Microsoft® SharePoint® 2010

The Business Value of Business Intelligence in SharePoint 2010

Executive Summary

SharePoint 2010 is The Business Collaboration Platform for the Enterprise & the Web that enables you to connect & empower people through an integrated, rich set of features, that can be deployed in an Intranet, Extranet or Internet-facing solutions. Robust Business Intelligence capabilities within SharePoint 2010 help organizations manage and access both structured and unstructured data, providing you with the ability to empower your decision makers, improve organizational effectiveness, and enable IT efficiency.

Empower Decision Makers: Ability to create, access, and share information seamlessly and easily

- Self Service: Empower all users to discover and manage their aspect of the business with the right information themselves, using only a browser
- Work with Structured and Unstructured Information: Easily find and work with structured and unstructured information within the same environment
- Share and Collaborate: Use familiar tools to create and share information seamlessly

Improve Organizational Effectiveness: Access the right information to translate strategy into action and enable accountability

- Accountability: Manage, drive and define organizational success by aligning to key metrics and strategy with a single version of the truth
- Transparency: Providing trusted access to the right information to the right people at the right time
- Discoverability: Enabling users to find the right information across all data sources and content types

Enable IT Efficiency: Create and maintain the infrastructure to effectively drive BI to all users, inside and outside the firewall with SharePoint 2010

- Enterprise-Ready Platform: Scale up and scale out with a highly available, secure, and interoperable platform with a unified architecture, inside and outside the firewall
- Robust Infrastructure Investments: Ensure performance and increase reliability with powerful system management tools and features
- Increased Developer Effectiveness: Easily create applications from a single development platform to meet changing business requirements

Who Should Read This Paper?

This whitepaper is directed towards decision makers, IT Pros, or anyone interested in learning how a SharePoint 2010 Insights enabling Business Intelligence solution can positively impact their business.

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The Evolution of Business Intelligence

Many companies struggle to provide actionable information to their employees in a timely manner and turn to Business Intelligence (BI) solutions to help their users make informed decisions. Although BI continues to be a top priority for business executives, many companies still struggle to answer a number of critical questions: Who are my most profitable customers? What projects will yield a strong return? What is our ratio of new graduates to industry hires? What impact will the price of fuel have on my merchandise? And so on.

In the past, BI focused primarily on methodology, technology, and data usage to drive decision making. Users could develop historical, current, and predictive analyses by combining operational and strategic views, though the process was lengthy and tools cumbersome. Business Intelligence was available to only a small number of users, while the need for more information by others continued to grow. IT departments tried to keep pace with growing demand for information, and quickly realized that the thirst for information created a backlog of requirements, while requests continued to mount. Users wanted access to inofmration in realtime, 24/7, to create their own reports and make changes to existing ones. When IT could not meet these demands, users began creating their own means to get the information they needed, which might go against company policy or be of questionable accuracy.

Figure 1: Competing Business and IT Priorities

Business Priorities	IT Priorities
Drive insight from complexity	Interoperate with LOB systems
Collaborate with customers and partners	Provide scale agility
Embrace millennial work styles	Enable innovation
Comply with regulations	Protect intellectual property

The technology was also unable to effectively integrate both structured and unstructured information, where the core DNA of the organization lived. Most BI solutions could effectively deliver structured information: data from different Line of Business systems, customer information from a CRM database, etc. However, as more and more business critical information resides in unstructured formats, from blogs and wikis to ad-hoc document libraries, traditional BI solutions quickly fell short.

Users today want more from their BI solution, demanding Discoverability, Collaboration, Self Service, Insights, and Data Access delivered through browser based, interactive, and accessible in real-time for both structured and unstructured information so they have a complete view of the situation pertinent to making the right decisions. They want to use solutions that are owned by the business, integrated with business goals, and that

facilitate collaboration. However, meeting those demands and unlocking the information needed to make informed decisions with typical BI solutions proves difficult for many companies for a variety of reasons:

- Specialized tools require complex training and provide limited access to information, and are not integrated with the way people work. *(no self service or collaboration)*
- "Ownership" of BI resides in IT department, not in the business (*no business ownership)*
- Multiple disparate systems cause organizational inefficiencies , different versions of the truth, and silo information hubs *(limited accountability and transparency)*
- It is difficult and time consuming to find the right information *(limited discoverability)*
- Inflexible architectures and systems force customers to change the process to fit the system rather than the way they want to work *(limited flexibility)*
- It is difficult to scale, due to cost and complexity of traditional systems, and respond rapidly to the changing business needs. *(limited agility)*

As companies seek to address these challenges, more and more are turning towards a robust BI solution that empowers an organization's decision makers, improves organizational effectiveness, and provides the backbone to truly enable IT efficiency: Microsoft SharePoint 2010.

