



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

**Brio Vendor Presentation**

**August 7, 2003 - Hardyman Alltel Rm. - 1:00 – 3:00**

**ATTENDEES:**

Frank Abraham, Nick Arnold, Dale Austin, Charlotte Baker, Janet Baynham, Linda Bradford, Billy Brewer, Mike Carter, Jayna Cheesman, Yan Chen, Debra Claunch, Karen Combs, Paula Cox, Loretta DeToma, Tammy Dishion, Christian Edker, Robert Garrett, Debi Hancock, Courtney Higdon, Jeanne Hurak, Jenell Johnson, Janet G. Jones, Kim King, Donna Maupin, Deb Moore, Kathee Norris, Cathy Owen, John Pica, Patricia Polly, Tonya Prince, Barry Rankin, Alan Shephard, Diane Skoll, Barbara Sosbe, Fred Walker, Lu Wang, Ruby Watts, Stephen Welch, Lisa Wilson, Dana York, Ning Zhao

**PRESIDING:**

Jayna Cheesman

**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>▪ Brio Reporting Tool Functionality:               <ul style="list-style-type: none"> <li>▪ <a href="http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/BrioToolFunctionality.pdf">http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/BrioToolFunctionality.pdf</a></li> <li>▪ Brio Tool Demonstration</li> <li>▪ <a href="http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/BrioToolDemo.pdf">http://www.uky.edu/IS/DataAdmin/DOCS/ware/IUUN0020-QRVE/QRVE-Workgroups/BrioToolDemo.pdf</a></li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Presenters</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Jayna introduced Ryan Saunders (Strategic Account Executive) and Rusty Bruce (Principle System Consultant). She said the two handouts were a script for the vendor to follow, and the numbers on this document reference the functionality on the second spreadsheet handout.               <ul style="list-style-type: none"> <li>▪ <b>ACTION: Ryan will send an electronic version of the presentation to Jayna. (Completed 8/8/03.)</b></li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Company History</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ 520 employees.</li> <li>▪ 10,000 customers</li> <li>▪ PeopleSoft has Brio embedded when you buy the product.</li> <li>▪ Purdue University in West Lafayette is one of their clients, as well as Ohio State, Indiana, Miami University..</li> <li>▪ HEUG@Brio is the Higher Education User Group listserv.</li> <li>▪ Partners include PeopleSoft, SCT, SAP.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Brio Performance Suite</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Ryan explained the Brio Performance Suite includes:               <ul style="list-style-type: none"> <li>▪ Enterprise reports – with complex, unlimited formatting</li> <li>▪ Analytical Reports – OLAP</li> <li>▪ Dashboards/Metrics</li> <li>▪ End User Query &amp; Reporting</li> </ul> </li> </ul>

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<ul style="list-style-type: none"> <li>• <b>Brio Performance Suite</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Brio Foundation Services is the web delivery component for Brio Intelligence (Explorer) and SQR. <ul style="list-style-type: none"> <li>▪ Brio Intelligence (Explorer), desktop and enterprise version (Brio Insight) have the same functions.</li> <li>▪ SQR is an enterprise reporting tool for complex reporting.</li> </ul> </li> <li>▪ The desktop is 100% compatible on the web.</li> <li>▪ Rusty talked about OCE (Open Catalog) files and said they define where the data is, and also provide security on the data to which each user has access.</li> <li>▪ Rusty said data can be pulled from multiple databases into one report. The detail data values can be seen when designing a query.</li> <li>▪ The database engines decide whether to do a join before or after the 'where' clause. Rusty thinks the 'where' happens first.</li> <li>▪ Metatopic cloaks a join for users (pre-defined joins) <b>OR</b> is a user defined view that masks joins of other views. These can be shared by adding them to a shared file server. However, you can't join the metatopic to other views. You can pull multiple metatopic elements into one report.</li> <li>▪ SQL can be viewed at any time from the View menu.</li> <li>▪ QIQ Architect is a developer tool to automatically change Brio reports when tables or views change.</li> <li>▪ Custom Groupings allow a user to build their own dimensions when it's a function of the values in another column. For instance, if the city and state are available, but not the region, a grouping column can be added and defined as to what states are to be included in each 'region'. Time dimensions can also be defined, for instance, by quarter.</li> <li>▪ Calculated elements can be put at the request line, result set, pivot/chart level, etc. It is best if these are put in the result set, so all other reports (pivots, etc.) will use them.</li> <li>▪ Pivots are like cross-tab.</li> <li>▪ Pivot functionality is extensive.</li> <li>▪ Can combine different arithmetic functions together to do complex functions.</li> <li>▪ There are no wizards for report styles because they think the tool is easy to use due to drag and drop functionality.</li> <li>▪ 'Free form' allows you to create reports for publishing.</li> <li>▪ 'Sections' of reports can be scheduled and posted to different web pages in the Enterprise version.</li> <li>▪ Exports to different file formats can be automated. Output to Word requires some customization through OLE automation.</li> <li>▪ If a New View Name is added: join old to new, then remove old, but you would have to fix any pivots using the old view.</li> <li>▪ Adding new elements to a view are no problem.</li> <li>▪ Deleting or changing an element name – user receives an exception error or expression error when they access the report.</li> <li>▪ The software relies on the database for format/properties of elements.</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Examples</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Rusty showed some examples where Purdue is using EIS which is pretty sophisticated. They have written queries behind the scenes, and made them available through a web site. Everyone who runs these would need the desktop versions.</li> <li>▪ There is a 2-day class on how to build EIS. The student must be able to write SQL. It also used JavaScript, but most is generated for you.</li> </ul>

