

How to train your users to create their own BI reports?

So that you (IT) don't have to

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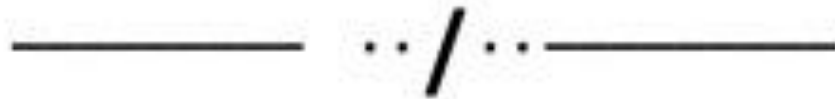
why?

why self service BI?

- IT's turn around time & budget
- Varying business requirements
 - World Changes. Business Changes. Data need changes.
- It's great for adoption!
 - Flexibility & control for Business users
 - Sense of ownership
 - Sparks collaboration



GIVE A MAN A FISH
FEED HIM FOR A DAY

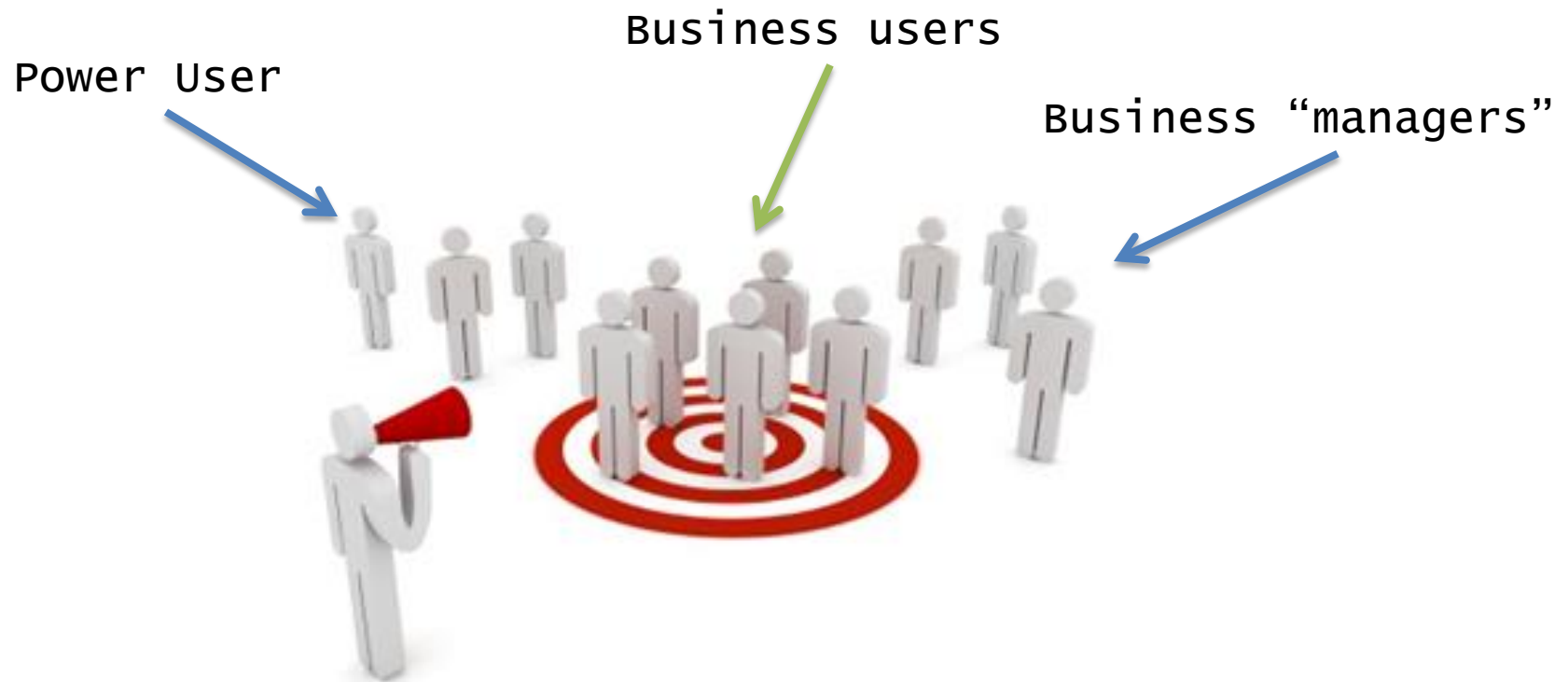


TEACH A MAN TO FISH
FEED HIM FOR A LIFETIME

Setting the context...

1. self service BI is not new...

2. Target Audience:



Three Stages:

1. Laying the Foundation
2. Training plan & content
3. Post Training

1.

