

A White Paper

Eight Must-Have Criteria for Self-Service Analytics

The Information Builders Approach



Information Builders helps organizations transform data into business value. Our business intelligence, integration, and data integrity solutions enable smarter decision-making, strengthen customer relationships, improve performance, and drive growth.

Table of Contents

1	Introduction
2	Tools Vs. Apps: Which is Better for Self-Service Analytics?
3	Eight Must-Haves When Choosing the Right Analytics Platform
3	1 Usability
3	2 Scalability
4	3 Security
4	4 Data Services and Integration
4	5 Functionality
4	6 Performance
5	7 Personalization
5	8 Information Integrity
6	Self-Service Analytics and Applications for Everyone
6	For Business Analysts, Power Users, and Developers
7	For Management, Operational Employees, Partners, and Customers
8	Maximum Scalability
8	Optimum Data Quality
9	Conclusion

Introduction

Self-service analytics puts enterprise information directly into the hands of your decision-makers, thereby increasing agility, broadening business intelligence (BI) penetration, and reducing reliance on IT staff. If you develop a comprehensive strategy and implement the right supporting tools to meet the needs of all user communities, you'll go a long way toward ensuring the success of these analytics.

Executives, operational employees, customers, partners, and other business users make better and faster decisions when they get single-click access to relevant, real-time analytic content. Analysts and power users need to perform deep data manipulation to uncover trends, patterns, relationships, and anomalies. When developers and IT staff use powerful, yet intuitive tools to make robust analytic content available to all, they provide data services and analytics in ways that make them heroes instead of bottlenecks.

If you want to give your users exactly what they need, when and how they need it, deploy an enterprise analytics and applications platform with a broad range of features to satisfy the widest range of information requirements. Make self-service analytics part of a wider-reaching enterprise strategy that blends traditional approaches to analytics with dashboards, data discovery, self-contained analytic apps, and other self-service capabilities. This will enable power users to perform highly complex or multi-faceted analyses – even publishing and sharing sophisticated, interactive analytical environments to end user communities – while giving non-technical business users fast, easy ways to answer specific questions or investigate and solve certain problems. It will also free up IT staff to pursue new ways to meet growing demands for information, which will make everyone more successful.

In our previous white paper, “Reinventing Self Service for the New Era of Analytics: How IT Can Empower Business Users in the Data-Driven Generation”, we discussed the need for self-service analytics, and the challenges organizations face when trying to satisfy different user types and ensure that enterprise data is self-service ready. In this paper, we'll share eight critical factors for self-service success. From flexibility and usability to scalability, security, and data quality, considering these criteria when choosing a self-service analytics solution will ensure that everyone is able to make better decisions, faster. We'll prove it too, with real-world success stories based on Information Builders' suite of intelligence, integration, and integrity solutions.



Tools Vs. Apps: Which is Better for Self-Service Analytics?

Some companies turn to analytical solutions to satisfy self-service demand. Vendors claim these solutions are ideal for business users, but they're really tailored to analysts and power users with more advanced technical skills. Users with limited technical savvy, such as operational employees, customers, and partners, remain in the dark.

Analytics that are simple, precise, and focused on a specific business problem will satisfy the non-technical business users that make up the majority of your information consumers. The success of the apps market demonstrates a transformation in how these stakeholders want to access and interact with enterprise data.

But apps alone aren't enough for your analysts and power users, who want more sophisticated Some companies turn to analytical solutions to satisfy self-service demand. Vendors claim these solutions are ideal for business users, but they're really tailored to analysts and power users with more advanced technical skills. Users with limited technical savvy, such as operational employees, customers, and partners, remain in the dark.

Ameritas, a provider of insurance and financial products, created self-service dashboards and analytic apps that streamline billing, enrollment, and reconciliation processes for Group Insurance customers. Business users simply select the content they want to see and drag it onto their portal to easily interact with data, answer specific questions, and solve unique problems.

Mobility also drives increased need for self-service analytics apps. Few traditional analytic solutions are mobile optimized. They provide only static data or offer very limited interactivity, rather than delivering engaging and interactive analytics to any device.

Logistics service provider **AJ Logistics** understands the importance of mobility in self-service analytics. AJ's clients – who spend most of their time on location at various job sites – access a comprehensive self-service environment via their iPhones and iPads to simultaneously track multiple projects, obtain status updates, issue commands, generate invoices, manage inventory, and schedule deliveries.