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<ul style="list-style-type: none"> <li>• <b>QIX Executor Builder</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ This is not needed to develop EIS; Brio Explorer (desktop) can be used.</li> <li>▪ The Insight Server processes BQI files. It can run as its own web server, but the recommendation is to run a separate web server.</li> <li>▪ A thin desktop connecting to the Insight Server can read, drill-down/up, produce html.</li> <li>▪ A power user on the desktop connecting to the Insight Server can modify queries or create new queries.</li> <li>▪ If a user has access to reports on the server, they can tailor how they want their web page to look, so it can appear as different sections on the web page.</li> <li>▪ A user can set up a list of their favorite reports, so they don't have to go pages deep to see them every time.</li> <li>▪ Can either have users just see static reports in the environment, and/or can let users execute reports in this environment.</li> <li>▪ Can also let users see other report (FOCUS, Crystal, etc.) output. It can also run these report outputs.</li> <li>▪ Security can be on folders, roles, or user.</li> <li>▪ Can subscribe to a folder, then tell it to send an email to the user if something new comes up. Or when 'exception' reports show up (i.e. problems).</li> <li>▪ Can set up default personal web page format for users, and then they can modify.</li> <li>▪ Can set up parameter files, so reports with different parameters can be run.</li> <li>▪ User groups can share parameter lists.</li> <li>▪ Can use database security or version 6.6 can build security into BQI. Can use LDAP, AD, etc.</li> <li>▪ Can have 'global' administrator and also 'departmental/folder' administrator which would only be able to publish BQI to that folder.</li> <li>▪ On a single report, they have 'adaptive state' that varies access by user (i.e. execute, view, modify, replace, etc.)</li> <li>▪ Can create BQI file from scratch on the web. <ul style="list-style-type: none"> <li>▪ HTML version – pivot through tool bar option</li> <li>▪ Brio Insight – pivot like on the desktop version (i.e. dragging)</li> </ul> </li> <li>▪ The first time someone tries to run a report from the server, they are automatically prompted to download the BQI plugin from the server.</li> <li>▪ There is no change control on reports. Users should not overwrite the original report, but change the name.</li> <li>▪ You can set limits on the length of runtime of the report.</li> <li>▪ Who can run longer jobs can be varied, but have to write JavaScript to do this.</li> <li>▪ Priorities can be set on reports in the scheduler.</li> <li>▪ BQI file must be saved to the user's desktop first, and then published to the Brio Server.</li> <li>▪ From the HTML version, you can only export to pdf, not Excel. You can cut and paste into Excel. There are components that allow you to export to Excel. You can also save as BQI file if you have Brio on your desktop.</li> <li>▪ The next version (8.2 in 11/03) will have export to Excel from the HTML version.</li> <li>▪ There is a scheduler. Jobs can be run with parameters. Can be based on a timed event or an event/data load trigger, etc. Output can be sent to an email distribution list. Reports can be scheduled to run on specific dates, first Wednesday, etc.</li> <li>▪ Can also tell a job to post to your personal page when you subscribe to a report.</li> <li>▪ Your personal page can be published, so others can access it. Security can be set at the user level.</li> </ul>

<ul style="list-style-type: none"> <li>• <b>Licensing Options</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ <b>Desktop</b> <ul style="list-style-type: none"> <li>▪ Brio Explorer - \$1,095/user, 15% maintenance</li> </ul> </li> <li>▪ <b>Enterprise</b> – Brio Intelligence for the Web <ul style="list-style-type: none"> <li>▪ Viewer (view, run)</li> <li>▪ Interactive viewers (+ analyzer)</li> <li>▪ Analysts (create reports + publish, data model)</li> <li>▪ Developers (+ EIS development) (equivalent to Brio Explorer), must have desktop version</li> <li>▪ Administrators (install software, security, etc.)</li> </ul> </li> <li>▪ <b>Brio Performance Suite</b> <ul style="list-style-type: none"> <li>▪ SQR and Brio Intelligence OR Brio Intelligence for the Web</li> </ul> </li> <li>▪ Web version <b>does not</b> create EIS</li> <li>▪ Prices given were list prices.</li> <li>▪ Costs Brio approximately \$300 for each credit card charge.</li> <li>▪ They want us to take ownership of counting users and billing the campus departments.</li> <li>▪ <b>Server-based Brio Performance Suite</b> <ul style="list-style-type: none"> <li>▪ Unlimited users</li> <li>▪ Windows: \$55,000/CPU (minimum 4 CPUs), 15% maintenance</li> <li>▪ Unix: \$78,000/CPU (minimum 5 CPUs), 15% maintenance</li> </ul> </li> <li>▪ <b>QIQ Architect</b> - \$5,000/user</li> <li>▪ <b>Upgrade</b> from Brio Explorer to Brio Insight approximately \$250/user</li> </ul>
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