



RUNAS RADIO



<http://www.runasradio.com>



Richard
Campbell

RunAs Radio is a weekly Internet Audio Talk Show for IT Professionals working with Microsoft products. The full range of IT topics is covered from a Microsoft-centric viewpoint.



Greg
Hughes

Text Transcript of Show #070
(Transcription services provided by [PWOP Productions](#))



Erin Welker Helps Us With Performance Point Planning!
August 13, 2008



Erin Welker Helps Us With Performance Point Planning! August 13, 2008

[Music]

Brandon Wenn: From runasradio.com, you're listening to RunAs Radio, the Internet audio talk show for IT professionals with Richard Campbell and Greg Hughes. This is Brandon Wenn, announcing show #70, with guest Erin Welker, recorded Tuesday, August 12, 2008. RunAs Radio is produced each week by PWOP Productions, providing professional media and podcasting services online at pwop.com.

Richard Campbell: You're listening to RunAs Radio. I'm your host, Richard Campbell, and with me as always after a long break, my good friend, Greg Hughes.

Greg Hughes: Hey, Richard. Welcome back from the Galapagos.

Richard Campbell: Oh, it was off the hook, man. What a lot of fun. I highly recommend it. If you can get an opportunity to go to Galapagos Islands, go.

Greg Hughes: I would like to do that. You know, my mom went several years ago and said the same thing. You did a kind of roughing it version of the Galapagos, didn't you?

Richard Campbell: It wasn't really roughing it. We weren't staying on a boat which is the usual way to go to Galapagos Islands. We were actually staying in hotels on the islands and the hotels are a little rustic. They were the kind where, you know, you use boiled water to brush your teeth and sometimes the electricity is on and sometimes it isn't and sometimes there's water and sometimes there's not, but it was great to be in the towns. There are three towns in the Galapagos Islands and we went to them all and really had an amazing time.

Greg Hughes: That's great. I'm glad you got an opportunity to go out and do some travel that wasn't work related.

Richard Campbell: Actually take a break, right? Get away for a couple of weeks and do something else.

Greg Hughes: Yeah. Well, welcome back. We got some great shows lined up, don't we?

Richard Campbell: Right back into it again in a good way and thanks, we got a bunch of email while I was away as well. It's good to have a couple weeks off, so I haven't had a chance to go through it all yet. I literally landed last night, but we'll sort it all out and put some emails on the show. Thanks very much for your feedback and if you want to send us a message about a different kind of show, something you're concerned about, send us an email at

info@runasradio.com. All right and to our guest, a returning guest, Erin Welker. She spent 25 years in Information Technology development, management, database administration and business intelligence. She began working with SQL Server in version 1.11, Ugh -- Analysis Services, SSIS, DTS, and Reporting Services since their inception. She was privileged to be a member of the Project REAL team, and has written whitepapers on data warehousing in SQL Server 2005. Her current focus is PerformancePoint Planning.

Greg Hughes: Ah, cool.

Richard Campbell: Hey Erin.

Erin Welker: Hi!

Richard Campbell: Thanks for coming back.

Erin Welker: Well, thank you. You crack me up.

Richard Campbell: Somehow we missed each other at TechEd.

Erin Welker: Yeah. Well, you know, TechEd is a crazy event.

Greg Hughes: And there's only what? How many thousand people there?

Richard Campbell: Yeah, that's right, 10,000 people. Somehow we just didn't bump into each other in the halls?

Erin Welker: Yeah, that's even after the split.

Greg Hughes: That's right.

Richard Campbell: Yeah, going to two weeks. I got to go for both weeks. I was the .NET Rocks! guy the first week and then RunAs Radio guy second week.

Greg Hughes: I think they call that glutton for punishment, Richard.

Richard Campbell: Oh yeah. Two weeks in Orlando is like beating yourself with a hammer except it doesn't take as long and hurts less, but be that as it may, it was a great show. The IT show of course is always bigger. It was really a zoo. Any highlights for you, Erin? What were you doing there? Were you speaking?

Erin Welker: I was speaking on PerformancePoint Planning.



Erin Welker Helps Us With Performance Point Planning!

August 13, 2008

Richard Campbell: Oh, how useful for our topic of the day.

Erin Welker: Yeah.

Greg Hughes: What a coincidence.

