Chapter 1

Business Intelligence and BusinessObjects XI Release 2: Working Hand in Hand

In This Chapter

▶ Discovering how business intelligence can help your business

▶ Delving into BusinessObjects XI Release 2

*B*efore you roll your sleeves up and get running with BusinessObjects XI Release 2, it's worth taking a moment to consider the bigger picture. At the beginning of this chapter, we give you an overview of business intelligence, and show how you can use business intelligence applications and technologies to help you make better business decisions.

If your business has been running Crystal Enterprise or BusinessObjects, you're probably faced with having to upgrade — specifically, to BusinessObjects XI. If so, welcome to some enhanced capabilities. If not — if you're just starting out with Business Objects XI — welcome to a whole new business universe. The last half of this chapter provides an overview of the different components that make up the BusinessObjects XI Release 2 Enterprise product suite — and offers some pointers on finding the right tools for the job — both for the migration and the projects to follow.

Fitting Business Intelligence into Your Business

Business intelligence (BI) is a business management term for the tools and methodologies used to collect, provide access to, and analyze data (which, in a typical organization, usually means information about a firm's operations such as details of sales, production, or human resources).

Life before business intelligence

In the beginning was the data, and the data was hidden away somewhere deep in the bowels of the corporate databases where only an elite of highly trained users were able to reach it.

If you needed access to any of this data to do your job effectively, the only way to get at it was to beg one of those highly trained elite users for help. But when your query finally made its way to the top of Mr. Elite User's in-tray, often several months later, the information that trickled down to you in the form of a spreadsheet or even a printed report would be horrendously out-of-date. As for whether Mr. Elite User was likely to understand your business requirements in the first place and so avoid supplying you with wrong (or at best irrelevant) information. . . well, you're better off not even going there.

"Timely? Pertinent? I'm sorry, we don't do those. Can I interest you in these global sales figures from the first quarter of last year instead?"

Business intelligence lets you keep track of what's going on in your company. It provides you with timely and pertinent insight so you can measure your performance against your company's established goals, and take action at a time when it is still possible for you to influence the outcome. Best of all, it lets you do it all yourself, rather than having to depend on IT professionals to provide you with the data you need at a time that suits their schedule.

Put simply, BI lets you make better business decisions because it gives you access to the right information at the right time.

BusinessObjects XI Release 2 has four main functional areas, which allow you to track, understand, and manage your business:

- ✔ **Reporting:** Reporting, as its name suggests, enables you to format and deliver information to large audiences both inside and outside your organization in the form of reports.

- ✔ **Query and analysis:** Query and analysis tools provide you with a means of interacting with business information (by performing your own ad hoc queries) without having to understand the often complex data that lies underneath this information.

- ✔ **Performance management:** Performance management tools let you keep track of and analyze key performance indicators and goals using Dashboards, Scorecards, and Analytics.

- ✔ **Data integration:** Data integration lets you extract information from a range of sources and transform it so that it becomes usable by your other BI tools, data marts, and data warehouses.

A tale of two products

BusinessObjects XI has illustrious ancestors: Both Crystal Enterprise and Business Objects products brought efficient, interactive reporting to databases — and a host of other tools that helped lay the foundation for what we now call business intelligence. Then their powers combined: Business Objects and Crystal Enterprise merged in late 2003 — and BusinessObjects XI fully integrated the features of *both* companies' products.

BusinessObjects XI Release 2 has been around since 2005; about a year and a half later, an update appeared: BusinessObjects XI Release 2 Productivity Pack. That's the subject of this book. And a formidable — though sometimes confusing — toolbox it is.

Taking a Closer Look at BusinessObjects XI Release 2 Enterprise

In this section, we take a look at some of the different members of the BusinessObjects XI Release 2 Enterprise family.

At first glance, BusinessObjects seems to offer a confusing range of tools that do the same job. But at least for the immediate future, there's a good reason for the overlap in product functionality: Crystal Enterprise and BusinessObjects were originally different products. Check out the sidebar "A tale of two products" to find out more.

Tools for migrating from previous installations

Which tools you'll need for the migration depends mainly on whether you're coming from a BusinessObjects or Crystal environment. Be patient, and follow the ancient wisdom that says *Get the right tool (or, in this case, wizard) for the job*.

Import Wizard

The Import Wizard (see Figure 1-1) is a locally installed Windows application used by administrators to import user accounts, groups, reports, and folders from Crystal Enterprise, BusinessObjects, or Crystal Info into BusinessObjects XI Release 2 Enterprise. You can also use the wizard to move a test deployment of BusinessObjects XI to a production environment.
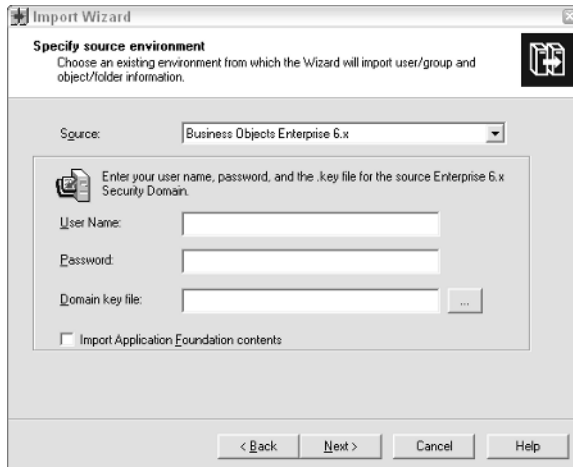
In BusinessObjects XI Release 2, the Import Wizard supports upgrades from these existing implementations:

