

## Janney Simplifies BI Content Discovery and Governance with ZenOptics

### Janney at a glance\*

**1832**

Janney firm history dates back to 1832

**120+**

Office in 21 states

**2,000**

Employees

**\$124B**

Client assets under advisement

\*As of June 30, 2021 (Source: Janney.com)

## Summary

### Challenge:

The business intelligence team at Janney identified the need to increase content visibility and boost user access across its reporting environment. Additionally, the team needed to reduce the number of duplicate reports, increase consistent security across BI platforms, and set the stage for governance – including standardizing terms and metrics across departments for consistency.

### Solution:

Janney decided to implement ZenOptics Analytics Catalog to streamline the reporting environment and increase discoverability of analytics assets for users. In addition to establishing one place for users to access all their reports, ZenOptics also helped amplify governance initiatives and improved report lifecycle management to ensure users were appropriately using the correct reports.

### With ZenOptics:

- Business users can easily find and launch their reports and dashboards
- Cross-platform search improves discoverability and improves self-service
- BI Team spends less time searching for and creating reports
- Governance is established and supported through certifications and standardized terms in glossary
- Report Stats identify duplicate and stale reports to be “pruned”

## Background and Drivers

Janney Montgomery Scott is a full-service financial services, wealth management, and capital markets firm with more than 125 locations across the United States.

As an increasingly data-driven organization, Janney is strategically focused on growing a culture of analytics across the company. Executives and operational teams alike recognize the importance of data and analytics, along with the need for business intelligence, reports, and dashboards that are easy to find, access, and use.

Janney's existing BI ecosystem consisted of a SharePoint portal with links to different platforms, SSRS and SQL Studio for basic/ad hoc reporting, MicroStrategy as a full-stack BI solution, and ThoughtSpot for power users. This created access challenges when hyperlinks would break or browser updates would inhibit access to information in the portal. Further, content couldn't be consolidated across the various sources, and users were unable to connect insights across the different tools. "We didn't really have a way for colleagues to discover content, and those resources were isolated across multiple silos by application or department," says Eric Seel, BI manager at Janney. "We knew that we wanted to simplify discovery and interaction."

When business users, recognized by the BI team as internal customers, were unable to find a report or dashboard, the burden fell to the BI team to discover the information – or to create it if it wasn't found. Often, the BI team spent time creating a report only to discover afterward that the asset already existed, which caused frustration for a small BI team with limited resources.

From an enterprise perspective, Janney had simultaneously embarked on an Enterprise Data Governance (DG) initiative and formed a Data Governance Committee to determine the scope and scale of enterprise DG. As a member of the committee, Seel recognized the need to quickly and thoroughly manage and govern BI assets at enterprise scale. Although Janney's research concluded that they weren't initially going to pursue an enterprise DG tool, Seel saw the opportunity for the BI team to jumpstart DG goals by managing BI assets. As such, he decided to focus on a way to bring together standardized BI content in an analytics catalog and glossary to manage the content all in one place.

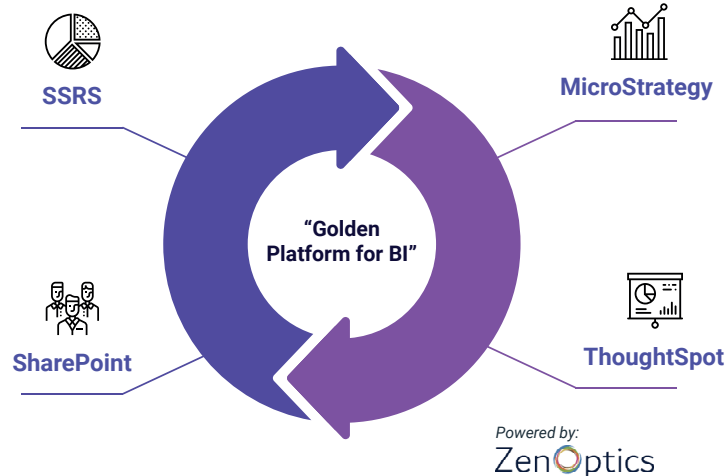
“We really wanted to simplify access for our users and essentially create one-stop-shopping,” explains Seel. “We needed a centralized catalog so users could find all our content, and we wanted to better manage and govern both our BI content and the underlying data terms, attributes, metrics, etc.”

## Solution

After learning of ZenOptics, seeing a demo, and doing some competitive research, Janney selected ZenOptics to be the single point of access and governance for its BI assets due to ZenOptics' broad catalog functionality and alignment with immediate needs of the firm.

Janney's BI team worked closely with the ZenOptics product and engineering teams to set up the connectors to SSRS, MicroStrategy, and ThoughtSpot for the platform. To encourage support, adoption, and engagement with ZenOptics, the BI team socialized ZenOptics as part of the vital enterprise strategy to evolve the data and analytics culture of the company.

