

در این فایل در نظر داریم به معرفی شاخص های اصلی ارزیابی سیستم های هوش تجاری (BI) بپردازیم.

منتها ذکر این نکته ضروری است که راه اندازی سیستم هوش تجاری و داشب وردهای مدیریتی بدون وجود پایگاه های داده موجود در سطح سازمان که دیتا در آنها رسوب کرده باشد امری عجولانه است.

البته که سیستم هایی در سازمان ها وجود دارند از قبیل منایع انسانی، سیستم مالی، سیستم حضور و غیاب و لیکن این سیستم های تنها درصد کمی از فعالیت های سازمانی را پوشش داده و در عمل ضریب نفوذ مکانیزاسیون در سازمان ها چندان بالا نیست.

یکی از بهترین راه های افزایش این ضریب و مکانیزه یا الکترونیکی کردن فعالیت های، گردش کارها و فرایندهای سازمان ها

BPMS

به عبارت بهتر استقرار یک سیستم BPMS مناسب و بیاده سازی و اجرای فرایندها در سیستم BPMS پیش نیاز استقرار سیستم های هوش تجاری و داشبوردهای مدیریتی است.

Reporting and Analysis

Reporting

Accessibility

Real time reports access operational data stores

Generates reports automatically

Web query

Ad-hoc queries

Column-based indexing for faster data retrieving

Navigates all connected relational databases

Interactive data exploration with analytics



Desktop interface to advanced analytics

Multiple data sources and platforms

VLDB drivers

Multiple table inserts

Table functions

Accesses delimited ASCII files

Accesses fixed format ASCII

Schedules information alerts based on specified conditions

24x7 server availability

Real time access to operational data

Report drill through from OLAP cubes

Report drill through from zero data cubes

Tree-style structure that logically organizes database columns into folders

Embedded production report writers

Batch production and distribution of reports

Combines multiple reports into a single "report dashboard"

Exports reports to other formats

Multiple format support including HTML, Excel, and PDF

Integrates with Microsoft Front Page and other HTML development tools

Interface with Microsoft Analysis Services and Hyperion Essbase

SAP BW

Java-based reporting tool

Custom Java tag library reduces the amount of coding required to integrate reports into

JSP pages

Object-oriented 4GL

Graphical interface avoids complex languages, such as C or Java



Reporting Capabilities

Step-by-step report creator

Point-and-click graphics tool

Hides or drills down to detailed information

Pre-set templates

Saves, schedules, and publishes reports

Multiblock reports

Report catalog and report serving

P&L reporting

Data-manipulation capabilities for row and cumulative totals

Cross-tabs break a report across an unlimited amount of categories

Desktop and web reporting interfaces

Identifies exceptions in report

Automates the generation of reports

Publishes report templates for others to be modified

Formats tools to change fonts, colors, styles, column and row sizes, and alignment

Automatically drill through to several reports from a single page

Accesses analytics from Microsoft Office applications

Report wizard's guides users through analytical and reporting tasks

Exception highlighting shows values in a report that are above or below a value range

Creates metrics

Users can view, create, modify, print, and forward reports

Auto saves

Proactive drill-down options, including automatic, conditional, and in all supported

formats

Cascading style sheets

Financial reporting and analysis including intuitive ad hoc, OLAP, and forecasting



Unicode

Creates subsets for the logical groupings of information

Nested crosstabs and charts

Data explorer

Report explorer

Repository explorer

Field explorer

Graphical table linking

Field mapping between databases

Custom templates

Preview window

Asymmetric reporting provides a customized view of OLAP grids

GUI, drag-and-drop development environment

Adds columns

Adds filters

Creates analytic workflows

Calculates initial insights into the data quickly and easily

Data groups can be defined and customized by users

Embes live applications, Web sites and non-BI content within report

Data can be viewed as reports, charts, graphics, etc.

