <http://www.microsoft.com/optimization/tools/overview.mspx>

BPIO Assessment Results - Example

		Basic	Standardized	Rationalized	Dynamic
	Results Legend				
	<div style="background-color: #FFD700; padding: 2px; margin-bottom: 2px;">Developing</div> <div style="background-color: #FFD700; padding: 2px;">Established</div>	Data silos, custom and IT dependent reporting, limited automation	Business Unit-wide strategic alignment, but no centralized scorecards. IT dependant reporting & analysis on centrally managed, subject-based data automation of data loading	Enterprise-wide strategic alignment and financial consolidation. User-driven and centrally managed reporting and analysis. Centralized data management	Real time closed loop and proactive analysis
BI Focus Area	Performance Management	Static documents to track performance with manually entered performance metrics (KPI)	Interactive, departmental scorecards where performance metrics (KPI) are sourced from database	Strategy driven enterprise-wide scorecards Automated tools for budgeting, planning, forecasting	Embedded reporting within business process
	Reporting and Analytics	Static decentralized and highly IT dependent reports (several reporting tools) Standalone spreadsheet based analysis	IT driven Parameterized reporting from defined data sources Analytical tool connecting to subject-oriented data	User-driven report building, definition, scheduling and subscription Wizard-based publishing of data from front-end analytical applications and Web-based interactive analysis	Advanced visualization (KPIs exposed in strategy maps and custom visualizations) Predictive analytics, data mining
	Data Warehousing	Data silos for analysis and reporting, Hand-coding ETL	Basic ETL packages to load subject/ functional data mart	Centralized and managed data warehouse Automated ETL design, implementation and maintenance	Business Intelligence or Business Activity Monitoring (BAM) within business process automation, Master data management

Getting Started





BLUEGRANITE

IMPROVING YOUR BUSINESS WITH TECHNOLOGY