

*Any User. Any Data. Any Deployment.*

Business  
White Paper



## Actuate Adaptive Reports

Most employees, customers and partners require information more flexible than fixed-format reports. Users must be able to request and consume information easily, without the complexity of ad hoc query tools or report writers. Adaptive Reports are ideal for such users, empowering them to customize Actuate report content, structure and formatting, using a powerful web interface.

With Adaptive Reports, users modify predefined report templates to meet their individual needs and create new reports using a web-based wizard. In doing so, users fulfill most of their own requirements for information without having to learn report-development tools.

Adaptive Reports provide a customized alternative to a static report or an ad hoc Actuate Query.

## The Need to Empower Users

In the new millennium, IT groups must be more responsive than ever to user information needs, yet maintain tight control of their organizations' system and information assets.

By selecting the Actuate Information Application Platform, information managers can make high-quality, personalized information available in a variety of actionable forms that users can access anytime and anywhere, with full security measures.

## What Are Adaptive Reports?

Actuate Adaptive Reports empower users to customize the look and feel of Actuate report content they receive. Users accomplish this by using a powerful web interface for customizing report content and structure and for formatting custom software developed during a professional services engagement that is part of the Actuate Adaptive Reports Package. Adaptive Reports can be set up so that the user first sees a report and can modify it, rather than first encountering a reporting tool or wizard. This clears away a front-end usability hurdle common to self-service reporting solutions.

With Adaptive Reports, users can modify predefined report templates to meet their individual needs or create new reports using a web-based wizard. In doing so, users can fulfill their own requirements for information without having to learn cumbersome report-development software.

## Why Use Adaptive Reports?

By using Actuate Adaptive Reports, IT groups can:

- Empower end users with self-service solutions that fulfill ad hoc report requests
- Enable users to request report modifications without tying up IT staff resources
- Control costs and comply with budgets
- Create reusable Information Applications that meet user needs quickly
- Maintain control of information, application and system assets

## Wide Variety of Adaptive Reports

Any standard report can be implemented as an Actuate Adaptive Report, including:

- *Statements for customers, resellers and suppliers*
- *HR benefits statements for employees*
- *Budgeting and expense summaries for cost-center managers*
- *Key indicator reports for divisional managers, financial analysts and executives*
- *Customer profiles, call reports and forecasts for salespeople and managers*
- *Any report that can be personalized to a user's specific requirements*

In all these examples, users receive personalized content that displays just the information they want to see, in the language and format that works best for them. Moreover, Actuate can deliver these reports via email, web pages, information portals, Excel spreadsheets, Acrobat PDF files, printed reports, embeddable objects and executive dashboards.

## Adaptive Reports Empower Users

Information Applications developed using the Adaptive Reports method empower users so they can use their web browsers to personalize reports in real time as they:

- *Select data to display*
- *Arrange rows and columns*
- *Add charts and graphs*
- *Select colors and fonts*
- *Sort and filter information*
- *Select output file formats*
- *Specify delivery methods*

Adaptive Reports wizards guide users through creating reports from scratch or modifying existing reports to meet their specific requirements.

### Adaptive Reports Maintain IT Controls

Actuate Adaptive Reports meet users' information needs without forcing IT groups to give up the control they require to protect their organizations' information assets. For example, using Adaptive Reports, IT groups can:

- Avoid ad hoc user requests for reports that will be used only once
- Reduce the number of user requests for follow-on application enhancements
- Add customized reporting based on industry standards into their standard technology stacks
- Deliver reports that users can consume immediately, without requiring special client software, desktop upgrades or expensive user training
- Eliminate poorly designed data requests and queries that overwhelm and bog down database servers
- Fulfill user information requests using highly scalable and available Actuate Server clusters
- Standardize on one Information Application technology to fulfill user information needs

By providing all these benefits, Actuate Adaptive Reports overcome the traditional trade-offs that IT must make when they allow users to submit information requests directly to application servers.

