

Managing Distributed Portal Development with Metric Insights

For enterprise-scale portal implementations, it is critical to establish processes and standards that support distributed development across many BI professionals in the organization. This whitepaper outlines the best practices for successfully transitioning from an initial portal development, where a centralized team implements the solution, to a distributed implementation where federated teams develop Metric Insights use cases with the support and guidance of a small, centralized team acting as a center of excellence (COE).

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The Decentralization Journey

The initial implementation of Metric Insights in a large enterprise is always performed by a single, centralized team. With support from Metric Insights, this team identifies compelling use cases to form the first proof points within the organization. Starting with a smaller implementation allows for the following:

- The implementation acts as a critical proof point for the value of a BI Portal, generating momentum for continued enterprise-scale deployment.
- A smaller rollout allows the team to experiment with internal portal development processes to validate that they are ready to be scaled.
- Internal standards, support processes, and rollout procedures can be devised and modified in an iterative manner so that improvements can be made quickly without confusing the wider organization.

Once the initial implementation of Metric Insights is in production and all requirements for a wide-scale rollout have been met, the role of this team shifts from content producers to facilitators. The team typically then transitions into a COE, providing guidance, mentorship, and training to other Business Analyst teams.

Growing Usage

To successfully expand usage of Metric Insights across the enterprise, the COE team must define a process similar to how they might tend a garden. The process must ensure that the following activities are continuously occurring:

Plant Seeds With New Groups



Performing demos, conducting lunch-and-learns, and promoting the solution to other BI teams across the enterprise during knowledge sharing sessions are effective mechanisms for educating the broader community on the benefits of the portal solution. Additionally, senior management adoption of the portal as an enterprise standard can act as an accelerator for growth.

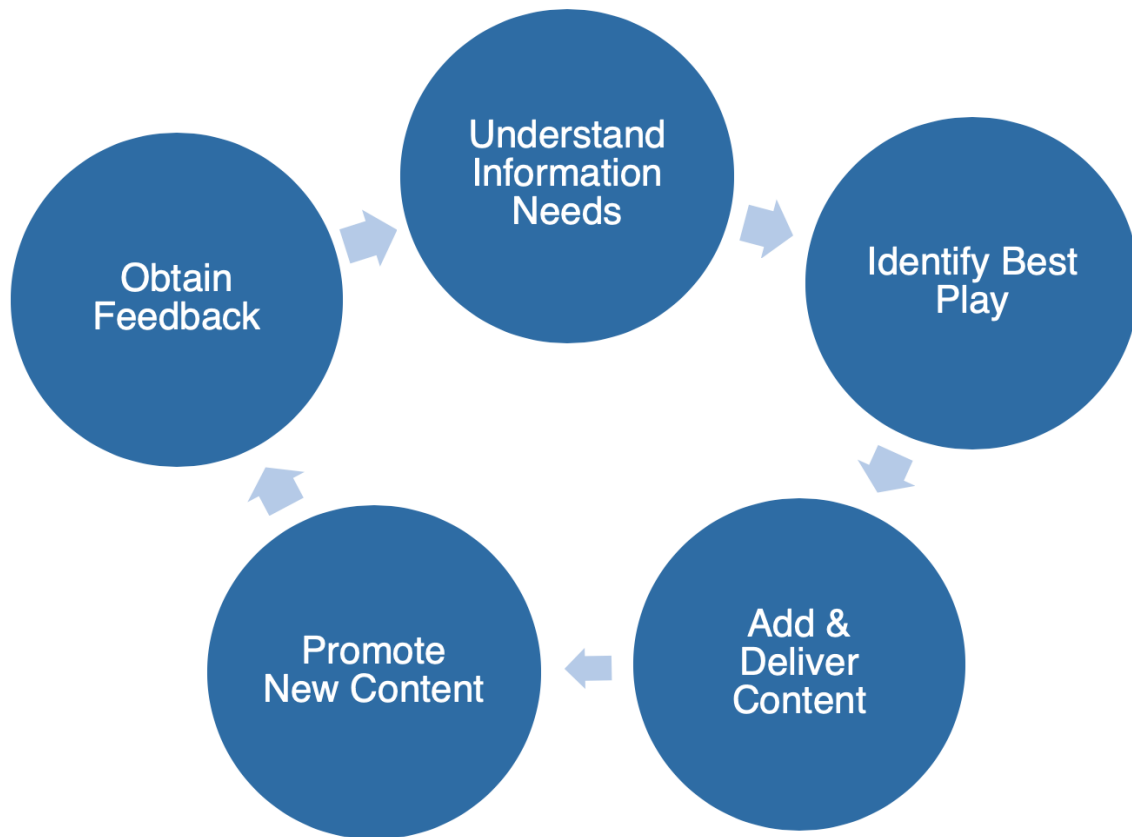
Nurture Development Of Impactful Use Cases

