



Is Your BI Tool Flexible Enough?

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A Flexible BI Tool - What Does it Mean and Why Does it Matter?

So you spent the last few weeks/days/hours (use the appropriate metric based on how fast your BI tool is) to create a good dashboard or analyze data that you want to present to your team in your next meeting. You are excited about it. You even added a nice touch with a new visualization to show a business forecast. But when you present it to your colleagues, you're asked:

"Why is that line green and not purple? Shouldn't it be purple like our brand colors?"

"What is that line chart showing?"

"Can you change the scale? I just can't read it like that"

You then have to explain that it's the BI tool's defaults and you're not sure those can be changed, and if they can, it will take time.

Unfortunately in this case and many others, "small" design and layout concerns can take users' attention away from the actual content. This is just one, simple example of how the flexibility (in this case visual) of your BI tool can determine your BI solution success and the adoption by the user communities within your organization.

Many BI tools these days seem to be similar on the surface – providing similar capabilities (connections to common data sources, visualizations and dashboards, analytical options, mobile consumption options etc.). The promise of these BI tools is often similar as well – easy to use, scalable, good performance.. However, once you dive slightly deeper into a real-life project or task, you often find that your BI tool (even though once meeting your initial requirements) doesn't always provide the necessary options, resulting in users having to compromise or under-deliver. Why is that the case?

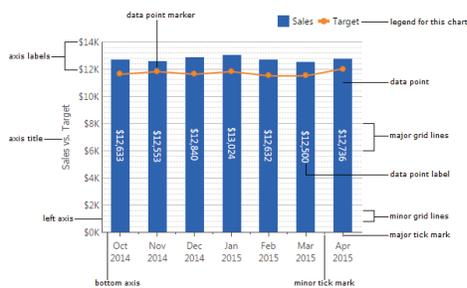
Typical BI solutions suffer from a lack of flexibility. While they come standard with pre-built solution types, they can't adapt to changing business needs and requirements.

Why is Flexibility so Important?

Flexibility allows you to design pixel perfect reports for increased adoption

The ability to meet a specific design is key to get the necessary buy-in from a large audience. As BI tools are more and more visual, the ability to display the data exactly the way the users want to consume it (“pixel perfect”) is often an important business requirement. Often, the right styling in place enables a professional look and feel and impacts a potential user’s emotional factor, thus increasing the chances of improved adoption of the tool across an organization. This is even more important when the design is for an external group of users, or when the solution is embedded into another application with existing styling.

For a BI tool to allow you to realize a PowerPoint wireframe or a Photoshop mockup exactly as designed, a great deal of flexibility is required around the way you can layout and layer the information, as well as control the visualizations styling via built-in configurations or your own preference (i.e. via CSS). For example, looking at the bar chart below, there are many elements one may wish to control beyond just changing the bar colors.



In addition, web-based views (such as dashboards) require the support not only of data bound visualizations, but also other design elements such as frames, labels, buttons, sliders and others.

Stay up to speed with your changing business needs

As your business evolves and new challenges come into play, your BI and analytics needs will change as well. That is why it is good practice to have an iterative process for your dashboard and always consider it a “live project”. Being able to quickly modify and change elements on your existing views without breaking the view, or the way it is accessed by others without having to recreate it, is critical to support changing needs in a timely fashion.

Be independent (with less tools and users involved to get your job done)

Many “business-friendly” tools can be intuitive, yet limited in scope, requiring users to rely on multiple products to meet their needs. Some may be limited around the way they can prepare data and join it across different sources, others may be limited in the way they can analyze the data or display it (in dashboards/reports/scorecards/specific visuals). Whatever the case may be, getting the job done via a combination of tools, that don’t always play nicely together, or by depending on another person to change another system is not an optimal approach. Flexible BI tools can serve as a one-stop shop, allowing users to get all of their common BI needs in a single place, ensuring great efficiency and improved effectiveness.

Adapt to each and every user

A one-size-fits-all-users approach can send self-service business intelligence efforts off track. So can a lack of oversight and up-front development. As different users have different skills and needs, it is important

to be able to cater to those users in a dedicated way to support the way they can and want to work. For example, for some users, too many options such as the ability to re-visualize (change visualizations types) can be overwhelming and confusing. Being able to control and limit the options per user, or group, enables users to experience the system as they expect and according to their skills. Smart systems take this idea further and offers users tailored options automatically via different user roles, as well as offer automatic updates based upon user behavior.

Be ready for the unknown

You can do a lot of planning prior to purchasing your BI tool or starting your project. You may have a long list of functionality requirements or you may have even conducted a small proof of concept, but once your project starts, new system requirements often arise. Flexible systems shine when it comes to scenarios that were unknown at the time the systems were designed. Make sure your tool gives you the necessary internal hooks to adapt to new challenges and to further extend the solution functionality and integration with other systems via its open APIs.

Flexible systems are those that can be used for more than one purpose or mission, and especially for purposes that are developed after the systems are deployed.

Is your BI tool flexible enough to meet your future needs?



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