White Paper

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Microsoft PerformancePoint Server 2007 – Monitoring and Analytics CTP2

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Executive Summary

Business intelligence (BI) delivers on a simple promise: improved business performance by delivering better decision making throughout your entire organization. The focus is on connecting the right people to the right information at the right time. BI is a three phase cycle:

1. Plan – What needs to be done?
2. Monitor – What happened and what is happening?
3. Analyze – Why is it happening?

To reach all the business users in a secured and integrated environment, Microsoft developed PerformancePoint Server (PPS) by combining Microsoft Business Scorecard Manager (BSM) 2005 and ProClarity Analytics. PPS also combines the advantages of both SQL Server 2005 BI and Microsoft Office environment and it provides centralized application management, improves security and control, by extending the existing investment in SQL Server 2005.

PerformancePoint server 2007 helps the business users to understand how their actions affect business performance and prioritize their actions to support strategic business goals.

In this White paper, we will look at the evolution of PPS Monitoring & Analytics (M&A) Community Technology Preview (CTP) 2 Release. We will cover some of the high level features of PPS CTP2 and see some of the business benefits of using PPS CTP2.

Introduction

Microsoft® Office PPS 2007, is a complete performance management application including business scorecarding,

analytics and planning functionality that facilitates companies to more effectively plan and manage their businesses. It's a number of components including SQL Server 2005 and PerformancePoint analytics. This new application expands Microsoft's growing line of business intelligence (BI) products with a new focus on performance management solutions. Microsoft has established a unique position in expanding the delivery of BI to everyone by focusing on an easier-to-use experience while also delivering the high performance and outstanding price performance businesses require.

PPS is a prime OBA (Office Business Applications) which includes building the offering out horizontally, into areas such as sales and operations planning, human workforce planning and sales and marketing planning.

Microsoft's BI platform stack is a fundamental in creating a robust analytical and reporting capability. Microsoft introduced Integration Services for integrating data from both structured and unstructured data sources, Analysis services for analytical capabilities and Reporting services for creating reports in SQL Server 2005. This laid the strong foundation in creating the BI stack. The second layer is the portal and collaborative environment using which the data can be delivered to users. PPS extends this BI stack by providing a strong planning and analytical component.

PerformancePoint Server 2007

Office SharePoint Server 2007
Microsoft Office Excel 2007

SQL Server 2005 Integration Services   SQL Server 2005 Analysis Services   SQL Server 2005 Reporting Services

SQL SERVER 2005

Figure 1 : Microsoft BI stack

Evolution of PPS 2007

Microsoft developed Business Scorecard Manager 2005 as a tool for monitoring the business. It works with SQL Server Analysis services and SQL Server reporting services, and answers the first two questions of the BI life cycle i.e. What happened and what is happening? ProClarity is a tool that adds value to Analysis and address the third question; Why? Microsoft acquired Proclarity software. After the acquisition, ProClarity Analytics was introduced as part of PPS 2007.

PPS 2007 combines these two tools along with a planning component. This new component adds the corporate aspect of trusting the decisions and the accountability.

As of writing this white paper, PPS 2007 is in CTP2 release. Microsoft has plans of introducing 2 more CTP releases before the official launch of the product in September 2007.

PPS 2007 provides information and access to all employees, define strategy, and align with Key Performance Indicators (KPI) objectives for the scorecards to be monitored, measured and managed throughput the organization in a pragmatic way. Users can measure the success by using reports, charts, graphs and analysis tools as well as unstructured data such as documents, spread sheets and websites. It provides a framework to work with business information and easily integrates with Office and Microsoft Sharepoint Server.

Business Benefits of using PPS 2007

Microsoft PerformancePoint Server 2007 helps businesses to articulate goals, monitor business activity, identify and analyze issues, and collaborate and take action.

- **Record your decisions:** Today when we make a decision, we can record that in PPS. Next quarter we can compare the forecast with the current decision. This is all done in one place making it easier to manage. We then have a history of not only how the data has been modified but also the decisions that triggered it and we can measure the performance of those decisions with the outcome.