Generates of table of contents on demand

On-demand pagenation of table of contents

Drill-through analysis

Searches, filters, and sorts data

Report prompts give multiple selection criteria

Ad hoc reporting into any application

Search capabilities for specific categories within cubes and reports

Drills down within a PDF to other data sources



PDF drill down witihin the PDF document

Active reports with thin client disconnected thinkline analysis capabilities

Formatting

Guidelines and vertical rulers

Auto-arrange fields

Drag-and-drop browse field data

Drawing style interface

Line drawing, box drawing

Circles, ovals, and boxes with rounded corners can be added to reports

Moving and resizing objects

Conditional font formatting

Vertical text rotation

Fractional font size

Format editor

Format painter

Horizontal page number

Custom and bound images

Graphic image support (such as BMP, TIFF, PCX, TGA)

Redo and undo

SQL Functionality for Report Creation

SQL database access

SQL "merge" command

SQL "with" clause

Reports created from an outside source can be uploaded into tool .xls, .txt. etc.

Creates SQL reports via stored procedure

Format



Exporting

Creates graphs

Establishes thresholds

Narrowcast Server subscriptions and report execution

Object security

OLAP services

Input filters

Report scheduling

Web report execution

Security group access control

Creates new attribute, attribute forms, and metrics

Percentile calculations, ranks, and distributions

Calculation Capabilities

Statistical and hypothesis testing

Fast query performance

Real time forecasting

Closed-loop transactional processing

Universal transaction to any communication device, wired or wireless

Transactional confidence ensured with scalability and fault tolerance

Complex query IF-THEN-ELSE logic

Custom function plug-ins for customers who designed algorithms for calculating scores and other statistical models

Add calculations such as sum, average, moving average, and count to reports

Functions

Custom functions

Metrics



Wizard functionality creates simple or compound metrics

Sets join specifications

Sets VLDB

Performs null and zero value checks to identify how to handle data

Percent-to-total metric types

Transforms metric types

Ranks metric types

Filters

Filters using an attribute's form (ID, description, etc.) or on elements of an attribute

Sets qualifications based on a relationship filter or metric

Creates custom expressions

Creates new metrics

Uses joint element list to join attribute elements and filter the result set

Imports filter elements from .xls or .txt files

Defines output level of report data at different levels, e.g., at the attribute or entity level

Attribution merge

Metric-to-metric comparison

Data Visualization Tools

Report Types

Cross-tab reports

Form-style reports

Sub-reports

Conditional reports

Top/bottom reports

Drill-down/summary reports

OLAP reports



Tabular reports or data visualization-enabled reports

Financial reports

Compound reports that combine several reports into a single PDF file

Parameterized reports using run-time filtering

Sorting and grouping

Matrix

Freeform

Linked

Slice and Dice

Pivoting

Dimension hierarchy

Dimension tool

Tiles

Check boxes

Radio button

Drop-down boxes

Graphs and Charts

Types

Bar charts

Stacked bar

Column

Stacked column

Line charts

Area

Numeric or date/time x-axis

Pie/doughnut

Scatter plots



Bubble

Gauge

Gantt

Funnel

Multiple 2D and 3D charts

Histograms

Data constellations

Paraboxes

Time tables

Charts and plots

Animated reports

Histograms

Scatterplots

Thermometer

Data constellations

GIS mapping

Dot density

Waterfall

Swatch

Parallel coordinate

Trend

Box and whisker

Control Limits

Features

Color coding

Peer graphics

Multiscapes

Changes graphical views in real time



Zooming

Customer KPIs

Graphically displays Gantt charts and networks

Interactive chart

Chart description

Chart legend

Control limitations

Mapping Capabilities

Users can toggle between a map and business intelligence application Mapping capabilities to view and analyze data with a geographical or spatial component in the context of a physical location