- ✔ BusinessObjects 5.1.4 and above
- ✔ BusinessObjects 6.0, 6.1, and 6.5
- ✔ Crystal Enterprise 8.5, 9, and 10
- ✔ Application Foundation 6.1.b, 6.1.3, and 6.5.1
- ✔ BusinessObjects XI (if you haven't installed the Productivity Pack until now)

TIP

You can also administrate remote servers from the Import Wizard.

Figure 1-1:
Importing user/group and object/folder information from a previous version of Business-Objects using the Import Wizard.

Repository Migration Wizard

The Repository Migration Wizard has a much more specific use than the Import Wizard: It's used solely to migrate a Report Design Repository from previous versions of Crystal Enterprise Server into the BusinessObjects XI Release 2 repository.

REMEMBER

The *repository* is the database server that stores all the information about your BusinessObjects system and its users.

Data Source Migration Wizard

The Data Source Migration Wizard lets you migrate reports based on Crystal queries, dictionaries, and InfoViews to BusinessObjects Enterprise XI.

The Data Source Migration Wizard has a slightly misleading name, because you can use it to migrate *two* types of objects: data sources and reports. It works by converting the data source for each report into an object that can be used in BusinessObjects Enterprise, and then resetting the report's data-source location so it points to the new object.

Report Conversion Tool

Okay, the Report Conversion Tool is not (strictly speaking) a migration tool — but you can use it to convert Desktop Intelligence reports to the Web Intelligence format — and then publish the converted reports — so it does serve as a bridge between technologies. It can convert the following types of report to the Web Intelligence XI Release 2 (`.wid`) format:

- ✔ **Legacy BusinessObjects reports** (`.rep`) previously migrated to the Desktop Intelligence (`.rep`) format using the Import Wizard.
- ✔ **Desktop Intelligence reports** created directly in the Desktop Intelligence tool.

WARNING!

The Report Conversion Tool isn't a panacea. It can't convert all Desktop Intelligence reports, nor all Desktop Intelligence features. Exactly what gets converted depends on the features of the original report; some features prevent the report from being converted at all; other features may be modified or removed during the conversion process.

You can also use the Report Conversion Tool to open reports from previous versions of the BusinessObjects desktop-reporting tool directly in Desktop Intelligence. However, to be sure that you take full advantage of the product's security features, you're better off using the Import Wizard to import your legacy reports.

All it takes to design a universe

As we explain in Part III, the concept of a *universe* (in effect, a collection of business objects) lies at the heart of any BusinessObjects XI Release 2 installation. When it comes to building and managing these universes, you have a couple of different tools at your disposal.
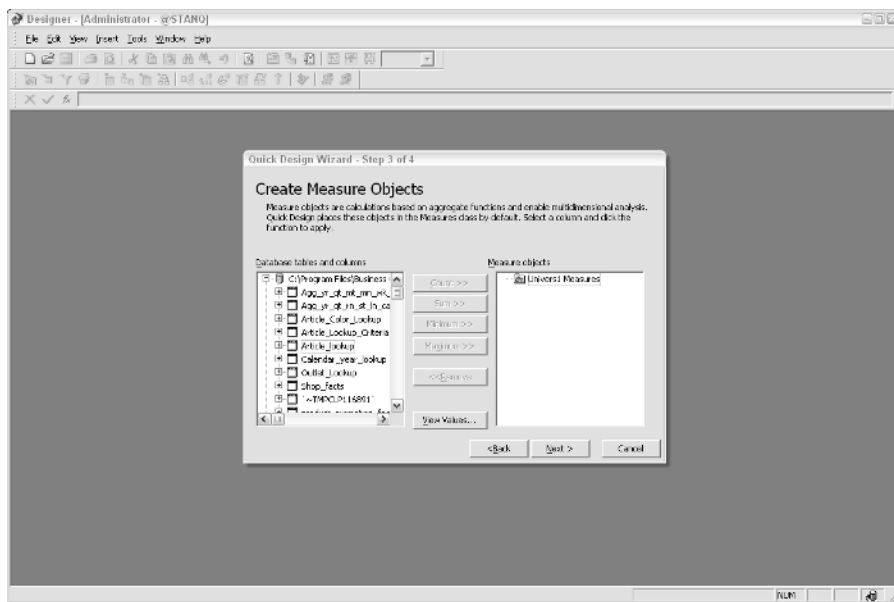
Designer

Business Objects Designer is the tool that enables BusinessObjects XI users to create universes (see Figure 1-2).

The person who creates business universes is called (believe it or not) a *universe designer*. Depending on the situation at your company, this person may be the database administrator, a programmer, a project manager, or even a report creator who has sufficient technical skills to create universes for other users.

