

REPORTING 101



BROUGHT TO YOU BY **WINDWARD**

Reporting, Analytics, Business Intelligence (BI) and Data Visualization Software Explained

Got Data?

You've got company data—lots of it. And you want to get it from point A (your database or other data source) to point B (an output format) so that your customers can use it. Clearly you need some sort of software application, but what type?

Pop quiz: Which type of app should you use to present your data?

- Reporting software
- Document Generation software
- Business Intelligence software
- Analytics software
- Some combination of the above
- None of the above

Answer: It depends.

That's right; the application you should use depends upon your situation *and* how you define the above terms.

Windward has been in the reporting software industry for more than a dozen years, and along the way we've seen many different ideas of what "reporting," "analytics," "business intelligence" and other related terms mean.

We wrote this primer to bring clarity to this topic and to help you understand what sort of tool will best benefit your company.



To get data from a data source and into a useful document, you need a some type of software program—but which one?

What is Reporting Software?

Search online for “reporting software” and you’re faced with an array of results, some of which seemingly have nothing to do with one another. So let’s start by presenting *our* definition:

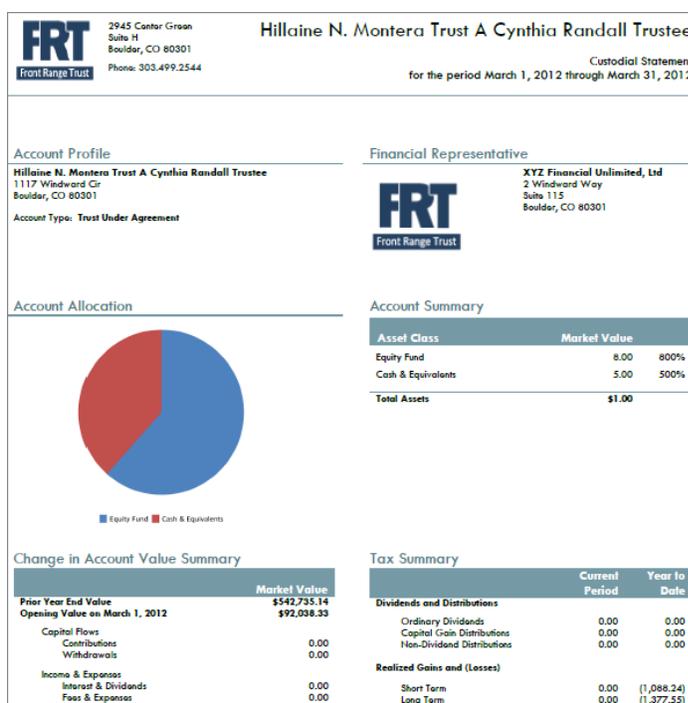
Reporting Software: An application that pulls data from a data source (cloud, database, XML file, etc.) and displays that data so that users can easily make sense of it.

You use reporting software to create a template. The template has fixed elements along with placeholders for data, or what Windward calls **tags**. When you run the report, the template populates with the most up-to-date information stored in your data source.

Invoices, inventory tallies, financial statements, product usage tables and more are all types of reports generated by reporting software. For example, CodeObjects, an insurance process management software company, provides customers automation services throughout the entire insurance application process. [They use reporting software to generate reports that prove client compliance with state and federal regulations.](#)

Lastly, these are the main reporting sub-categories as we define them:

1. **Embedded reporting.** Reporting functionality that is embedded into your company’s software application.
2. **Enterprise reporting.** Stand-alone software that you use to generate reports.
3. **Mobile reporting.** Reporting components that embed into your mobile application.
4. **Web-based reporting.** The act of generating reports from a Web interface.



Reporting software was used to create this financial statement.