Integration with Microsoft Office and Others

Automatically generates Excel PivotTables from the application Reports against data stored in the Microsoft Analysis Services cube Reads and updates Microsoft Access and Microsoft SQL Server databases

from within the application

Exports data into new Excel spreadsheet

Exports to Excel template

Embedded Excel

Exports to Microsoft Exchange

Exports to Microsoft Mail

Exports to XML

Exports to PDF

Exports to character-separated values

Exports to RTF

Exports to disk

Exports to application



Exports to ODBC databases

Exports to lotus notes

Automatically generates summations and calculations within Excel

Excel pagenation (across multiple worksheets)

Interactive Beans

Presentation beans (graphs, crosstab, and table)

Data bean (query and calculation builders)

OLAP beans

Bean catalog to save, retrieve, and manage analytical objects

Distribution and Archiving

Electronically distributes of any content via preferred delivery vehicles, e-

mail, FTP, or network printers or fax

Scheduled delivery

Alert or event-driven delivery

Intelligent bursting

Archiving of reports or any other content

Expiration and versioning

Two-way e-mail

Java reporting component

.NET reporting component

COM report designer component

Uses portals to deliver customized information enterprise wide

Distributes content across enterprise with web applications

Delivers reports via Microsoft Excel

Delivers reports via portals

Delivers reports via e-mail

delivers reports via Adobe Acrobat



Reports can be distributed on a scheduled or alert-driven basis Reports are accessible to mobile users

Analysis

Analysis Capabilities

Analysis of variance

Regression analysis

Decision analysis and decision tree display

Multivariate analysis

Psychometric analysis

Categorical data analysis

Survival analysis

Nonparametric analysis

Cluster analysis

Site selection analysis

Clickstream analysis

Promotional analysis

What-if analysis

Basket analysis

Churn analysis and prevention

Currency conversion

Guided analysis with analytic workflows

Exception highlighting can identifies problem areas within a path of data in real time

Genomics

Microarray analysis

Taqman analysis

Cheminformatics

Clinical trial design and analysis



Biostatistics

Health services and outcomes analysis

Supply chain optimization

Drill-down capabilities to find root causes

Asymmetrical analysis

Portals

IBM WebSphere

Microsoft Share Point

Plumtree

BEA

Vignette Portal Services

CA Clever path

Peoplesoft Enterprise Portal

Oracle 9i Portal

mySAP Portal

Other portal

Personalization at user level

Permission-based content management

NetWeaver

Exploration Tools

Predictive modeling

Mail-order addresses

Sale histories

Web transactions

Forecasts resource demands

Executive-level analytical interface

Generates customer segmentation data



Generates customer profiling data

Predefined queries

Interactive graphic interface

Built-in customization and programmatic support

Forecasts demand for products and services

Medical diagnosis and research

OLPP

Enterprise Search

Searches full BI content

Fuzzy matching and word stemming

Embedded standard search toolbar

Fine-tunes search by narrowing criteria

Leverages metadata layer within search

Auto-filling prompts to maintain context within searching capabilities

Security to limit user access searches to access only areas

Search capabilities within a report or other document to identify related topics

Leverages structured and unstructured data

Indexes full content and not just report names and descriptions

Accesses data sources to search information across the organization

Scorecards

Tools to Design Balance Scorecards

Setting strategic objectives for each perspective

Views the scorecard strategy from financial, customer, internal, and learning perspectives

Adds or renames perspectives

Aligns strategic objectives with perspectives

Associates measures with strategic objectives

Graphically links strategic objectives in cause and effect relationships



Links can be edited as required

Assigns targets to measures

Lists strategic initiatives

Links objectives to strategic initiatives

Personalized column display

Formulas

Functions

Creates individualized scorecards

Integration of ISVs

Metric wizards

Build application and reporting templates

Tools to Communicate Objectives

Communicates measures

Communicates targets

Communicates initiatives aligned with the strategy

Communicates descriptions of objectives

Online automatic user notification of changes to a metric status

Regroups metrics by owner

PDF printing for off-line viewing

Incorporates all enterprise data from every business process

Visualizes performance data in graph format

Monitors red zones via scorecards

Communicates changes in corporate strategy

Delivers scorecards via intranet, extranet, or e-mail

Cascades scorecards throughout the organization

Drills down to textual commentary

Multidimensional analysis capabilities

Strategy and accountability mapping capabilities



Scorecard functionality integration with documents, spreadsheets and web sites

Scorecard functionality integration with reports, graphs, charts, and analysis tools