Laying the
foundation

Stage #1. Laying the Foundation

- Data
- Tool
- Culture
- User Experience

Data

- Need a Business Friendly analytic layer (DW/OLAP/Power Pivot Model)
- Data Integrity
- Performance

Tool

- Excel, Power View?
- SQL Server reporting services - Report Builder? Performance Point Dashboard Designer?
- Power Query? Power Pivot?
- Third party tools?

Culture

- Where are the “analysts” & “decision makers”?
- Does your organization value data driven decisions?
- Understanding IT maturity level of users

User Experience

- How many clicks does it take to get to data?
- Create “Templates”
 - Design it for average business users and not just power users.
- Central place to collaborate
 - Have an IT managed site to allow business users to share their reports

2. Training Plan & Content

Stage #2. Training plan & Content

- How to build a training plan?
- How to create Content?
- Sample training plan
- Sample content

Training Plan

- Trainer?
- Attendees?
- Content?
- Logistics
 - Length?
 - Online vs In Person?
 - Time?

Training Content

- Where do you get your content from?
- How to show Business value?
- How to organize the training content?
 - Introduction, Summary, Body
 - Tip: Include Hands-on Lab

Sample Training Plan - I

- Four sessions

Introduction 1. Business value 2. Navigation 3. IT created reports & Templates	60 minutes
Excel I	90 minutes
Excel II	90 minutes
Power View	120 minutes

Sample Training Plan - II

- Two sessions

Introduction & basic Excel	120 minutes
Advanced Excel	120 minutes

Sample
content

Dashboard

Slicer

Fiscal Year

- Fiscal Year 2007
- Fiscal Year 2008
- Fiscal Year 2009

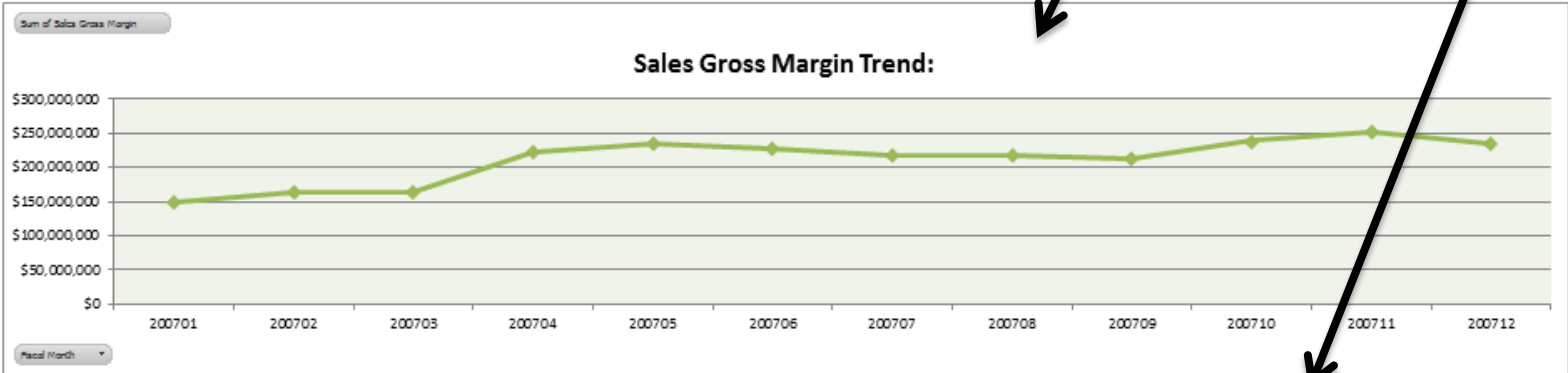
Product Category

- Audio
- Cell phones
- Games and Toys
- Music, Movies and Audio Books
- Cameras and camcorders
- Computers
- Home Appliances
- TV and Video

Sales Territory

- Asia
- Europe
- North America

Chart



Pivot Table

Product Category	Product Subcategory	Sum of Sales Gross Margin
Home Appliances		\$2,121,262,151
Computers		\$1,789,030,055
Cameras and camcorders		\$1,505,913,623
TV and Video		\$725,718,459
Cell phones		\$487,275,862
Music, Movies and Audio Books		\$98,835,600
Audio		\$84,900,103
Games and Toys		\$78,985,749
Grand Total		\$6,891,921,631

Sales Territory	Sales Region	Sum of Sales Gross Margin
North America		\$4,057,279,569
Asia		\$1,493,860,279
Europe		\$1,340,781,783
Grand Total		\$6,891,921,631

Conditional Formatting



Step #1 (Basic)

