

New Business Analytics Platform

Power BI and COGNOS Decommission

As part of the roll out of our new business analytics tools, we are planning on decommissioning Cognos and related Cognos Reports. This is in line with the objectives set by the business to have “one source of the truth” and to enable consistent reporting throughout Colart. User access to most versions of Cognos will be revoked on 25 November 2019. The below documentation outlines the detailed plan to ensure a smooth transition.

WHY?

To replace existing BI tools

Lack of alignment: multiple tools (GDW Cognos 10, French Cognos 8, Powerplay, Merit) are used throughout the business with different measures or ways of reporting.

Lack of flexibility: Users are frustrated with the inability of Cognos to create different reports, visualizations and easily adjust the reports already built.

Lack of confidence: The numbers presented in Cognos are not trusted due to many historical M3 overlay adjustments and configuration issues.

Lack of information: Cognos doesn't pull through a large majority of relevant M3 data captured.

Lack of maintenance: Cognos versions currently used are old and the maintenance of these platforms is simply not possible.

Lack of efficiency: Reporting isn't optimized and takes a lot of time around month end to compile packs.

To replace bespoke SQL Query Based Files Excel Files

Lack of flexibility: Very few users have the technical ability to alter SQL scripts to change the outputs

Lack of understanding / accuracy: These SQL Files are being used without having a deeper understanding of the M3 configuration resulting in misrepresentation of information.

Lack of reports: Users don't have the ability to produce new reports unless they have a deep understanding of M3 configuration & SQL.

HOW?

Building aligned, solid and reliable databases

All databases have been constructed on the Cloud to greatly reduce the risk of outages.

Users can easily and directly access various dedicated databases on the Cloud, called “Analysis Service Modules”. These are optimized for very fast querying.

Working on flexible and user-friendly interfaces

Users can access these modules through different ways:

- **PowerBi App**, which contains pre built standard reports and is the easiest option.
- **PowerBi Service** to link directly to the relevant Analysis Services Module.
- **Excel** to link directly to the relevant Analysis Services Module.

ACCESS POWERBI

Get a PowerBi (Pro) license

For immediate access, you can use a 60-day free trial (if you haven't already used this).

To request for your permanent license, please raise a ticket on the Tech Support Site <http://techsupport.colart.com/servicedesk/customer/portal/4/create/44> and classify it as “Reporting Issue” and “Power Bi Licenses”.

Logging into & setting up PowerBi

To log into PowerBi, you will have to follow the below steps:

- Go to the PowerBi site <https://powerbi.microsoft.com/> and save it as a Favourite
- Sign in (*top right corner*) with your Colart Microsoft Account i.e.joesoap@colart.com
- If you do not have your pro license yet, sign up for the 60-day free trial.

To set up the Apps

- Click on the “3 Squares” symbol in the taskbar on the left
- Click on “Get Apps” in the top right corner
- Under “My organization”, select “Business Analytics Core Reports”
- Click on “Get it now”.
- You will only need to setup the App once

To view the App Content

- From the Apps section, click on “Business Analytics Core Reports”
- The various reports are available on the left-hand taskbar and broken down by Section, Report & Page.

GET TRAINED

PowerBi is a Microsoft off-the-shelf product widely used throughout the business world. This tool will become as popular as Excel so it will be beneficial to all of us to become proficient in using it. Various PowerBi training opportunities are available for users.

Online Training

As this is a Microsoft tool, there exists nice and clear training online. As a start, we highly recommend the online training sections listed below, available on this link: <https://docs.microsoft.com/en-us/power-bi/guided-learning/>

- Get Started Building with Power BI
- Analyse Data with Power BI
- Use Visuals in Power BI
- Publish and share in Power BI

Please ignore the other online sections available on this link as they are at an advanced level.

Colart Training Videos

The Business Analytics team will also compile internal training videos based on user feedback. Link: <https://intranet.colart.com/en/business-analytics-home/training-materials/>

Live Training in groups

Your line manager is responsible for organising group training sessions with the Business Analytics team.

During these sessions, you will get an overview of the PowerBi tool functionalities and run through the Power Bi App and various Analysis Services Modules.

Drop-in Sessions

Dedicated slots will be made available for one-to-one training sessions, specific questions or assistance to build your own reports:

Monday to Thursday - 10:00 to 11:00 or 15:00 to 16:00 (*UK time*)

Please book your session (max 30min) directly with a Business Analytics team member at BusinessAnalyticsSupport@colart.co.uk

!!! Users will be denied access to GDW Cognos 10, French Cognos 8, Powerplay and Merit Portal from 25 November 2019 !!! Therefore, it is highly recommended that users are proactive in getting trained to feel comfortable with using PowerBi before then.

SHARE QUERIES & SUGGESTIONS

Two months ago, we created a steering group to discuss the main requirements for the business. Based on this input, the Business Analytics team has designed various basic reports.

We are aware that adjustments might be needed on some data, measures or field names, so we would value your feedback.

Feel free to share your query or suggestion by raising a ticket on the on Tech Support Site <http://techsupport.colart.com/servicedesk/customer/portal/4/create/44> and classify it as “Reporting Issue” and “Power Bi Query” or “Power Bi Suggestions” accordingly.

RELEVANT SECTIONS & REPORTS

As the focus was given to support in priority the Cognos decommission, equivalent reports have been created in PowerBi:

Section – Sales Statistics

1. Report – Sales Statistics
2. Report – Potential Sales

Section – Customer Orders

1. Report – In Full Analysis
2. Report – Lead Time Analysis
3. Report – Orders Placed
4. Report – Merchandising Out

The most relevant report is 1. Report – Sales Statistics which is a summary of invoiced and uninvoiced orders.

Other strategic reports have and are being developed. Feel free to scroll through the information available. User specific access has been put in place, so you and your colleagues won't be able to see information that hasn't been designated as widely available.

CONNECTIVITY

You can access PowerBi without a VPN connection; the risk being mitigated as you sign in with your Microsoft account.

To use the Analysis Services Modules with the Excel direct link, you will have to connect with a VPN and sign into your Microsoft account in Excel.

Link: [asazure://uksouth.asazure.windows.net/bianalysislive:rw](https://uksouth.asazure.windows.net/bianalysislive:rw)

Training will be needed to use the above link. Please reach out to the Business Analytics team for either **Live Training in groups, Drop-in Sessions** or wait for the **Colart Training Video** to follow in due course.

If you are having issues using Excel with PowerBi, please raise a ticket to the General IT Support Site: <http://techsupport.colart.com/servicedesk/customer/portal/2/create/23>.

CONTACTS

Should you have any question or doubt, feel free to contact:



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