Self-Service Analytics with an application developed using Lumira Designer

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About the Speakers

- Alonso Arteaga King
- Dir. IT Information Services
- Responsible for Business Intelligence and Master Data Management at Chamberlain Group
  25+ years of IT experience
- As an IBM sales rep, Chamberlain was my 10th new customer almost 20 years ago

- Gopal Krishnamurthy
- Founder/CEO, Visual BI
- Growing niche market leading BI & Analytics solution firm and keeping customers and employees excited and happy
- Co-Produced a Movie

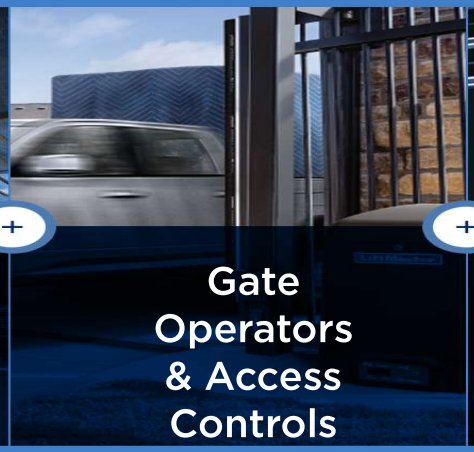
Key Outcomes/Objectives

1. Segmenting your users allows you to target the BI solutions and drive adoption
2. Selecting the right tools allows you to reduce cost and maintenance
3. Fostering a strong super user community and stakeholder engagement sustains usage and adoption

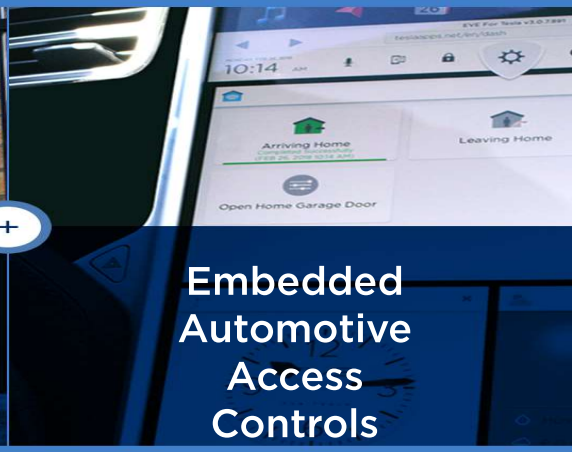
Our Core Categories

Residential Garage Door Openers

Commercial Door Operators



Gate Operators & Access Controls



Embedded Automotive Access Controls

Our Vision

We give the power of access and knowledge.

Our Mission

People everywhere rely on CGI to move safely through their day, confident that what they value most is secure and always within reach.

Our Brands

LiftMaster · CHAMBERLAIN · myQ · GRIFCO · Merlin · tend · SYSTEMS · CPSG

In-Garage Delivery is here For Amazon Prime members

key

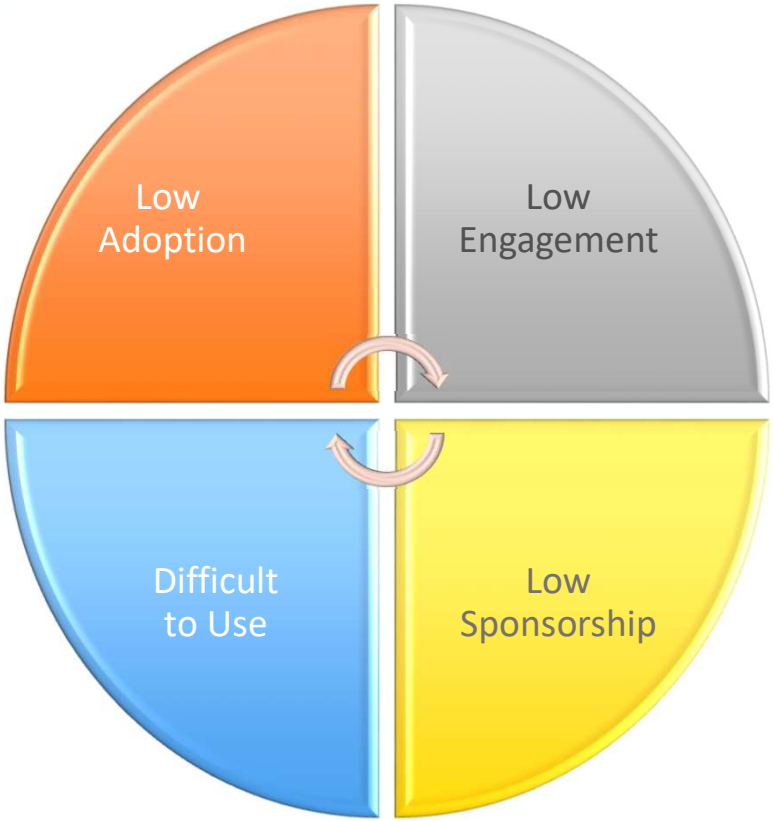
myQ

Agenda

- Our Problem
  - Background – Where are we coming from?
  - What we have tried before
- Our Solution
  - What we did
  - What have we solved?
- Benefits
  - How are we measuring Success?
  - What's Next?

