



# Reporting, BI, Document Generation & Dashboards

A Brief Guide: What You Need to Know About Reporting, BI,  
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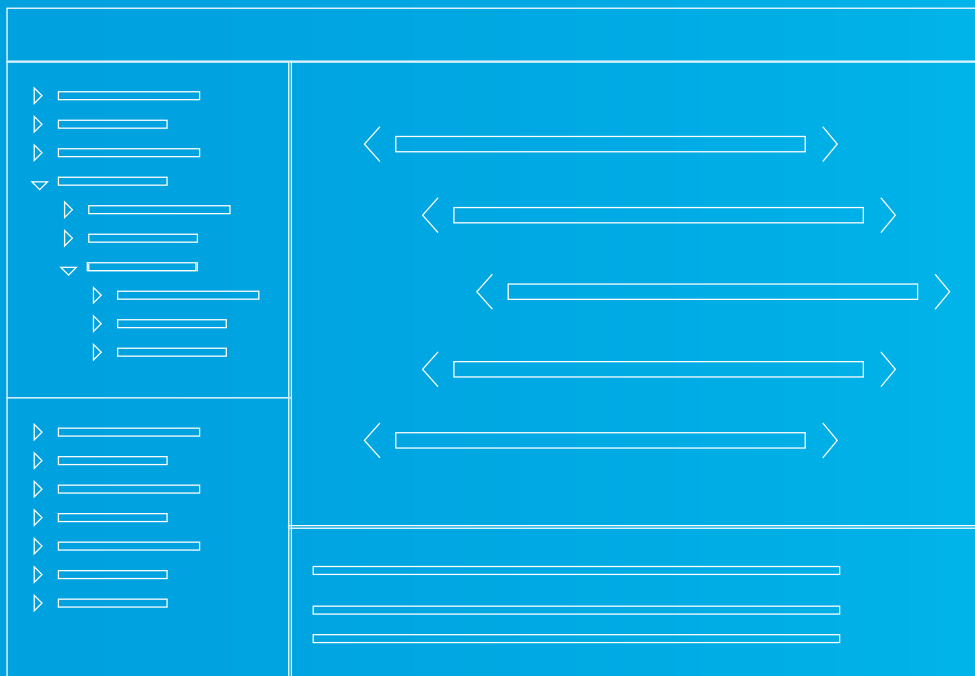
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## Reporting, BI, Document Generation, and Dashboards

### A Brief Guide: What You Need to Know About Reporting, BI, Document Generation, and Dashboards

The evolution of enterprise-wide reporting tools has led to an extensive range of software and platforms that are often confusing when it comes to realizing what-is-what and how they work. In fact, end users get confused with the terminologies they see online when looking for a solution to address their unique reporting or analysis needs. Here we define these terms and help you know the purpose of these tools at a glance and how you can take advantage of them, so read on.

**Read on to Know Why →**



## What is Business Intelligence (BI)?

The words Business Intelligence (BI) stand for applications, technologies, and practices that are used to collect, integrate, analyze, and present business information. The target of BI in business is to help the administration make better decisions by seeing the big picture. This system is highly reliant on data and is often interchanged with briefing books, information systems, and query or report tools. Business Intelligence is important in business for a reason. It provides the past, current, and predictive views of the operations of a business which in turn are used to determine the future of the company. The whole process often relies on the gathered data, and at times through operational data. The BI apps handle production, sales, and the financials among other sources that help a company generate data to manage the performance of a business. A similar gathering of information about other business in the same market can also happen – which is known as benchmarking. With BI systems in place, it is possible for an organization to encourage self-service or DIY reports. In this case, the end-user is able to access the information of the organization without being tech-savvy.

## **What is Reporting?**

Reporting is presenting data in tables, charts, and other visualization forms so that the end-user can use it to get vital information to make decisions. To get the reports, one should use reporting tools to extract and present this data.

You can present reports in various ways depending on the tool in use. The most common ones are static and interactive reports. The static reports are intended for the recipient to view, analyze, and use it in the way they should without altering anything. And interactive reports are given so that the one who receives them can navigate, filter, sort, view, and make changes as needed. In a nutshell, reporting is the initial step in the processing of data in view of attaining specific goals when it reaches the intended person. Actionable information you get from the data insights can greatly help decision makers to decide on the best course of action for the business. By use of visualization components, the reporting technology can present information in an accurate and usable way to the end-users.

## **What is Ad-Hoc Reporting?**

Ad-hoc reporting is a name for creating reports in a creative manner in real time by users, instead of pre-designing it by the use of templates. In addition to this description, ad-hoc reporting describes one-time tailor-made reports that address a particular objective or question of a business. In basic terms, ad hoc reporting is creating your own reports. A user can leverage guides or tools with intuitive features that can help them tackle various reporting aspects. At times, tools that perform ad-hoc reporting can entail visual representation, charts, graphs, and many others.



## **What are Dashboards?**

Dashboards are single screens that contain essential information placed in panels. Compared to a vehicle's dashboard, these ones contain a unified view of data that is essential to move the business forward. A useful dashboard contains a variety and flexible set of panels including charts, graphs, performance indicators, personal reminders, maps, news, currency quotes, time, and any other item that you can display on the web. Dashboards are important to any business owner because they transform the overwhelming data and make it easy to interpret information, thus simplifying the process of decision making. The key benefit of dashboards is that they provide a quick and convenient access to the performance metrics of the business, making it easy to reach decisions. In addition to this, you access data whenever you want, identify any errors, inefficiencies, and respond accordingly. As part of BI, you will need to use dashboards in a clever way to ensure you take advantage of every opportunity the data presents. So, you will require competitive goals, often look at the key performance indicator, act in response to the data, and let every decision maker in the company have access to it. By the end of the day, you want a dashboard that is easy to understand for your employees so that it can impact your company positively.

