



Query Repository View Enhancements (Project IUUN0020)

Brio/Crystal Demonstration

July 7, 2003 - 149 ASTeCC - 3:00 – 4:40

ATTENDEES:

Linda Bradford, Jayna Cheesman, Debra Claunch, Paula Cox, Wanda Dixon, Chris Donahoe, Doyle Friskney, Debi Hancock, Tom Hanna, Frank Hawks, Loretta DeToma, Courtney Higdon, Janet Jones, Christine Levitt, Gary Lindle, Marilyn Lyons, Jennifer Miles, Kandi Neal, Barry Rankin, Chris Shotwell, Lu Wang, Raleigh Watson
Jayna Cheesman

PRESIDING:

PROJECT COORDINATOR:

Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> • Handouts 	<ul style="list-style-type: none"> ▪ Query Repository Views: http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRViews.pdf ▪ Brio Intelligence Explorer 6.6/Crystal Reports 8.5
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ Jayna introduced Mike Carter and explained he would be doing a demonstration on the desktop reporting tools for Brio and Crystal. She said IT would be looking at “Enterprise” versions of these products at a later date. ▪ Jayna said she asked Mike to compare the products and highlight where they are similar and how they differ. ▪ In the future, IT will ask the users which reporting tool they want IT to select as the “standard” in terms of providing training and support.
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ Jayna reviewed the data used for the demonstration. Both product demonstrations would use University data and included the Course Term records (i.e. Institution, Term, Academic Unit, Course Prefix, Course Suffix and Course Section.) She said the Course Section Maximum Enrollment and Actual Enrollment would be summed, and a percent capacity field would be calculated. Jayna briefly reviewed the ‘Query Repository Views’ handout.
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ Mike began the demonstration with Brio Explorer 6.6. He said one nice thing about this product is it has Open Catalog Extensions (OCE), which retains the logon information and views a user likes to work with. These OCEs can be shared with other users. For instance, if you only work with 10% of the views on a regular basis, the tool can be configured to only show these views at start-up. Crystal does not support this feature in Crystal Reports 8.5. Chris asked if later version of Crystal have this option, and Mike said he was not sure. ▪ Mike said both products support On-Line Analytical Processing (OLAP) for multidimensional data cubes. Jayna said multidimensional cubes of the data are physically built and optimize the ‘slicing and dicing’ of the data by different dimensions (i.e. date, location, product, etc.) ▪ Mike said the ability to import SQL program code is supported by both products. This ability allows you to import SQL code allowing more functionality. ▪ The Excel Add-In and Access Add-In allow you to run Crystal Wizard from within Excel or Access. ▪ The ability to set Parameter fields, or prompts for varying parameters, is supported by both Crystal and Brio. Crystal allows parameters when filtering, in formulas and in the body of the report. Brio can only handle parameters in filter selection.

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	<ul style="list-style-type: none"> ▪ The ability to process complex queries, a query that includes more than one type of operator (http://www.psychcrawler.com/info/help/compqry.html), or the linking of two or more query statements using an AND or an OR connector (http://qaprogram.air.org/docs/Apps2_2.pdf), is supported by both Brio and Crystal. Crystal handles this by working outside Crystal Reports within Crystal SQL Designer. ▪ Mike said Crystal is stronger in free-form reporting. It also handles conditional formatting better. Conditional formatting is the ability to apply some format, bold, underline, etc., when a condition is met, such as a specific value in the data element. ▪ Mike said both products have wizards to guide users, but Crystal has Report wizards to help users build reports.
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ In discussing the data file formats each tool can import, Frank and Chris said Crystal can import Excel, tab delimited and comma delimited files. <ul style="list-style-type: none"> ▪ ACTION: Mike will update the handout to show that Crystal can support importing .txt, .csv and .xls data file formats. (Completed 7/9/03.) ▪ Regarding 'Document Save Options', the ability to password protect design mode available in Brio, means the user can password protect any code they write. ▪ Regarding 'Export Format Types', Mike said Crystal Release 9 supports exporting .jpg and .gif format types.
<ul style="list-style-type: none"> • Demonstration 	<ul style="list-style-type: none"> ▪ Jayna said she and Mike were unable to put two conditional formats on the same column in Brio. (For example, you might want to highlight in red values over a minimum limit, and in blue others over a maximum limit.) She also said the cross-tab reports in Crystal do not show the element names. ▪ Raleigh asked about the ability to search for substrings within element names. Mike said this was not a function of either tool. ▪ Gary asked how easy it is to join records. Mike said both tools support this quite well, and showed what the joined tables looked like in each product. <ul style="list-style-type: none"> ▪ ACTION: Mike will call Crystal to ask if any version of their product allows the user to limit the views like in the Brio OCE. ▪ Discussion about selection of a reporting tool. Jayna said the majority vote would select which tool IT should support. Doyle said this does not mean other tools could not be used. When asked about SAS, Jayna said this was purchased primarily for the use of Institutional Research and IT does not expect this to be opened for campus use. SAS is a programming language and not for general use. She said Brio and Crystal support GUI (Graphical User Interface) for users who don't want to have to do code behind the scenes. Doyle said a total immersion of WebFOCUS is needed to determine if the product has the tools users need. He said the University knows we will not end up with one reporting tool, but IT will only be supporting one tool for each user level (i.e. high-end, intermediate and low end.)
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ Jayna asked those present to comment on the tools they are currently using. ▪ Frank said he uses Crystal and he is able to write reports. Others who use an enterprise product called Seagate can then run the reports. ▪ Linda said complex queries take forever to run on the desktop. Jayna said this is not a limit of the tool, but the difference between desktop and server versions. She said server versions generally run much faster since they do not run on the

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	<p>users PC.</p> <ul style="list-style-type: none"> ▪ Linda said the way a user joins the data can also determine the results and there is more chance of error when users do the joins. Jayna said this is a good example of why we want to have pre-defined views with the joins already in place. ▪ Courtney said Excel handles pivot tables when working with small sets of data. She said the spreadsheet size is limited on the amount of data it can handle. ▪ Jayna asked if someone had joined spreadsheet data with the Oracle database. Chris said yes, Shan has done this in Crystal. You need a common field to join the data on. ▪ Jennifer said cubes can also be used to analyze trends.
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ Jayna asked if the users would like to have the vendors come in and do more detailed demonstrations of their products and the response was yes. ▪ Chris said for the Controller's Office, the choice of tool would be based on cost. <ul style="list-style-type: none"> ▪ ACTION: Deb will contact the users on the UKWHEREY listserv to let them know another demonstration will be done on Monday, July 14, 2003. (Completed 7/8/03.) ▪ Loretta said Brio has a \$150 per year maintenance charge. Frank said there is no maintenance for Crystal desktop. This may also be a determination in which tool will be supported. <ul style="list-style-type: none"> ▪ ACTION: Mike will check to see if Crystal 9.0 supports pivot tables. ▪ Doyle said when questioning the vendors, it is also important to see what their next three year road map for the product is. He suggested their demonstrations focus on the desktop products in the morning and their enterprise products in the afternoon. ▪ Jayna asked if users would be interested in self-paced training. Wanda said NetG has training for Crystal Reports.