Our Problem

- I don’t have the data I need
- Just email me report

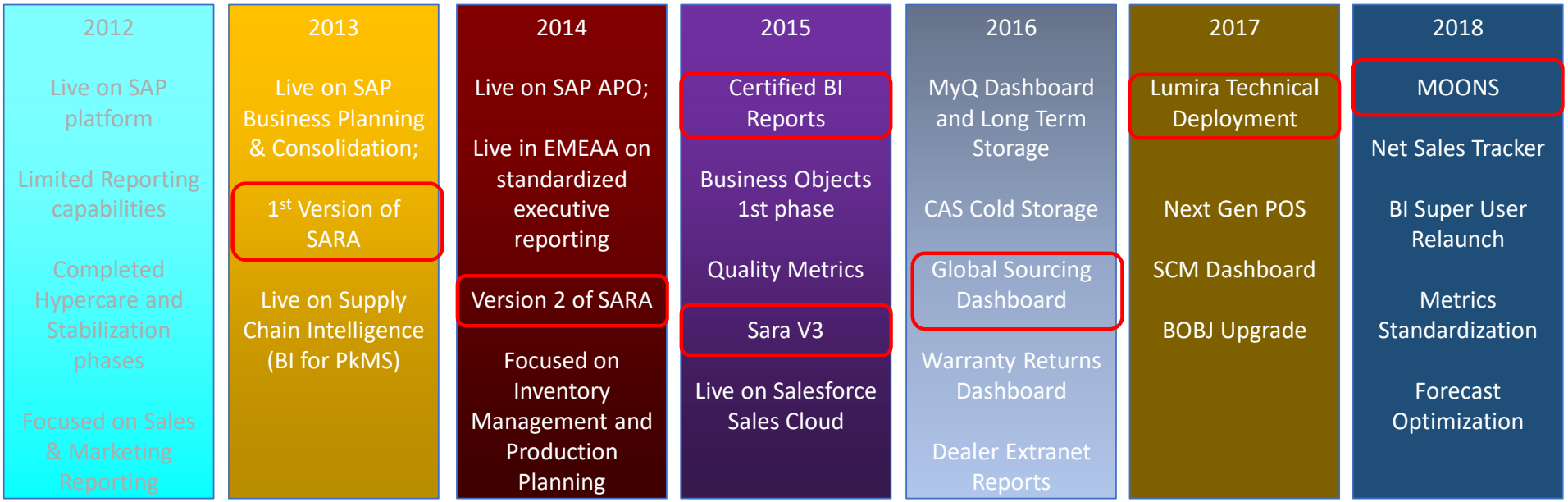


- I don’t know what data is available
- I just need to download to excel

- I don’t understand the data I see
- Why can’t I get the data the way I want?

- Numbers don’t match
- Who owns this data?

BI History



2012	2013	2014	2015	2016	2017	2018
1. Sales 2. Finance	1. Finance 2. Distribution 3. Sales	1. Demand Planning 2. Materials Management	1. Executive Team 2. Quality 3. Retail	1. MyQ 2. Sourcing 3. Field Service	1. SCM 2. Marketing	1. Marketing 2. Finance 3. SCM

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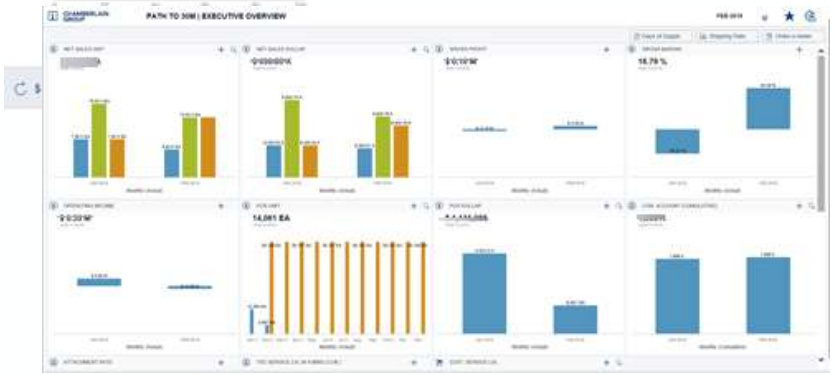
Previous Solutions