Message board forums and discussion threads

Event-driven and cascading alerts

Manual metrics update

Lead and lag indicators

Creates strategy maps, impact analysis and cause-and-effect diagrams

Creates strategy maps, impact analysis and cause-and-effect diagrams

Feedback

Analysis of the measure results against its target

Graphical indicators

Displays current performance data for each measure

Reporting capabilities

Report interactivity

Charting capabilities

Closed-loop data updates

Scheduled, ad-hoc, and event-driven delivery of HTML, Excel, PDF reports, and third party content by e-mail, network printer, FTP or fax

Deployment flexibility e.g., over the Web or in PDF

Multilingual

Administration

Web-enabled administration tools for scalable deployments

Automatically generates interface tables and summaries, optimizing data loading, and query performance

Responsibility-based security restricts user access to required data granularity, scorecards and measures

Schedules recurring loading events



Automatically generates documentation of data lineage from the input tables to the summaries

to the KPI reports

Automatic back-up of historical data

Migrates a balanced scorecard system (data and metadata) between instances

Use of materialized views for advanced summarization architecture

Dashboards

Updates, edits, and changes look and feel of UI at individual user level

Establishes KPIs or metrics

Access to multiple enterprise data resources

Real-time data update capability

Connects to operating systems to perform transactions

Customizable at user level

System administration configuration capabilities

Drill down capabilities

Drag and drop

Built-in pre-defined metrics

Web-based

Edits metrics

Exploits different statistical methods

KPI and alert customization

Indicators and links to reports and shared documents

Provides automated scheduling

Exception highlighting is visible on charts and in key performance metrics

Embedded instant message or chat capabilities



Analytics

Predictive Analytics

Predictive Modeling Techniques

Regression algorithm

Scoring

Classification

Groupings

Clustering

Variable contribution

Time series analyses predicts patterns and trends in data over time

Association rules identifies patterns in transaction data for describing which events frequently

occur together

Consistent coder automatically fills in missing values and detects out of range data

Sequence coder aggregates events into a series of transitions

Event log aggregates events into periods of time

Segmentation Text categorization

Predictive Data Analytics

Self-service reporting and guided analysis for users

Customizes content and layout of any given report with a range of variations defined by certain

factors or parameters

Drill anywhere capabilities to help users "drill" into detail as represented by their business

models

Segments data by user

User-defined data groupings

Forecasting

Automatic forecasting



The forecasting process, hierarchy, parameters, and business rules can be set up through an interactive graphical interface

Project set-up wizard generates automatic forecasts for millions of data rows in a batch, or thousands through the interactive graphical interface

Reconciles up and down the hierarchy

Generates exception reports based on sound statistical logic and business rules

Publishes results automatically via a company portal or the Internet

Facilitates ongoing and repeatable forecasting as part of a company's overall planning process

Events management console

Code generation for batch processing

Automatic regressed selection

Performs automatic hierarchical forecast reconciliation

Aggregates transactional data into time series format

Accumulates data into any frequency time series

Seasonality and intermittent series tests

Automatic indicator variable creation

Automatic model selection

Output produced in common formats such as HTML, PDF, Microsoft Word, OpenDocument Format, etc.

Several output data sets are available, including forecasts, goodness-of-fit statistics, model parameters, seasonal and trend statistics, etc.