Richard Campbell: So, maybe we need to start at the beginning here. PerformancePoint is a new Microsoft product?

Erin Welker: Well, yes and no. When I say PerformancePoint, since my focus has been on planning, that's what I tend to think of. However, what most people probably think about is the monitoring and analyses component so I kind of think of it like SQL Server in the box. You get the database management system, of course, then SSIS and SSAS and SSRS. Likewise, with PerformancePoint, you get three components, the Monitoring, the Analytics, and the Planning team. Now, Monitoring and Analytics actually had their Renames, the prior component, so monitoring used to be Business Scorecard Manager and Analytic came from the ProClarity acquisition by Microsoft.

Greg Hughes: Gotcha.

Erin Welker: However, Planning is brand new.

Richard Campbell: I remember the Scorecard being -- it was almost like an Excel document in the beginning, wasn't it?

Erin Welker: You may be thinking of the Excel add-ins for Business Intelligence.

Richard Campbell: Okay.

Erin Welker: There are actually two prior versions of Scorecard Manager -- and my memory is pretty bad these days. I can't remember the first version. Then Maestro came out, codenamed Maestro which was Business Scorecard Manager and that has evolved into the monitoring portion of PerformancePoint where you build your Dashboard with your key focused indicator and all your little gauges and stuff.

Richard Campbell: This is really about using the Analytics Services of SQL server. This is providing sort of the UI.

Erin Welker: Exactly and that's the piece that Microsoft has been kind of lacking in the past to kind of fill in that area.

Richard Campbell: For sure and then they bought ProClarity which was a surprise to me and I wondered

when the product would resurface, the ProClarity product.

Erin Welker: Right and here it is, PerformancePoint.

Richard Campbell: And here it is. So, those two pieces aside, so Microsoft built their dashboard bit and it's evolving nicely. Now, ProClarity is in and I'm sure it's going to evolve some more. I mean a couple of versions from now, I think we'll have a very different product, but the planning pieces is something totally separate.

Erin Welker: Correct, correct, and this is actually not something I intentionally went into. The opportunity arose and, you know, it's always good to learn a new skill set so here I am in PerformancePoint Planning and the nice thing about it is underneath the covers, it greatly utilizes the SQL Server, the database management system as its underlining DataMart and it also utilizes Analysis Services. So, having those skill sets really helped me tremendously in getting up to speed with PerformancePoint Planning.

Richard Campbell: So, right off the top, I got to say this is not about planning IT infrastructures. This is about business planning.

Erin Welker: Well, yeah, but actually you could probably use that in planning most anything.

Richard Campbell: Oh, really?

Erin Welker: For instance, during my TechEd presentation, my demo was planning IT projects.

Richard Campbell: Oh, okay, like the actually working out the budgets and the requirements for an IT project.

Erin Welker: Right, so it was mostly resource planning and management, but of course, there are hard costs that go with an IT project as well so you can put all those in as well. So, the target audience, well, actually, the primary target audience would be for financial planning. I am by no means a financial guru so that piece of the product I'll admit that I haven't been into that deeply and I don't know or can talk to very much. What I'm using it for right now is at a corporation where they're planning their projects. Not IT projects in this case but actually manufacturing projects which they used to do in Excel spreadsheet so you can think of it as kind of cost accounting where you have an initial budget and then as the project is going along, you're keeping track of your cost and how they match against budget and



Erin Welker Helps Us With Performance Point Planning! August 13, 2008

you're adjusting your forecast accordingly, all of course with the goal of coming in at or under budget.

Richard Campbell: Interesting. This sounds so much like a CRM product yet it really seems to be presenting to us as a server project.

Erin Welker: Yeah, yeah. It is a server project and one of the great benefits for, well, there are actually two benefits for getting at my current engagement. Number one, they used to manually enter in all their actual. This is a full-blown VI type of profit where we have an ATL job that loads all the actual in from the source system and then they pull it up in Excel spreadsheet and analyze that based on like I said prior forecast, their budget, and the actuals to make adjustments to the forecast. The second benefit that they really see is, again, this all used to be in separate spreadsheets. So, now we're loading it into a central database and of course they can do reporting and analysis and we will actually be using the M and the A piece of PerformancePoint, by M and A is Monitoring and Analysis pieces, to report on a more global level how things look so they can start doing better resource planning as they take a look at jobs across the board and what the requirements will be for resources as they're planning parts procurement. They can project that and maybe get some volume discount on parts they purchased from third parties and the benefits kind of go on and on.

