Helping an Oracle shop successfully deploy Executive Dashboard using Microsoft Technologies

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Situation

The IT department at the customer was tasked with delivering a KPI-based (Key Performance Indicator) Executive Dashboard. The Dashboard was to display high level information for bookings, sales, backlog, and inventory in a graphical form. The users had to be able to click on the graph and drill down into multiple layers of information with the ability to filter the results. And, the solution had to be deployed using desktop tools that were familiar to the users.

The customer had experienced success using SharePoint for both an internal intranet and an extranet deployment for collaborating with their customers. The dashboard was required to run within their existing Microsoft SharePoint internal site. Therefore, the technologies used to accomplish the goal required Microsoft products, tools and skills. However, the customer was an Oracle shop with limited experience in Microsoft technologies. The customer did not find a solution that fit their needs with Oracle tools and the Oracle tool set was considered too expensive.

Customer Concerns

The customer knew that there were several risk factors:

- Dissipation of scarce budget resources if the benefits were not captured

- Loss of user confidence if the information was incorrect or difficult to retrieve

- Dissemination of wrong information would adversely affect user business decisions

The customer knew that they had little experience in both rolling out a KPI-based dashboard, and Microsoft development/databases. Yet, they were under pressure by management to deliver it according to a specific timetable so they had to get it right the first time – they couldn't afford failure. Also, the customer's user community was not able to specify exactly what they had in mind and so the IT department needed guidance from someone that had done it before. Nor did the customer did not want to invest in the expense of acquiring new tools and the costs associated with the learning curve.

Solution

The customer brought in AccessIG, Inc., a Microsoft Certified Partner, as a member of the team to help mitigate the risks and to ensure successful deployment. Because AccessIG had extensive business experience the customer did not have to explain each step of the business requirement. AccessIG also brought comprehensive technical experience, especially being a Microsoft Certified Partner, and, they brought valuable "best practices" experience that the customer could draw upon.

The customer had to develop and deploy an Executive Dashboard with high level KPI's and drill downs for backlog, bookings, sales, and inventory. Users were expecting an easy to use solution, delivered in a web browser, using the Microsoft desktop tools with which they already were familiar.

The customer is a leading Aerospace and Defense supplier of receiver, tuner, demodulator, direction-finding, and signal processing products to customers around the world.

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Teaming with AccessIG, it was decided that the best approach would be to empower the customers IT department with the knowledge they needed to build and support the required solutions as soon as practical. The plan was to have AccessIG build the "backlog" section of the solution and then train the customer by using the results as a "hands on" working example of the development process.

First, AccessIG analyzed the requirements and recommended the proper Microsoft technologies to accomplish the goal. AccessIG teamed with the customer to install the necessary products. This was accomplished remotely, at low cost, with the customer participating as well as learning.

Next, AccessIG counseled the customer on developing a preliminary star-schema design. After that, the customer participated in several remote sessions with AccessIG, learning how to finalize an efficient design. Based on customer specifications regarding the KPI's and Drill Down's, AccessIG proceeded to develop the backlog part of the solution. This consisted of an SSIS/ETL function and SQL Server Reports.

AccessIG performed on-site, accelerated training using course materials available to Microsoft Partners for SSIS, SSRS, and SharePoint Integrated Mode. After the training was complete, the customer was confident that they were able to continue to develop and support their own solutions with minimal, remote support from AccessIG - available to the customer at low cost using Microsoft Live Meeting

AccessIG was able contribute real value based on their experience and was able to help the customer avoid problems in both business and technical areas that the customer had not anticipated.

What wasn't expected was that based on the success of the training and the course materials, the customer had a greater understanding of the technologies. So, on the final afternoon of the three day training experience, AccessIG and the customer held an Imagineering session regarding the backlog dashboard and were quickly able to greatly expand the feature/functionality and user interface to a level that wasn't originally anticipated.

Benefits

- After initial development and training by AccessIG, the customer was quickly able to continue development and support on their own

- Developed new knowledge and skill sets

- Now able to leverage both Microsoft and Oracle technologies for the benefit of their users

- Preserved investments in existing systems and tools

- Substantial cost savings versus Oracle tools

- Users were able to quickly access KPI information with drill-down and analysis capabilities through the existing SharePoint site

- Was able to leverage eductional materials through Microsoft Certified Partner that accelerated training