Customer-Facing Analytics

Ameritas and AJ Logistics leverage customer-facing analytics. An essential part of self-service, customer-facing analytics boost value by increasing pervasiveness and extending decision-making capabilities to even more users. They also demonstrate the need for simple and intuitive apps in addition to more sophisticated analytic and data discovery solutions, so customers can interact with analytic content, without learning a specific tool.

Eight Must-Haves When Choosing the Right Analytics Platform

The best self-service environments optimize the user experience through a secure, interactive, intuitive, and personalized environment for information access and analysis. Consider the eight characteristics below when choosing a platform to support your self-service analytics strategy.

1 Usability

An intuitive interface will promote high levels of pervasiveness and maximize return on investment. Analysts and power users can start with a blank slate and build sophisticated analyses. Non-technical business users will get simple, straightforward apps that let them interact with information with little or no training. And business analysts and IT staff will have a comprehensive, yet user-friendly way to publish, share, and operationalize insights for all information consumers.

Major grocery retailer **Food Lion** created an intuitive self-service analytics and reporting environment that allows managers to access financial information via the corporate intranet, and automatically schedule the distribution of daily sales results by e-mail. Sales and financial information is now received days to weeks sooner, and managers perform better analysis of weekly store promotions, quickly detect buying patterns, and respond to changes in the marketplace.

North American Lighting shares more than 100 reports, dashboards, and BI apps with workers through a convenient and visually compelling interface for instantly analyzing and interacting with complex data sets. This consistent, real-time view of plant operations and performance accelerates the planning of production schedules, ensures that orders are filled efficiently, and enables more accurate tracking of customer shipments.

2 Scalability

Breaking out of the tool mentality will make self-service analytics available to a larger number of stakeholders and create an environment that serves both power users and non-technical users. Environments that are user friendly expose more information to more consumers.

Furthermore, a scalable underlying architecture will effectively support a growing user base, without driving up hardware and maintenance costs – even when the number of users reaches into the hundreds of thousands. Licensing is also an important consideration. Many analytic solutions offer licenses for named users only, which increases software-related expenses. A solution with a more flexible licensing model supports the largest number of users at the lowest total cost of ownership.

Scalability was important for global retailer **Ace Hardware** when it extended decision-making capabilities to all types of internal and external users. The company built a universal self-service analytics and reporting platform to accommodate corporate users, customers, retail partners, and suppliers. Field staff monitor vendor performance and improve merchandising programs, while 10,000 users get accurate information wherever and whenever they need it.

3 Security

Data security is crucial when opening up analytics to new audiences. Preventing unauthorized viewing of confidential information is even more important when data is shared among external user groups like customers and partners. A platform with multiple levels of security creates a comprehensive, tightly integrated security net for the most sensitive data and applications.

4 Data Services and Integration

Data services and integration allow IT to enable the data environment and open up all information – from internal systems like CRM, ERP, and legacy applications, as well as social, cloud, mobile, and other sources – to all your end users.

5 Functionality

A broad range of capabilities, delivered through a single integrated platform, will address the unique needs of the many types of information consumers in your organization. A unified environment with dashboards and scorecards for executives; data visualization and predictive analytics for analysts and power users; self-contained analytic apps for employees, customers, partners, and other business users; and robust development tools for IT staff will promote pervasiveness by giving each user exactly what they want. It's even better if that functionality is available as needed, so it can be easily purchased and plugged into the environment as your requirements evolve.

Elavon, a full-service credit card processing company, provides consolidated, comprehensive analytic, mobile, and reporting capabilities to executives and field staff through a three-tiered application comprising analytic dashboards for 600,000 merchants, self-service reports for business analysts, and structured ad hoc reports for employees. Full mobile capabilities offer support for the native interface characteristics of any smartphone or tablet. The self-service environment enhances many critical facets of Elavon's operations – from sales and marketing to business planning and customer service.

6 Performance

End users expect superior performance from self-service analytics, even when large data volumes are processed or a high number of queries are generated. Slow response times can lead to frustration, or even abandonment of the environment altogether. A supporting platform with the right performance-related features will optimize performance at all times, even when working with high volumes of data or responding to a large number of simultaneous queries.

