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ACCTON Mastering Bi Clean Ups

ACCTON Mastering Bi Clean Ups User Manual

Contents

ACCTON

ACCTON Mastering Bi Clean Ups

Product Information

ACCTON INSIGHT HUB | 2023

accton.io

E-BOOK: MASTERING BI CLEAN-UPS: A Practical Guide to BI Environment Maintenance

Specifications

- Model: ACCTON INSIGHT HUB | 2023
- Website: **accton.io**
- Content: E-BOOK – MASTERING BI CLEAN-UPS

Product Usage Instructions

Introduction

As BI systems evolve and grow, they often accumulate unused reports, cluttered dashboards, and outdated data, leading to inefficiencies and reduced user experience. To maintain a high-performing and streamlined BI environment, regular clean-ups are essential.

Why is Clean BI Environment Important?

Having a cleaned-up BI environment may seem like a logical concept, but it is necessary to invest time and effort into this endeavor for better performance, user experience, data reliability, and resource optimization.

Step 1: Identify Unused Reports

To effectively clean up your BI environment, start by collecting historical data on report usage, analyzing usage patterns, and creating a list of potentially unused reports. You can gather data from usage logs or utilize analytics tools like Accton Auditor for insights.

FAQ

Q: How often should I perform clean-ups on my BI environment?

A: It is recommended to conduct regular clean-ups to ensure optimal performance and efficiency. Depending on the size and usage of your BI system, a quarterly or bi-annual clean-up schedule may be suitable.

Q: Can I automate the clean-up process?

A: Yes, you can automate the clean-up process by utilizing tools that can identify unused reports, schedule clean-up tasks, and streamline the maintenance of your BI environment.

INTRODUCTION

As BI systems evolve and grow, they often accumulate unused reports, cluttered dashboards, and outdated data, leading to inefficiencies and reduced user experience. To maintain a high-performing and streamlined BI environment, regular clean-ups are essential.

This ebook is designed to help you optimize your BI system through systematic and efficient clean-up processes. By following the steps outlined in this guide, you can eliminate redundant reports, improve report utilization, enhance user satisfaction, and ensure your BI environment remains agile and reliable.

WHY IS CLEAN BI ENVIRONMENT IMPORTANT?

- Having a cleaned-up BI environment may seem like a logical concept, but you might wonder why it is necessary to invest time and effort into this endeavor. After all, even with a cluttered and disorganized repository, BI tools continue to function, and users can still perform their job functions.

- So, why should you prioritize regular clean-ups for your BI environment?
  While it may be true that BI tools can still deliver insights even in an untidy environment, maintaining a clean and streamlined BI system offers numerous advantages that can significantly impact your organization's efficiency and success.

- **Better Performance and Efficiency**
  System performance becomes optimized, resulting in faster response times and increased productivity.

- **Improved User Experience**
  A well-structured BI system provides users with easy access to relevant reports, enhancing usability and user satisfaction.

- **Data Reliability and Governance**
  Users can rely on accurate and up-to-date information, while risks associated with inaccurate data are minimized.

- **Resource Optimization**
  Eliminating unnecessary reports saves storage space, reduces maintenance efforts, and maximizes resource allocation.

- So basically, regular clean-ups establish a clean and usable BI environment that provides solid foundation for efficient decision-making.

IDENTIFY UNUSED REPORTS

To effectively clean up your BI environment, it is essential to start by identifying unused reports. This step involves

collecting historical data on report usage, analyzing usage patterns, and creating a list of potentially unused reports. Let's explore each of these steps in detail:

Collect Historical Data on Report Usage
Begin by gathering data on report usage over a significant period..

- **Identify the Method**

  Most BI systems have built-in usage logs or audit trails that record user activity. Alternatively, you can use analytics tools like Accton Auditor that track report usage and provide detailed insights.

- **Define the Time Frame**

  Select a suitable time frame for gathering the data, typically not less than 6 months. This duration allows you to capture enough usage data and identify long-term trends in report usage.

- **Extract Usage Data**

  Depending on your BI system or analytics tool, you may have options to export the data in various formats such as CSV, Excel, or through API calls.

1. How frequently is the report accessed?
2. How many users access the report?
3. Which user roles or departments access the report?Are there notable variations in the usage patterns of the report?
4. Are there reports that are accessed frequently during specific time periods?
5. How do the current usage patterns compare with historical data?
6. What feedback have users and report owners provided regarding the necessity and usefulness of the report?
7. What is the potential impact on business operations if the report were to be discontinued or archived?
8. Is the same or similar information available through alternative reports or sources?

