



Query Repository View Enhancements (Project IUUN0020)

Brio/Crystal Demonstration

July 14, 2003 - 149 ASTeCC - 3:00 – 4:20

ATTENDEES:

Nick Arnold, Janet Baynham, Kelly Bevins, Andrew Blues, Kathryn Brinigar, Paul Brown, Rhonda Bryant, Janet Cabaniss, Annetta Carter, Kandy Casey, Chuck Combes, Judy Duncan, Connie Ecabert, Lori Eckdahl, Kathy Fryer, Robert Garrett, Nellie Hatfield, Marilyn Hensley, Spencer Houlihan, Vaughn Leake, Betsy Mahoney, Sonja Mather, Mary McBeath, Karen Minton, Kathee Norris, Patricia Polly, Paula Sandford, Helen Slayton, Roger Sugarman, Fred Walker, Shanhong Wang, Ruby Watts, Lisa Wilson,

PRESIDING:

Jayna Cheesman

PROJECT COORDINATOR:

Jayna Cheesman, Kathy Hamperian

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<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: http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/RptToolDemo.pdf
	<ul style="list-style-type: none"> ▪ Jayna explained the demonstrations were being done at the requests of the users. Several users have asked about the differences in the tools and which tool they should use. Jayna introduced Mike Carter and said she had asked him to compare the tool functionality and do a demonstration on them. Since many people were involved in year-end the previous week, a second demonstration was scheduled.
	<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. She briefly reviewed the 'Query Repository Views' handout.
	<ul style="list-style-type: none"> ▪ Mike began the demonstration with Brio Explorer 6.6. He explained that Brio Explorer is part of the Brio suite of products and he would be focusing on the desktop version. He reviewed the "Topics" page in the handout, the roadmap he would be following. Jayna said Mike was not a guru on either of the tools, and asked more experienced users of the tools to provide additional information during the demonstration where appropriate. ▪ Mike said Brio Explorer handles data connectivity better than Crystal. He said one this product 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. He said Crystal displays all the views a user has access to, each time you use the product. Jayna said this feature of Brio would be good for users with institutional access to the data, since it lets you tailor which views you want to display. ▪ 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

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	<p>dimensions (i.e. date, location, product, etc.) She said it's the ability to interactively change the way the data is being analyzed.</p> <ul style="list-style-type: none"> ▪ Mike said the ability to import SQL program code is supported by both products. Jayna said both Brio and Crystal generate SQL code when producing reports. It is also possible to write and 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. <ul style="list-style-type: none"> ▪ Mike said Explorer handles 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) better since Crystal only supports limited steps. He said Crystal SQL Designer is needed to produce complex queries outside Crystal Reports 8.5. The data can then be imported to Crystal Reports for processing. ▪ 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. ▪ Mike talked about the "Accessible Database Formats". He said there is an error on the handout. Both Brio and Crystal can access Microsoft Excel. ▪ Mike briefly reviewed the "Import Data Files" page and the "Export Format Types" page.
<ul style="list-style-type: none"> • Demonstration 	<ul style="list-style-type: none"> ▪ Mike began the product demonstration and explained the various reports the tools could generate: a pivot report, standard report, cross-tab report and using the Microsoft Excel Add-In. ▪ 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 a value over a minimum limit, and in blue, a value over a maximum limit.) ▪ Trish asked, once a report is created, can the data be refreshed and the report used again? Mike said yes. ▪ Someone said they use Access to go against the Oracle data and to generate pivot tables and asked if this is the same data. Jayna said yes. ▪ General discussion about MS Excel and MS Access. Both of these products are covered by a University site license, so users pay no fees. Chuck said MS Excel is limited on the amount of data rows that can be returned. The limit is 65,000 rows. MS Access is generally unlimited on the amount of data that it can handle. ▪ Jayna said both products allow a user to join data they may have on the desktop with Oracle data. She asked how many used Excel (about two thirds of those present raised their hands), and said this 'desktop data' could be joined with the Data Warehouse data in Oracle. ▪ Mike showed that if you're only interested in summary data, you can suppress the details in Crystal Reports. He said field names could be changed. He also said formulas could be selected in both tools.

