

## Questions for Selecting Reporting Tool

Acknowledging that the tool selection process is not always compatible with a simple flowchart, we present the considerations below as starting points for choosing the most appropriate tool for your skill level, use case, and audience(s). Many items are related, and some may eliminate certain tools (e.g., if you need to “mash up” data from CSV files you can’t use OBIEE; if you don’t want to model your own data, then Power BI isn’t for you) so you should read through the list and familiarize yourself with these points as you decide which tool is most appropriate.

### Your Knowledge, Skills, and Access

#### **How well do you know the data you will be using?**

If you’re familiar with the data and data sources you’re using, you are not limited and can choose any of the available tools at your disposal. Power BI will offer the most flexibility for defining unique relationships between data, and for combining different data sets and data sources to answer more unique questions – but it will also take more time to set up. OBIEE requires less knowledge of the data, and takes less time to build, but also offers fewer options for visualization and distribution once the reports are created.

#### **Are you comfortable building your own data models to create queries?**

If so, you can use any of the tools in our analytics ecosystem based on your other needs. If you are not, then OBIEE is your best bet – with pre-joined data relationships based on an in-depth analysis of common campus reporting needs, it’s designed for users with limited data modeling skills.

#### **Do you have a Power BI Pro license or OBIEE Author access?**

This is not a deal-breaker (unless you have an urgent request with little time) but may influence your decision in either case if all other considerations are equal. If you don’t have either, you can apply for additional access at <http://www.uwm.edu/dar>.

### Query Design

#### **What data sources will you be using? Data warehouse? HRS? Wisdm? Others?**

If you’re using solely warehouse or HRS data (individually, not together) then OBIEE might be the answer -- with the caveats that OBIEE HRS author access can take some time to acquire if you don’t have it, and that data warehouse data in OBIEE is modeled based on the predefined joins above, which removes your ability to define custom relationships or add new data elements that aren’t already part of the OBIEE models.

If you need to define your own data relationships, combine data from two or more sources, or use data from Wisdm or another data source, then Power BI is your only option.

#### **Do you need to mash up data from an Excel spreadsheet or other local file?**

If so, OBIEE doesn’t allow mash-ups, so Power BI is your only option.

**If you're using strictly UWM warehouse data, are you answering a "common" question (students in a plan, class enrollments, student term enrollment, "official" semester/weekly snapshot reporting) that is already modeled in OBIEE?**

If so, perhaps OBIEE is the best choice. Maybe you can even use a pre-existing shared dashboard to answer your question or generate a report for your needs.

## Deliverables

**What deliverable(s) do you want to create? A dashboard, a graph, pivot tables, a simple list?**

Both OBIEE and Power BI can be used to create pivot tables, student lists, and dashboards/reports. Given that a security structure is much more established for OBIEE than Power BI, OBIEE is the preferred tool for creating lists with student-level information.

**Do you need to allow user interactivity (i.e., filters/sorts)?**

Both OBIEE and Power BI can be used to create dashboards/reports that users can interact with.

**Is this a one-time need, or something that needs to be updated? How often?**

If the deliverable needs to be updated regularly (e.g. weekly), using OBIEE is likely the best option because there is an existing technical structure for maintaining widely used datasets and refreshing dashboards/reports. Power BI is likely a better option for meeting one-time needs that require highly customized data.

## Audience

**How many users do you expect will be viewing your content? Is it a smaller set of known users who you will personally contact, or a larger employee group where you won't individually contact everyone who consumes the report?**

In general, OBIEE is a better platform for distributing content to a large audience because of the technical support structure that exists currently. If you are looking to distribute information to a wide audience, please consider developing a shared dashboard in OBIEE. In the future, Power BI might also be adequate for wide distribution of dashboards/reports.

**What is the technical proficiency of your intended audience?**

If the technical proficiency of the audience is low, OBIEE is probably a better option because of the centralized support structure that exists currently for OBIEE. Audiences with average technical proficiency should also be able to navigate reports in Power BI.