Industry Vertical Predictive Analytics

Predictive Web Analytics

Search engine optimization

Automated user and visit segmentation

Web site activity and user behaviour analysis

Home page activity



Activity sequence analysis

Propensity analysis

Predictive Call Center analytics

Creates create cross-sell and retention campaigns using business rules and behind-the-

scenes predictive analytics

Campaign validation and assessment

Campaign execution

Campaign improvement

Customer contacts

Service requests

Campaign opportunities

Campaigns won

Campaigns lost

CRM Predictive Analytics

Campaign management functions and persona-specific interfaces

Integrates between analytical models and campaign management processes

Wizards for accessing data from virtually any data source or format

Reusable templates and linkable campaign diagrams

Data mining and customizable modeling tools

Market basket analysis

Link analysis

Times series analysis

Forecasting and optimization

Customer segmentation and profiling

Behavior analysis

Centralized security and access control

Customizable filters for list creation



On-the-fly calculation of count, sum, average and other formulaic expressions

Shares and reuses campaigns and campaign components

Web-based interface for requesting campaigns

Prioritizes communications within and across campaigns

Prioritizes communications within and across campaigns

Creates entity relationship diagrams with drag-and-drop interface

Lists all values for a categorical field

Campaign briefs for planned or active campaigns

Data, Text, and Web Mining

Data Mining

Data Access

Data capturing solution with multiple types of data, languages, and protocols support

Accesses data in remote databases

Accesses data held in ODBC-compliant database

Accesses data in flat files, SAS data sets, Microsoft Excel, IBM Visual Warehouse, and

Oracle Express

Accesses web site data

Uses various data cleansing options to remove or replace invalid data and automatically

fill in missing values

Automatically selects appropriate algorithms for prediction, clustering, and modeling

etc.

Data Manipulation and Cleansing

Partitions data into training, test, and validation datasets

Works with complete record and field operations, including field filtering, naming,

derivation, re-categorization, and value replacement

Records can be selected according to multiple criteria



Records selection, sampling, merging, and concatenating, sorting, aggregation. and balancing

Randomized sampling

Creates union, intersection, or complement of datasets

Filters exceptional records

Drill-through feature selects data points from a chart to create a new dataset

Splits data into n-tile percentage intervals for any numerical variable

Modeling

Mines data in database where it resides within data modeling functionality

Use IBM DB2 Enterprise decision trees, regression, association, and demographic

clustering techniques

Use Oracle 10g naïve Bayes and adaptive Bayes networks and SVM

Uses predictive and classification techniques

Browses the importance of the predictors decision trees and rule induction techniques,

including CHAID, exhaustive CHAID, QUEST, and C&RT

Browses and interactively creates splits in decision trees

Browses, collapses, and expands decision rules

Browses, collapses, and expands decision rules

Views model equations and advanced statistical output

Uses clustering and segmentation techniques Kohonen networks, K-means, and

TwoStep

Chooses from detection algorithms including GRI, Apriori, sequence, and CARMA

Filters, sorts, and creates subsets of association models

Employs data reduction techniques factor analysis and principal components analysis

Combines multiple models, or one model can be used to build a second model

Creates multi-variable regression predictive models

Attribute-based predictive input metrics

Imports third-party predictive models using the PMML industry standard



Metric-based predictive input metrics

Conditional predictive input metrics

Drill down capabilities

Data Sampling

Simple random

Stratified

Cluster

Systematic

First N

Rare event sampling

Text Mining

Data Access

Accesses numerous forms of textual data such as PDF, extended ASCII text, HTML,

Microsoft Word, and Open Document format

Web crawling capabilities

ETL textual data into an SAS data set for mining

Feature Extraction

Vocabulary finder extracts technical terms, product and company names as well as common misspellings

Phrase finder identify recurring phrases and expressions

Normalizes and includes extracted entities in a matrix table

Entity extraction is available for multiple languages

Text Processing Capabilities

Content analysis on short alphanumeric variables (up to 255 characters) and longer ANSI, RTF, and other formats