Insights in SharePoint 2010

Microsoft SharePoint 2010 is the business-collaboration platform for the enterprise and the web that empowers all users to collaborate, discover, and manage their aspect of the business with the right information. By using familiar tools to create and share information, users can manage, drive and define organizational success by aligning key metrics and strategy to an extensible, trusted, and secure platform. Insights in SharePoint 2010 brings together structured and unstructured information, people and expertise to deliver a rich BI experience, and in turn empowers individuals to quickly respond to changing business needs.

Figure 2: Microsoft SharePoint 2010

IT is empowered to meet the needs of the business through a unified insfrastucture that provides the right level of services, interoperability with client tools, and back-end systems for 24/7 availability, seamless manageability, and extensibility with common industry standards and developer tools.

Unlike other solutions, SharePoint 2010 provides the most integrated, accessible and user-friendly BI solution on the market today. Insights in SharePoint 2010 is enabled through a number of robust offerings, including:

- **Excel Services**: Excel Services makes it simple to use, share, secure, and manage Microsoft Office Excel workbooks as interactive reports in a consistent way throughout the enterprise and create dashboards. With rich programmability capabilities, you can take your workbooks further by extending your workbooks on the server and maintaining a single version of the truth, all the while protecting the intellectual property contained within the spreadsheet.
- **Visio Services**: SharePoint 2010 provides the capability to create Web-based Visio visualizations via Visio Services, which improve the process of conveying the status of a process or flowchart to business users and key decision makers.
- **PerformancePoint Services**: Create rich, dynamic and context-driven dashboards and scorecards that display information from company-wide strategy to operations with PerformancePoint Services, all from within a browser. Empower users to aggregate data from multiple systems and content types (e.g., Excel workbooks, reports, unstructured information, etc.) to analyze trends and discover patterns, all in a single environment.
- **Chart Web Parts**: Create charts directly in SharePoint using just your web-browser on data gathered in SharePoint Lists or from Excel workbooks. Through a simple wizard, users can create simple dashboards quickly and easily.
- **Status Indicator Lists**: Quickly create, and manage Key Performance Indicators (KPIs) to convey the status of your projects, and overall performance of short or long-term goals with a broader audience.
- **Business Connectivity Services (BCS)**: BCS allows you to create SharePoint applications that bring external data into the Office system, extending the rich Office user experience and SharePoint collaboration capabilities to business data and processes, while offering complete Create, Read, Update and Delete functionality, whether in SharePoint or offline in Office.
- **Search in SharePoint 2010**: Get better answers, faster with Search in SharePoint 2010. New federated search capabilities improve the relevance of results based on usage and history, enable people search through social connections driven by interest and expertise, and leverage support for over 400 content types and in 85 different languages.

SharePoint 2010 enables companies to democratize business intelligence by providing business insights to ***all*** employee leading to better, faster, more relevant decisions that are delivered through a familiar environment, integrated into a business collaboration infrastructure, and built on a trusted and extensible platform. With SharePoint 2010 insights, you can:

- **Empower Decision Makers:** Ability to create, access, and share information seamlessly and easily
- **Improve Organizational Effectiveness:** Access the right information to translate strategy into action and enable accountability
- **Enable IT Efficiency:** Create and maintain the infrastructure to effectively drive Business Intelligence to all users, inside and outside the firewall

