Strategies for Choosing the Right Reporting Tool for the Job

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Introduction
Why Are We Here?

Common Issues

- Customers and partners continue to have serious challenges making the right tool choices
- The “BEx – Web Intelligence replacement” scenario is very common, and a very poor choice
- Often a strong tendency to “standardize on one tool”
  - Concern having to train users on multiple tools (incorrect, in most cases only developers)
  - Confused by the various options and different tool choices
  - Existing guidelines and best practices not as effective as hoped
- Element of uncertainty
  - Partners burnt on other projects (more comfortable with SAP Business Explorer (SAP BEx))
  - Concerns about the large number of patches for the solution (uncommon for SAP customers)

Meanwhile others are quite successful with the solution

... and a poor tool choice is often responsible for current problems
Agenda

1. SAP BusinessObjects BI Portfolio – Product View
2. SAP BusinessObjects BI Portfolio – Consumer View
3. SAP BusinessObjects BI Portfolio – User Requirements
4. Wrap-up
Planned Product Directions for BI Solutions — Richest Offering for all Business Users

Discovery and Exploration

Enterprise Reporting

Ad Hoc Query, Reporting, and Analysis

Dashboards, Visualization

Advanced Analysis

Enterprise Data Warehousing and BI Platform

SAP NetWeaver BW and BWA

SAP BusinessObjects Enterprise

SAP BusinessObjects Explorer

Crystal Reports

Web Intelligence

Xcelsius

Advanced Analysis

Report Designer

SAP BEx Analyzer

Web App Designer
SAP BusinessObjects BI solutions provide business users with access to unified information through a broad suite of BI tools for confident decision making and alignment across people and teams on a single, scalable BI platform.

- **Reporting**: How do I access and transform corporate data into highly formatted reports for greater insight?
- **Dashboards and Visualization**: How do I visualize data for better decision making?
- **Interactive Analysis**: How do I answer ad hoc questions and interact with information?
- **Advanced Analysis**: How do I determine trends from complex historical data and possibly make better forecasts?
- **Data Exploration**: How do I find immediate answers to business questions?
The *de facto* standard for reporting

- Proven world standard for report design
- Ubiquitous reporting assets and expertise for fast implementation
- Chosen reporting solution by over 500 major independent software vendors

Deploy a common framework for all enterprise reporting needs

- Build any kind of report – such as business, financial, legal, and regulatory reports
- Sophisticated report formatting: create multi-page, multi-query, pixel-perfect reports
- Templates and wizards to speed up report creation
- Secure, large-scale distribution of reports over the Web
- Connectivity to any data source
Empower business users with powerful, yet easy to use analysis

- Intuitive, Web-based interface with offline capabilities
- Start from a blank slate or use an existing analysis or report
- Multi-source access
- Interactivity with filtering, ranking, sorting, calculations, etc.
- Data lineage

Lighten IT workload

- Self-service analysis and reporting
- Controlled and secure access with tight BI platform integration
- Intuitive, business-centric view of information with universes
Consume attractive, personalized dashboards online or offline

- Access to personalized, Flash-based dashboards
- Secure visualizations anywhere – portal, reports, PDF, MS Office documents

Empower business users with interactive information

- Powerful “what-if” analysis with sliders and other controls
- Ability to drill-down into details
- Pre-built components, skins, maps, charts, gauges, and selectors
Bring BI to all business users

- Simplicity and speed of search
- Intuitive data exploration and visualization
- Fast response across mountains of data anywhere in the organization
- Accelerated version with in-memory technologies

Help IT to be successful

- Easy and efficient to manage and scale
- More reactive to business with faster delivery
- Support for heterogeneous data sources
Empower analysts to consume and explore multi-dimensional data sets

- Comprehensive OLAP data access
- Multiple OLAP cubes in the same work space
- Cost-effective Web-based deployment

Quickly find patterns, exceptions, and other areas of interest

- Comprehensive range of business and time calculations
- Stunning visualization options (e.g., scatter plot, bubble plot, radar chart, etc.)
- Exception highlighting
- Ability to drill-down into details – Web Intelligence or Crystal Reports
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The Right Tools for Every Business Role
Enterprise BI = Different Business Users with Different Needs

Manage by metrics. In a hurry to get answers

Access and interpret data for executives and managers, using BI tools

Day to day operational needs underserved by traditional BI due to “complexity”

Executives and Managers

Business Analysts

Information Consumers
Mapping the Right Tool to the Right Scenario
Supporting an Enterprise BI Strategy

- **Exploration**
  - SAP Business Objects Explorer

- **OLAP Analysis**
  - Voyager / Business Explorer (BEx) / Advanced Analysis
  - Web Intelligence