As the cliché goes, “You only have one chance to make a first impression.” The COE must ensure new groups deploy impactful and successful use cases at the outset – generating momentum for future use case development.

Prune/Weed Content That Is No Longer Useful

For long-term success, the COE must ensure the portal does not become a garden overrun with weeds. Over time, content that was once useful will become obsolete. The COE must implement processes that ensure any unused content is removed from the portal, so users are only presented with relevant information.

The Engagement Growth Cycle



To foster the long-term success of an enterprise-scale adoption of the portal, the COE must help BI teams adopt an iterative process for onboarding new content to the portal. Training is available from Metric Insights to guide the COE team through effective execution of this process:

Understand Information Needs

The BI team supporting the business must perform this analysis with guidance from the COE to ensure that needs are clearly understood before a solution is devised.

Identify Best Plays

This may be as simple as onboarding the most popular dashboards and providing the ability to pre-filter content. In other scenarios, sending preconfigured report bursts, alerts, or exception reports may be a critical need.

Add & Deliver Content

The BI team builds the necessary content in adherence to the standards and best practices established by the COE.

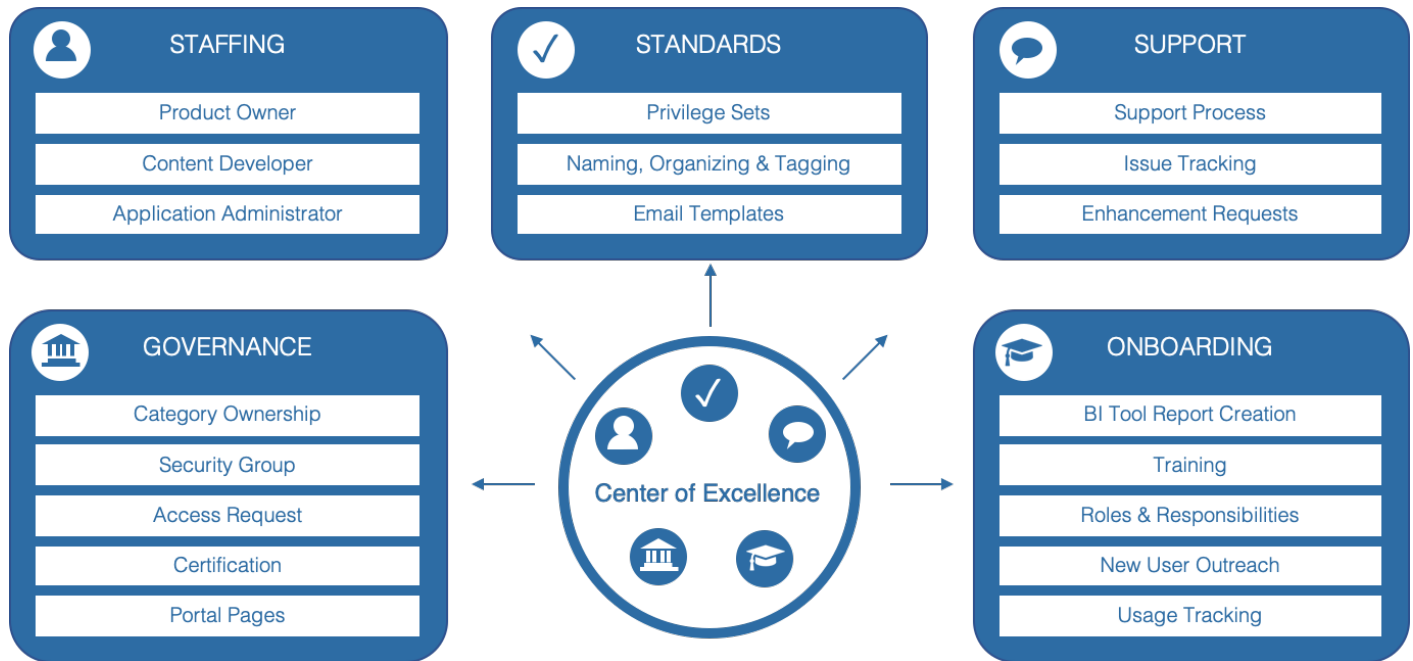
Promote New Content to Users

Promoting new content via email distributions, new content folders in the portal, and direct outreach is critical in achieving high user engagement rates.

Obtain Feedback

Collecting feedback from business users and, if necessary, revising use cases is essential to achieving long-term success.

Readiness Checklist



Before transitioning to a decentralized model, it is critical to assess organizational readiness in the following areas:



Governance Model

A clear governance model for portal content is crucial for a wide-scale, distributed deployment model. It is important to determine the right balance between centralized and distributed control of the following areas:

- Category Ownership
- Security Group Management
- Access Request Process
- Certification Process
- Portal Page Authoring

In each area, the decision between retaining central control vs decentralizing the function represents a trade-off between maintaining consistency and minimizing the efforts of the COE.

Category Ownership