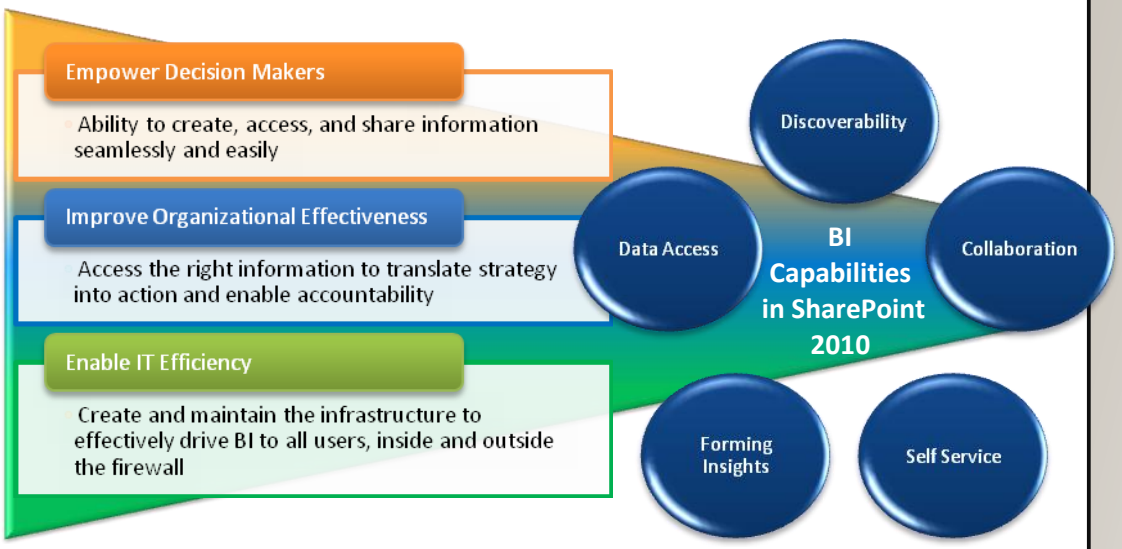

Figure 3: Business Intelligence in SharePoint 2010

Empower Decision Makers

SharePoint 2010 provides users with the ability to create, access, and share business insights to effectively empower decision makers, while keeping **Business Intelligence ownership within the business**, enabling agility to all users:

- **Self Service**: Empower all users to discover and manage their aspect of the business with the right information themselves, using only a browser
- **Work with Structured and Unstructured Information**: Easily find and work with structured and unstructured information within the same environment
- **Share and Collaborate**: Use familiar tools to create and share information seamlessly

Self Service

SharePoint 2010 empowers all users to discover and manage their aspect of the business with the right information. Users can operate in a familiar user interface (UI) to drive adoption, with a zero footprint browser to drive deployment. Users will no longer have to reach out to IT or specialists within their department to provide the necessary information, but rather discover and find the data they need on their own using familiar tools to create, analyze, and share the facts, thus decreasing the time and effort required to make informed decisions. Furthermore, Business Intelligence in SharePoint directly integrates with Microsoft Office tools and Microsoft SQL Server, making it even easier to strengthen the business with BI. Users can now make better informed decisions, and IT resources can now be diverted to other tasks, reducing costs and improving performance.

Work with Structured & Unstructured Data

With BI in SharePoint 2010, users can work with structured and unstructured information within the same environment, driving faster and more effective decisions. Rather than spending a significant amount of time combining and manipulating data from multiple sources and environments, SharePoint 2010 makes it easier to provide users with a more complete and integrated business perspective.

Share and Collaborate

Create and share critical business intelligence among colleagues and departments using familiar tools like Excel, Word, Visio, and web browsers. SharePoint 2010 makes it easier to find and discover information, and significantly increases the velocity of information sharing through collaboration enhancements. Users can easily publish powerful Excel workbooks with unlimited data and rich visualizations as whole or part of user dashboards, and bring the right people and expertise together to achieve strategic and tactical goals. This in turn enables the business to be more agile and make decisions faster, reducing waste and increasing performance.

IMPROVE ORGANIZATIONAL EFFECTIVENESS

BI in SharePoint 2010 provides users with access to the right information to translate strategy into action and enable accountability, driving improved organizational effectiveness. Key benefits include:

- **Accountability**: Manage, drive and define organizational success by aligning to key metrics and strategy with a single version of the truth
- **Transparency**: Providing trusted access to the right information, to the right people, at the right time
- **Discoverability**: Enabling users to find the right information across all data sources and content types

Accountability

BI in SharePoint 2010 enables users to manage, drive and define organizational success by aligning to key metrics and strategy with a single version of the truth. When everyone in a business unit understands current performance and how they fit into the picture, management can hold groups and individuals accountable for that performance. With SharePoint 2010, users can easily convey organizational strategy and metrics so that everyone in a given department or area of the business can understand performance and make adjustments to ensure business goals are met.

Transparency

SharePoint 2010 provides trusted access to the right information to the right people at the right time, providing a consistent view across all business applications and data sources. SharePoint 2010 further allows companies to manage the organization's DNA, no matter the type of content, and ensure proper records management, audit, and control. This increased transparency allows companies to identify, isolate, and correct problems to drive better performance.