Captures and distills the most important underlying information within a document collection

Default or customized stop lists for each language removes terms with little or no informational value

Calls external text pre-processing to EXE or to DLL

Integrated multilingual spell-checking

Integrated thesaurus to assist the creation of taxonomies and comprehensive categorization schemas

Case filtering on any numeric or alphanumeric field and on code occurrence (with AND, OR, and NOT Boolean operators)

Excludes pronouns, conjunctions, etc. based on user-defined exclusion lists (or stop list)

Categorizes words or phrases using existing or user-defined dictionaries

Categorizes Word based on Boolean (AND, OR, NOT) and proximity rules (NEAR, AFTER, BEFORE)

Substitutes and scores Word and phrase substitution using wildcards and weighing Frequency analysis on keywords, phrases, derived categories or concepts, or user-defined codes entered manually within a text

Interactive development and maintenance of hierarchical dictionaries, taxonomies, or categorization schemata

Restricts the analysis to specific portions of a text or to exclude comments and annotations

Stemming to identify root words

Part-of-speech tagging based on sentence context

Noun group extraction for identifying phrase-level concepts such as "competitive intelligence"

Compound word splitting into distinct sub-terms

Dictionary building assistant to find related words (including synonyms, antonyms, holonyms, meronyms, hypernyms, and hyponyms)



Keyword Extraction and Analysis

Keyword retrieval function allows identification of text units (documents, paragraphs, or sentences) containing one keyword or a combination of keywords with optional filtering of cases

Attaches QDA Miner codes to retrieved segments

Retrieved segments can be exported to disk in tabular format (such as Excel,

OpenDocument format, or delimited text files) or as text reports (such as rich text format or OpenDocument format)

Integrated clustering and dendrogram display of keyword co-occurrence

First- and second-order proximity analysis

Proximity plot to easily identify all keywords that co-occur with a target keyword 2D and 3D multidimensional scaling on either joint frequency or co-occurrence of words or categories

Keyword co-occurrence criteria (within a case, a sentence, a paragraph, a window of n words, or a user-defined segment)

Text retrieval from dendrogram or proximity plots

Automated Text Classification

Machine learning algorithms (Naïve Bayes and K-Nearest Neighbors) for document classification

Feature selection automatically selects best subsets of attributes

Numerous validation methods (leave-but-one, n-fold cross validation, and split sample)

Integration with Statistical Software

Alphanumeric variables can be stored in the same file as all other numeric variables Variable selection, statistical analysis, and content analysis are performed within the same program

Matrix outputs are automatically added to existing statistical outputs



New variables representing occurrence of words, keywords, or concepts can be added to the existing data file or exported to a new data file

Data can be imported from and exported to different file formats

Performs numeric and alphanumeric transformation

Applies filters on records of the data file to restrict the analysis to specific subgroups

Language Support

Text parsing for multiple languages

Language independence

Provides dictionary with major languages

Dimension Reduction Techniques

Textual data is preprocessed into a matrix for the application of dimension reduction techniques

Roll up terms automatically identify the n-highest weighed terms in a document SVD transforms each document into an n-dimensional subspace

Text Clustering Algorithms

Group documents based on their contents

Expectation-maximization clustering groups documents using spatial clustering techniques

Hierarchical clustering using Ward's agglomerative method to facilitate automatic grouping of documents into taxonomies

Groups documents into hierarchical clusters belong to one leaf cluster as well as its parent clusters

Cluster documents downstream in the process flow diagram using K-means or SOM/Kohonen clustering

Profiles clusters using additional structured data from original documents (age, purchase propensity, etc.)



Document Categorization

Uses neural networks, memory-based reasoning, regression, and decision trees to assign documents to predefined categories

Combines quantitative and qualitative data with text analysis to improve predictions

Compares performance of multiple models and deploy score code to categorize new
documents