Certified BI Report



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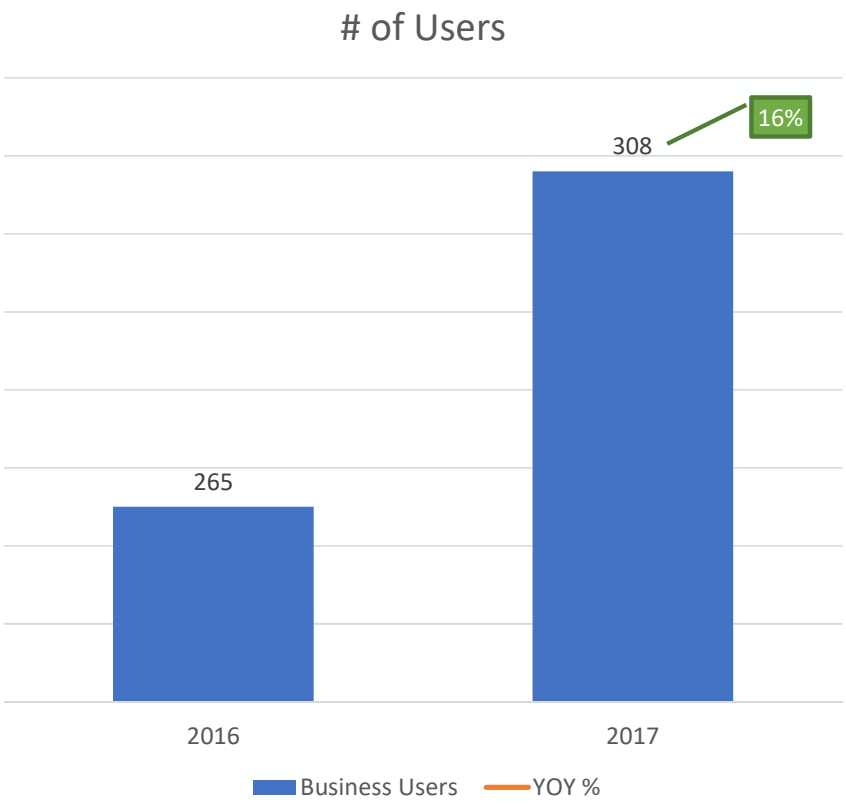
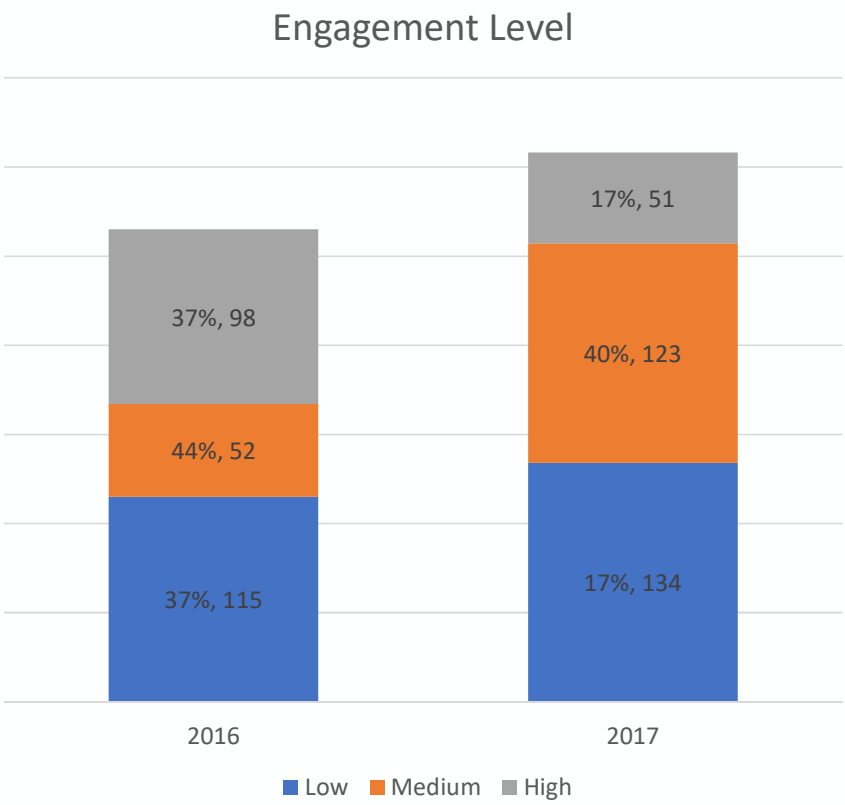
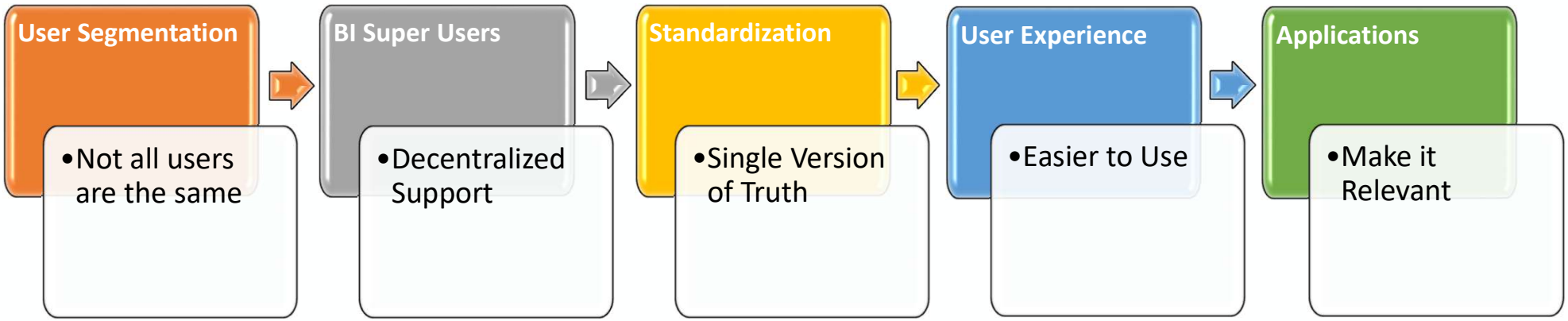
Low Adoption and Low Engagement

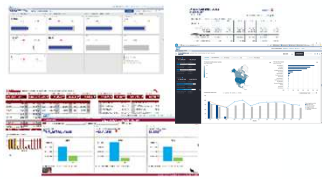




Our Solution



User Segments (1/2)

Segment	Characteristics	Typical Use Cases	Tools
Information Consumer	• Uses Reports and information prepared by others • No time to be trained • High Level understanding of Data • Prefers to receive information • High Level Metrics and summarized information • No/Limited navigation within data set	• Executives receiving daily Order-O-Meter • Managers receiving monthly Finance Overview • Executives using Global Sourcing Dashboard • Salespersons using SARA	
Business User	• Starts with Reports and information prepared by others but performs basic navigation • Limited time to be trained • Understands own domain data • Needs to drill down into medium level of detail • Basic Navigation – Filter, Drill Down	• Managers using pre-defined BI queries • Managers drilling down on Global Sourcing Dashboard • Salespersons using detail reports in SARA • Financial Analyst creating personal views on existing BI queries	 Qlik SAP Lumira Ignite Creative Ideas

User Segments (2/2)

Segment	Characteristics	Typical Use Cases	Tools
Business Analyst	• Starts with Reports and information prepared by others but changes to suit his/hers needs • Available to be trained – self-trains • Understands domain data • Understand how to use tools • Advanced Navigation – Filter, Drill Down, Combine, Visualize, annotate, publish	• Analyst using pre-defined BI queries to create own views • Analysts creating reports for others • Managers analyzing data for exceptions, etc. • Analyst analyzing data for particular project, issue, business situation, etc.	Power BI, Qlik, SAP Lumira
BI Super User	• Creates Reports and information for others • Trains other users • Deep understanding of data across domains • Advanced Navigation – Filter, Drill Down, Combine, Visualize, annotate, publish, create • Supports department or data domain users • Works with IT-BI for new development	• Analyst creating new views and reports for other users • Analyst modifying existing business reports and views • Scheduling broadcasting of reports to information consumers • User Acceptance Testing new BI projects and changes	Power BI, Qlik, SAP Lumira

