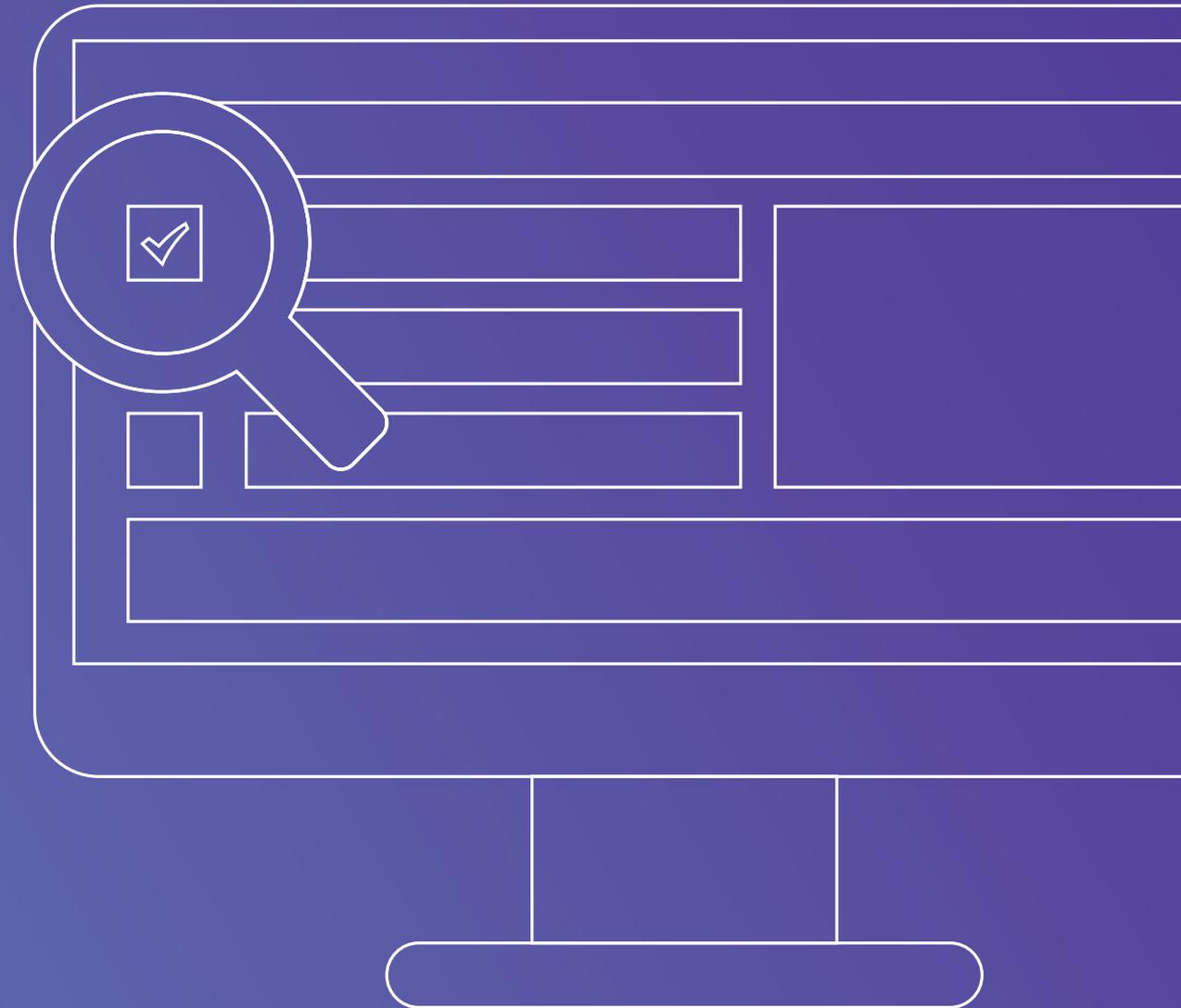

How to Get Started with BI Connector Evaluation

Whitepaper



Introduction

BI Connector Evaluation

BI Connector has opened a plethora of options for companies to visualize their **OBIEE** subject areas and reports in modern visualization tools like **Tableau**, **Power BI** or **Qlik**. Many leading organizations around the world have evaluated and purchased **BI Connector** desktop and server editions to simplify access to **OBIEE** data warehouse.

