

Preferred Strategies: BI Quick Launch Overview

Preferred Strategies BI Quick Launch Overview

The Preferred Strategies BI Quick Launch is a suite of Report Templates, Samples and Universes that accelerate and simplify Business Objects Business Intelligence implementations for SAP ERP and JD Edwards EnterpriseOne and World customers. The BI Quick Launch empowers people throughout your organization inside and outside your IT department to develop their own reports, analyze information, make better decisions, and provide management with interactive drilldown reports that instill confidence in the information reported from your ERP data.

JD Edwards and SAP Customer Requirements and Objectives

The BI Quick Launch is designed to help JD Edwards and SAP customers achieve the following without requiring a data warehouse:

- ❖ Simplify the report development process so business users can develop their own reports reducing reliance on IT resources
- ❖ Reduce report development backlogs
- ❖ Modify existing reports quicker
- ❖ Improve report processing time
- ❖ Make reports more interactive to analyze
- ❖ Improve the delivery process of reports to managers and end users
- ❖ Include drilldown capabilities so managers and business users are empowered to answer their own questions with the click of a mouse

Crystal Reports for SAP and JD Edwards

Companies who try to use ERP report writing tools often conclude that developing reports against an ERP requires a very technical skill set often limited to a small number of individuals within the organization. Very few people outside the IT department are capable of developing ERP reports and becoming proficient report writers due to the complexity of internal ERP reporting tools and extensive knowledge of the ERP data model required.

As customers started to seek alternatives to internal ERP reporting applications, Crystal Reports became the reporting writing software of choice for many JD Edwards and SAP customers. As the most widely used reporting application in the world that can be connected to practically any data source regardless of front-end ERP or application Crystal Reports, in its thirteenth generation as a product became acknowledged as a great value-add to its customers by JD Edwards and SAP. In efforts to improve reporting capabilities for their customers, JD Edwards started providing OEM Crystal Reports licenses to customers and SAP acquired Business Objects.

The Need for Report Templates

Providing Crystal Reports for transactional ERP reporting was a huge step forward for JD Edwards and SAP, however, what is still missing is the ability to enable people outside IT to develop their own reports. Even when using the database drivers delivered from JD Edwards and SAP that convert cryptic table and field names and data into a more intuitive format, it is still not enough for people outside the IT department to become proficient report writers. As long as the first step of report development requires people to sift through thousands of ERP tables and know how to properly join tables together, ERP reporting will remain an IT function.

Companies who have tried to implement Crystal Reports with their ERP using report templates have found it a much easier process than developing reports from scratch (sorting through thousands of tables and linking tables together to start each report). Beginning report development from a report template allows your power users to skip the table linking and formula creation aspect of report design and immediately start the report development process by dragging fields into a report.

Preferred Strategies BI Quick Launch – Report Templates for Crystal Reports

Developing report templates requires extensive ERP and business intelligence knowledge. If you have the required knowledge and want to spend thousands of hours documenting fields and calculating formulas to create report templates for your report developers to use on a daily basis, then you may be able to create for your organization what the Preferred thousands BI Quick Launch delivers within a few days. After tens of thousands of hours developing the BI Quick Launch we have lived through five versions of development adding enhancements with every version. Preferred Strategies templates are very thorough and provide the following characteristics:

- ❖ Identifying which of the thousands of ERP tables are used for reporting by ERP module
- ❖ Selecting and linking ERP tables by modules to ensure the tables are joined correctly
- ❖ Creating hundreds to thousands of calculations and formulas per template and universe i.e. Current Year – Year to Date – Actual Amount
- ❖ Using a standardized intuitive naming convention for all formulas
- ❖ Including proper data conversions for dates, decimals, etc
- ❖ Performance enhancing techniques for data filtering
- ❖ Including best-practices reporting techniques required to develop advanced reports
- ❖ Financial Management Reports tailored to your organization's chart of accounts and organizational hierarchy
- ❖ Providing flexibility to connect to transactional ERP data or a data warehouse

Preferred Strategies BI Quick Launch – Report Samples for Crystal Reports

Using Report Templates as the source, Preferred Strategies includes Report Samples as part of the BI Quick Launch package. Report Samples offer a suite of immediate interactive reports that have been created and tailored specifically to your ERP data, chart of accounts and organizational hierarchy. Within a few days of installation, your managers will have instant flexible reports with drilldown capabilities that empower them to answer their own questions and analyze reports gaining instant visibility into operational performance. Report Samples not only provide immediate value to management, they also supply your report developers with working examples of how to utilize best-practice report design techniques. Since Report Samples were created from Templates, users can start developing a new report by selecting a Report Sample rather than a Template if they prefer.

The Report Samples included in the Preferred Strategies BI Quick Launch include the following characteristics:

- ❖ Heavily parameterized reports across various ERP modules that include prompting for row-sequencing, columns, data filtering and formatting
- ❖ Financial Management Reports tailored to your organization's chart of accounts and organizational hierarchy with several layers of drilldown from various summary financial levels to the general ledger transactions and from the general ledger to originating module information
- ❖ Best-practices reporting techniques in action on advanced reports

Preferred Strategies BI Quick Launch – Universes for Web Intelligence and Polestar

The Preferred Strategies BI Quick Launch includes Universes to be used for Business Objects Ad-hoc Query and Analysis software (Web Intelligence) and Advanced Visualization & Search software (Polestar). A Business Objects Universe is the semantic layer required to develop ad-hoc queries with Web Intelligence and Information Spaces (Reports) with Polestar. Just as a Report Template is the critical starting point for a Crystal Report, the Preferred Strategies BI Quick Launch Universes are equivalent for Web Intelligence and Polestar to work with your ERP data.

Learn More

To learn more about Preferred Strategies or Business Objects, please contact us at (888) 232-7337, send an email to info@preferredstrategies.com, or visit our web site at www.preferredstrategies.com.

Preferred Strategies BI Quick Launch for JD Edwards:

www.preferredstrategies.com/products/bi_quick_launch/business_objects_jde_biql.php

Preferred Strategies BI Quick Launch for SAP:

www.preferredstrategies.com/products/bi_quick_launch/business_objects_sap_biql.php