Greg Hughes: You know, I can think of any of probably dozens of different sources of financial and project customer and other information that quite often went into whether it was financials or professional services planning or what have you at a company that I worked with and, you know, organically companies grow up and we have a lot of different places where we keep the information then Sarbanes-Oxley comes along and it's like you have to respect the integrity of that information. What does this PerformancePoint server do for me? Because what I'm hearing you say, so, check my logic here, is that we can pull in information from these different disparate sources and then model and work with it in order to get information out of it but not necessarily modify the original source.

Erin Welker: Correct. We wouldn't be modifying the original source. Most of the modifications would be in the budgeting aspect, the planning aspect per se.

Greg Hughes: Working with the data that we source from those different locations.

Erin Welker: Right, and as we're talking, another benefit comes to mind. There is a big piece of PerformancePoint Planning called Business Rules where you define calculation and of course that's one

of the problems with spreadsheet, disparate spreadsheet, is that you can put in your own formulas then one person has tweaked the formula in their spreadsheet and then another person tweaks them a little differently in their spreadsheet. Well, these formulas are at a server level and are shared both in Excel, which is actually the input viewing and input mechanism that PerformancePoint Planning uses by default and so those calculations are kind of across the board to where if you're viewing them in Excel or you're viewing them through Reporting Services or in a dashboard, they're actually stored as MDX script within Analysis Services so that the calculations are ubiquitous.

Greg Hughes: I think using Excel as, you know, Excel files stored on file shares or on individual desktops sort of the classic old way of doing things and probably the current way of doing things as well in a lot of cases, that's where you end up with that. So, there's an Excel add-in for PerformancePoint as well.

Erin Welker: Correct.

Greg Hughes: So, there, you can use all those visualization tools and modeling tools that you get with Excel but what I hear you say is avoid the problems of splitting the data up and not having a central place to work with common data.

Erin Welker: Yeah and that's actually one of the things I really have to drill into the business users is that when they pull up Excel and this PerformancePoint add-in, it looks and acts like Excel but it makes Excel an input mechanism. They can store the spreadsheet as files just like they always did but that breaks the connection with PerformancePoint at that point. So, as they use the add-in, it's more as an input mechanism to input their data into the server.

Greg Hughes: I think the reason people use Excel is because it does have all that great mathematical and modeling stuff in it, right?

Erin Welker: Yeah and they're comfortable with it.

Greg Hughes: The problem is it also makes it really easy to store the data locally and to rely on that as your primary copy of data that may or may not be the best business decision.

Erin Welker: Absolutely.

Richard Campbell: Well, and I noticed looking around the Microsoft site on this, that PerformancePoint server is actually sort of being grouped into Office because it really feels to me like an Excel extension, but it's a lot more than this



Erin Welker Helps Us With Performance Point Planning! August 13, 2008

because you're integrating SQL Server and Analysis Services like that's a lot of infrastructure to make this work well.

Erin Welker: Yeah, yeah, that's where the lines are really starting to blur especially in VI, between SQL Server and as you said Microsoft Office. I think it's great. Microsoft has leveraged what they already have to provide the visual, the GUI to the client.

Richard Campbell: This has seemed to be the go that a lot of internal development groups and ISVs and so forth wrote for people or often like I mentioned earlier, you'd find this as part of a CRM product or part of an accounting package, this budgeting piece, but it then required that all the data be there. How open is this? How able am I to pull data from a lot of different places, my custom apps, my Microsoft Dynamic apps, some other accounting package I might use?

Erin Welker: Well, it's SQL server so in that respect it's wide open. There is an aspect of PerformancePoint that's heavily documented called data integration piece which in essence is getting actual data into PerformancePoint. So, PerformancePoint does store the data in a particular way but they give you the means and the knowledge of how to get your source data into PerformancePoint which is just the SQL server database and ultimately an Analysis Service cue.

Richard Campbell: So, it sounds like you're going to spend some time in SSIS pulling data from sources to get it into a form that PerformancePoint can consume.