BI Super Users

Role	Responsibilities
Advanced BI User	1. Demonstrates an expert knowledge of business metrics and key performance indicators, reports the data behind the reports, and how to read / interpret the data 2. Analyzes Data, creates reports/data stories and uses reporting to answer questions regarding business performance; trains end users on created reports/data stories 3. Works with business leadership and management to understand current and future reporting needs 4. Works proactively with BPOs and Super Users to understand business processes 5. Collaborates with other BI super users and Advanced Users to understand cross-functional reports and share knowledge 6. Works directly with BI Super Users on new projects related to reporting and analytics; drives definition of functional requirements, helps write functional specs; helps tests all changes
BI Super User	1. Demonstrates an expert knowledge of business metrics and key performance indicators, reports the data behind the reports, and how to read / interpret the data 2. Defines and creates reports, analyzes data, and uses reporting to answer questions regarding business performance; trains advanced users on data domain and trains end users on reports/Metrics 3. Works with business leadership and management to understand current and future reporting & Metrics needs 4. Works proactively with BPOs and Super Users to understand business processes 5. Collaborates with other BI super users and Advanced Users to understand cross-functional reports and share knowledge 6. Works directly with IT on production support issues and new projects related to reporting and analytics; defines functional requirements, writes functional specs; tests all changes

Standardization

- Easier said than done
- Stakeholder alignment
- Simplify
- Governance – Who owns it
- Define use cases

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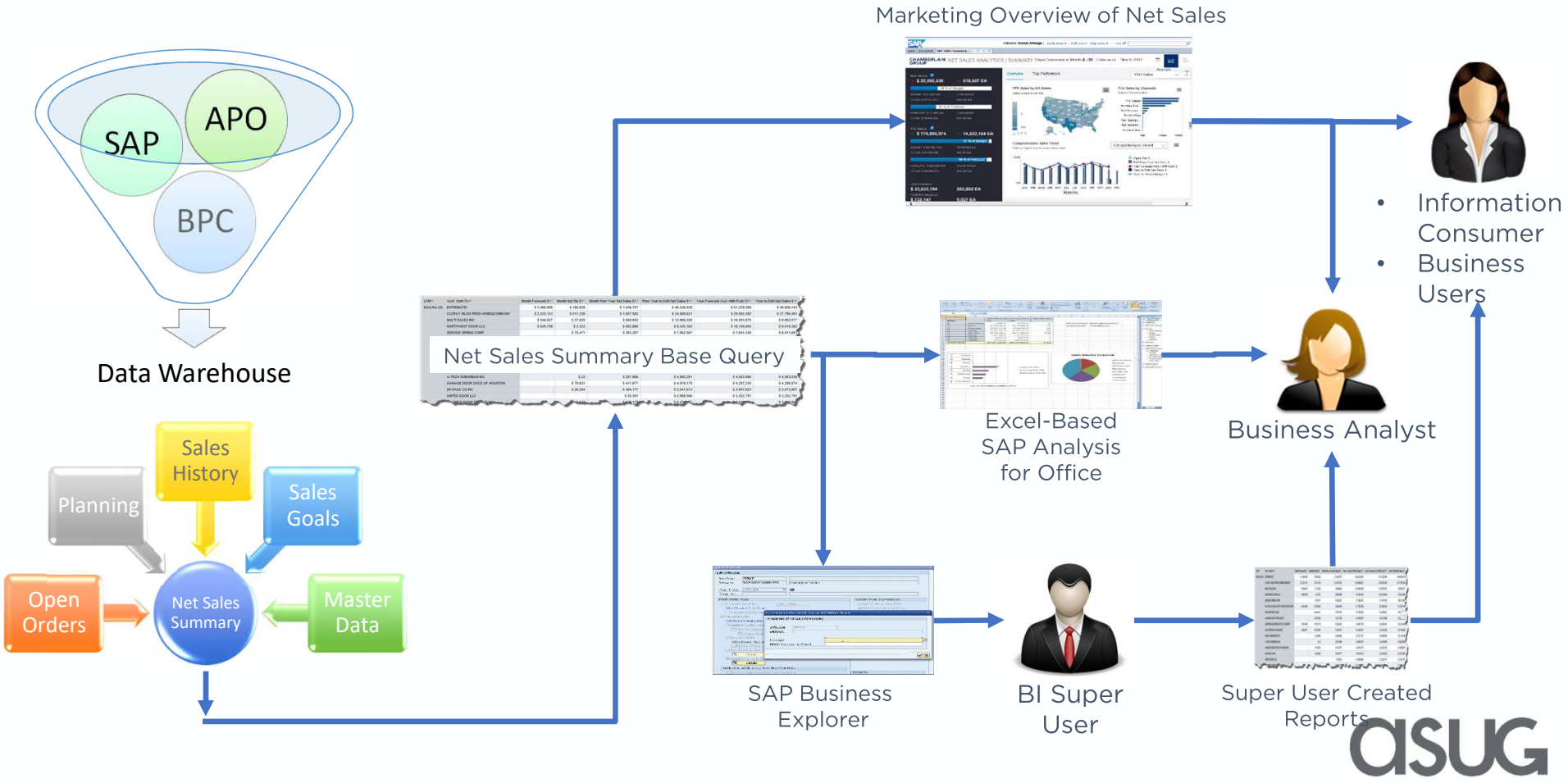
User Experience

- Define Personas – tie to user segments
- Involve right representatives of segments
- Influence design and usability
- Tie use cases to roles
- Simplify
- Brand it

MOONS

WELCOME TO THE
MOONS
CHAMBERLAIN GROUP
MARKETING OVERVIEW OF NET SALES

How do I access the Data?