Analyse Report Usage Patterns
Once you have the historical data, analyze the usage patterns to identify trends and patterns. Look for reports that consistently have low or zero usage over the specified period. Pay attention to reports that were created for specific projects or time-sensitive purposes but are no longer relevant.

Create a List of Potentially Unused Reports
Include reports that have shown minimal usage, reports that have become outdated due to changes in business processes, or reports that duplicate existing functionalities. This list will serve as a starting point for further evaluation and decision-making.

THE GREAT SORTING GAME

Once you have identified potentially unused reports, the next step is to segment them into user groups. This segmentation helps prioritize your clean-up efforts based on user access and report usage. Let's explore what different approaches you can use for such segmentation:

- **By Number of Users**

  Differentiate reports accessed by fewer or more than X users. This simple division allows you to focus on reports that have limited user engagement versus those that have broader utilization.

- **By Report Type or Functionality**

  Categorize reports into groups such as financial reports, sales reports, or customer analytics reports. Clean-up

departments one by one to see quick results.

- **By User Roles and Departments**

  Identify reports that are tailored to a particular set of users or departments to assess their relevance and usage within that context. Reports accessed only by a specific department or role may require closer scrutiny to determine if they are still needed.

- **By Report Age or Last Modification Date**

  Reports not modified or accessed for an extended period may indicate their potential for removal. But be cautious, as some reports may be rarely used but still hold value for specific purposes.

- **By Complexity or Data Sources**

  Complex reports that require extensive maintenance or have numerous data sources may warrant closer examination to ensure their ongoing value and accuracy.

No need to segment your reports by all criteria at once. These are the existing options, and you can build your own approach based on them. Here's an example of a segmentation strategy you could use:

- Next, segment reports into >5 and <5 user groups based on regular usage (choose whatever number seems reasonable for your case).
- You probably have your reports related to different departments already, so start by grouping them by departments and users. You can go department by department with all further steps.
- Analyze the patterns of each group: frequency of access and any notable variations in usage patterns.
- Now you can add some individual analysis depending on the level of insights you need: the age of reports, last modification date, content relevance etc.

REAPPROVE REPORTS WITH USERS

A very tedious step is to reapprove reports with users to validate their necessity. This collaborative process ensures that reports align with business needs and contribute to actionable insights.

It can be very time-consuming, especially in organizations with a large number of reports. So we suggest 2 approaches to the reapproval process: the right one and the quick one.

The Right Approach

- Contact all the report owners and relevant stakeholders to initiate the process. Inform them in advance so that they can allocate proper amount of time to review all the reports they are related to.
- Schedule meetings to discuss the reports, their purpose, and their perceived value. Ask questions to understand the specific business requirements the reports fulfil, any challenges users face, and any potential improvements they suggest.
- If you already have an analytics catalogue in place or any BI portal that serves as a primary access point to all analytics in you company, you can use its capabilities to speed up the process.

The Quick Approach

- Launch a notification that the review process has started and actions are required from the stakeholders. The form they receive may include a simple 5-star rating system, a question if the report is relevant with

YES/NO/Requires discussion options and a comments section for any additional feedback.

- Another option is to initiate a vote where all stakeholders can choose which reports should stay and then arrange a discussion to reapprove the results.
- Additionally, you can explore other technological solutions that enable users to provide feedback or suggestions directly within the BI environment.

Whatever approach you choose, the most critical step is to maintain thorough documentation of the reapproval process, including meeting minutes, feedback received, and decisions made. This documentation ensures transparency, accountability, and serves as a reference for future audits or reviews. Capture the outcomes of the reapproval process, such as reports approved for continued usage, reports identified for further evaluation, or reports recommended for archiving.

INTO THE ARCHIVES

SAFELY STORE UNUSED REPORTS

Now, it's time to tidy up your reports. Here are some practical tips and best practices for archiving reports marked as unnecessary.
Every good archivist knows the importance of proper documentation and version control. Before you tuck away those reports, document their purpose, relevant metadata, and any dependencies they may have. This will ensure a clear record of their history and help you understand their context in the future.

- Don't forget to establish a version control system to track any changes or updates made before archiving.
- Just like organizing a library, you need a safe and accessible place to store your archived reports. Choose a secure storage location within your BI system or consider using a separate storage solution.
- Remember to back up the archived reports regularly and establish a naming convention or tagging system to make retrieval a breeze. You never know when you might need to dust off an old report for reference!
- By following these practical tips, you'll not only declutter your BI environment but also ensure that your valuable reports are safely stored for future reference. So, roll up your sleeves, put on your archivist hat, and let's get those reports neatly organized in the archives!