Discoverability

BI in SharePoint 2010 allows companies to remove barriers to productivity by providing users with the ability to find the right information across all data sources and content types when and where they need it. With SharePoint 2010 users can quickly and easily develop a more complete picture of performance, leading to better decisions, include the right people and content for a complete view of the situation, and collaborate, all in a single, unified environment that is easy to use and familiar.

Enable IT Efficiency

With SharePoint 2010, the IT Department can create and maintain the infrastructure to effectively drive BI for the entire organization. Key benefits:

- **Enterprise-Ready Platform**: Scale up and scale out with a highly available, secure, and interoperable platform with a unified architecture, inside and outside the firewall
- **Robust Infrastructure Investments**: Ensure performance and increase reliability with powerful system management tools and features
- **Increased Developer Effectiveness**: Easily create applications from a single development platform to meet changing business requirements

Enterprise-Ready Platform

Scale up and scale out with a highly available, secure, and interoperable Business Intelligence platform. BI in SharePoint 2010 creates a cheaper, standards-based, manageable and scalable unified BI architecture. Support of standards means easier interoperability (XML, REST, and WSRP). SharePoint 2010 further lowers Total Cost of Ownership (TCO) through rationalizing and standardizing the organizational approach to BI by empowering Information Workers through the tools with which they are already familiar.

While individual BI solutions may need to be integrated with each other, SharePoint 2010 provides a common platform for all BI functions provided by SharePoint as well as from third-party software providers, reducing complexity and management time, thereby saving costs.

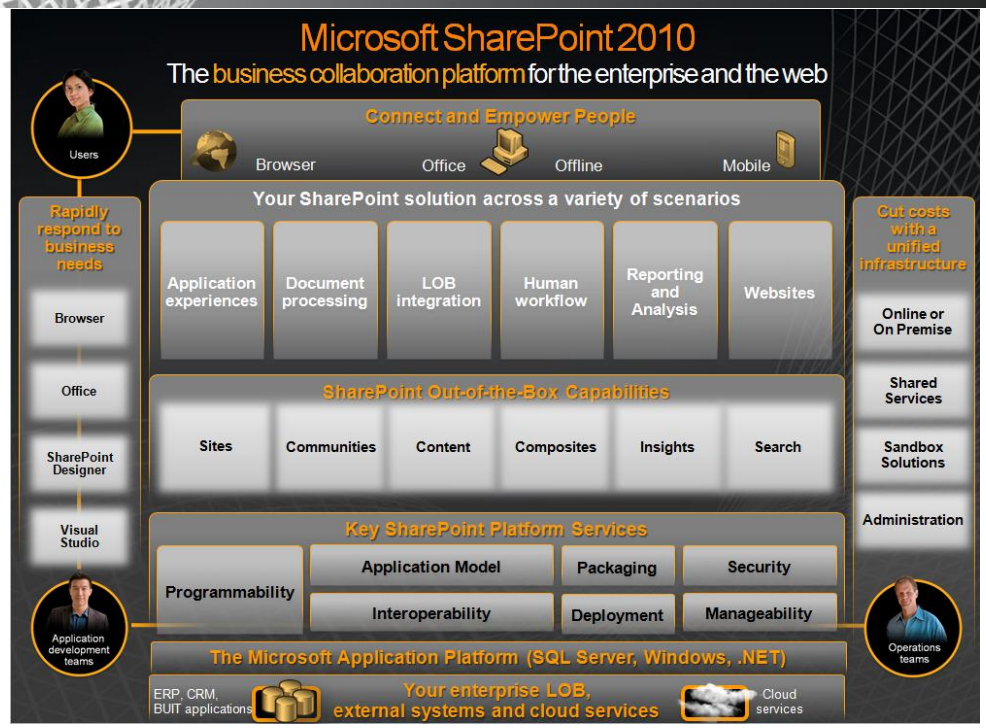

Figure 4: The SharePoint 2010 Platform

Robust Infrastructure Investments

SharePoint 2010 allows you to reduce downtime-related costs with a resilient platform at all levels. Database Servers provide data mirroring and granular backup and restore. Application & Search Servers are supported by multiple servers and automatic failover. Web Servers are further enabled through overload prevention and service priorities.

SharePoint 2010 further allows you to reduce down-time using proactive health monitoring, action replication across sites and farms, and upgrade process visibility. With proactive health monitoring, administrators can leverage improved problem identification, links to guidance and resources, and service-level data to address issues and improve performance. Through the replication of actions across sites and farms, administrators can realize significant time savings in a robust scripting environment that enables you to programmatically set-up sites, populate content, and more.

