



Business Intelligence Integration with Lotus Notes

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THE HUMAN DIMENSION OF TECHNOLOGY

Business Intelligence Integration with Lotus Notes

- The live integration of Business Intelligence reports and live Notes documents provides a more complete representation of the information fabric of an organization and a synergistic jump in combined business value
- In the past, the BI and Notes were used for different purposes, by different users, with minimal overlap and integration
- Sun & Son's Data Modeler for Notes now allows live Notes data to be integrated easily with BI reports, charts and analysis for a seamless view of organizational information and knowledge

Different Tools – Different Worlds – Business Intelligence

- Business Intelligence tools are optimized for working with highly structured data including numeric and date data types and short text-based identifiers
- BI tools excel at visualizing information in tabular and graphic formats, at slicing and dicing data for analysis, and for delivering meaningful results from data queries
- BI tools are optimized for high quality presentation, speedy query performance and powerful analytics
- BI tools tend to be most intensively used by managers, financial analysts and decision makers
- Report design is a specialized skill, and most business users work with predesigned reports

Different Tools – Different Worlds – Lotus Notes

- Lotus Notes is optimized for working with semi-structured and unstructured data and facilitates collaboration around shared documents
- The rich collaborative capabilities in Notes include messaging, threaded annotation and discussion, rich composite documents, file attachments, workflow and routing, and document-based security
- Notes is optimized for display and retrieval of document-based content, sharing, routing and full text search
- Organizations which have adopted Notes use it broadly for messaging, document management, and tracking and routing applications
- Notes applications are easy to build and tend to proliferate throughout the organization

Different Data – Different Insights

- The structured relational data for which Business Intelligence is optimized tends to consist of “old hard facts”
 - Structured data tends to answer the question “What happened”
- The semi-structured and unstructured data for which Notes is optimized is rich in contextual background and embedded knowledge
 - Unstructured data tends to answer the question “Why did it happen?”
- Notes workflow and routing capture the record of people involved, actions taken, and lessons learned
 - Workflow data tends to answer the questions “How did it happen?”, “Who was involved?”, and “What did we learn?”

The Intelligent Business System

- A complete “Intelligence” system for Business should include:
 - Powerful handling of structured data for a clear picture of business activities and results
 - Rich tools for visualization and analysis
 - The ability to drill down to a clearer view of the facts
 - The ability to drill down to the underlying causal factors behind what happened
 - The ability to drill down to the people, processes and expertise that made things happen
- By linking Lotus Notes with traditional Business Intelligence, we can achieve a new level of Intelligent Business
- Sun & Son’s Data Modeler tools make this happen

Drill Down to Rich Notes Content from BI Reports

Drill down to live Notes documents from structured BI reports

Work Items

Negrete Medical

AccountManager	Assigned To	Status	Notes Document Link	Date Due
Chris	Aaron Kieron	Assigned	Eliminate duplicate addresses from newsletter list	February 6, 2019
		In Progress	Ensure content is shown in left pane for all users	February 2, 2022
	April Witte	Assigned	Change background color to dark blue in section title	January 30, 2002
			Fix flicker in edit dialog	September 9, 2026
			Eliminate duplicate addresses from newsletter list	August 15, 2001
			Ensure content is shown in left pane for all users	September 24, 2014
			Display correct info in second column of By Author view	October 16, 2019
		In Progress	Fix flicker in edit dialog	June 24, 2020

Drill Down to Rich Notes Content from BI Reports ...

The screenshot shows a web-based form titled "Travel Authorization" with a toolbar at the top containing "Close", "Edit", "Finance for Review", and "Approve". The form fields are as follows:

Request Date:	03/15/2008	Req'd By:	Howard Carter
Traveler(s):	Howard Carter		
City(s):	Alexandria, Cairo, Khartoum		
Travel Dates:	03/20/2008 - 03/31/2008		
Purpose:	Catalog underground resources		
Total Cost:	\$8,110.00		
Justification:			
Priority:			
Budget Cat:			
Billable to:	100 %		

Below the form, there are sections for "Comments:", "Cost Worksheet:", "Approvals:", and "History:". Callouts point to specific features: "Workflow Routing" points to the "Approve" button; "Comments and Annotations" points to the "Comments:" section; "Attachments and rich content" points to the "Cost Worksheet:" section; and "Tracking History" points to the "History:" section.

Comments:

▶ **Cost Worksheet:**

▼ **Approvals:**

Next Action: Approval by Ravi Har Singh Khalsa

▼ **History:**

03/20/08 03:08 PM Entered by Ravi Har Singh Khalsa
03/20/08 03:08 PM Submitted by Ravi Har Singh Khalsa

Data Modeler Builds Live Links at the Metadata Level

Reservation

You would like to include:

Lotus Notes

Computed Element

Label: Link

Formula: "notes://" + "locrhs.sunandson.com" + "/" + @WebDbName + "/" + "\$All/" + @Text(@DocumentUniqueID) + "?OpenDocument"

Data Type: Text

Display Type: Link

Multi-value: Concatenate
 Separate Rows
 First Value

Build links to navigate in context to live Notes documents

Integration Scenarios

- Integrate Notes-based customer relationship management system with relational inventory and sales management to provide role-based composite applications for sales reps
- Integrate Notes-based software problem report tracking application with BI performance management system to allow real time drill down from scorecards to live tracking documents
- Build BI reports as an aggregative navigation system for data from multiple separate Notes databases
- Enrich reporting from ERP system to allow drill down to related Notes knowledgebase documents

Please contact us for more information

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