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	<ul style="list-style-type: none"> ▪ Jayna said the Crystal cross-tab reports do not display the column headings and these would have to be added separately.
<ul style="list-style-type: none"> • Strengths and Limitations 	<ul style="list-style-type: none"> ▪ Mike said the strengths and limitations of each tool were based on his opinions of the products. He said both tools were evenly matched on building simple queries. He said Crystal uses wizards and Brio has a drag-and-drop feature. He continued to review the handout.
<ul style="list-style-type: none"> • Q & A 	<ul style="list-style-type: none"> ▪ Jayna said the users would be voting on the tool IT should set as the standard. This support for the standard tool would include regular scheduled training. She said IT would try to provide help on other tools, but would only be able to provide support for one tool at each user level. There is a question about the financial stability of Brio which may affect the choice of tool to support. ▪ Helen said the latest version of Crystal is 9.0 and asked if this version would address some of the differences. Someone said they had been told Crystal 8.5 works better with the Oracle data in the Query Repository, and that there were problems with Version 9.0. Others mentioned something similar happened with Brio 6.0. They said this version was buggy with Oracle. <ul style="list-style-type: none"> ▪ ACTION: Mike will check on what the connection problems to Oracle are with Crystal Version 9.0 and later versions. ▪ Someone said Brio also has an annual maintenance fee of \$120 to \$150 per year. ▪ Jayna said users could keep the reporting tool they are currently using but central training may not be provided by IT. She said this did not exclude IT from coordinating outside vendor training of the tool for which users would be charged. ▪ Jayna said one downfall in not using the supported tool would be in sharing reports with others. ▪ When asked about converting reports to another tool, Mike said the SQL code can be exported from the old tool and imported to the new one. He said formatting would be lost and the syntax of the SQL code is slightly different within the tools, so there would be some modification required. <ul style="list-style-type: none"> ▪ ACTION: Mike will send Deb the differences between the Standard version and the Development version of Crystal. ▪ ACTION: Deb will post the differences between the Standard and Development versions of Crystal on the web site. ▪ Jayna said both vendors have “Enterprise” versions of the reporting tools. She said Brio would be doing a demonstration of the desktop and enterprise versions on August 7, 2003. She said a demonstration by Crystal would be earlier the same week, but a date has not been finalized. ▪ Jayna explained since IT does not control the funding or specific purchases for reporting software, they cannot commit to the vendor on the number of users that would use “Enterprise” versions of the software. She said pricing is usually based on the different levels and number of each level of user. ▪ Trish said for simple queries users could use Excel or Access which is “free”. Jayna agreed these could be used by the low-end users. She said most high-end users, doing statistical analysis are using SAS. ▪ Jayna said some functionality may be lost in “Enterprise” versions. She said each desktop tool addresses different needs. IT wants to support only one tool per user level.
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> ▪ Jayna said the HRS security has been added to the views. She said Data Administration has been in the process of standardizing the names for the HRS Views and hopes to have it completed by the end of the week to be presented to the users for review.

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	<ul style="list-style-type: none"> ▪ Jayna said since DWERequests@email.uky.edu has been established, a lot of Data Warehouse change requests have been received. She said IT will try to make the requested changes concurrent with changing element names in those views. ▪ Jayna said deciding on the joins that are needed will be beneficial. Someone said Brio can set auto joins and asked if this is available in Crystal. Mike said yes. ▪ Jayna said Keith LaVey has offered to have his group help convert reports, to help the users and also so IT can get a feel for the new views with joins that may need to be created. ▪ When asked when a decision on the reporting tool would be made, Jayna said it would be after the first week of August 2003 when the vendor presentations have been completed. <ul style="list-style-type: none"> ▪ ACTION: Deb will send out a list, “Reporting Tool Functionality”, for workgroup members to review. This list will be used by each vendor as a guideline of items to be addressed during their presentation. Users can also use the document during the presentations to take notes and assist in their evaluation of the products. (Completed 7/15/03.)