Erin Welker: Yes and actually that's the way I did it because that's where I come from and that's how I know to do things, but they actually also have a set of stored procedures and I haven't tried this so I can't say beyond a shadow of a doubt, I don't think you even have to touch SSIS if you kind of hook the stored procedure calls together maybe through the SQL Server agent.

Richard Campbell: Nice. Well, that means depending on the skill set I've got internally here with my existing apps, I could tie into an awful lot of stuff. There are bunch of ways to achieve the same goal.

Erin Welker: Exactly.

Richard Campbell: So, is Excel the UI? Is that the way to use PerformancePoint?

Erin Welker: Excel is the means of entering information and this is what makes PerformancePoint Planning, as I've talked about thus far, a little different

from your typical VI application because it actually enables you to input data directly into the data warehouse, meaning this is data that's in the data warehouse and no place else, yet. Of course they also provide the means of getting it out if you want to just look at this just like any LOB application where this is a segment of information that you ultimately want to move on to another larger centralized data warehouse.

Richard Campbell: Well, and it's interesting because I've always looked at OLAP databases, the Analysis Services databases as read-only's. You're pulling it from the database and putting it there, so the fact that we're writing directly to it, that's a real twist on the normal model.

Erin Welker: Yeah and of course like many VI people, I came from OLTP, went to straight OLAP and now I'm kind of in this hybrid environment and it makes for some confusion.

Richard Campbell: It's definitely a challenging way to think about the problem. I've never thought about backing up Analysis Services like how do I protect the data that ends up being generated there.

Erin Welker: Well, Analysis Services ultimately could be regenerated from the data warehouse. So, a lot of people choose not to back up their cube because of that. Now, of course, if it gets to be very large, it might be a lot easier to back up your Analysis Services database system and restore them directly, but the metadata information, all the catalogue information are stored in a SQL Server database so you could wipe your cube and Analysis Services for that matter off the face of the Earth and PerformancePoint would rebuild it based on the information that's in the SQL Server database. Those are the key things to keep backed up.

Richard Campbell: Okay, so it is still in and the data that I'm entering in Excel through the PerformancePoint plug-in is being written in SQL Server and that's what needs backing up.

Erin Welker: Absolutely.

Richard Campbell: Okay and everything in Analysis Services is generated. It does need to be backed up. You only want to back it up for expediency's sake. It can be completely recreated if you've got the time.

Erin Welker: Correct, correct.

Richard Campbell: That's good. Go ahead, Greg, sorry.



Erin Welker Helps Us With Performance Point Planning! August 13, 2008

Greg Hughes: One of the benefits I could -- I'm sort of I'm listening and thinking at the same time, sorry about that, but one of the benefits I can see of doing something like this is, you know, I think a lot of organizations measure things differently from department to department in terms of how they measure performance or success or completion and not just financial stuff but it could be related to human resources type stuff or like you say, projects and whatnot. Is there a capacity in here to sort of have a centralized modeling type of resource or somebody who can actually sort of build your company, cross-company models, which can then be reused and deployed across an organization from department to department to help ensure that kind of consistency?

Erin Welker: Yes and I'm kind of thinking as you're talking as well mostly because I've been focused more on a particular subject area. However, it's going very well and there has been talk of, well, maybe we can use it in this piece of our organization and this piece and PerformancePoint does provide the same type of things that we would provide for and create a data warehouse environment such as conformed dimensions, such as those calculations that would be appropriate across the board, that capability is there.

Richard Campbell: Yeah, this is not a draggy, droppy, slicing kind of tool, is it? This is the budgeting side, the how far are we into our budget here, are we in line with expected expenses, that kind of planning stuff, the budgets and forecasts, rather than the analytics part that I guess the ProClarity piece really breaks.

Erin Welker: Yeah, but that being said, you probably want to get through this piece where you are getting that information and, you know, the people that are a little higher up in the organization are going to want to do various analysis, they're going to want to have scorecards to see across the board, how are we delivering on our projects, are we at cost, do some analysis to see maybe some cost of effect of why certain jobs typically come under budget, all that exists which I'm quite sure that's the very reason why they chose to implement it through SQL Server database and Analysis Services cubes because that capability is readily there.

Greg Hughes: The whole idea is to be able to plan so proactively see these things coming and spend your money more productively.