AUTOMATE THE CLEAN-UP PROCESS

Free up valuable time and resources by automating routine clean-up processes. Instead of spending hours manually identifying and archiving reports, you can let technology do the heavy lifting for you. Automation not only increases efficiency but also reduces the risk of human error, ensuring consistent and accurate clean-up.

Business Process Engine
With business process engine integrated with your analytics management system, you can automate

- collecting historical data on report usage
- scheduling reapproval sessions archiving reports based on predefined criteria

To successfully automate a BI clean-up process, choose the engine that:

1. Integrates seamlessly with your existing environment.
2. Includes workflow automation, task management, scheduling, and collaboration.
3. Is easy to define and modify workflows without requiring extensive technical expertise.

If you already have an analytics catalogue, explore if there are any built-in business processes that can be adapted to your clean-up needs. It may provide pre-configured workflows that align with your goals.
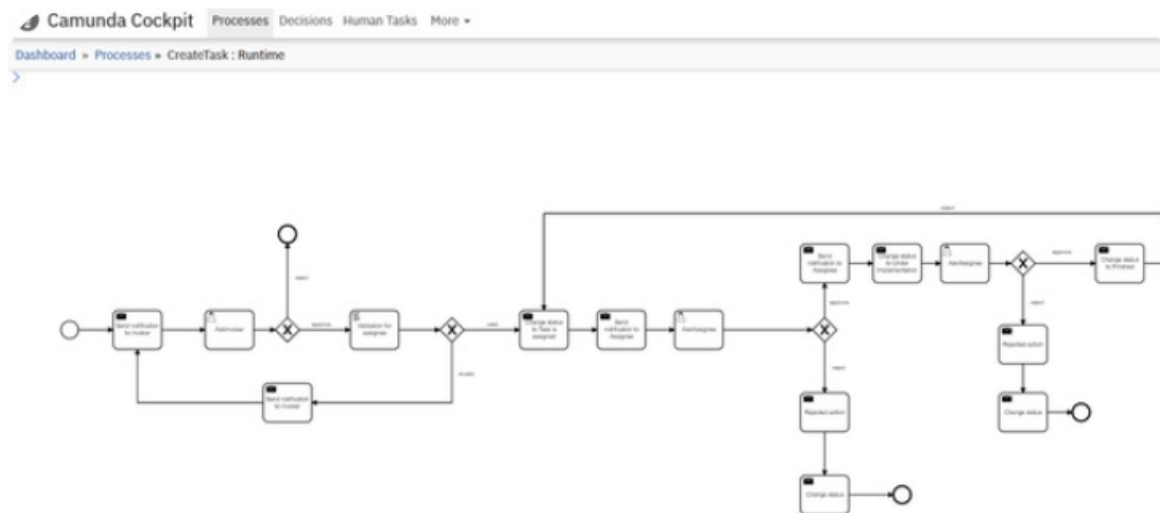
CREATE A CLEAN-UP SCHEDULE

- To maintain a clean and efficient BI environment, it's crucial to establish a regular clean-up schedule. Set a frequency that works for your organization, whether it's monthly, quarterly, or annually.
- This way you ensure that it runs like clockwork, freeing up your time to focus on more strategic tasks. Regular maintenance prevents the accumulation of unnecessary reports and keeps your BI environment organized and optimized.

Clean-up Schedule Example

monthly

- Collect historical data on report usage for the past month.
- Analyze reports creation and usage patterns and identify potentially unused reports.
- Schedule reapproval sessions with report owners and stakeholders to validate report necessity and usage.
- Archive confirmed unnecessary reports.

quarterly

- Conduct a comprehensive review of user groups and segment reports based on access patterns.
- Analyze reports with limited usage and engage with relevant stakeholders for reapproval.
- Archive reports that are no longer relevant or align with business goals.

annually

- Perform a thorough assessment of the entire BI environment.
- Identify reports that have become obsolete due to changes in business processes or system upgrades.
  Collaborate with report owners and stakeholders to reevaluate the necessity and relevance of reports.
- Archive outdated or unused reports to declutter the BI environment.