As a BI Manager or Architect who has been tasked to evaluate **BI Connector** in your company, you are wondering how to get started? This white paper will help you to get prepared to evaluate **BI Connector** and see if it meets your business requirement.

There are three essential steps to getting started with BI Connector:

1

Understand your users



2

Form a core team for evaluation



3

Understand initial use cases



Step One

Understand Your Users

The best way to start is to identify the first set of **OBIEE / Tableau / Power BI / Qlik** users who would be using **BI Connector** and their skill sets. Here are four major user groups we have seen at our customers:



OBIEE super user

These users have been using **OBIEE Answers** for a long time and know the **OBIEE** subject areas thoroughly. They understand the purpose of each **OBIEE** subject area and where the data comes from for each field. These users have built out the reports in **OBIEE** that have been in use for several years. This user is usually an intermediate level user in **Tableau / Power BI / Qlik** also.

Tableau / Power BI / Qlik super user

We have seen that this is the most common set of users who are eager to get started with **BI Connector**. However, the challenge for these users is that they often have limited to no knowledge of what **OBIEE** is, how it works, what the subject areas do, how **OBIEE** performs and the purpose of the **OBIEE** reports. These users view **BI Connector** as a tool that opens up **OBIEE** as a data source just like an Excel data source. They mistakenly believe that the **OBIEE** backend will behave like Excel and that they can drag and drop or extract the entire subject area or report. However, **OBIEE** is a complex backend data source. While **BI Connector** has made it simple to access **OBIEE** subject areas and reports, the complexity of **OBIEE** is still very relevant. Just dragging and dropping columns randomly without a clear understanding of the subject areas will not lead to success but frustration.

Step One

Understand Your Users

Continued



OBIEE end user

These users are usually functional users from the various departments in your company like finance, HR, etc. who know how to consume the **OBIEE** dashboards. They know their data well but might not understand the **OBIEE** subject areas and filters, but they will know how to set the right set of prompt values to get their data out of **OBIEE** dashboards.

Tableau / Power BI / Qlik end user

Last but not least are the Tableau end users. These are ultimately the data consumers and decision makers in your company and have little time to understand how **Tableau**, **Power BI** or **Qlik** works let alone **OBIEE**'s complexity. For these users, performance and ease of use are crucial. Some of them will have the desire and skills to manipulate the dashboard by changing filters or changing the visualization to understand it more. Most of the times they will need data from multiple sources (**OBIEE** being one of them) to get the full picture of their business. For example, **OBIEE** might have the orders actuals data while a spreadsheet might have the quota while Salesforce might have the forecast/pipeline data. The end users would love to see these three sets of data come together in one single dashboard and help them better understand their business.

Step Two

Form a Core Team

Evaluating **BI Connector** is never going to be a one-person job because the skills sets required are varied as seen in the user classification. Here is the quick summary of the skill sets necessary for **BI Connector** evaluation:



- 1** Start with someone who has an in-depth knowledge of **OBIEE** subject areas. The user should have a clear understanding of which dimensions work with what facts and how to set the right filters to get the data out of **OBIEE** with good performance. This knowledge typically rests with **OBIEE** super users.
- 2** Enlist stakeholders who have a clear understanding of requirements and success criteria for the evaluation. It will be a group of **OBIEE** end users and **Tableau / Power BI / Qlik** end users. There might be significant overlap in these user groups.
- 3** Bring in data visualization developers who can build out the use cases in **Tableau / Power BI / Qlik** while working with **OBIEE** super users.
- 4** Finally, you will need an IT administrator who can install and configure **BI Connector**. Even though this is usually an easy task, it will still require **Tableau / Power BI / Qlik** and **OBIEE** admins to work together.