Overview Screen

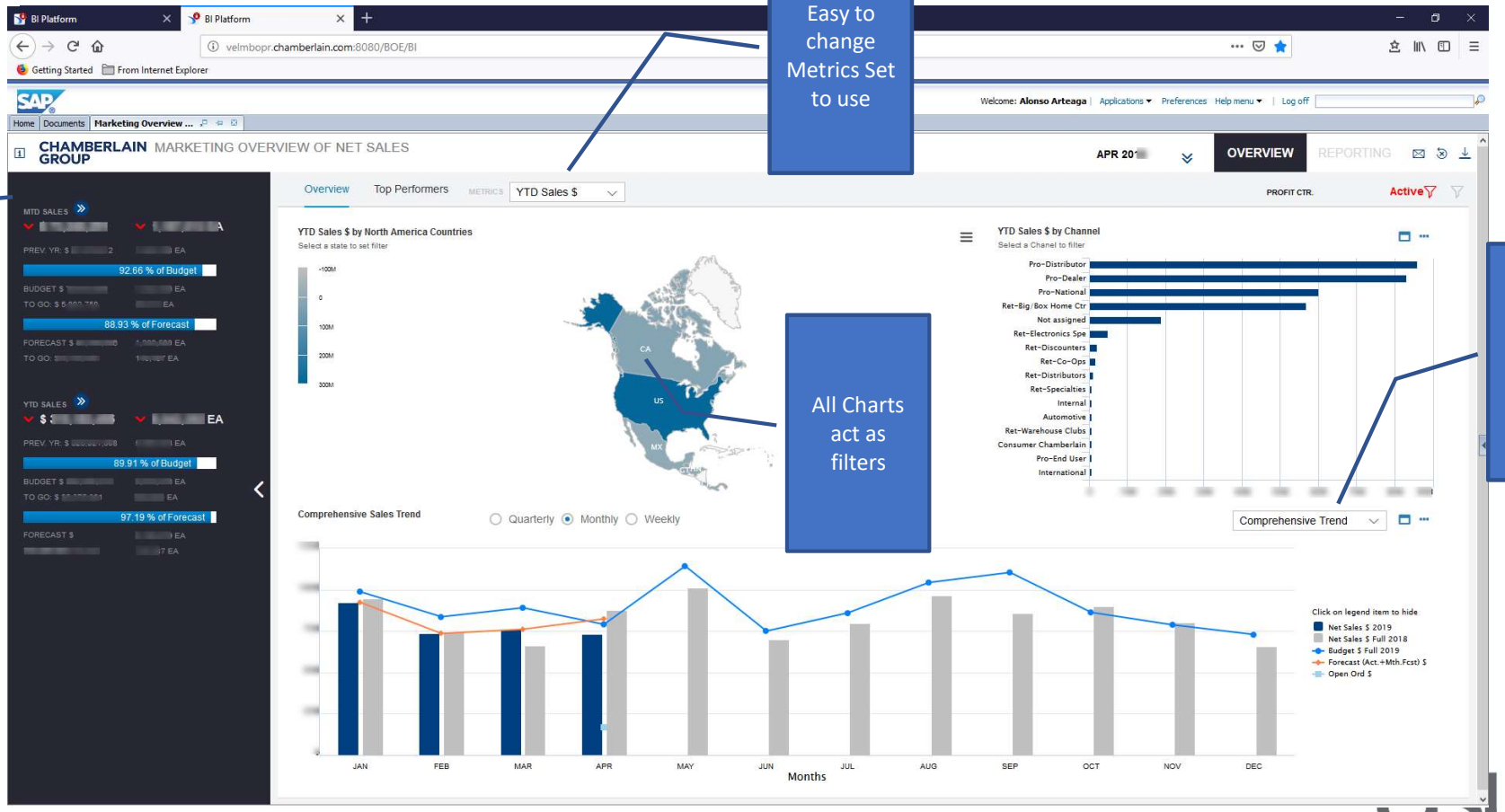
Information Consumer

Easy to change Metrics Set to use

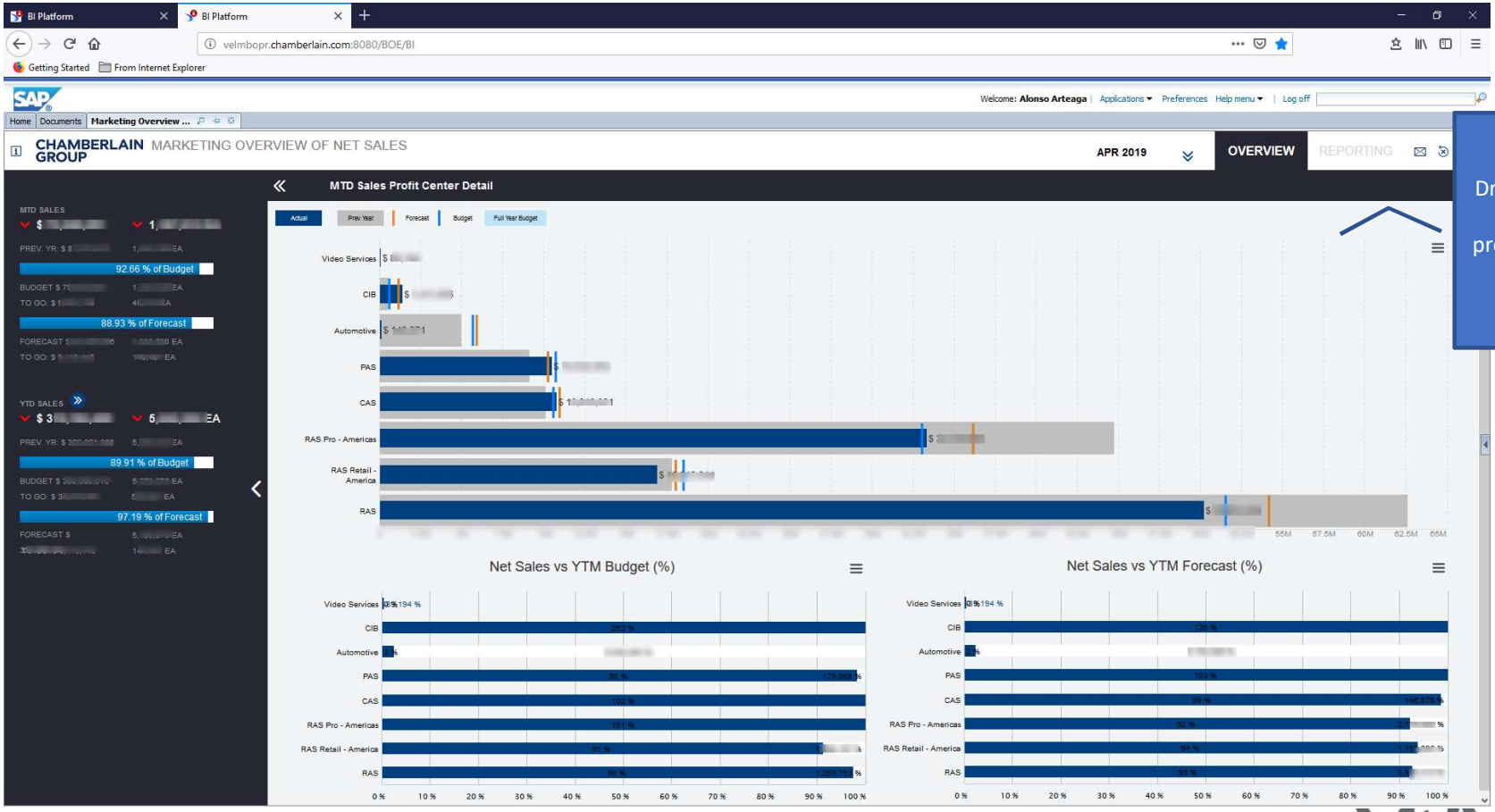
Quick View of MTD/ YTD Sales, Forecast and Budget