Typically, in a federated model, each group of content creators is responsible for organizing their own content. To maintain consistency, organizations may elect to leave root-level categories under the control of the COE with each content team defining their assigned subcategories.

Security Group Management

In a federated model, each team adding content to the portal is responsible for ensuring the content is placed in a category with the appropriate level of access so that only authorized users can access it. Each team also determines what content should be made globally discoverable. To effectively scale this process, the COE must establish the overall security governance model for teams to follow. This involves enabling content creation teams to create their own security groups in Metric Insights, which are then automatically synchronized to LDAP/Active Directory to establish user membership for each group.

Access Request Process

The COE should establish an access request process to support content discoverability. The key consideration here is whether a centralized or decentralized model is a better fit for the organization.

Centralized Access Request

In a centralized access request model, all requests are routed by Metric Insights to a central system. Once a user makes a request, a centralized access management system handles the workflow.

Decentralized Access Request

If an organization does not have a centralized system for managing access requests, Metric Insights can be configured to route access requests to the appropriate user or group, based on the requested content. In this scenario, content managers receive access requests from Metric Insights and can approve these requests by adding the user to the appropriate LDAP/Active Directory user group.

Certification Process

Before wide-scale rollout, the COE should establish procedures around content certification. The following questions should be answered and clearly documented for new content creation teams onboarded to the portal:

- Can any content be added to the portal or only certified content?
- Who is responsible for content certification?
- What process should be followed before content is certified?
- Does certified content require periodic review and recertification? If yes, how frequently?

Portal Page Authoring

Portal pages allow content publishers to combine different content into highly-curated views that optimize users' consumption experience. With a broader rollout, it needs to be decided whether each team will be allowed to create and publish their own portal pages, or if this will remain as a function of the COE. Decentralized portal page creation enables faster development but requires enforcing standards that ensure portal page look and feel is consistent across the application.