Increase Developer Effectiveness

Reduce development costs through comprehensive out-of-the-box components, using built-in integration with the Microsoft Office suite and .NET Framework object models to reduce learning curves and development time. SharePoint enables developers to quickly become productive, with simple to powerful development tools including Excel, Dashboard Designer, SharePoint Designer and Visual Studio.

With SharePoint 2010, developers can easily create applications from a single development platform to meet changing business requirements. As different business units' requirements change to meet the needs of their customers and to effectively check competition, developers can quickly deliver applications and required BI enhancements.

SharePoint 2010 also integrates with legacy systems with little difficulty. Interoperability is provided through the SharePoint Business Connectivity Services, which provides a standardized method of accessing, displaying and editing content from legacy systems. IT can provide users a single, unified experience from data in Line of Business or legacy systems, and consolidate multiple or out of date interfaces. With full create, read, update, and delete as well as synchronization with SharePoint Workspace and Microsoft Office, users can access the information they need online or offline, for increased productivity.

How to Get Started with SharePoint 2010

Regardless of where you begin, SharePoint 2010 provides a great number of places to start realizing value immediately. Below are a number of recommendations to get started from the simplest to more complex.

Figure 5: Getting Started with SharePoint 2010

Level 1: Just Starting Out

If you are just getting started with SharePoint 2010, you can quickly implement a BI solution using a number of capabilities out-of-the-box through SharePoint web parts:

- Start developing charts with easily-accessible data such as those within SharePoint lists
- Upload existing spreadsheets and use Excel Services to display and manage workbooks, maintain a single verion of the truth, and create dashboards, for your team and projects
- Track project information using status indicators either from a workbook, a database or manually entered information.

Level 2: Intermediate

Start by uploading content and information to create self-service performance dashboards. With SharePoint 2010 you can:

- Start creating reports in Excel Services and publish those reports as individual web parts
- Develop and publish dynamic Visio diagrams and display these in your SharePoint pages
- Integrate BI into your team communities and work processes by attaching workflows

Level 3: Advanced

For those further along the BI continuum, consider starting out with SharePoint 2010 by creating a performance dashboard using the rich capabilities of PerformancePoint Services:

- Bring Line of Business data into SharePoint providing real-time, or transactional information to your users alongside historical information.
- Use PerformancePoint Services to aggregate data from multiple systems and content to create rich, context-driven, and dynamic dashboards.
- Empower users to access the information they need easily using just a browser, interacting with the information in real-time using rich analytics and features like the Decomposition Tree to quickly spot trends and seize opportunities.

Conclusion

SharePoint 2010 is the Business Collaboration Platform for the Enterprise and the Web that enables you to connect and empower people through an integrated and rich set of features. SharePoint 2010 enables companies to democratize business intelligence, improving organizations by providing business insights to ***all*** employees leading to better, faster, more relevant decisions that are delivered through a familiar environment, integrated into a business collaboration infrastructure, and built on a trusted and extensible platform.

SharePoint 2010's robust Business Intelligence capabilities help organizations manage and access both structured and undstructured data, providing you with the ability to:

- **Empowers Decision Makers** with the ability to create, access, and share business insights while keeping Business Intelligence ownership within the business, through ***Self Service*** capabiltiies, working with ***Structured and Unstructured Information***, and the ability to easily ***Share and Collaborate***

- **Improves Organizational Effectiveness** by aligning strategy and execution across the organization and providing users with access to the right information, therby improviing ***Accountability***, ***Transparency***, and ***Discoverability***, and

- **Enable IT Efficiency** by helping IT department create and maintain the infrastructure to drive BI for the entire organization with an ***Enterprise-Ready Platform***, ***Robust Infrastructure Investments***, and ***Increased Developer Effectiveness***.

By leveraging SharePoint 2010's capabilities across Discoverability, Collaboration, Self Service, Insight Formation, and Data Access, all users can effectively drive, manage, share, and create insights for their aspect of the business with a single, integrated Business Intelligence solution.

Microsoft® SharePoint® Server 2010

Additional Resources

Learn more about Business Intelligence in SharePoint 2010 at:
http://sharepoint.microsoft.com/product/capabilities/bi/Pages/default.aspx

Learn more about Microsoft SharePoint 2010 at:
http://sharepoint.microsoft.com

Learn more about Microsoft Business Intelligence at:
https://www.microsoft.com/bi