All Charts act as filters

Easy to change trend analysis

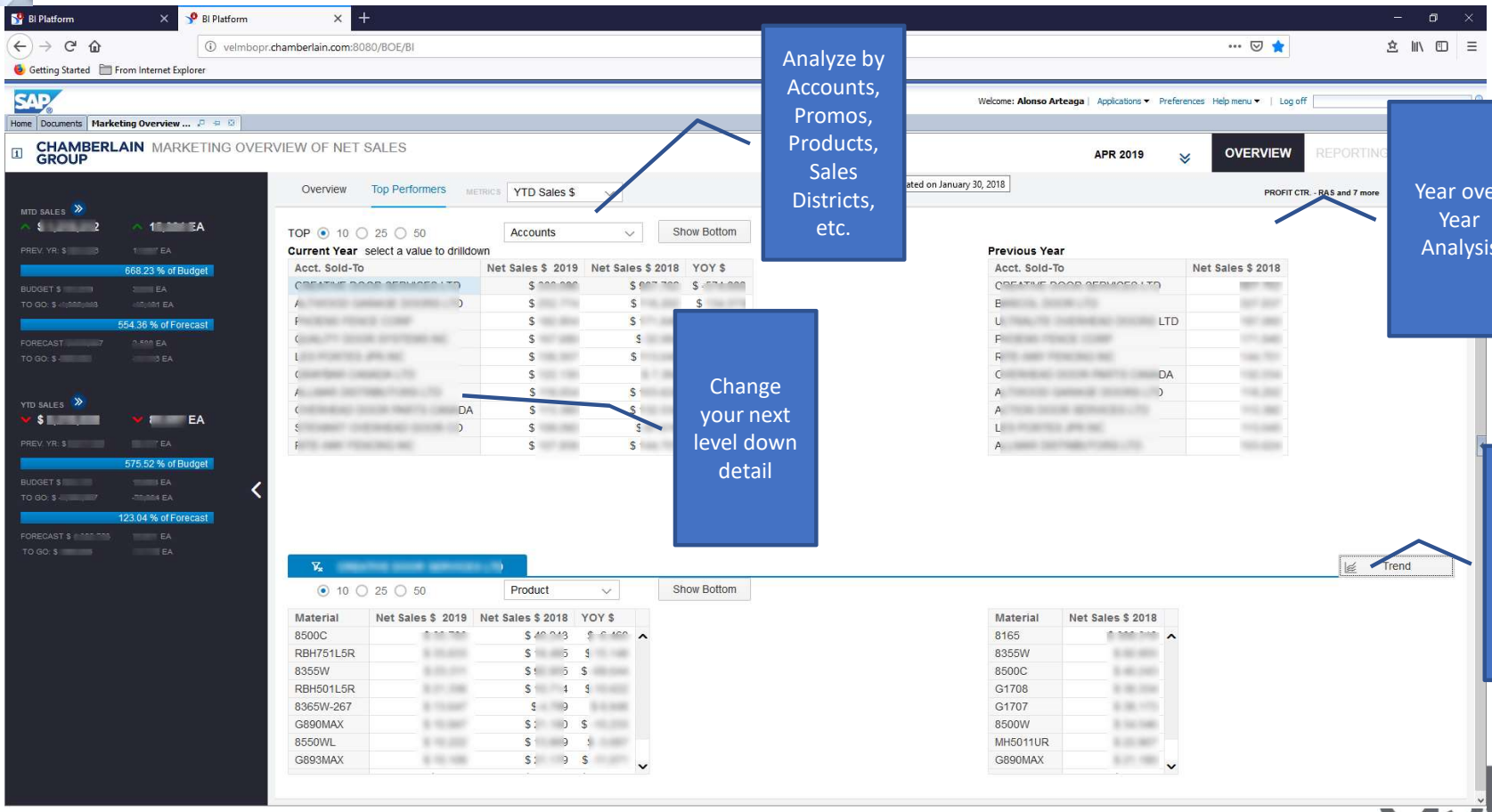


Information Consumer



Drill Down to predefined detail

Business User



Business Analyst

Select from pre-defined user friendly dimensions

Select from Pre-defined standard metrics

Create your own report

Create and save your own filters

Save, email or download

BI Platform

velmbopr.chamberlain.com:8080/BOE/BI

Getting Started | From Internet Explorer

Home | Documents | Marketing Overview ...