COE Staffing

For an effective, enterprise-scale rollout, careful consideration must be given to COE team staffing. Depending on the scale and pace of the rollout, these roles may be part-time responsibilities of FTEs. Metric Insights will provide the COE guidance on appropriate staffing for each of the roles in the table below:

Role	Responsibilities
Product Owner	<ul style="list-style-type: none">• Requirements Gathering• Onboarding Coordinator• Metric Insights Liaison
Content Developer	<ul style="list-style-type: none">• BI Tool Onboarding• Standards Development• Developer Support• Internal Training• Portal Page Implementation
Application Administrator	<ul style="list-style-type: none">• System Administration• Infrastructure Management• Data Source Management



Standards

A coherent set of standards lays the foundation for long-term success of an enterprise portal

implementation. Standards must be developed and documented in the following areas:

Privilege Sets

The capabilities exposed to users in the portal are controlled by their assigned privileges. For example, an end user may be given the privilege to create a burst or add comments. A content creator may be granted privileges around authoring, such as the ability to define a new data source or manage privileges for end user groups. The best practice is to organize the user community into a set of roles defined by distinct privileges. As users are onboarded, they can then be assigned the appropriate privilege sets through their group membership.

External Report Viewing

In Metric Insights, BI dashboards can be viewed directly within the portal or they can be viewed externally in the native BI tool through a link. To create a consistent user experience, it is best practice to standardize the viewing experience, irrespective of which team authored a given report. In this way, business users are provided a streamlined and coherent experience.

Naming Conventions, Tagging, Folders

Establishing naming conventions for tiles in the portal, along with guidelines for tagging and organizing content into folders, creates consistency in user experience and in content management.

Email Templates

Email templates are used when bursting content to users, as well as in Favorites and Alert Digests. Defining standard headers and footers for these templates ensures legal compliance with confidentiality notices and

provides a consistent look and feel across all emails.



Support Model

Support models must be clearly defined before a wide-scale rollout of the portal. This is necessary for both the business user community interacting with the portal and for BI teams building out use cases to support their end users.

Support Process

Well-defined support procedures must be established to promptly resolve end user inquiries. Typically, first line end user support is provided by the BI team responsible for their content – since users cannot easily distinguish between questions about the portal and those relating to underlying content. Any service-level expectation around end user support must be clearly communicated to all stakeholders.

Similarly, the mechanism used to provide tier 1 technical support to BI teams must be established, along with procedures to escalate issues requiring Metric Insights support.

Issue Tracking System

Existing Help Desk systems must be configured to allow for tracking of any support requests raised both by business users and by content creators. The process for initiating new tickets and monitoring open tickets to resolution must be established and applied to each group onboarded to the portal.

Enhancement Request Tracker

A process must be established for tracking new feature requests for the portal, so that these items can be catalogued and prioritized.

Requests may represent capabilities that can be easily enabled in the system, or they can be product enhancements communicated to Metric Insights for future releases.



Onboarding

To ensure a smooth experience for every new team onboarded to the portal, the COE must define an onboarding process covering the following areas:

Tile Creation for BI Tool Reports

When a new BI team is onboarded, one of the first actions this team will typically perform is to create new tiles in the portal for the BI tool this team is currently utilizing. There are three distinct options for how to create this content. The route selected will impact the level of training required, as well as the pace of the onboarding process.

Manual Content Creation

One option is to manually create a Tile in Metric Insights for each dashboard the team wishes to promote to the portal. This approach is typically used when portal content is highly curated and it is imperative that only the small subset of vetted reporting from the BI tool appears in the portal catalog. To implement this option, all content creators on the onboarded BI team must be trained in the process of adding external reports to Metric Insights.