As you can see, it is impossible to find a single person who is an expert in all the above areas. Therefore, you will need to form a core evaluation team with representatives from all the user groups.

Step Three

Understand Your Initial Use Cases



A successful evaluation requires a clear definition of the target use cases and the business problem that you are solving for the users.

Here are some problems that have led you to evaluate BI Connector

- Users are frustrated with downloading data from **OBIEE** and uploading to **Tableau / Power BI / Qlik** manually
- Users would like to blend **OBIEE** data with other critical external data
- Your company wants to consolidate most if not all **BI** users to use **Tableau, Power BI** or **Qlik** as the data visualization tool.

Step Three

Understand Your Initial Use Cases

Continued



Here are some **BI Connector** use cases to solve the given problems

- Connect to **OBIEE** subject areas and reports from **Tableau Desktop**, **Power BI Desktop** or **QlikSense Desktop**
- Build **Tableau / Power BI / Qlik** dashboards that enhance the value of **OBIEE** data
- Publish data sources created from **OBIEE** subject areas and reports to **Tableau / Power BI / Qlik** server
- Blend **OBIEE** data with other data sets in **Tableau / Power BI / Qlik** server
- Automate extraction or import of **OBIEE** data into **Tableau / Power BI / Qlik** server for slow performing **OBIEE** queries
- Publish **OBIEE** data to the cloud using **Tableau** or **Power BI** gateway

Speaking with your users and understanding their success criteria is essential for efficient evaluation. Focusing specifically on the use cases related to success criteria will save a lot of time and effort for you and your core team.

Workflow to Evaluate BI Connector

Step 1

Understand user primary pain points for evaluating **BI Connector**

Step 2

Form a core team of **OIBEE & Tableau / Power Bi / Qlik** super users and end users

Step 3

Determine the use cases which will solve the end user pain points

Step 4

Download **BI Connector Desktop** and **Server Edition** for free 30-day evaluation

Step 5

Core team will install **BI Connector Desktop** and test out connectivity to **OIBEE** subject areas and reports

Step 6

Start building up pre-determined set of use cases in **Tableau / Power Bi / Qlik**

Step 7

Tableau / Power Bi / Qlik and **OIBEE** admins will install **BI Connector Server Edition**

Step 8

Publish data sources to **Tableau / Power Bi / Qlik Server / Cloud**

Step 9

Test out the data and performance of your solutions in **Tableau / Power Bi / Qlik**

Step 10

Get feedback from your end users to ensure the solution solves their pain points

Step 11

Work with **BI Connector** team with getting the appropriate licensing

Step 12

Start rolling **BI Connector** for a wider audience and be a data champion

Remember BI Connector Team is here to help you out at any stage in the above process. We have a great team of OIBEE, Tableau, Power Bi and Qlik experts to help you through the evaluation.

Summary



Evaluating **BI Connector** is a team effort where you need to bring together skillsets from **OBIEE, Tableau / Power BI / Qlik** teams and the business users. The core team should identify use cases, build and test the solutions using **BI Connector** by connecting from **Tableau / Power BI / Qlik** to **OBIEE** subject areas and reports.

If you follow the template and workflow provided in this whitepaper to evaluate **BI Connector** in your company you will be able to get the right people working together and focusing on the correct use cases. Your users will experience the power and value of **BI Connector** in unlocking the data visualization and blending capabilities of these modern data visualization tools. Now the fun part of using **Tableau / Power BI / Qlik** begins – getting the right visualization and data to right people and you can be the data hero of your company!

At any time during the evaluation, if your core team has questions on how to use **BI Connector**, login to <https://support.biconnector.com> to view knowledge base articles, white papers, how-to videos and to request help from **BI Connector** team by creating a support ticket.

We are here to help you!

Visualize OBIEE Data in Your Favourite Tool

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