Erin Welker: Right, so what we've done thus far is given them a little more than what they already had, a little more meaning that it's now centralized but we're just beginning to tap in the benefits of doing that.

Richard Campbell: Well, this is a very young product for Microsoft, isn't it? First version, second version?

Erin Welker: Yeah, it was released just under a year ago in September of last year.

Richard Campbell: Wow. It's amazing that they've got as much capabilities they've got this first time around. I've got to think you're looking at -- are you bumping into limits here? Where is it weakest?

Erin Welker: I would say it's weakest in performance and I would say anybody who is implementing PerformancePoint, it's typical Microsoft in the sense that it's very easy to implement and also very easy to implement badly. As I said earlier, I mean I've really benefited from my knowledge of SQL Server and Analysis Services in order to do some performance tuning. I know what Analysis Services likes and what it doesn't to a certain extent. I'm not a big expert but I have a fairly big background in that so I've been able to make some big enhancement as far as how the performance is because of how I know what's going on underneath the covers. I've used Profiler. Profiler has been pretty much up and running full time so I could see what's going on and when something takes a long time, I can analyze where it's at and beef it up and I am active on the forum and that's what I see a lot coming out of is people who may not have that background and it's again very easy to do it all through the GUI and also make some decisions that result in bad performance.

Richard Campbell: Well, just not being aware of the consequences of your drag and drop, click things together, how that actually gets manifest as queries in the backend.

Erin Welker: Yeah, and I think that's a big, big piece of it and Microsoft has released Service Pack 1 which has some improvements in the Excel add-in side. Also, you know, it's going to get better and better.

Richard Campbell: So, installation, purchase, how does this get sold? What's the licensing model like?

Erin Welker: I can't say that I can really speak to that.

Richard Campbell: That bad, huh?

Erin Welker: No, no, no, no, I mean literally my knowledge is -- my client dealt with that and he -- licensing I'll admit to you is not something that interests me all that much or that I retain very well.

Richard Campbell: Oh no. It's something to avoid if you could avoid it. No two ways about it.



Erin Welker Helps Us With Performance Point Planning! August 13, 2008

Erin Welker: Yeah and usually my client deals with that, so literally I can't really speak to it.

Richard Campbell: Yeah, it's just not your area of expertise, but I can see how a SQL Server and OLA person fell into this role because you do have a grasp of how that summary review that appears in that plug-in really manifest itself back of the database in the Analysis Server. So, what kind of tweaks are we talking about here? You're building new cubes or defining new dimensions to make things more efficient?

Erin Welker: Well, one thing to be aware of if you're going into PerformancePoint and you do know what you're doing is that any changes you make to the database are very likely to be overwritten by PerformancePoint. It has a stranglehold as it probably should on your schema. There are certain things I've gotten away with but I'm also very careful because I don't want to leave anything behind that's not reported. So, if I had to say in my experience, my number one performance hit is on the calculation roles because these are manifested as MDX script that get run every time you run an MDX query.

Richard Campbell: Interesting.

Erin Welker: So, if anything you can do to delay those perhaps, maybe put it in your ETL or minimize the scope or rewrite them in such a way that they're more efficient. There's actually a new language, as if we didn't have enough, in PerformancePoint called PerformancePoint Expression Language, which is initially very MDX-like and in fact it generates MDX and one of the first things I'll do if it's performing badly is I'll go straight to MDX and start coding it that way either because of restrictions in PEL or I want to define exactly what the MDX is going to look like.

Richard Campbell: So, you can get under the hoods and literally tweak that code directly?

Erin Welker: Yes, that you can do and another thing you can do, which I have done as well in the Excel add-in -- actually to back up a little bit, my client I think accurately spoke to the PerformancePoint add-in as basically an updateable piece of table.

Richard Campbell: Interesting.

Erin Welker: So, the interface looks very much like creating a pivot table straight in Excel where you select, "Okay, I want this on my rows, my columns, and this what I want to analyze and here's some filters," so it's very much a drag and drop environment; however, the requirements of my clients

as how things are displayed were pretty regulated to where I couldn't really do that for that drag and drop so I had to go directly into MDX.

Richard Campbell: And you said regulated, are you bumping into like a regulation restriction for the industry?

Erin Welker: No, no, no, I probably chose the wrong word.

Greg Hughes: Regulated by SQL Server.