7 Personalization

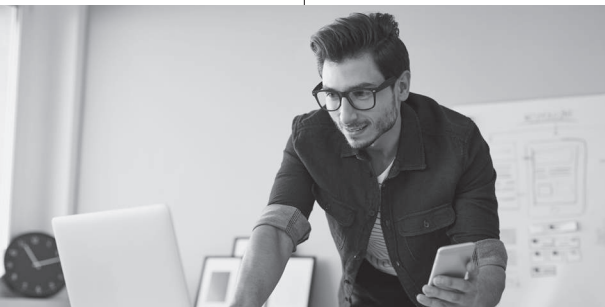
Information is only truly relevant when users can tailor it to their very specific needs. Giving users full control over what they see and how they see it will drive greater levels of BI pervasiveness.

8 Information Integrity

Accuracy, consistency, and completeness are important when information is shared with a broad user base. An underlying platform with fully integrated data quality management ensures that all data is timely, trusted, and readily available for self-service access.

Big Data

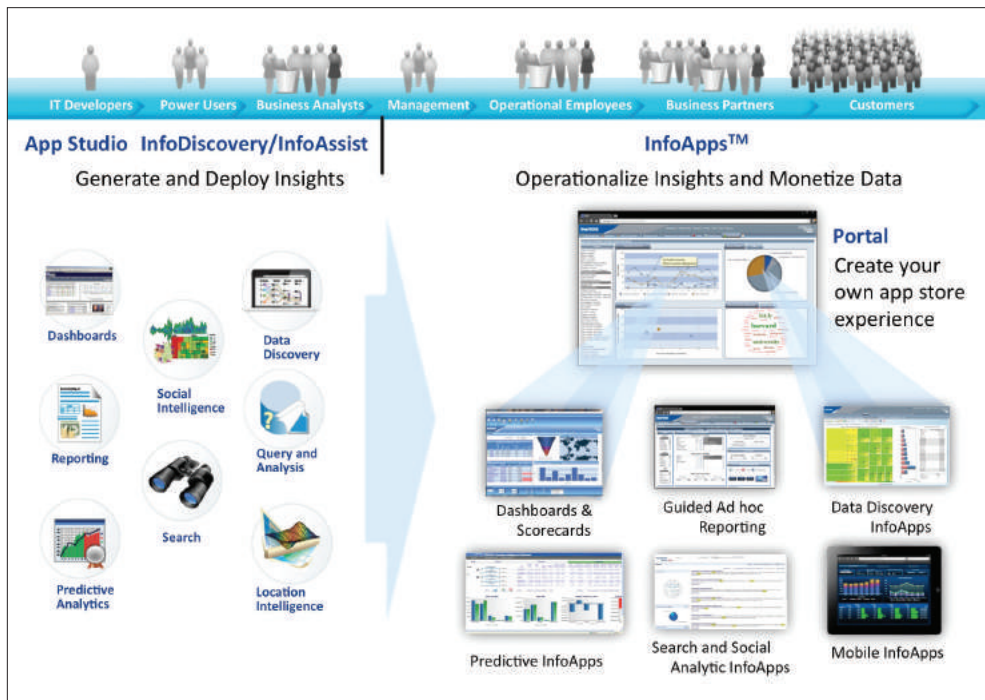
Massive volumes of data, sometimes from unstructured sources, flood many environments in real time. Providing self-service access to this big data can pose challenges. A comprehensive platform with all the capabilities highlighted here will empower your users with a fast, convenient way to interact with big data



Self-Service Analytics and Applications for Everyone

An enormous gap exists between empowered and disenchanted users. Sixty-four percent of respondents in a recent TechTarget survey rated the success of their self-service project as “average” or lower. The amount of training required by most self-service tools, and the complex or confusing nature of the solutions in place, were among the reasons cited.

Information Builders provides a unique combination of features to give all users self-service access to timely, relevant, and trusted information, regardless of their requirements or skill set. A reliable, high-performance architecture meets the most rigid security requirements and easily scales to support large self-service environments with hundreds of thousands of users.



Differentiated Self-Service: Tools for analysts and InfoApps for the masses.

For Business Analysts, Power Users, and Developers

Building on the industry-familiar Microsoft Office Ribbon Interface, WebFOCUS App Studio simplifies user experience and workflows. Developers can create application content immediately, without a costly and time-consuming learning curve. App Studio dramatically increases development efficiency by eliminating the need for developers to use multiple tools to piece together an analytic application.