## Centralized access for BI content



The team focused on user-centric ways to support the work of Internal business customers and clearly demonstrated (through training, a short user guide for quick reference, and support) how ZenOptics could reduce the number of clicks to efficiently get information into the hands of the users. To discover and access the right reports and dashboards, users value ZenOptics Search, Favorites, Categories, and Glossary. The simplification of the discovery process has a positive impact. "Users are really happy to simply launch the report they wanted, without needing to worry whether it's in MicroStrategy or another BI platform," observes Raghu Sashti, MicroStrategy Developer at Janney. "Users can focus on the content itself as opposed to where it came from. That was more important for the business end-users."

Additionally, the ability to certify reports and metadata within ZenOptics assures business users that they are using enterprise-approved information.

*"Using ZenOptics we can apply a gold-standard stamp identifying reports that have been certified by the BI team as validated, tested, and reliable," explains Seel.*

Certification has helped to support progress on the corporate governance initiatives as well.

From an administrative standpoint, the BI team values the ability to communicate the report attributes (metadata) for standardization, consistency, and greater understanding of the content – all while enabling governance. "The ZenOptics Data Dictionary has encouraged our analysts and developers to work with our business partners to standardize terminology and metric methodologies across departments," says Seel. "Previously, considerations such as column names and metrics were more likely to be based on the requesting department's preferences, and little consideration was given to a standard enterprise-wide taxonomy."

The BI team is now able to easily determine if reports exist. "Now the team searches the catalog for existing resources prior to starting a new script, improving efficiency and standardization," Seel explains. "We frequently use ZenOptics to direct users to self-service content for faster results; in the past the user would have waited while we wasted resources unknowingly building a duplicate report," he continues.

From a security standpoint, "[prior to ZenOptics] we were streamlining authentication across multiple platforms, but we had slightly different authentication and access control models for SSRS than we did for our other BI tools. We really wanted to move to a uniform access control model with seamless single sign-on; ZenOptics makes that simple," explains Seel.

## Results

“All of our BI content is accessible from a single ZenOptics platform, it is easily searchable – allowing individuals to [favorite] their most valuable resources - and reports and dashboards can be organized in multiple ways - for example, by Business Team or Subject Area – to promote discovery and usage,” says Seel. As a result, users are able to quickly discover BI content across the entire environment.

Today, Janney recognizes five major areas of improvement as a result of their ZenOptics implementation.

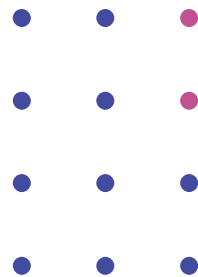
- 1.** Janney **consolidated the business intelligence catalog by listing all BI content in one place for their users**, regardless of the source platform. Further, the associated descriptions of reports and dashboards, and key metadata elements automatically integrated in ZenOptics allow users to easily understand and discover content – even if the user does not yet have permission to actually view the report.
- 2.** The **inherited access control of the source systems** allows user permissions to continue to be defined in the source BI platform while allowing users to see report titles, descriptions, business owners, and metadata. Users can even request permission to reports directly through the ZenOptics platform.
- 3.** Janney IT now has **centralized access to all BI reports and dashboards** from one site. Driving BI traffic from ZenOptics ensures that users always see the current version of the content and facilitates better use of redundancy tools like load balancers and server clusters in the BI systems.
- 4.** Janney created a **consolidated BI Glossary, which improves data governance for BI metadata** (for example, attributes and metrics). The Glossary standardizes terminology and metric methodologies across departments, aids users in understanding the definition of those metrics and attributes, and shows which reports utilize selected elements.
- 5.** Janney utilizes the **ZenOptics Report Statistics and usage monitoring** to understand user activity of reports and dashboards across the BI ecosystem. Administratively, this allows the BI team to continue the governance with report lifecycle management and “prune” out outdated or irrelevant reports.

Notably, ZenOptics has also helped Janney to improve compliance efforts and identify those improvements over time, particularly in the areas of supervisory procedures and security, which helps as Janney conducts their annual FINRA reporting requirements.

## Working with ZenOptics

Overall, Seel and the BI team find value not only as a result of the implementation, but also in the experience of partnering with ZenOptics.

“ZenOptics has been one of the most responsive and easiest to communicate with of the vendors I’ve worked with, particularly the small companies,” expresses Seel. “I’m very impressed with your team’s interest in our success. It definitely has exceeded my expectations from a support standpoint. [The executive leaders have] been extremely generous with [their] time and effort, and we really appreciate that. And that speaks to interest in a long-term partnership” where we have a mutual, vested interest in each other’s success.



## About ZenOptics

ZenOptics’ mission is to help customers maximize the value and increase the effectiveness of their existing analytic investments, by aggregating all their analytic assets into a single, collaborative easily managed web application.

Our web application is designed to provide increased ROI through user productivity enhancements and by reducing the total cost of analytics infrastructure. This is done by increasing and enhancing the use of all information by consumers, by providing management with tools to optimize their investments, and by providing both management and users the ability to establish a self-governing reporting enterprise.

ZenOptics uniquely offers knowledge worker efficiency, promotes self-service report governance and an automated path to optimizing analytic infrastructure investments.

**[www.zenoptics.com](http://www.zenoptics.com)**

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