The Line Blurs: How Document Generation and Mail Merge Resemble Reporting

Like reporting, **document generation (docgen)** is an automated way of producing a document. You create a template and when you generate the output, specific information populates the template. For a detailed look at docgen, we recommend you download our white paper “[What’s Up, Doc? The Definitive Guide to Document Generation.](#)”

From our perspective, the difference between reporting software and document generation software is subtle—our customers use our solution for both—and **whether you define what you do as reporting or docgen depends upon whether you consider the output a document or a report.**

Mail merge is also an automated way to produce documents. Mail merge originally was used in the computer industry as a term referring to the process of taking contact information (name, address, phone number, etc.) from a data source and automatically inserting that data into letters, mailing labels and other documents related to personalized mail.

The term is both evolving and waning in usage; it is now used to mean turning any template into a personalized document, such as a monthly bank statement.

Reporting Analytics and Business Intelligence (BI) Dashboards

Now our topic gets even murkier. **Reporting analytics** and **business intelligence** applications are very different, both from each other and from reporting software, **but we find that many companies use all three terms interchangeably. This has led to confusion** with customers during initial discussions about what solutions would work best for them.



If your output has high-end charting and graphing, you most likely are using a business intelligence tool.

Based on how we've seen the market evolve over the past decade, here's how we define these terms:

Reporting analytics relies on algorithms to statistically determine relationships among various data points. Reporting analytics software uses scientific formulas to find groupings or trends, and it allows for predictive forecasting based on the data at hand.

Reporting can be a small part of analytics as it could be used to retrieve the data for these formulas, but reporting software does not do the analytics.

Business Intelligence (BI) is a super set of analytics. It is the practice of using all the formulas and outputs analytics comes up with and putting that information into digestible terms.

Forrester Research calls BI ["a set of methodologies, processes, architectures, and technologies that leverage the output of information management processes for analysis, reporting, performance management, and information delivery."](#)

Most of the time, BI is referring to **data visualization** (high-end charting and graphing) or high-end data dashboards, which reporting software does not typically handle.

So, Which Tool Do You Need?

Still wondering what's best way to get your data from Point A to Point B?

As we see it, your choice boils down to one of these three situations:

1. If you want to create a template to present data and that template will be run again and again for different customers, groups of data, etc., **then you need reporting software.**
2. If you want to create a template to present data and that template will be run again and again for different data—and the output is some sort of letter, contract or other document—**then you need docgen software.**
3. If you want to manipulate raw data with variable values to expose trends and patterns, especially through visualization, **then you need an analytics or BI tool.**

If you answered #1 or #2 above, the white paper [Your Complete Checklist for Evaluating Reporting Software](#) will get you started by showing you the questions to ask when considering a reporting or docgen solution.

The Windward Difference

Are you in need of reporting or document generation software? Then we invite you to look at the Windward solution. We believe that reporting should be simple and that free-form template design is a must, because you deserve attractive, informative and impressive reports.

Windward provides a unique experience using Microsoft Office to format and edit report templates. Behind the scenes, Windward's sophisticated engine pulls data from multiple sources and merges that data into your reports, creating a fast and hassle-free experience that can make generating reports fun.

Windward delivers a solution that allows IT professionals to create basic templates and business users to customize those templates and create variations to meet their document generation needs. For details about the technology and how it has been successfully deployed, please visit the [Windward Studios website for an overview video and free trial.](#)

About Windward

For businesses in document-intensive industries, Windward Studios is the document generation and reporting software company that empowers business professionals to create beautiful, professional reports.

Windward OEM and enterprise customers span over 70 countries and all industries, including financial services, insurance, energy, healthcare, HR and technology. We've been delighting customers since 2004.

Our primary products are AutoTag, a design tool that creates custom templates with Microsoft Office, and a Java or .NET engine that connects to virtually any data source.

Windward delivers exceptional support, training, and documentation, with a 98% satisfaction rating from our customers. We're a Microsoft Gold and an Oracle Gold partner.

Improve Your Software Product's Reporting and Document Generation

[Download a free trial](#) of Windward's products or [schedule a live demonstration.](#)