WebFOCUS In-Document Analytics

Extend the Impact and Reach of Business Intelligence With Interactive Documents

Organizations can now consumerize analytics by enhancing everyday communications and documents that they create and distribute. There are billions of static documents circulated on a daily basis that leave the users powerless to analyze the information within them.

The Information Builders WebFOCUS BI and analytics platform enables the creation and delivery of highly interactive documents, which combine one or more analytical views, a subset of data, and in-built interactive controls into a single self-contained file.

We call this In-Document Analytics. Consider a PDF (Portable Document Format) document, and how limited it is in delivering insight other than via its predefined format. Now add a subset of data, interactive views, Excel-like functionality, and you have an ADF or Analytic Document Format. Recipients only require a web browser running on a computer or mobile device to open a convenient, secure, and highly intuitive custom document from which to further explore the topic of interest.

Information Builders provides the industry’s most scalable software solutions for data management and analytics. With one smart platform for integration, data quality, and analytics, we help companies manage their data, generate insights, take action, and deliver impact.

Highlights
- Comprehensive data integration, with direct access to more than 300 sources
- Accelerate time-to-market for big data analytics, mobile applications, and other projects
- Reduce integration TCO by eliminating most custom integration code
- Leverage existing application and infrastructure investments
- Available on Amazon Elastic Cloud Computing (EC2)

From a simple underlying report it is possible to add calculations, filters, pivots, rollups, charts, exports, and to spin the data in multiple ways for more insight — without ever touching Excel.
There are several innovative use cases for In-Document Analytics, which help to illustrate just how flexible and strategic this technology format can be.

**Consumer-Facing Communications**

There are many communications that are delivered to customers from organizations, including news updates, invoices, account status, promotions, newsletters, reminders, and thank you notices. Each of these is likely delivered in the form of a relatively static electronic communication, such as a PDF or e-mail.

**eStatements enable self-service capabilities that cut statement delivery costs, help to retain and attract customers, and automate information delivery.**

How can you add more value to that communication, and how can you enhance the relationship with that customer, or prospect? In-Document Analytics allows you to take these static communications and documents and make them actionable and dynamic. One example is an eStatement, whether for a retail bank, credit card company, or airline. Instead of just sending a balance or a list of transactions, providing an account status can be enhanced by delivering a single document containing interactive charts, dashboards, and reports that allow the recipient to analyze and explore data in context to the topic or subject.

This B2B example of an interactive invoice contains several pages of related analysis and the contract terms. The current month’s invoice is displayed on the first page, which includes a tabular report plus charts, any of which can be explored further.
Customers, Partners, Suppliers, and Vendors
Another use case for recipients outside the corporate firewall is communication to B2B customers and partners. Again, basic communications can be enhanced to promote loyalty, up/cross sell, optimize partnerships, and offer industry insight. An example might be the sending of an invoice, accompanied by data and breakdowns of past purchases, or industry data relating to performance of the purchased product, or similar purchases by other customers. This might be classified as an interactive invoice.

Internal Communications and Documents for Employees
There are many circumstances where an Analytic Document Format is valuable to employees, whether at corporate headquarters, regional offices, in the field, or for home workers.

Creating and maintaining server logins and connections can be expensive and time consuming. It also opens the door to breaches. The creation and automatic distribution of ADFs extends the reach of BI, so more people can benefit from the analysis of ever increasing numbers and variety of data sources.

Mobile-friendly documents are useful to traveling sales or field support personnel who visit customers and may not have reliable access to online connections. WebFOCUS can deliver iPad-friendly customer analysis documents that are e-mailable, disconnected, and secure.

Pictured is a healthcare-related ADF with two tabs/pages that incorporate a summary patient analysis via several chart types, and a tabular readmission risk report incorporating predictive analytics.

A CEO can forward a performance overview of the last quarter to every employee, along with both quantitative data and qualitative comments on each metric and indicator.

Operational workers can receive custom reports and performance dashboards relating to their area of responsibility. Organizations employing Hadoop can package big data subsets for line managers to analyze, looking for new ways to boost operational performance.
How to Create In-Document Analytics

ADFs can be created in several ways. There are two WebFOCUS authoring tools: The IT/BI developer-oriented App Studio and the business user-oriented InfoAssist+. They both enable the design of documents that incorporate multiple tabs/pages with custom views, reports, charts, and dashboards. In addition, end-user applications, such as InfoApps™, can be designed to offer outputting of views in several formats, including ADF. A non-technical user can create ADFs in a matter of seconds, promoting analytical collaboration and accelerating time-to-business value.

A non-technical business user can create a report in a matter of minutes in InfoAssist+, sourced from potentially complex enterprise data, save as an ADF, and then e-mail to a colleague who can manipulate that data without ever accessing a server.

A Range of Digital Self-Service Benefits

In-Document Analytics is a strategy that can extend the value and reach of your data, and deliver a range of digital self-service benefits, both inside and outside the firewall, and across many industries and recipient types.

Benefits range from differentiated customer offerings, increased customer loyalty and retention, cost savings, additional revenue streams, and superior analytics adoption and metrics-driven decision-making.

The consumerization of analytics is here, and with no license fees for recipients, In-Document Analytics now offers a convenient, user-friendly and economical way to deliver analytics to any and all stakeholders.