CHAMBERLAIN GROUP MARKETING OVERVIEW OF NET SALES

APR 2019 | OVERVIEW | REPORTING

Perspective Template: ---Default Perspective---

Edit Measures | Edit Dimensions

Table | Chart | Trellis | Map

Drag and drop dimensions to rows or columns

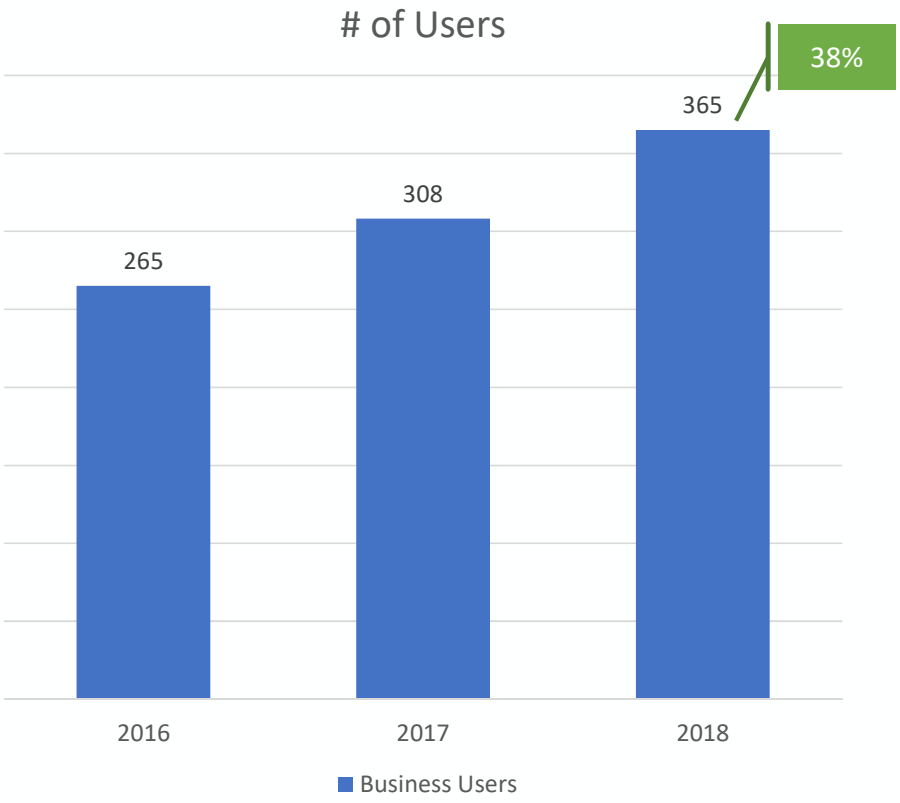
DIMENSIONS: Acct. Channel, Acct. Cust.Grp.2, Sales District, Acct. Cust.Grp, Sales group, Acct. Sold-To, Acct. Ship-to, City, Configuration, Config Category, Config Classificatio, Config Type, Country, Dist. Channel, General Item Categor, Material, Month, Plant, Postal Code, Brand, Prd.Ctg

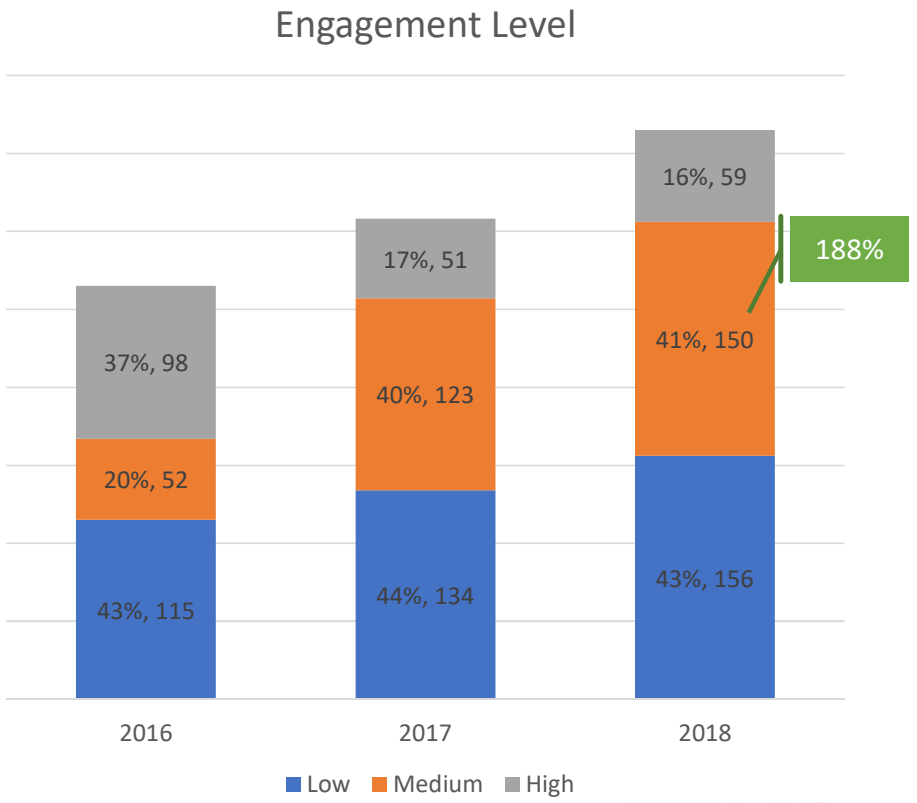
COLUMNS: Profit Center, Measures

ROWS: City

Profit Center	Overall Result	RAS	RAS Pro - Americas	CAS	PAS	CIB
City	Net Units 2019	Net Units 2019	Net Units 2019	Net Units 2019	Net Units 2019	Net Units 2019
ABBOTSFORD						
AIRDRIE						
AJAX						
ALLENFORD						
ANCASTER						
ARISS						
ASHTON						
ASSINIBOIA						
AURORA						
BADJEROS						
BARRIE						
BOISSEVAIN						
BOLTON						
BOWMANVILLE						
BRADFORD						
BRAMPTON						
BRANDON						
BRANTFORD						
BROMONT						
BURGESSVILLE						
BURLINGTON						
BURNABY						
CALGARY						
CAMBRIDGE						
CAMPBELLVILLE						
CHATHAM						A
CHICOUTIMI						

How do we measure success?





Why use Lumira Designer?

- Ease to develop applications
- Mobile deployment capabilities
- VisualBI Components extend functionality and reduces development time
- Robust applications developed
- Reuse all queries
- Ability to Brand solution

Why SAP Lumira Designer?