- **Ad Hoc Query & Analysis**
  - Xcelsius

- **Dashboards**
  - Crystal Reports

- **Production Reporting**

- **Professionally Informed**
  - Executives, Managers
  - Information Consumers

- **Technically Capable**
  - Business Analysts

- **Interactive Experience, Responsiveness**
  - Full

- **Limited**

The Right Experience for the Full Range of Business Roles

SAP BusinessObjects Explorer
- Search and explore data
- Common “Google” style user experience
- Limited analysis functionality

Crystal Reports
- Pre-built report from static to parameterized layouts
- Operational reporting

Xcelsius
- Easy to use data visualizations
- Compelling interactive dashboarding type of analytics

Web Intelligence
- Online and offline reporting capabilities
- Powerful ad hoc reporting capabilities
- Limited advanced analysis capabilities

Advanced Analysis
- Advanced analysis capabilities
- Full hierarchy awareness

User skill set (Consumer)

Information consumer

Executive or Management

Business Analyst

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Choose the Right Reporting Tool
A Simplified Approach

Is the user answering a regular, repeatable, and structured business problem or question?

- Yes
  - Do you require a highly formatted or legally predefined layout?
    - Yes: Crystal Reports
    - No: Xcelsius
- No
  - Do you require hierarchical navigation?
    - Yes: BusinessObjects Explorer
    - No: Advanced Analysis / BEx Analyzer

Is your audience a Business Analyst / Power User user type?

- Yes
  - Do you require dashboarding functionality or strong data visualization?
    - Yes: Web Intelligence
    - No: Advanced Analysis / BEx Analyzer
- No
  - Does the user require full flexibility in changing the report?
    - Yes: Web Intelligence
    - No: Crystal Reports
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What are the typical requirements from your customers?

- **Sales**
  - Is the workforce mobile? What drives them?

- **Finance**
  - Can we expect them to be “good with numbers”?

- **HR**
  - How sophisticated are these users with new technology?

- **IT**
  - Can we expect them to be more technical than the regular user population?

- **Marketing**
  - Might market segmentation and data mining be likely scenarios for even unsophisticated users?

- **Customer Support**
  - Would a KPI dashboard not be most appropriate for all users and engineers?

Is an Information Consumer, Business Analyst, or Manager and Executive profile always the same for all these departments? Are there more types of users?
What are some requirements for your industry area?

- **Technology**
  - Can we expect a more technically mature audience?

- **Energy and Utilities**
  - Government regulations, reporting in particular fixed formats

- **Telecommunications**
  - Data volumes tend to be very large

- **Financial Services**
  - Tend to be analyst heavy. Some users are very sophisticated.

- **Retail**
  - Potentially large data volumes, deep product, and geographical hierarchies

- **Government and semi-government**
  - Sensitive to changes in the law, which may make for a very changeable environment

You can probably think of industry-specific needs and considerations from your own experience. Bring your industry knowledge to bear in the discussion.
One use case is one type of user, one type of usage, one department, one industry

- Allow the consumer of the reports to describe the use case
- Talk to the business as well as IT
  - Business:
    - What is the level of sophistication?
    - How is the information used and how does the user interact with it?
    - What is it we’re trying to achieve or support?
  - IT: constraints, practical limits
    - Current IT landscape and roadmap
    - Existing infrastructure or existing data models
- Consider improvements to current business process
- How is the data structured? Do we need to make back-end changes to support the requirements?
SAP BusinessObjects BI Portfolio
Matching Requirements to the Right Tool (cont.)

Financial Reporting and Analysis Requirements
- Reports and analytics need to be available in a browser and Microsoft Office
- Users need to be able to create new calculations on the fly
- Users need to be able to leverage hierarchies
- Users need to be able to leverage custom BW query structures

Sales Reporting and Analysis
- Reports and analytics need to be accessible online and offline
- Reports and analytics need to be distributed via email
- Users need to be able to change the view of the data (e.g., weekly to monthly to quarterly)
- Users should be able to customize existing reports or create their own reports
- Users need the capability to drill down or navigate into more detailed data
- Users need the option to leverage scenario-based content, such as, a what if scenario

Human Resource Reporting and Analysis
- Reports and analytics need to present highly textual information
- Reports and analytics need to follow strict layout and will be used as official documents
- Reports and analytics need to support date specific aggregation (e.g., the headcount for the date 31.12.2009)

Executive or Management Reporting and Analysis Requirements
- Reports and analytics need to present highly aggregated information
- Reports and analytics need to present highly visualized information
- Reports and analytics need to allow for further navigation into more detailed oriented data
- Reports and analytics need to be delivered in a response time below five seconds
Matching Requirements to the Right Tool
Crystal Reports

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Crystal Reports does not provide the functionality to create calculations on the fly when viewing reports; such functionality is available only in the actual Crystal Reports Designer but not in the Crystal Reports Viewer.

