



Assignment 3: Designing Business Intelligence Reports

In this assignment you will learn how to create new reports that will be used by different people in the organization. Business intelligence reports are very important tools in managerial decision-making and are targeted to variety of audiences that includes accountants, finance professionals, marketers, salespeople, product managers, among others. The relevance, utility and timeliness of presented information are critical for effective and efficient decision-making. This exercise will provide you with hands-on experience in understanding and building information-rich business reports.

Case situation

You are the manager of the business intelligence department at Insight Toys Corporation, one of the world's largest toy manufacturers with operations across the globe. Few weeks ago, the company appointed a new Marketing VP, and in a recent presentation he announced a new strategy for some of the best-selling toy products. He asked you for help in developing a case study (a visual story line) that will help the executive team for better and faster understanding of the presented information. In his keynote, he wants to go over some facts about current business performance and then use that data to make the case for a new strategy. The manager is not sure what type of data he will ultimately use in his calculations and he asked to make the report as flexible as possible in order to allow for further explorations, slicing and dicing.

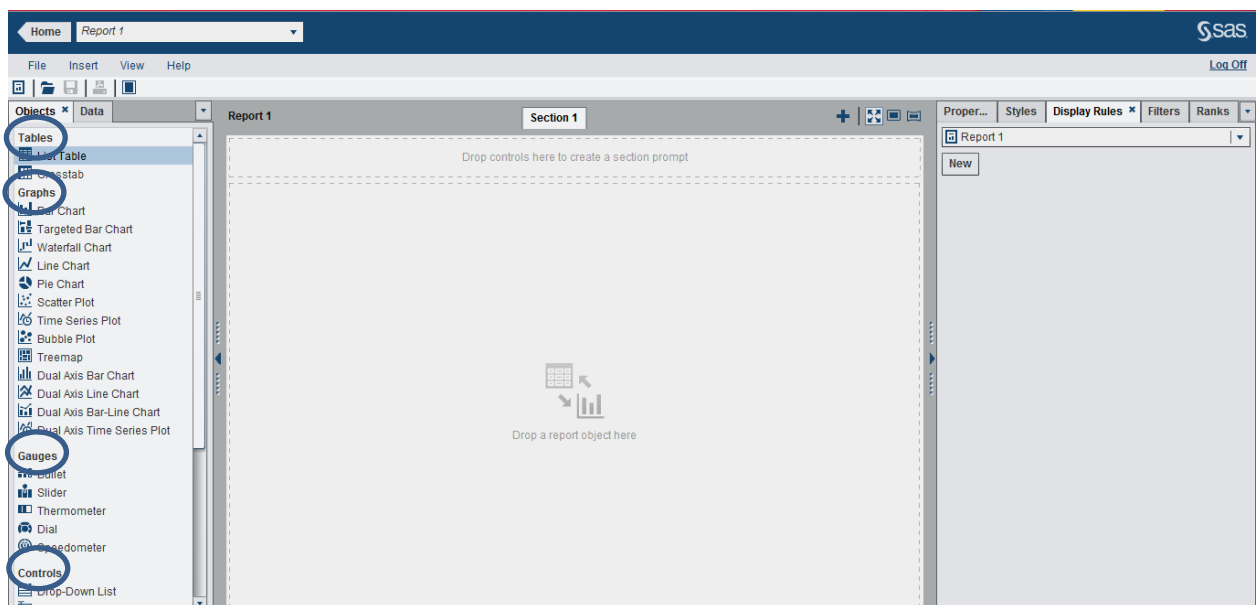
After the meeting, you realized that there are a couple of reports already in place, but they were customized exclusively for the previous VP and they have too many details that may not be useful or even worse- they may confuse the new user. This time you thought that the new report should have a more strategic purpose and that it is designed in a way that make it easy for user to understand and explain.

Furthermore, you heard about plans that the company will soon have project-based

teams, which will be responsible for new product launches. These teams will have a cross-functional aspect, i.e. it will include people from different departments such as operations, marketing, finance or R&D. This fact makes you think about some anticipating measures and you decide that the new BI reports should be easy to use by other people beside the Marketing VP.

Instructions for report creation:

- Create a report with at least four sections.
- The BI report should include key facts about company's performance on a global and regional level. These facts should include both financial and marketing related data.
- Try to decide the appropriate visualization tool depending on the data you use. How will the charts be perceived by a simple user? What questions he/she may ask?
- Make use of additional tools such as global and local filters, text inputs and images.
- Use at least six different charts from both **Graphs** and **Tables** objects, two from **Gauges**, two from **Controls** and two from **Others**. See details below:



Use the following resources as supporting material for this assignment:

- [Create a basic report using SAS Visual Analytics Designer \(4:27\)](#)
- [Specify properties for the report and report sections \(3:09\)](#)
- [Filter data in SAS Visual Analytics Designer \(6:49\)](#)
- [Create a text input field control report object and set properties and styles \(4:46\)](#)
- [Create a bullet gauge report object and set properties and styles \(6:24\)](#)
- [Create a drop-down list control report object and set properties and styles \(6:14\)](#)

Once done, submit your report as a single file to your instructor (via email attachment or CMS/dropbox) or print and submit the document as required.