



Pervasive Performance Group

Taking Performance Management Enterprise-wide & Enterprise-deep

Making BI Better: The Emergence of Report Analytics

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Introduction

From small, centralized firms to large, global organizations, today's companies continue to grapple with a longstanding, long-vexing challenge: capturing and presenting data in an engaging and understandable format that facilitates well-informed business decisions. Many tap into Business Intelligence (BI) to address the problem, but BI alone is not always the answer. In fact, many studies show BI failure rates between 50% and 70%.

Report Analytics has emerged as a new category that turns disparate data into dynamic reports for easy analysis and visualization. Report Analytics allows end users to easily access, extract and incorporate data from any combination of existing reports already published inside or outside the enterprise, then create, distribute and publish dynamic, interactive reports — without requiring the time or expense of IT involvement.

Awash in Information

In today's enterprise, there is no shortage of information. If anything, for most organizations, the volume of data is just this side of overwhelming. The challenge, then, lies not in amassing BI data, but in addressing and engagingly presenting data that already exists. In most organizations, that data exists in multiple applications, data stores, and formats. As a result, professionals spend hours aggregating information from various sources and manipulating it in Excel in order to present the right combination of data in the right format to the right people, instead of the more critical activities of presenting and analyzing it.

This problem is a high priority among the majority of businesses. According to Ventana Research, “leveraging reports from BI systems is important to 57 percent of organizations, and getting to the data from source ERP, CRM and other applications is important to 71 percent.”

“Turning data into information for taking actions and making decisions has bedeviled businesses throughout the computer age. Many organizations have data in dozens of applications and legacy systems along with many reports in various business intelligence systems. The challenge is to get data from each of the reports and assemble it into contextualized views of information for particular business needs.”

— Ventana Research, April 2011

Needed: The Information I Want...Now

Data overload seems to be most acute in the reporting function. This stands to reason; reports are the

primary vehicle by which information is presented to users for business analysis and decision-making. And they can be the most problematic as well. There is more than adequate data out there in existing reports from disparate sources: external sources such as the Web, the Cloud, vendor or supplier-produced reports, and invoices...in-house content repositories and databases such as “canned” HR, ERP and CRM reports...and personal productivity documents such as BI and PDF reports, mainframe greenbar reports, spreadsheets, ASCII and text files, HTML reports, semi-structured Content Management System (CMS) documents, and more. But pulling the right data together from all these sources to create decision-quality information is a major challenge.

The issue is in presenting this information in a meaningful, easy to consume, and actionable way. The preponderance of data has become difficult to parse and analyze, and resulting reports are sub-optimal at best and inscrutable at worst. Compounding the issue is the format of this report data. Reports from ERP, HR, CRM and other systems present data in a basic, static form that does little to foster understanding, analysis, or decision-making and often does not include the unstructured, semi-structured, or externally sourced data that’s often necessary to make information meaningful. Most organizations spend significant amounts of money and time consolidating and mapping this data into a data warehouse. As a result, throughout the corporate world, applications, data marts, and BI systems are generating literally tons of reports that provide accurate data but insufficient insight and limited usability that require lots of IT support. But complex data warehouses and BI implementations are not the only option available.

Report Analytics “mine data from our standard reports to produce and export customized data meeting the specifications required by our outside billing firms...I create about 20 different summary receivable data views, including detailed receivables by patient type, financial class, aging category, and much more.”

— Executive Director of Business, Critical Access Hospital

Report Analytics Fills a Gap in BI Strategies

In the midst of such a longstanding business challenge, a new kind of analytics solution has begun to take root: Report Analytics (RA). It aggregates, mines and transforms information generated and stored throughout the organization in various reports, making it easy for users to access, extract and analyze data from virtually any existing source inside and outside the enterprise, without having to create a data warehouse. In effect, Report Analytics functions as the “missing link” in the broader BI reporting arena, capturing both structured and semi-structured data from virtually any existing document, including:

Table 1: Report Analytics Brings Together Diverse Data

ERP Reports	PDF Documents	Spreadsheets
CRM Reports	HR Reports	Financial Statements
Production Reports	Salesforce.com	Business Intelligence
Purchase Orders	Invoices	Billing Statements
Vendor Reports	Supplier Reports	Competitor Financials
External Market Reports	Public Domain Data	Historical Reports

By bringing information together from many different sources without moving it all into a data warehouse or heavy dependence on IT, Report Analytics helps the enterprise gain maximum value from existing reports and business application investments. This results in faster and deeper visibility into the business and better, more well informed business decisions.