## **What is Document Generation?**

Document generation is the automatic creation of documents according to set templates. In this case, software for the generation is used to come up with documents that entail a combination of static content (with sections that do not change) and dynamic content which is tailor-made for a specific recipient of the generated document. The document can be a simple form with the required data or a complicated one that provides several users with information across departments of a business. The generation of documents can either be in batch literally hundreds or thousands of identical documents at once or be transactional whereby only a single document for a specific user to be customized in a certain way. It is also common to hear the words document automation or document assembly in place of document generation depending on the industry where it is availed. It is commonly used in businesses such as HR, transport, legal, finance, health, government, defense, medical, education, logistics, and so on. The major reasons these firms use document generation is to comply with the laws or maintain their professionalism. Companies can have their own departments for document generation or even outsource this work to dedicated firms.

## **When Do You Need Reports and BI Dashboards?**

Most people tend to construe reports and BI dashboards to mean the same thing – which is wrong. While many find it difficult to interpret the two terms without confusion, it is easier to find their distinction by highlighting their disparities.

### **Enterprise Reporting**

Also known as production reporting, enterprise reporting is a way of distributing reports in a company in order to enable users to perform their duties. In conventional tools, reporting entails tables, texts, and at times visuals. They are usually produced automatically because of their regular use.

The arrangement of reports happens by placing elements on a page through the pagination process. This process is able to create an intricate display of printed reports or through web channels. This option is quite complex and will require you to have technical abilities because they are normally long sometimes and come in many pages.

### **Dashboards**

On the other hand, dashboards avail only information that is necessary to attain particular business goals at a glance. The design for these dashboards is for decision-making purposes by presenting all the required data on a single screen and lead to making decisions without tiring the eye.

Therefore, a dashboard will contain more visual features that are interactive. The intention behind the dashboards is to make it easy for decision-makers to arrive at a solution rather than just provide information. Because of their use, they contain essential performance indicators.

In general, reports are static while the dashboards are interactive, but not always so. There are non-tabular reports with data labels, data images, maps, and other visual report elements.

### **Ad-Hoc Reporting**

Ad-hoc reporting is different from enterprise reporting and dashboards. Its design is for special purposes, often without a prior plan. You will require ad-hoc reporting in situations where there is a need for self-service. The user can create solutions of their own by dragging and dropping whatever data they want in the report.

### **Document Generation**

Document generation can be used by organizations to create forms like letters and contracts. They can be created in batches or as customized documents meant for a specific group or individual.

## **Which One Do I Use?**

There is usually room for every kind of reporting. While ad-hoc reporting is for personal use, dashboards and enterprise reporting helps in delivering information to executives and the specific end-users of a business. They are usually easy to interpret for the end users to find what they need fast and report back. Viewing dashboards are much easier before delving into the much detailed reports for most people. However, by the end of the day, it will depend on the enterprise or the individual requirements at hand.

## **When Do You Need a Distinct Tool for Each?**

Often, Business Intelligence (BI) and reporting are interchangeably used to mean the same thing, but it is far from the truth! The distinction between BI and reporting goes beyond data correlation and charts and at some point, you will need a distinct tool for each of them to address your specific business needs.

To be clear on what we are talking about, here is a brief description that makes the two distinct. Business Intelligence (BI) is an indicator of why there is the occurrence of events and how to improve the performance of a business in the future. It usually uses multiple data sources and helps you discover the relationship between data that you might not be aware of to help you explore new opportunities in the industry. For instance, through analysis of the performance of shipping, consumer satisfaction polls, and the variations in demand, you will get information into how and when to increase the shipping staff to enhance how the business competes with others, improve customer relations, and maximize profitability. On the other hand, reporting is showing the status of the business now and the events of the past. In this situation, the reports will utilize specific formats during a particular period of time to help the person to better know how they performed depending on the results. Reports can also determine what various departments did in a specific time frame.

For example, a daily report that shows a certain number of consumer orders are pending will inform the packaging department to package specific products and place them on the outgoing list. The shipping department will need the same information to deploy their staff to head to various locations and submit the orders of customers. Every department in that company will act accordingly to ensure the business meets its goals.

So, if you are looking for high-quality reports and document generation that you can always rely on and make it a breeze, then you need a distinct tool that addresses it.

## Why Windward?

You will find literally hundreds of reporting software in the market – however, only a few of them can offer smart solutions that are downright impressive like Windward does.

Although Windward doesn't deal with BI or dashboards, it is the best breed for reporting and document generation.

The good news is Windward's reporting engine can be easily integrated within your existing applications. With its user-friendly report designer and proactive report engine, you can create reports in quick time and in a wide range of formats. No wonder, enterprises all over the globe are increasingly relying on Windward's docgen and reporting software.

Besides, Windward makes it a cinch to connect to a wide range of data sources and with just a few lines of code, you are good to go. It greatly decreases the time needed to design reports as you can have the report designer as an MS Office add-in. So you can start creating reports and documents in the all-familiar MS Office platform at a fraction of the cost like a Pro!

So embrace the fast and easily adaptable Windward's exclusive reporting and document generation engine to save time and have an edge over your competition.

Visit [www.windwardstudios.com](http://www.windwardstudios.com) for more information or [START A FREE TRIAL →](#)