Developers and IT teams can build rich, engaging self-service analytic environments and much more with **WebFOCUS App Studio**. This robust application development platform eliminates the complex multi-tool paradigm that exists with most other solutions and provides a single, fully integrated environment for rapidly designing and creating any type of analytic content.

With **WebFOCUS InfoAssist**, analysts have the power to assemble information into highly complex charts, dashboards, and other analytics from multiple information sources. These analytics can then be shared with non-technical users to reduce IT backlog and make business units more self-sufficient. They can also gain deeper insight from all kinds of data. Business analysts can author beautiful data visualizations, or retrieve and decipher data from spreadsheets, departmental databases, enterprise data warehouses, and third-party data sources faster than ever before. Multiple charts, graphs, maps, and other visualization styles can be combined into analytic dashboards and interactive InfoApps™, then published to other users via the web and mobile devices, to help find the answers to pressing questions and issues.

For Management, Operational Employees, Partners, and Customers

WebFOCUS empowers non-technical business users with intuitive ways to independently access and analyze enterprise information.

Data-savvy business users and developers can publish and share **InfoApps**, which deliver interactive analytic content such as data visualizations, charts, graphs, and reports to business users through a portal for an easy “app store-like” experience. InfoApps go beyond dashboards by offering a variety of controls and filters on a custom user interface to aid in decision support.

With WebFOCUS, you can also create powerful self-service environments that include:

- Customizable dashboards and reports to satisfy the need for financial statements, analytics, charts, forecasts, scorecards, and more
- Guided self-service, which provides familiar controls that allow users to create millions of permutations from a single report
- Active Technologies, which combine data and analytical capabilities in a single analytical document for offline analysis
- Advanced analytics, such as data visualization and predictive analytics, to facilitate insight
- BI Portals, to serve as a dynamic repository, management, and distribution system for InfoApps, dashboards, visualizations, and other BI content

Maximum Scalability

Information Builders' solutions are the most scalable on the market today – up to 1,000 times more scalable than competing applications. Other vendors boast about scalability, but are referring to the amount of data that can be processed, or the number of reports that can be generated. Others claim their products support large user bases, but won't tell you the amount of resources required to do so. Information Builders' solutions minimize the hardware, software, and staff needed to implement and maintain large-scale self-service environments.

Optimum Data Quality

Fully integrated solutions promote data quality and play an integral role in the data strategy that supports successful self-service environments. iWay tools and Omni products from Information Builders ensure that data is always timely, trusted, and readily available for self-service access.

- Real-time **data quality** management and profiling maximizes the consistency, completeness, and correctness of data across all information assets
- **Data governance** allows data stewards and other stakeholders to manage and control information at every stage and in every system
- **Master data management (MDM)** consolidates millions of records, and makes unified and validated master data instantly available to a wide range of enterprise applications and systems



Conclusion

With the right supporting technologies, you can effectively and economically meet the self-service needs of everyone – from executives, operational employees, customers, and partners to power users and developers. An underlying platform that is intuitive, flexible, and feature-rich ensures a superior, personalized user experience, while promoting security, performance, scalability, and information integrity.

The Information Builders suite of intelligence, integration, and integrity solutions enable self-service success by giving you tools for publishing, sharing, and operationalizing insights for users across your enterprise. Companies like Ameritas, AJ Logistics, Ace, North American Lighting, Elavon, and Food Lion rely on Information Builders to support self-service environments that increase productivity, enhance decision-making, and drive better business performance.

Want to Learn More?

To find out more about leveraging the power of self-service analytics, read Information Builders' white paper, "[6 Ways to Improve Self-Service Technologies.](#)"

Worldwide Offices

Corporate Headquarters

Two Penn Plaza
New York, NY 10121-2898
(212) 736-4433
(800) 969-4636

United States

Atlanta, GA* (770) 395-9913
Boston, MA* (781) 224-7660
Channels (770) 677-9923
Chicago, IL* (630) 971-6700
Cincinnati, OH* (513) 891-2338
Dallas, TX* (972) 398-4100
Denver, CO* (303) 770-4440
Detroit, MI* (248) 641-8820
Federal Systems, D.C.* (703) 276-9006
Florham Park, NJ (973) 593-0022
Houston, TX* (713) 952-4800
Los Angeles, CA* (310) 615-0735
Minneapolis, MN* (651) 602-9100
New York, NY* (212) 736-4433
Philadelphia, PA* (610) 940-0790
Pittsburgh, PA (412) 494-9699
San Jose, CA* (408) 453-7600
Seattle, WA (206) 624-9055
St. Louis, MO* (636) 519-1411, ext. 321
Washington, D.C.* (703) 276-9006