Whatever the purpose of the larger universe may be, the purpose of a business universe is to let nontechnical users run queries against a database in order to create reports and analyze data. Its simple interface is designed to provide a business-focused front end to make the SQL structures in the database more easily understandable, using vocabulary that's familiar to business users.

Figure 1-2:
Using the Quick Design Wizard in Designer to create a universe.

Universe Builder

Universe Builder is another tool that you use for — you guessed it — building business universes. How it differs from Designer mainly concerns whether or not your metadata source was compatible with BusinessObjects XI Release 2 at the time it was released. If it was, you're probably better off building your Universes with Designer. If not, use Universe Builder instead.

For more information on the specifics of Universe Designer, see Chapter 5.

BusinessObjects Desktop Intelligence

BusinessObjects Desktop Intelligence is a desktop reporting tool that allows you to analyze data, perform ad-hoc queries to fetch new data, and create new reports of your own. Now a feature of BusinessObjects XI, it was previously known as BusinessObjects — a stand-alone flagship product. It makes a seriously powerful desktop tool.

TIP Using a desktop tool instead of a permanent network connection gives you a handy advantage by freeing up your IT resources as you use less bandwidth.

Part III explains the workings of BusinessObjects Desktop Intelligence in more detail.

BusinessObjects Web Intelligence

Sometimes, having to open a full-client application just isn't the most convenient way of working, especially if your machine isn't powerful enough for the job.

Fortunately, BusinessObjects also features a tool that makes it possible for you to perform a range of query and reporting tasks directly from a browser-based interface: BusinessObjects Web Intelligence.

Part IV looks in more detail at how Web Intelligence works.

Enterprise Performance Management

Although Desktop Intelligence and Web Intelligence are powerful tools in their own right, there may still come a time when you want to move on from the reports they let you build and take your use of the BusinessObjects XI suite to the next level.

Part V describes how you can use the suite's Performance Management tools to create more complex dashboards, metrics, and analytics that allow you to keep track of how your organization is doing.

Publishing Wizard

The Publishing Wizard lets you add new documents to BusinessObjects XI Release 2 Enterprise. You can assign object rights to specific BusinessObjects Enterprise folders — allowing you to control who publishes what, and where (within the company, anyway).

TIP Although the Publishing Wizard is a Windows application, you can use it to publish reports to servers running on both Windows or Unix.
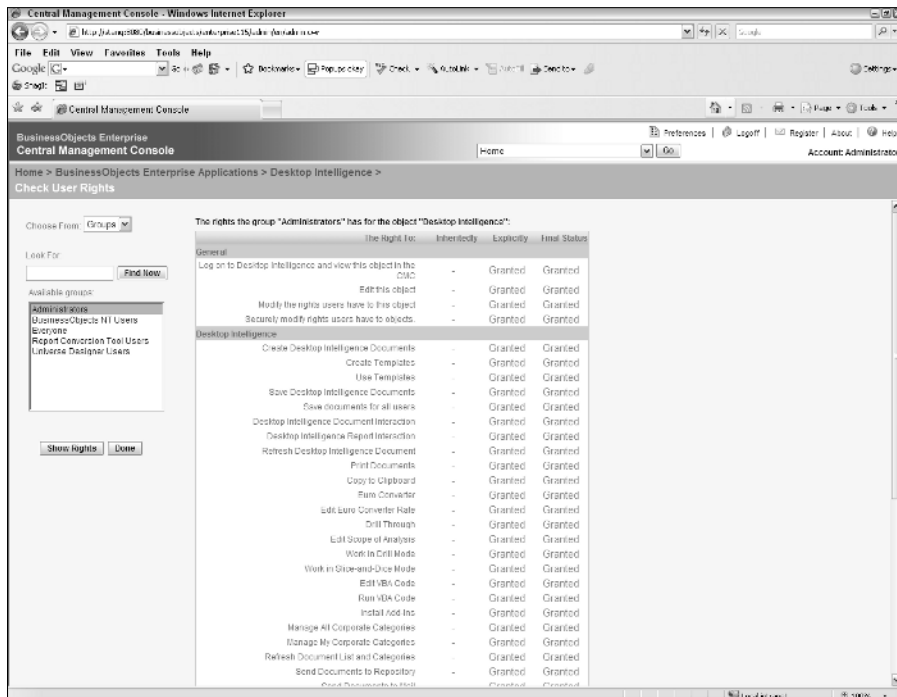
InfoView

Consider InfoView your company's business intelligence portal. As a browser-based tool, InfoView is the main interface for most users who work with objects in BusinessObjects XI Release 2. You can use InfoView to view, manage, and work with your organization's different business-intelligence objects — including Crystal reports, Web Intelligence documents, and Desktop Intelligence documents, as well as the suite's Enterprise Performance Management tools.

Part IV looks at InfoView in more detail.

Central Management Console

The Central Management Console (CMC), shown in Figure 1-3, is the Web interface that lets you or your administrator control and make best use of your BusinessObjects deployment. It enables you to carry out such tasks as setting up user roles, server administration, managing passwords, and more.

Chapter 4 examines this tool more closely.

Figure 1-3: Managing user rights with the Central Management Console.