Fiscal Year	FiscalYear 2009										
Gross Margin	Fiscal Month										
Product Category	200901	200902	200903	200904	200905	200906	200907	200908	200909	200910	200911
Audio	\$2,501,184	\$2,449,931	\$2,551,421	\$3,035,071	\$3,486,205	\$3,234,660	\$3,624,427	\$3,451,950	\$3,303,966	\$3,332,816	\$3,463,414
Cameras and camcorders	\$28,422,379	\$26,942,066	\$26,847,122	\$29,623,655	\$33,113,321	\$31,637,584	\$33,666,543	\$32,938,310	\$30,979,419	\$31,510,151	\$31,959,814
Cell phones	\$10,771,593	\$10,434,993	\$10,568,891	\$12,302,715	\$13,391,967	\$13,059,382	\$13,437,281	\$13,478,556	\$12,611,827	\$13,205,914	\$12,645,614
Computers	\$41,732,158	\$42,601,989	\$42,792,652	\$53,499,213	\$57,949,818	\$56,502,453	\$50,467,586	\$49,817,704	\$48,589,077	\$54,833,420	\$48,094,414
Games and Toys	\$2,748,392	\$2,632,113	\$2,348,935	\$2,487,587	\$2,798,166	\$2,915,719	\$3,175,147	\$2,799,356	\$2,821,108	\$2,817,526	\$2,899,814
Home Appliances	\$42,906,733	\$43,162,314	\$46,608,395	\$51,239,155	\$56,801,746	\$54,640,122	\$53,956,083	\$53,211,627	\$50,938,887	\$55,957,817	\$50,151,714
Music, Movies and Audio Book	\$1,765,712	\$1,794,584	\$1,661,008	\$1,768,832	\$2,065,847	\$1,851,045	\$1,762,852	\$1,740,556	\$1,760,478	\$2,134,753	\$1,584,714
TV and Video	\$16,523,718	\$16,227,063	\$16,191,666	\$19,073,501	\$22,696,681	\$22,735,218	\$23,707,905	\$22,539,719	\$22,854,249	\$21,105,201	\$22,639,514
Grand Total	\$147,371,869	\$146,245,053	\$149,570,090	\$173,029,729	\$192,303,751	\$186,576,183	\$183,797,824	\$179,977,778	\$173,859,011	\$184,897,598	\$173,439,314

Choose fields to add to report:

- Σ Sales
 - Gross Margin
- Sales
 - Fiscal Month
 - Fiscal Year
 - Product Category
 - Product Subcategory
 - Sales Gross Margin
 - Sales Region
 - Sales Territory

Drag fields between areas below:

Report Filter: Fiscal Year

Column Labels: Fiscal Month

Row Labels: Product Category

Values: Gross Margin

1. Open the Template
2. Explore the Field List
3. Explain the concept of “dimensions” & “measures”
4. Create a Simple Pivot Table – Row Labels & Measures
5. Add column labels & report filters

Step #2 (Basic)