SAP's Hybrid BI Strategy

Products

SAP BusinessObjects BI portfolio

Analytics catalog

SAP Analytics Hub

- Helps all users search for and launch analytics of any type: SAP or non-SAP, on premise or in the cloud

Data discovery Discover, analyze, and share	App design and data discovery Interactive dashboards and analytic apps	Reporting Distribute formatted information
SAP Analytics Cloud ▪ Integrated BI, smart discovery, and planning ▪ Data exploration ▪ Best for holistic analytics use cases with both cloud and on-premise-based data – **without data replication**	**SAP Lumira, designer edition, 2.x** ▪ Creation of sophisticated, dynamic analytic applications such as planning front ends ▪ Integrated data discovery and analytic applications ▪ For mobile and desktop consumption	**SAP BusinessObjects Web Intelligence** **SAP Crystal Reports** ▪ Securely distribute information across your organization ▪ Answer new questions with predefined interactive reports ▪ Publish personalized reports using e-mail

Office integration

SAP Analysis for Microsoft Office and SAP BusinessObjects Live Office

- For financial analysts and other business users
- Ability to rapidly access, visualize, and analyze hierarchical data within Excel and PowerPoint
- SAP BusinessObjects Live Office enables parts of SAP Crystal Reports and SAP BusinessObjects Web Intelligence documents to be embedded into Office documents

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- SAP Analytics Cloud and SAP Lumira 2.x are poised as two different offerings for customers.
- SAP Analytics Cloud – Data Discovery offering for customers running cloud based services (such as SAP SuccessFactors, Ariba etc.)
- SAP Lumira 2.x – Data Discovery & App Design offering for customers using On-Premise systems (such as SAP BW, SAP HANA, SAP BW/4HANA, SAP S/4HANA)
- Designer is the flagship app design product on-premise and will continue to be. Discovery will compliment designer.

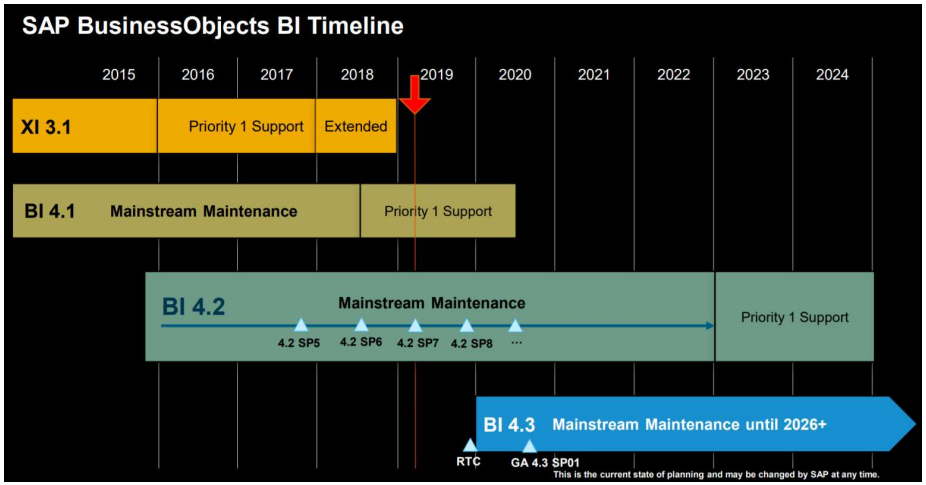
Source: *SAP Analytics 2019 Strategy and Roadmap*

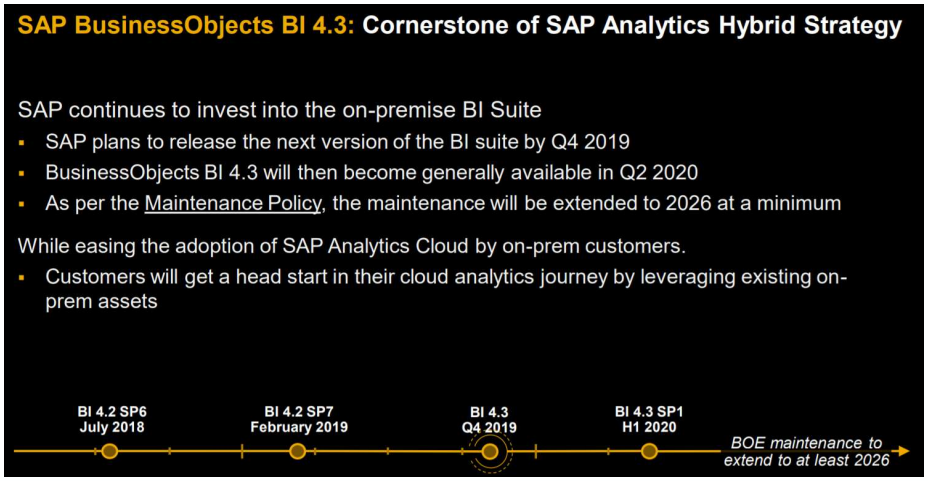
SAP Analytics Strategy

Hybrid BI Strategy

- Analytics on-premise (Business Objects) or on Cloud (SAC)
- Investment on SAP BI 4.3 release and SAP Analytics Cloud
- SAP Analytics Cloud connectivity to Webi data models
- Enhanced live Universe connectivity 2.0, data remains on premise
- Utilize Data Level Security from the Universe
- Hybrid user management – onboard existing on-premise users to cloud
- Analysis for MS office connectivity to SAP Analytics Cloud models
- SAP Analytics Cloud to get the SAP BI 4.3 connectivity servers, enabling connection to 100+ data sources
- SAP BI 4.3 General Availability Q2 2020, maintenance at least till 2026+
- Streamlined licensing options
- SAP Lumira 2.X still recommended for multiple migration scenarios

SAP Analytics Cloud and On-Premise SAP BI tools are sure to co-exist with support extending beyond 2026+





Source: *#askSAP Community Call SAP Analytics 2019 Strategy and Roadmap*

What's Next?

- STARS: Sales Tracking and Reporting System
- Operations Dashboard – Extend beyond sales
- Add predictive capabilities
- Improve Performance
- Continue to drive Super User Program
- Continue to Train Users

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Presentation Materials

Access the slides from 2019 ASUG Annual Conference here:

http://info.asug.com/2019-ac-slides

Q&A

For questions after this session, contact us at [email] and [email].

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