Erin Welker: No, I mean it's very specific would probably be a better word to how they do things. So, for instance, when I have these dimension members, I want to show these dimension members on the same access and if I had these other ones, then I want to show these other dimension members so it gets a little complicated.

Richard Campbell: Yeah, just getting all those relationships right have got to be time consuming.

Erin Welker: Yeah, I guess that's the way to put it. So, it was just something that really required some specific coding within MDX to get it to pull exactly the way they wanted to see things.

Richard Campbell: Right. That sounds like a really useful skill. MDX is a very specialized area of querying. It's a unique language.

Erin Welker: Well, and I have to tell you I avoided it as long as I could for two reasons. Number one, I wasn't particularly strong in MDX. I used the past tense because I feel a lot stronger now.

Richard Campbell: Right.

Erin Welker: But also, you know, as this consultant, you want to be very careful about what you're leaving behind. You don't want to leave anything that's overly complicated and MDX as you said is kind of a specialized skill set.

Richard Campbell: Yeah, no question, a classic thing for a consultant to have in their pockets since typically most organizations aren't going to have someone with that specialty. It's an unusual specialty.

Erin Welker: Yeah.

Richard Campbell: When it comes to reporting side, I mean we haven't really talked about it from an Excel perspective and I'm sure you can print from Excel, but is there more to do with the reporting? I'm thinking about standardized reporting around budgets and so forth.



Erin Welker Helps Us With Performance Point Planning! August 13, 2008

Erin Welker: Well, again, it's in Analysis Services so you can use anything that Analysis Services supports as far as reporting.

Richard Campbell: Right.

Erin Welker: Actually, even as we speak, I've kind of shifted in to report mode and so I've been doing reporting through Reporting Services which is its own set of challenges.

Richard Campbell: Sure.

Erin Welker: That's been well documented and well blogged about so I won't go into details unless you want to go there.

Richard Campbell: No, I don't think we need to dive too far but it makes sense to me that SSRS would be a place you'd end up doing a fair bit of reporting here. I'm now seeing sort of three UIs for PerformancePoint Planning that makes sense. You've got the plug-in which lots of folks are going to hang around in. I'm sure this also shows up in dashboards and the scorecard view so that the executives could see how budgeting is progressing or how the money is being consumed and then SSRS is sort of the standard reporting approach.

Erin Welker: Correct. I think you nailed it and of course there are some third party apps out there but those are the ones that come to my mind as well.

Richard Campbell: Okay. Well, and all that stuff is programmable so you can go and customize to your heart's content.

Erin Welker: Yup, absolutely. Again, a lot of the skill sets you've learned through other projects definitely come into play here. It's very much a VI application.

Richard Campbell: Right. Just Microsoft richening up the front-end so you don't have to do all that work yourself.

Erin Welker: Right.

Richard Campbell: Erin, coming down to the end of time. Any points we've missed?

Erin Welker: No, I think the main thing that I've tried to relay as I talk to people is that PerformancePoint Planning is initially thought of if people think of it at all as a financial planning tool and obviously it's good at that. It's got a lot of intelligence built in for that very type of application; however, really any type of application you can think of, it's certainly something that it can be used for and

another story I want to relay quickly is my current client, actually this is their third or fourth attempt, I can't remember, to do this type of thing. They tried a custom application. They tried using Microsoft Projects.

Richard Campbell: Yeah. I was thinking that. Isn't this Projects' role?

Erin Welker: It's very reminiscent of that, that if you've used Projects, you know that Projects has a nasty habit of just kind of doing its own thing and writing over all the stuff you've just entered.

Richard Campbell: Okay.

Erin Welker: It could be pretty frustrating and this doesn't do that.

Richard Campbell: That's good. Yeah, the biggest thing I could see and the weakness on the Project approach is pulling all those different data sources together to try and get an overall view.

Erin Welker: That's true.

Richard Campbell: All right, Erin. I think that's all we've got. Final statements?

Erin Welker: I wish I could go to Ecuador.

Richard Campbell: I highly recommend it. Fantastic country and Galapagos was a great experience. Erin, thanks so much for coming on the show.

Greg Hughes: Thanks Erin.

Erin Welker: Well, thank you. It's been a joy.

Richard Campbell: Always a pleasure and we'll talk to you next week on RunAs Radio.