Better suited: Advanced Analysis, Web Intelligence

Crystal Reports is offering such capability only via prompting and it requires the actual design of the report to be prepared for the workflow.

Better suited in case this is a frequent requirement: Web Intelligence or Advanced Analysis

Crystal Reports is not offering actual design capabilities as part of the viewing experience.

Better suited: Web Intelligence or Advanced Analysis

Crystal Reports is able to integrate Xcelsius models, but those are created with Xcelsius and not Crystal Reports.

Better suited: Xcelsius

Crystal Reports is — compared to the other tools — lacking in terms of visualization capabilities and the ease of consumption of those.

Better suited: Xcelsius
### Matching Requirements to the Right Tool

**Web Intelligence**

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Matching Requirements to the Right Tool
Web Intelligence (cont.)

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- Users need to be able to leverage hierarchies (!)

Sales Reporting and Analysis
- Users need the option to leverage scenario-based content, such as, a what if scenario

Human Resource Reporting and Analysis
- Reports and analytics need to present highly textual information
- Reports and analytics need to follow strict layout and will be used as official documents

Executive or Management Reporting and Analysis Requirements
- Reports and analytics need to present highly visualized information

- Users can leverage hierarchies in a limited fashion, but in case this becomes a strong requirement other tools might be a better choice
  
  Better suited: Advanced Analysis

- Web Intelligence is not able to provide What if Scenarios.
  
  Better suited: Xcelsius

- Printing or detailed layout focused reporting is not a strength of Web Intelligence.
  
  Better suited: Crystal Reports

- Web Intelligence is certainly able to present data in a visual manner and in an ease of use style, but this requirement is based on the executive and leadership team, and therefore other tools might be a better choice
  
  Better suited: Xcelsius
Matching Requirements to the Right Tool
Xcelsius

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Matching Requirements to the Right Tool
Xcelsius (cont.)

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Users consuming an Xcelsius model can not create calculations on the fly.

*Better suited: Web Intelligence, Advanced Analysis*

Xcelsius is able to provide the meta-data and data for hierarchies, but there is no hierarchical visualization component at this point of time (Xcelsius 2008 SP3)

*Better suited: Advanced Analysis, Web Intelligence*

Distribution via email can be done with an SAP BusinessObjects Labs plug-in, but keep in mind that the new direct SAP NetWeaver BW connectivity is not supporting SAP BusinessObjects Enterprise at this point (Xcelsius 2008 SP3)

*Better suited: Crystal Reports, Web Intelligence*

Xcelsius is creating pre-built models and dashboards. A customization or creation on the fly workflow is not suited for the tool.

*Better suited: Web Intelligence*

Even though such options can be designed as part of the overall dashboard, there are other tools better suited for such a requirement

*Better suited: Web Intelligence, Advanced Analysis*
Matching Requirements to the Right Tool
Xcelsius (cont.)

Human Resource Reporting and Analysis

- Reports and analytics need to present highly textual information
- Reports and analytics need to follow strict layout and will be used as official documents

- Xcelsius is not focusing on printing or highly structural layouts.
  
  Better suited: Crystal Reports

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Matching Requirements to the Right Tool
SAP BusinessObjects Explorer

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SAP BusinessObjects Explorer (cont.)

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SAP BusinessObjects Explorer provides the information in a Web-based client. The user can export an image of the visualization, but the data is not live anymore at that point.

Better suited: Crystal Reports, Web Intelligence, Advanced Analysis, Xcelsius

See above comment.

Better suited: Crystal Reports, Web Intelligence, Advanced Analysis, Xcelsius

SAP BusinessObjects Explorer is not offering typical planning or what-if capabilities

Better suited: Xcelsius

Not a focus of SAP BusinessObjects Explorer

Better suited: Crystal Reports

SAP BusinessObjects Explorer is able to use the current data to resolve time dependency, but the user can not change the date for the time-dependency.

Better suited: Crystal Reports, Web Intelligence, Advanced Analysis
Matching Requirements to the Right Tool
Advanced Analysis Office

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Matching Requirements to the Right Tool
Advanced Analysis Office (cont.)