Fiscal Year		FiscalYear 2009											
Gross Margin		Fiscal Month											
Product Category	Product Subcategory	200901	200902	200903	200904	200905	200906	200907	200908	200909	200910	200911	200912
⊗ Home Appliances		\$42,906,733	\$43,162,314	\$46,608,395	\$51,239,155	\$56,801,746	\$54,640,122	\$53,956,083	\$53,211,627	\$50,938,887	\$55,957,817	\$50,151,795	\$50,782,163
	Refrigerators	\$8,614,607	\$8,593,955	\$12,138,786	\$13,853,828	\$15,405,423	\$15,005,852	\$13,146,682	\$13,654,139	\$12,765,460	\$15,899,442	\$11,837,659	\$12,227,555
	Coffee Machines	\$7,481,022	\$7,421,130	\$7,330,770	\$8,070,128	\$8,737,833	\$8,179,312	\$8,049,169	\$8,042,748	\$7,731,440	\$8,501,101	\$7,637,088	\$7,778,195
	Lamps	\$7,022,682	\$6,954,153	\$6,495,484	\$7,087,791	\$7,882,144	\$7,632,194	\$7,827,601	\$7,499,677	\$7,421,394	\$7,833,585	\$7,608,757	\$7,563,703
	Washers & Dryers	\$5,882,535	\$6,366,803	\$7,178,781	\$8,063,999	\$8,741,408	\$8,270,961	\$9,542,691	\$9,157,942	\$8,511,647	\$8,119,533	\$7,812,430	\$7,971,928
	Microwaves	\$4,619,707	\$4,401,289	\$4,469,571	\$4,655,991	\$4,864,042	\$4,748,749	\$4,615,479	\$4,539,597	\$4,509,194	\$5,066,712	\$4,535,802	\$4,612,809
	Water Heaters	\$4,328,751	\$4,306,847	\$3,955,304	\$4,073,185	\$4,872,949	\$4,824,952	\$4,389,948	\$4,504,496	\$4,304,482	\$4,611,905	\$4,773,463	\$4,562,030
	Air Conditioners	\$4,091,162	\$4,192,467	\$3,959,944	\$4,248,369	\$4,817,111	\$4,554,770	\$4,909,356	\$4,292,926	\$4,325,397	\$4,453,769	\$4,599,564	\$4,642,212
	Fans	\$866,267	\$925,670	\$1,079,755	\$1,185,864	\$1,480,836	\$1,423,332	\$1,475,157	\$1,520,102	\$1,369,873	\$1,471,770	\$1,347,032	\$1,423,731
⊗ Computers		\$41,732,158	\$42,601,989	\$42,792,652	\$53,499,213	\$57,949,818	\$56,502,453	\$50,467,586	\$49,817,704	\$48,589,077	\$54,833,420	\$48,094,409	\$50,039,305
⊗ Cameras and camcorders		\$28,422,379	\$26,942,066	\$26,847,122	\$29,623,655	\$33,113,321	\$31,637,584	\$33,666,543	\$32,938,310	\$30,979,419	\$31,510,151	\$31,959,838	\$32,690,806
⊗ TV and Video		\$16,523,718	\$16,227,063	\$16,191,666	\$19,073,501	\$22,696,681	\$22,735,218	\$23,707,905	\$22,539,719	\$22,854,249	\$21,105,201	\$22,639,531	\$23,073,207
⊗ Cell phones		\$10,771,593	\$10,434,993	\$10,568,891	\$12,302,715	\$13,391,967	\$13,059,382	\$13,437,281	\$13,478,556	\$12,611,827	\$13,205,914	\$12,645,617	\$13,125,043
⊗ Games and Toys		\$2,748,392	\$2,632,113	\$2,348,935	\$2,487,587	\$2,798,166	\$2,915,719	\$3,175,147	\$2,799,356	\$2,821,108	\$2,817,526	\$2,899,899	\$3,161,477
⊗ Audio		\$2,501,184	\$2,449,931	\$2,551,421	\$3,035,071	\$3,486,205	\$3,234,660	\$3,624,427	\$3,451,950	\$3,303,966	\$3,332,816	\$3,463,485	\$3,532,645
⊗ Music, Movies and Audio Books		\$1,765,712	\$1,794,584	\$1,661,008	\$1,768,832	\$2,065,847	\$1,851,045	\$1,762,852	\$1,740,556	\$1,760,478	\$2,134,753	\$1,584,740	\$1,718,447

6. Sorting
7. Turning off grand totals
8. Creating a hierarchy
9. Changing the Pivot Table Design

Step #3 (Advanced)

Fiscal Year	
FiscalYear 2007	
FiscalYear 2008	
FiscalYear 2009	

Row Label	Gross Margin
200901	147371869
200902	146245053
200903	149570090
200904	173029729
200905	192303751
200906	186576183
200907	183797824
200908	179977778
200909	173859011
200910	184897598
200911	173439314
200912	178123093
Grand Total	2069191293

Product Category	Gross Margin
Home Appliances	\$610,356,837
Computers	\$596,919,784
Cameras and camcorders	\$370,331,194
TV and Video	\$249,367,659
Cell phones	\$149,033,779
Audio	\$37,967,761
Games and Toys	\$33,605,425
Music, Movies and Audio Books	\$21,608,854

Row Label	Gross Margin
North America	1116344462
Asia	566804098
Europe	386042733
Grand Total	2069191293