International

Australia*
Melbourne 61-3-9631-7900
Sydney 61-2-8223-0600
Austria Raffaisen Informatik Consulting GmbH
Wien 43-1-211-36-3344
Brazil
São Paulo 55-11-3372-0300
Canada
Calgary (403) 718-9828
Montreal* (514) 421-1555
Toronto* (416) 364-2760
Vancouver (604) 688-2499
China Peacom, Inc.
Fuzhou 86-15-8800-93995
Czech Republic InfoBuild Software CE s.r.o.
Praha 420-234-234-773
Estonia InfoBuild Estonia OÜ
Tallinn 372-618-1585
Finland InfoBuild Oy
Espoo 358-207-580-840
France*
Suresnes +33 (0)1-49-00-66-00
■ Luxembourg
Germany
Eschborn* 49-6196-775-76-0
Greece Applied Science Ltd.
Athens 30-210-699-8225
Guatemala IDS de Centroamerica
Guatemala City (502) 2412-4212
India* InfoBuild India
Chennai 91-44-42177082
Israel Team Software Ltd.
Petah-Tikva 972-54-799-1799
Italy
Agrate Brianza 39-039-59-66-200
Japan KK Ashisuto
Tokyo 81-3-5276-5863
Latvia InfoBuild Lithuania, UAB
Vilnius 370-5-268-3327
Lithuania InfoBuild Lithuania, UAB
Vilnius 370-5-268-3327
Mexico
Mexico City 52-55-5062-0660
Middle East Anel Arabia Ltd. Co.
Riyadh 966-11-483-0016
■ Bahrain ■ Kuwait ■ Oman ■ Qatar
■ Saudi Arabia ■ United Arab Emirates (UAE)

Netherlands*

Amstelveen 31 (0)20-4563333
■ Belgium

Nigeria InfoBuild Nigeria
Garki-Abuja 234-9-290-2621

Norway InfoBuild Norge AS c/o Okonor
Tynset 358-0-207-580-840

Portugal

Lisboa 351-217-217-400

Singapore Automatic Identification Technology Ltd.
Singapore 65-69080191/92

South Africa InfoBuild (Pty) Ltd.
Johannesburg 27-11-064-5668

South Korea

Dfocus Co., Ltd.
Seoul 02-3452-3900
UVANSYS, Inc.
Seoul 82-2-832-0705

Southeast Asia

Information Builders SEAsia Pte. Ltd.
Singapore 60-172980912
■ Bangladesh ■ Brunei ■ Burma ■ Cambodia
■ Indonesia ■ Malaysia ■ Papua New Guinea
■ Thailand ■ The Philippines ■ Vietnam

Spain

Barcelona 34-93-452-63-85
Bilbao 34-94-400-88-05
Madrid* 34-91-710-22-75

Sweden

Stockholm 46-8-76-46-000

Switzerland

Brugg 41-44-839-49-49

Taiwan

Galaxy Software Services, Inc.
Taipei 886-2-2586-7890, ext. 114

Tunisia North Africa Business Consulting
Bizerte 215-22-86-85-79

Turkey Paladin Bilisim Danismanlik A.S.
Istanbul 90-532-111-32-82

United Kingdom*

Uxbridge Middlesex 44-20-7107-4000

Venezuela InfoServices Consulting
Caracas 58-212-261-5663

West Africa

InfoBuild FSA
Abidjan 225-01-17-61-15

* Training facilities are located at these offices.

Find Out More

We can help you succeed. Talk to your local Information Builders representative to learn how. Visit us at informationbuilders.com, e-mail askinfo@informationbuilders.com, or call (800) 969-4636 in the U.S. and Canada. To improve your skills, visit education.ibi.com.

Corporate Headquarters

Two Penn Plaza, New York, NY 10121-2898 (212) 736-4433; Fax (212) 967-6406