- **Data Allocation:** The users can be provided with the right amount of data to help in their decision making process. For e.g. the users can be sent a link to an Excel worksheet. When the user hits the link, we generate a spreadsheet that has the right amount of data for that user, the correct, current data. They add their inputs to the forecast; submit it and we move it along to the next person in the business flow, usually the manager. The users never have to hunt for data, and always see the latest data. We record what they did, when they did it. And the whole time, the user was just using Excel something they already know how to do. This is good for users of course, but it's good for IT departments too. Because, deep down, we've taken this formerly document oriented, hard to control, hard to manage process and made it a centrally managed, controlled, database process.

- **Integrated Performance Management Application:** PPS is fully integrated with the widely used and supported SQL Server BI platform for scalable and integrated information management, analysis, and reporting. PPS will integrate with Excel for performing analyses and with SharePoint Server for sharing information.

- **Security:** Like any other Microsoft application, security is a key feature in

PPS. Only authorized users will be able to access the data. Furthermore, this security is easily customizable by the administrators.

- **Monitoring, analyzing, and planning across all business operations:** PPS 2007 enables all employees—executives, managers, and front-line employees—to align their performance with overall corporate strategy. All employees can use metrics, key performance indicators (KPIs), reports delivered to every desktop through intuitive scorecards and dashboards, and the familiar, easy-to-use Microsoft Office environment to manage the business understanding of how their performance aligns with personal and departmental goals and objectives.

- **Cross Enterprise View:** PPS helps to integrate information from enterprise systems and business functions to provide all users with a more strategic and forward-looking view of the business. Office PerformancePoint Server 2007 model-to-model functionality helps customers to map various business models within the same corporation so organizations can run their businesses with greater flexibility.

- **Enhanced partnership between IT and business:** PPS business modeler is a unique design and modeling component that enhances the partnership between IT and business analysts. It enables the business users to use their insight and knowledge of the business to manage roles, workflows, business rules, and information. It has user friendly design and wizards that business people can use to setup their own business definitions, run queries, and create personalized scorecards without the need for IT support.

- **Shorter Cycles and Broader Contribution:** It's a three phase cycle which helps the business users to configure rules that manage processes such as assigning tasks, managing budget creation, monitoring the status of submissions, and approvals.

New features in PPS 2007 CTP2

With lots of new features being added in every CTP release, the entire process of building a scorecard or dashboard has been simplified to make it very user friendly. Here are some of the new exciting features available in PPS 2007 CTP2:

- **Office 2007 look and feel:** With the new Office 2007 look and feel, PPS makes it easier for the users to work in a familiar and friendly user environment.

- **Templates for design objects:** The product comes with lots of pre-defined templates which helps accelerate in building a scorecard or dashboard. From data sources, to scorecards and dashboards, templates circumvent manual creation of design objects.

- **Parameters:** There is also flexibility to create parameters and tie it to different objects or apply the parameters to the entire dashboard.

- **Preview Scorecard in the designer:** CTP2 also allows us to preview dashboards and scorecard views before deploying to Sharepoint or reporting services.

- **New first class objects:** Reports and dashboards have been included as new first class objects. Users can also choose to create different kinds of reports including thin OLAP charts and grids.

How can iLink help you?

With a strong business intelligence and analysis experience, iLink offers the best planning, implementation and consulting services for your business performance management solutions.

Our experts have significant hands on experience in designing and building dashboards and scorecards.

Expertise:

- Part of Front runner program for SQL Server 2005
- Custom Business Workflow
- Enterprise Search

Cost

Unlike other Business performance management applications, PerformancePoint is cheap and iLink reduces the overall cost of execution as well as the risk associated with the project. For pricing and other information, please contact us.

Contact Information

For more information, please e-mail us at info@ilink-systems.com or call us at 1-425-688-0669.