### Supporting All Actuate Reporting Features

In a matter of weeks, the Actuate e.Services team typically develops and deploys five ad hoc user reports. The delivered reports can include any or all of the following features:

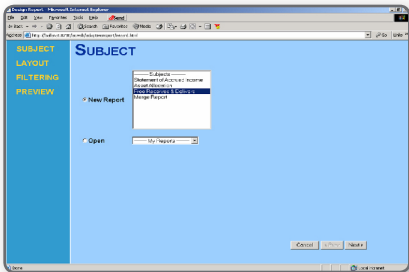
**Customized reports.** Users can personalize the creation and presentation of content to meet their individual needs.

**Interactive content.** Adaptive Reports take full advantage of all standard Actuate features such as tables of contents, report searching, report navigation, exporting, etc.

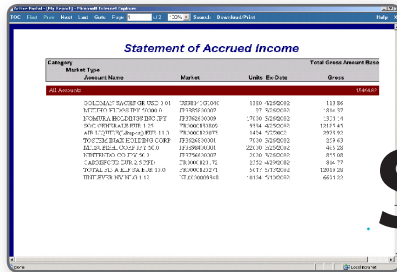
**Saved preferences.** Users can save their preferences on the Actuate Server so they can reuse them later.

**Seamless integration.** The Adaptive Reports web wizard and content integrates seamlessly with the look and feel of Actuate's security and Active Portal, as well as existing portal and security initiatives of customer organizations.

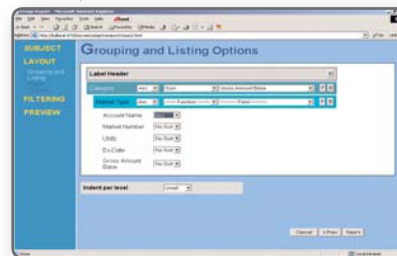
**Extensible framework.** Adaptive Reports is based on Actuate's object-oriented design framework for building reusable and extensible components that support easy customization.



With Actuate Adaptive Reports, users can choose existing templates...



...and run predefined reports...



...or change the colors, charts, columns, filters, currencies, totals and output format of existing templates...



...to create reports that meet their specific needs.

**Future-proof upgradability.** Adaptive reports are based on standard Actuate technology, so they are completely upgradable to future releases of the Actuate platform.

### Using Adaptive Reports Methodology

The Adaptive Reports Package features a comprehensive, flexible methodology designed to ensure success in deploying Actuate Adaptive Reports. Engagement steps include:

- *Assessments of required user experience*
- *Identification of information requirements*
- *Architecture review*
- *Data design*
- *Application framework development*
- *Application testing*
- *Documentation*

Before starting Adaptive Reports e.Services engagements, Actuate teams work with customers to identify the following information:

**Information delivery requirements.** The Adaptive Reports must meet both organizational and user needs for creating, managing and distributing reports.

**Infrastructure profiles.** The frameworks must support relevant hardware platforms, operating systems, database servers, application servers, information technology standards and methodologies.

**Project resources.** The methodology and timetables must consider all people that will be involved in the engagement, such as developers and business analysts, as well as system, database and application administrators.

**Customizations.** The framework must be able to handle required custom implementations, including SOAP APIs and Actuate Active Portal customizations.

**Security integration.** The Adaptive Reports framework must integrate with existing security implementations, including Open Security, Active Portal Security Extension (APSE) and Report Server Security Extension (RSSE).

By having all of this information before commencing the engagement, the Actuate e.Services project manager can select appropriate resources to meet customers' needs. In addition, the Actuate e.Services team can create report frameworks designed to meet both functionality and performance requirements. Using this approach, the frameworks handle a wide variety of reports and avoid the headaches and expenses associated with unmanageable queries and report modifications.

### Dependable, Self-Service Solutions

Adaptive Reports are the answer to a wide range of Information Applications in which users need flexible and personalized content in easy-to-use forms. They are self-service solutions that not only give business people the information they need quickly and easily, but also avoid uncontrolled database access and reduce IT workload.

### For More Information

To learn more about how Actuate Adaptive Reports can empower users with the ability to meet their own information needs, contact Actuate today:

- *Visit Actuate e.Services on the web at <http://www.actuate.com/services/eservices/>.*
- *View the self-guided demo at <http://www.actuate.com/productdemo/>.*
- *Contact Actuate at 888-422-8828 or +1-650-837-2000 to schedule an online demo.*