The Difference Between Report Analytics and Business Intelligence

If Report Analytics sounds like an outgrowth of Business Analytics or Business Intelligence, well, it is. But there are key differences between RA and traditional Business Intelligence. In Business Intelligence deployments, a select few staff members, usually in IT, tend to manage the data and create new content and new report types for business-side users throughout the enterprise. As copious reports are generated, so are copious backlogs. Users often find some necessary information is missing, so they dump it to Excel; import additional from data transaction systems or other sources that are not in the data warehouse; and then do their analytics from within Excel. Without this manual process, there is often little analytic value because of missing data.

A key Report Analytics differentiator — and perhaps the main reason it should be considered a supplement to traditional Business Intelligence— is that unlike BI, it requires little to no involvement by the IT function to incorporate additional data required for meaningful reporting and analysis. With traditional BI, an IT professional needs to load all information into a data warehouse in order for end users to access it. The all-too-frequent results are time bottlenecks, delays and cost overruns.

Not so with RA. End users bypass the IT/data warehouse route and access the data they need themselves from existing reports they know and trust. The IT Department is no longer a time or cost barrier to providing users across the enterprise with needed data. Line-of-business managers, executives and analysts can access vital corporate data from various existing reports; design and model analytic reports and dashboards; and distribute and publish them throughout the organization as needed. All without ever having to load information into a data warehouse or data mart.

RA also requires no change to existing reports or reporting processes, and no added programming or database access. Rather, it takes advantage of existing infrastructure, making it a more cost-effective solution than conventional BI solutions or a valuable addition to an existing BI environment.

“It’s solved our SAP reporting needs, with no new programming and no need for live connections to the SAP system or other database...Our existing SAP reports are easily produced and distributed and can be made accessible online with complete security...Our managers and directors can view the data mined from those reports in any manner they wish, with the click of a mouse.”

— Application Management Finance, Government Agency

Report Analytics Enables Self-Service BI

The “no IT needed” feature of Report Analytics plays directly into a fast-growing trend in the BI arena: self-service. Interactive graphics, menu-driven functions, and browser-based GUIs enable non-IT staff to analyze and report on large troves of data quickly and easily. Today, more than two-thirds of “best in class” companies have already adopted some form of self-service BI, according to Aberdeen Group. RA extends self-service from building your own reports to accessing your own data. Users access data from existing reports rather than tables, data marts, or data warehouses. This makes self-service even more powerful than in traditional BI.

Since the data is coming from existing reports, there is no need to verify data accuracy — the existing reports have already been vetted — and therefore no need to involve IT. End users can combine data from BI, a data warehouse, and invoices or PDF files into a single report, without requiring arcane, database knowledge such as names of tables or how to build a join. Users are able to leverage existing reports that they work with on a daily basis, but through RA they can combine them into dynamic analytic reports. And they can change the reports easily, without IT, to adapt to a changing business environment or to incorporate business process changes.

RA “provides the daily insight to our capacity data that we need to manage our business, without the cost and headaches of more complex BI solutions...It transforms report data into different levels and layers of detail that different managers and workers need, without programming...We use [it] to help bring data from multiple reports from multiple ERP modules into a single Excel workbook.”

— Director IS, Manufacturing Company

Why IT Is On Board

IT Departments tend to welcome the self-service BI trend because it frees their resources from report generation and allows them to focus on more mission-critical projects such as governance and security. With Report Analytics, IT staff is no longer burdened with backlogs resulting from creating data marts or warehouses, adding new data to data marts “on-demand” for specific users or groups, or managing the demand for new and different reports. IT can get out of the business of basic report writing, data integration and data loading to allocate scarce resources to systems installation, integration, or upgrades. IT can focus on applying new technology to support the business. Isn't that a better use of IT resources than report building?

Summary

As enterprises large and small find it increasingly difficult to corral expanding volumes of in-house and external data and transform it into relevant, impactful, management reports Report Analytics has emerged as a viable solution to address the issue. RA enables end users — without reliance on IT — to quickly capture and structure static data from multiple sources into dynamic reports. For any organization struggling with the challenge of turning disparate and diverse data into intelligence that drives well-informed business decisions or is finding that BI is not completely meeting business needs, Report Analytics is worthy of consideration.

About Pervasive Performance Group

Pervasive Performance Group is a provider of advisory services on performance management and business intelligence. Our focus is helping businesses expand performance management from finance or IT-centric initiatives to an enterprise-wide and enterprise-deep approach that increases the return on their BI and PM investments.

Pervasive Performance Group provides advice, insight, and direction that help businesses recognize and break down the barriers that inhibit wider deployment and limit return on technology investments. Our services help companies progress to a performance-driven culture that empowers IT to expand the reach and impact of technology. We do this by helping companies recognize the tangible and intangible value of expanding performance management from isolated initiatives and departmental fiefdoms to a collaborative performance culture.