JACKIE's Forum

Beyond Query/400 – Additional Features to consider

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This column continues the series of life after Query/400. Last month we looked at the various user groups within an organization and their different requirements. This month I want to concentrate more on examining the features within many of the query and reporting solutions available today.

The intent of this article is to educate you on the various capabilities that you may want to consider in your evaluation. This doesn't mean that you should create a technical checklist for your major decision criteria. A technical checklist may point you to a very complex solution. Your number one concern should be in prioritizing and analyzing the requirements for your main end users. This may mean that you don't need a product that allows sophisticated slicing and dicing of your data, you may simply require a tool that can distribute your reports in MS Excel to your sales reps via email. Make sure that you match the tool to your organization's requirements.

What type of querying or reporting do you need? Are static reports good enough or do the users require dynamic reports where they can modify or tune the reports IT has designed? Do you want all or only a few users to be able to create new reports? Do your users really want/need to slice and dice and drill-down and pivot their data?

EIS reports, dashboards, and pinboards are all examples of IT created reports with a graphical user interface often using pictures and symbols instead of just numbers. Is this important to your end users?

Nearly all query and reporting tools on the market today can output their results to MS Excel. While the various claims may sound similar there is actually quite a bit of difference in Excel integration. One nice, but not very common feature is having the totals in your report download as formulas rather than actual numbers. This allows you to start manipulating the downloaded data and the totals remain accurate. Some solutions support downloading reports into named regions. Other tools burst each "group by" to a different worksheet so that a report grouped by region may generate a separate worksheet for each region. Some products allow you to double click on a field and either drill down to more details, link to a new report or execute any one of a number of different functions all from within your spreadsheet. Sometimes when you look at a cell you may see references to the source data. In this case the spreadsheet is only valid when connected to a host and cannot be used off-line. As you can see the integration with MS Excel varies widely from product to product and you need to be aware of what's available and what your end user's require.

PDF files are also a very common output format. While most PDF files are read-only some allow you to drill down or link to other reports. Some tools will split a report by group into "chapters" much like separate MS Excel worksheets. Other tools may take a report grouped by salesman and intelligently burst and email each salesman his/her own page.

Often IT would like to create a quick extract or summary table. How quickly and easily can this be done? How do your users want to access their reports? Via web portals, report repositories or simply via email? What about receiving summary reports on a Blackberry? Will your users normally request a report or will the system generate them automatically? Can your company manage a product with a steep learning curve? Power users may attend education courses but others may not.

Products have different levels of geographic awareness from none (most common) to basic postal code awareness to full two-way integration with a geographic information system.

When choosing a solution you need to analyze your user community and determine if you need a simple report generator or a full function product that allows you to process logic to determine which reports to run, what data to include and how to distribute them or something in-between?

Finally, how important is very tight integration with the System i5 or iSeries? Do you want a solution that is completely under the control of i5/OS? Should it understand the nuances of your database, such as DB2's query governor, generating SQE vs CQE SQL, having the query definitions, templates and report repository stored on the i5? Do you have a large investment in Query/400? If you do then consider a tool that can import or convert your Query/400 definitions.

You will notice that I haven't mentioned much about standard comparison features such as charting, traffic lighting, calculated fields etc. That's because most reporting tools today have these capabilities. Your main consideration for these aspects would be the end user interface, is it simple and easy to learn or do you require IT to use these features?

Choices abound on the System i5 from very basic solutions to full-function applications. Don't hesitate to contact me with any questions or if you need assistance going forward. TUG

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