Continuous Improvement

As with any process, continuous improvement is essential. Encourage feedback from users and stakeholders to identify areas for refinement and enhancement. Use the insights gained from the clean-up process to adapt and optimize your automation workflows. By embracing a feedback-driven approach, you can ensure that your clean-up process evolves over time, aligning with changing business needs and technological advancements.

6 BI CLEAN-UP STEPS REVISION

- Identify unused reports by collecting historical data on report usage and analyzing usage patterns.
- Segment reports into user groups to understand access patterns and determine their significance.
- Reapprove reports with users to obtain feedback on necessity and usage.
- Archive unnecessary reports with proper documentation and version control.
- Automate the clean-up process using a business process engine to save time and effort.
- Stick to a regular BI clean-up plan.

Congratulations! You've learned the key steps to performing regular clean-ups in your BI environment. As you embark on this journey, it's essential to follow best practices and leverage additional tips to ensure successful clean-ups and ongoing maintenance.

BEST PRACTICES AND ADDITIONAL TIPS

1. **Establish Clear Documentation**

   Documenting your clean-up process is crucial for maintaining consistency and providing a reference point for future clean-ups. Create a documentation framework that outlines the steps, criteria, and actions involved in each phase of the process.

2. **Collaborate and Communicate**

   Foster collaboration and open communication with report owners, stakeholders, and users throughout the process. Regular communication will help build trust, gather valuable feedback, and ensure the clean-up aligns with the organization's goals.

3. **Monitor and Review**

   Track the usage and performance of reports post-clean-up to validate the effectiveness of your decisions. Continuously review your clean-up process to identify areas for improvement and adjust your approach as needed.

4. **Embrace Automation**

   Leverage technology solutions, including business process engines, to automate repetitive tasks and save time and effort. Automation allows you to focus on higher-value activities and ensures consistency in your clean-up efforts.

5. **Continuous Improvement**

   Clean-ups are not a one-time task; they require ongoing attention and improvement. Regularly review and refine your clean-up process based on feedback, lessons learned, and changing business needs. Adapt to new technologies and emerging best practices to ensure your clean-up efforts remain effective and efficient.

By following these best practices and implementing additional tips, you'll be well-equipped to perform successful clean-ups and maintain a healthy and optimized BI environment.

SPECIAL OFFER

A FREE TRIAL OF ACCTON AUDITOR FOR POWER BI

Power BI is a wonderful tool for making your business decisions smarter with advanced analytics. However, as time goes by, any BI tool becomes cluttered and hard to use. It requires more space, more licenses, and the number of unused reports becomes overwhelming.

To keep your BI environment healthy and easy to use, there is always a need to monitor and maintain the system in a clear and organised state.

But how do you manage?

ACCTON AUDITOR is a powerful engine that dives deep into the core Power BI usage data, bringing up all the necessary governance insights to give a full 360 degree view of what's going on in your analytics environment.

- It is 100% ready-to-use
- Fully customisable to your own needs
- Collects historical data to show trends and tendencies
- Easily scalable to any number of BI tools and team members

TRY FOR FREE

Accton Insight Hub is an enterprise information portal that provides a single point of access to all reports and analytics your employees need to make better and faster business decisions.
Our goal is to bring self-service business insight for everyone throughout your organization, maximizing analytics adoption and enabling the data culture.

Advancing informed decision-making

ABOUT ACCTON INSIGHT HUB

"Cool stuff"
BI manager, Farming

- "Accton can cover all functionality that is now scattered between many other tools. And I suppose business users would love using it"

  – BI lead, Energy
- "Great product: friendly both for users and developers"

  – BI lead, IT consulting
- "A very relevant product: a great solution to acute analytics problems. Among other things, it also greatly facilitates the onboarding process"

  – BI & CRM Head, Pharmaceuticals
- "A very interesting product for data-driven companies. A great thing for business, you can find any report, even presented at a meeting six months ago"

  Commercial sales and BI department head, Pharmaceuticals
- "I have never met a tool that would unite analytics from different sources in such a way. So far, everyone is solving problems only at the data level, but this new approach is fitting into a user-oriented trend"
- Head of BI Systems and Data Warehousing Department, Telco
- Accton Insight Hub

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Documents / Resources

	ACCTON Mastering Bi Clean Ups [pdf] User Manual Mastering Bi Clean Ups, Mastering, Bi Clean Ups, Clean Ups

References

- **Accton: Advancing Informed Decision-Making**
- **Accton: Advancing Informed Decision-Making**
- **Accton: Advancing Informed Decision-Making**
- **User Manual**