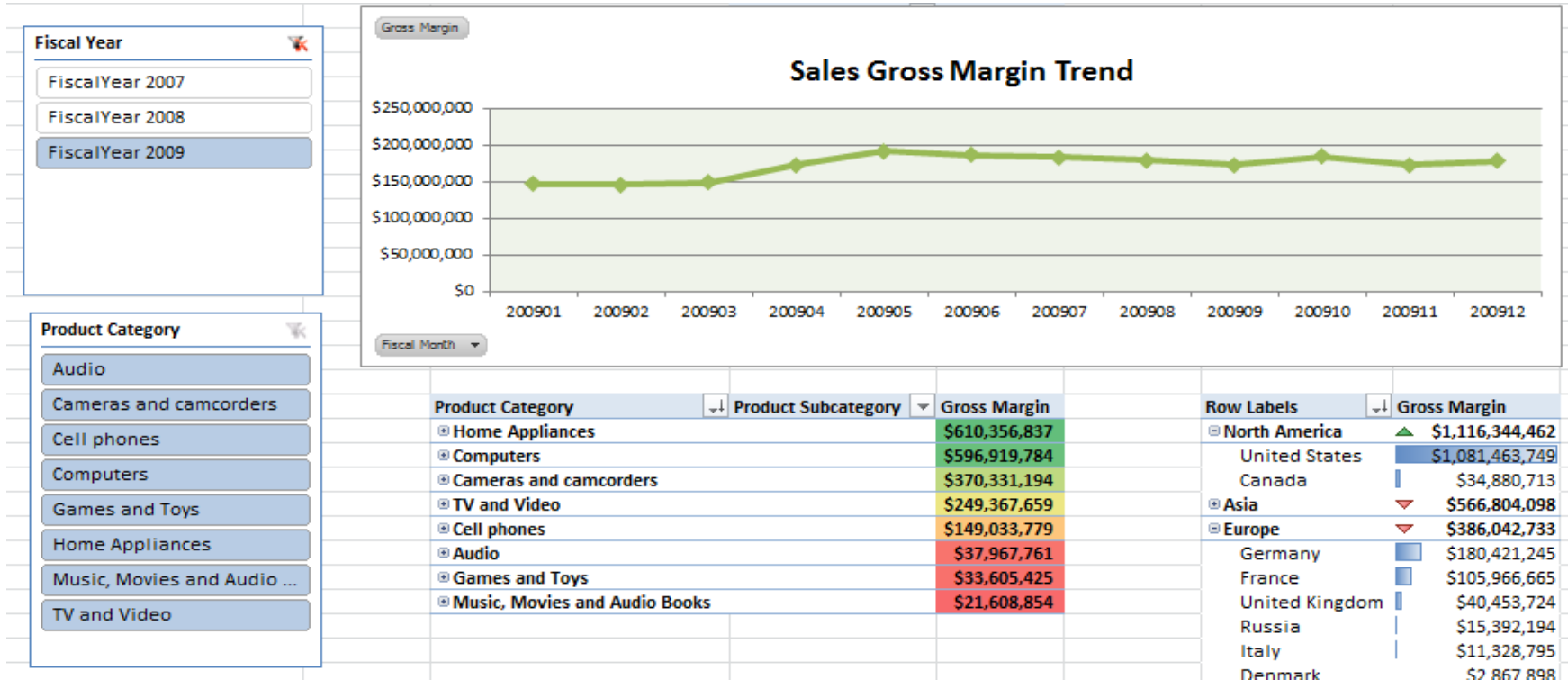
10. Remove fields from Pivot Table

11. Add more than one pivot table

12. Add slicer

13. Connect slicer with every pivot table

Step #4 (Advanced)



14. Add Pivot Table

15. Add one more slicer

16. Add hierarchy structure to pivot tables

17. Add conditional formatting

18. Format chart

3. Post Training

Stage #3. Post Training Follow Up

- Survey
- User Support System
- Monitor usage
- Demo user-created BI reports

Survey

- Keep it simple.
- Sample survey:

Please rate the training based on following criteria's:

1. Overall
 2. Content
 3. Trainer
 4. Easy of use (BI System)
 5. Comments?
-

User Support system

- User support specialist
- Documentation
- Where do users submit tickets?
 - Supported by corporate IT Support?
 - Dedicated support site?
 - Allow phone calls?

Monitor Usage

- “If you can’t measure it, you can’t manage it” – Peter Drucker
- Measure usage using Data from SSAS Trace
 - Usage over time (line chart)
 - # of Active users over time
 - Top users profile
 - Top used cubes/reports

Demo user-created BI reports

- Show them in your company “newsletter”
- Demo it to steering committee/project sponsors/C-level executives
- Appreciate them in training session
 - invite the person who created them to demo!

How to get followers?

- video

Summary

Checklist

- ✓ Data
- ✓ Business value of analyzing data
- ✓ Tools & User Experience
- ✓ Trainer
- ✓ Training Content
- ✓ Documentation
- ✓ User Support specialists
- ✓ Usage monitoring system

Thank you!

- URL To Download Slides:

<http://bit.ly/TrainBusinessUsers>

- Blog: <http://www.ParasDoshi.com>
- LinkedIn: www.linkedin.com/in/doshiparas/
- Twitter: @Paras_Doshi