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Executive or Management Reporting and Analysis
- Reports and analytics need to present highly visualized information

SAP BusinessObjects Advanced Analysis is integrated into Microsoft Office for release XI 3.1 – a Web-based approach is planned as part of XI 4.0.
  Better suited: Crystal Reports, Web Intelligence, Xcelsius

SAP BusinessObjects Advanced Analysis with release XI 3.1 is not integrated with a scheduling mechanism – this is planned for a future release.
  Better suited: Crystal Reports, Web Intelligence

SAP BusinessObjects Advanced Analysis is not offering typical planning or what-if capabilities. An integration with BI-IP is planned for the next version.
  Better suited: Xcelsius

Not a focus of SAP BusinessObjects Advanced Analysis
  Better suited: Crystal Reports

SAP BusinessObjects Advanced Analysis can present data in a visual manner and it’s easy to use, but this requirement is based on the executive and leadership team, so other tools might be a better choice
  Better suited: Xcelsius
Selecting the Right Tool — Example 1

Financial Reporting

- Initial plan: Customer decided on Web Intelligence as BI tools
- A natural “ally” with long SAP BusinessObjects experience at the customer dictated approach: All Web Intelligence
- Main objective is Financial COPA reporting
- Discussion of requirements in detail was started
- Look at reports already designed
  - 50 data elements, encouraging exploration: clearly a power user tool with typical OLAP features was required
  - Performance was an important aspect
- Ask for type of audience:
  - Both static report consumers (managers) and analysts was the outcome
- True need showed requirement for OLAP navigation for Business Analysts, and standard static reporting for Information Consumers

Outcome: Crystal Reports for Information Consumers and BEx/Voyager/Advanced Analysis for Business Analysts
Selecting the Right Tool — Example 2

Sales Dashboards

- Initial plan: Live dashboards with sales data, or reports with bar charts
- Discussion of requirements in detail followed
- Would like ability to quickly compare sales data for different products
- Data back-end issues may make live refresh not feasible as performance was not achievable
- Portable and offline analysis preferred, workforce often mobile
- Ability to make notes to the data, and print
- Easy, simple to use
  - Key part of their business culture
  - Expectation of technical ability of sales force relatively low

Outcome: Offline PDF containing Xcelsius dashboard and data, produced on schedule and emailed
# The “Business Intelligence” Approach

<table>
<thead>
<tr>
<th>Reports Dashboards</th>
<th>Universes</th>
<th>BEx Queries</th>
<th>InfoCube</th>
<th>BEx Queries Universes</th>
<th>Reports Dashboards</th>
</tr>
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<tbody>
<tr>
<td>- Requirements gathering</td>
<td>- Identify subject areas</td>
<td>- Identify data elements needed for universe in BEx</td>
<td>- If data for a query is not yet in the cube, change the cube to support the required query, universe and reports</td>
<td>- Develop the BEx query</td>
<td>- Develop required reports</td>
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<td>- End-user interviews</td>
<td>- Define required data elements</td>
<td>- Purpose-build the BEx query, bearing in mind BOE supported product features</td>
<td>- Test the BEx query</td>
<td>- Develop required dashboards</td>
<td>- Test reports</td>
</tr>
<tr>
<td>- Vision, strategy and purpose</td>
<td>- Evaluate ad-hoc requirements</td>
<td>- Consider adding aggregation</td>
<td>- Generate the OLAP universe</td>
<td>- Test dashboards</td>
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<tr>
<td>- Visual layout</td>
<td>- Prioritize ease-of-use/maintenance or performance</td>
<td>- Tune the query</td>
<td>- Hide inappropriate objects</td>
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<tr>
<td>- Mockups</td>
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<td>- Test universe</td>
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<td>- Navigation</td>
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<td>- Folder structure</td>
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SAP BusinessObjects BI Solution Architecture

www.sdn.sap.com/irj/boc/bi-solution-architecture
## 7 Key Points to Take Home

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<th>Use Case</th>
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<tbody>
<tr>
<td>Have a deep discussion on the use case and business requirements. In most cases the discussion doesn’t go deep enough, so ensure you understand the planned business purpose, the processes it supports, and the expected outcome.</td>
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<td>Understand the type of audience to which the use case applies. Don’t blindly map to an Information Consumer or Business Analyst, but understand what they really do.</td>
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<tr>
<td>Understand the particular business unit or department function, and how that influences the choice.</td>
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<td>Understand how the use case is applied now. Is there a consistent existing process, and how does it work? Does it have holes or gaps?</td>
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<td>If any reports already exist, look at those, and how they are being used. It may clarify things otherwise poorly explained.</td>
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<tbody>
<tr>
<td>Assess data requirements and how business requirements are supported by back-end.</td>
<td></td>
</tr>
<tr>
<td>Assess IT constraints that may need to influence your choice.</td>
<td></td>
</tr>
</tbody>
</table>
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