Automated Reporting Sync

If the reports that are to be onboarded are already well organized and curated in the underlying BI tool, the automated report synchronization feature in Metric Insights can be used to automatically populate tiles in the portal for all reports in a given area of the BI tool. For example, Metric Insights can be

configured to periodically examine all reports in a specific BI tool folder and automatically create a tile in the system for any report that is not already registered in the portal catalog. With this option, no manual Tile creation is required and BI team members can add content in the portal simply by creating a new report and placing it in a pre-established section of the BI tool folder structure.

On-Demand Tile Creation

A final option is to allow business users to automatically create tiles in the portal catalog through a portal page. This approach is appropriate in situations where full curation of portal content by the BI team is not feasible and the goal is to have end users self-select which content is promoted to the portal. This approach can easily result in a high level of clutter in the portal, so consider carefully before taking this route.

With all three of the above approaches, it is possible to configure search to allow users to find BI tool reports that have not been promoted to the portal. This capability enables a 2-tier discovery model in which secondary content is available via search without creating clutter in the portal catalog.

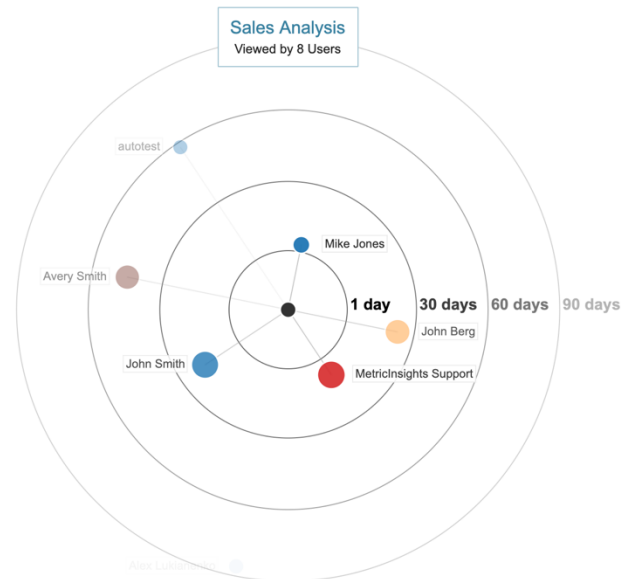
Training

Two kinds of training are typically performed when a new group is onboarded to the portal:

- (1) The content development team is trained on Metric Insights' capabilities, along with the internal processes developed by the COE.
- (2) The business users are provided with a short overview orientation of the portal. Often, the business user orientation can be performed via a short, prerecorded video.

Roles and Responsibilities

Every new content creation team onboarded to the portal must understand the roles and responsibilities required for a successful rollout. The content creators who receive training must be identified and the process for coordinating feature requests and issues with the COE must be defined. An individual on the team must be designated as responsible for content organization, periodic review, and removal of obsolete content. Finally, the first-tier support assumed by each content creation team must be assigned to the appropriate team members.



New User Outreach

During onboarding, the COE must work closely with each BI team to refine what they communicate to their users. The process for onboarding new users added to the team must be defined, along with a process for handling users who change their role over time or are no longer part of the team.

Usage Tracking

The final piece of the distributed portal development puzzle is implementing a process for continuously monitoring portal content usage – ensuring the portal remains relevant and uncluttered.

Metric Insights provides a specialized portal page for tracking user engagement with content and identifying:

- Content that is most popular
- Content with increasing usage
- Content with decreasing usage
- Unused content

As part of the onboarding process, the COE must work with each new content creation team to identify who will be responsible for content monitoring. It is critical to establish a content review cadence to remove obsolete content and keep the portal clean and intuitive.

Conclusion

Managing an enterprise portal deployment in a distributed environment with various federated teams can seem daunting. However, by applying the practices described in this document and with the help of Metric Insights' Solution Architecture team, this undertaking becomes extremely manageable. Adhere to these guidelines and any organization can effectively transition from a model of single group content creation to a highly evolved distributed model supported by a COE.

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