



**Query Repository View Enhancements (Project IUUN0020)**

**Crystal Reports Vendor Presentation**

**August 5, 2003 - Hardymon Alltel Rm. - 1:00 – 3:00**

**ATTENDEES:**

Nick Arnold, Janet Baynham, Linda Bradford, Mike Carter, Randy Casey, Jayna Cheesman, Yan Chen, Debra Claunch, Truett Cohorn, Karen T. Combs, Paula Cox, Penny Cox, Loretta DeToma, Tammy Dishion, Doyle Friskney, Kathy Fryer, Robert Garrett, Debi Hancock, Nellie Hatfield, Courtney Higdon, Larry Iten, Julie Jakway, Jenell Johnson, Janet G. Jones, Kim King, Judy Kisil, Angie Martin, Donna Maupin, Roxanne McLetchie, Kathee Norris, John Pica, Tonya Prince, Barry Rankin, Sidney Scott, Chris Shotwell, Diane Skoll, Barbara Sosbe, Brenda Teague, Gina Tussey, Fred Walker, Lu Wang, Ruby Watts, Lisa Wilson, Dawn York, Ning Zhao, Debbie Zoll  
Jayna Cheesman

**PRESIDING:**

**PROJECT COORDINATOR:**

Jayna Cheesman, Kathy Hamperian

AGENDA ITEM	DISCUSSION
<ul style="list-style-type: none"> <li>• <b>Handouts</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Crystal Reporting Tool Functionality:               <ul style="list-style-type: none"> <li>▪ <a href="http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/CrystalToolFunctionality.pdf">http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/CrystalToolFunctionality.pdf</a></li> <li>▪ Crystal Tool Demonstration</li> <li>▪ <a href="http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/CrystalToolDemo.pdf">http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/CrystalToolDemo.pdf</a></li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• </li> </ul>	<ul style="list-style-type: none"> <li>▪ Jason Skogland (Regional Manager) began the presentation and said he was filling in for Brian Rainboth (Account Manager). He said Summer Pearson (Pre-Sales Engineer) would do the desktop demonstration. Harvey Jobal would do the enterprise reporting demonstration later in the afternoon..</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Company History</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Crystal has 1,700 employees. The company is privately held and one of the fastest growing software companies.</li> <li>▪ Business Objects will be purchasing Crystal in November 2003, making them one of the largest BI vendors. Business Objects has analytics and packaged applications. Crystal has tools for operational reporting.</li> <li>▪ Business Objects plans to continue to support all Crystal products. These include Crystal Reports, Crystal Analysis, Crystal Applications and Crystal Enterprise. All of these are web-based solutions.</li> <li>▪ Partners are MS, SAP and 370 OEM partners like PeopleSoft.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Crystal Reports 9.0 Professional Desktop Demo</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Jayna asked Summer to point out the differences between Version 8.5 Standard and Version 9.0 Professional as she went through the demonstration. Most of the existing UK Crystal users have Version 8.5 Standard.</li> <li>▪ Summer said the Database Expert is new, it was called Database Explorer.</li> <li>▪ Report options include standard, OLAP, cross-tab, etc. Each has wizards to aid users.</li> <li>▪ Summer said the Reporting window is new in V 9.0. There is now a central location to store reusable report objects, images, text, objects, SQL commands, etc. SQL commands can be stored in a repository so they can be used in other reports. Other reusable objects, images and text can also be stored in a repository.</li> <li>▪ Stored procedures can be pulled into a report, along with other tables and views.</li> <li>▪ The product has 'all' variations of join/match.</li> </ul>

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	<ul style="list-style-type: none"> <li>▪ There are 400 pre-defined functions in the formula editor. The Formula Workshop is new in V 9.0, and has all formulas in one place. This was not the case in V 8.5.</li> <li>▪ All formatting, field selection, etc. can be done in either the design or preview window. Formatting options such as Bold, Underline, Italics, etc., are now on the toolbar in V 9.0.</li> <li>▪ Someone asked if numeric elements can be converted to string elements or vice versa, and then these elements joined. Summer said within Crystal Report Designer, the elements can be defined as Formula Fields, and the Conversion Type set. The formula fields are then linked to the original field.</li> <li>▪ In response, Summer said fields of different lengths can be padded using formulas and then joined.</li> <li>▪ There is no chart analyzer in V 9.0.</li> <li>▪ In response to a question, Summer said there are no conversion issues in moving from V 8.5 Standard to V 9.0 Professional. V 9.0 is backwards compatible.</li> <li>▪ OLAP allows access to pre-defined cubes and has drill-down/drill-up capability.</li> <li>▪ Parameters and parameter definitions are stored as part of the report. It will give the user the option to run the same parameters as the last time the report was run, or to choose new parameter(s).</li> <li>▪ Certain guidelines or formatting options can be followed to ensure when exporting to Excel it looks like the original Crystal output.</li> <li>▪ PDF output is identical to the Crystal output.</li> <li>▪ Multi-step queries (Script 11a) – sub-setting can be done using SQL commands or sub-reports can be done within Crystal Reports.</li> <li>▪ Output from one query used as input into next query (Script 11b) – this can be done either through sub-reports or the data can be output to Excel and then use Crystal against the Excel spreadsheet.</li> <li>▪ Can run custom SQL query to do joins. Summer said the SQL syntax is specific to the database to which you are connecting. If connecting to a MS Access database, Crystal uses MS Access syntax. If connecting to an Oracle database, Crystal uses Oracle syntax. Summer said the SQL Query Designer needed outside of Crystal Reports 8.5 Standard is no longer required in V 9.0.</li> <li>▪ If an element name used in a report changes, you will be prompted to map/replace the old element the next time you access the report.</li> <li>▪ If an element used in a report is deleted, you will be prompted to map/replace the old element the next time you access the report.</li> <li>▪ If an element is added to the view, when you verify the database in your report, it adds the element to the list of available elements.</li> <li>▪ If a new view is added to replace an old view used in a report, then you get the data source, create a new connection, pick old view and hit 'update'.</li> <li>▪ Adding joins won't pose a problem.</li> <li>▪ If you use pre-defined SQL queries (commands stored in a central repository), then changes can be made there, and all reports using this command will change automatically.</li> <li>▪ Conversion functions can be used to join two fields of different formats.</li> <li>▪ You can join two fields of the same format, but different lengths.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Crystal Reports</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Desktop reports can be saved and published to Crystal Enterprise. When publishing reports to Crystal Enterprise, the</li> </ul>

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<b>Enterprise Demo</b>	<p>user is required to logon to the server, then choose the folder to which they wish to publish.</p> <ul style="list-style-type: none"> <li>▪ Users only need a browser, either a html viewer (thin client), an Active X viewer or Java viewer. Multiple viewers are available to users: some require no code on the PC. We can decide which viewer a user will use.</li> <li>▪ ePortfolio ships with the product today. This is an application users can utilize to customize their web interface. Users have to be authenticated.</li> <li>▪ The software does integrate with Active Directory, LDAP, etc.</li> <li>▪ Based on security, a user may only see a subset of the reports available. Security can be applied to the folder or to object(s) within the folder.</li> <li>▪ A description of reports is available in the 'prompt' box when you position the cursor on that report name. The first page of the report can also be viewed.</li> <li>▪ Reports can be viewed or scheduled. If viewing a report, you can still drill down/up as you would on the desktop.</li> <li>▪ Report output can be exported and you can run the report on demand.</li> <li>▪ You can control how often reports can be run or refreshed.</li> <li>▪ When running a long report, the report window can be minimized, so other things can be done.</li> <li>▪ A report history can show when reports were run over time. The output from the same report run multiple times can be compared. The data has to be saved with the report in order to do this.</li> <li>▪ A full report is not sent to the user at one time. Stream on demand is used. As a page is requested it will be sent. A Search function accesses the database for the query to determine which page is requested, and then sends only that page back to the user.</li> <li>▪ Users can choose to view a report real-time or view output from a scheduled report. Users can be given rights to schedule reports, or they can be scheduled by the administrator.</li> <li>▪ Value-based security can be passed to a backend database. Users can be forced to enter the database ID and password, or the Enterprise ID and password can be passed to Oracle if they're the same. Roles are assigned in Enterprise.</li> <li>▪ The most efficient way to bring data back is to filter it based on user input, or force the user to logon to the backend database.</li> <li>▪ A search through the list of reports can be done based on title, description, etc., or based on key words in each or specific values.</li> <li>▪ Smart Reporting, part of the Premium package, can create new reports and modify reports published to Enterprise outside Crystal Reports. Smart Reporting uses a wizard to modify a report. You can save the report back to Crystal Enterprise in your space controlled by security.</li> <li>▪ Ad Hoc reports are part of the Enterprise Premium Package and provide more flexibility in designing reports. It can create a 'data source' for users, rather than them seeing all of the views and elements. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Jason will verify which of the above tools, Smart Reporting or Ad Hoc, were reflected in the responses on the 'functionality' spreadsheet.</b></li> </ul> </li> <li>▪ Reports can be scheduled based on a specific event through the Events Scheduler.</li> <li>▪ Scheduling is available at the enterprise level only. <ul style="list-style-type: none"> <li>▪ Can run at specific time(s)</li> <li>▪ Hourly, daily, etc.</li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>▪ Day of week</li> <li>▪ Nth day of month, etc.</li> <li>▪ Can specify database logon</li> <li>▪ Can specify selection criteria for report</li> <li>▪ Can specify destination for report</li> <li>▪ Can send out via email to list of people, or can send URL to them</li> <li>▪ Can specify output option/format</li> <li>▪ Can specify print setting (print to printer)</li> <li>▪ The viewer can be varied by the user ID/type.</li> <li>▪ Reports can be triggered/scheduled based on external events. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Harvey will check to see if information on how long it takes a report to run is available and also if a job can be canceled after running a specified period of time.</b></li> </ul> </li> <li>▪ You can let the security in Oracle control during report execution, or build another layer of security in Crystal Enterprise for people who view static reports (scheduled), and filter output at that level.</li> <li>▪ Has OLAP reporting capability. Users can create their own cubes. OLAP always runs real-time. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Jason will send information on the architecture.</b></li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>List Pricing on Licensing Options</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Pricing on CPUs, concurrent users, consulting.</li> <li>▪ <b>Desktop:</b> <ul style="list-style-type: none"> <li>▪ Crystal Reports and Analysis - \$400 per seat for Professional version. Can upgrade Standard to Professional for low cost. (52% of license to upgrade version). Could also go through reseller. <ul style="list-style-type: none"> <li>▪ <b>ACTION: Jason will send a list of Crystal users on campus.</b></li> </ul> </li> </ul> </li> <li>▪ <b>Enterprise:</b> <ul style="list-style-type: none"> <li>▪ MetaGroup – slide on methodology.</li> <li>▪ 80% of information users require operational reports (pre-defined)</li> <li>▪ % Ad Hoc</li> <li>▪ % analytic/high end</li> <li>▪ Recommend Crystal Professional be used to develop reports.</li> <li>▪ Pricing can be based on the number of CPUs, number concurrent users, total number (named) users, or combination of the last two.</li> <li>▪ Concurrent licensing usually best for large deployment.</li> </ul> </li> <li>▪ <b>Crystal Enterprise Premium</b> <ul style="list-style-type: none"> <li>▪ Includes ad hoc users too (view and write).</li> <li>▪ Includes Ad Hoc Tool and Smart Reporting, but not normal Crystal Enterprise.</li> </ul> </li> <li>▪ <b>Normal Crystal Enterprise</b> <ul style="list-style-type: none"> <li>▪ View, run and schedule.</li> </ul> </li> <li>▪ <b>Crystal Enterprise Professional</b> (not OLAP) <ul style="list-style-type: none"> <li>▪ \$55,000/CPU supporting the application (Crystal Enterprise) <b>OR</b></li> <li>▪ number of concurrent users equals \$3,495/concurrent user <b>OR</b></li> </ul> </li> </ul>

	<ul style="list-style-type: none"><li>▪ \$595/named (total) users</li><li>▪ Will negotiate on pricing if high volume.</li><li>▪ Not sure how Business Objects purchase will affect their contracts with their resellers. He thinks Crystal and Business Objects serve two different types of information needs.</li><li>▪ <b>Crystal Enterprise Premium</b> (includes OLAP)</li><li>▪ \$75,000/CPU OR</li><li>▪ \$5,000/concurrent user OR</li><li>▪ \$795/named (total) users</li><li>▪ Don't have GSA pricing, but give 25% discount to higher education and government.<ul style="list-style-type: none"><li>▪ <b>ACTION: Jason will send information on these products and how they differ.</b></li><li>▪ <b>ACTION: Jason will send information on government or higher education pricing.</b></li></ul></li></ul>
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