WEBINAR

Supercharge Your Report Broadcasting with Agentic AI & Multi-Platform Support

APOS

Today's Session – Key Topics

- Information Recipients - Internal & External
- Generation & Distribution of Reports
- Process Timing & Triggers
- Multi-Platform Broadcasting
- Agentic AI & Proactive Intelligence

- **Q&A** – see webinar console

APOS

Today's Presenters:

ALLAN PYM

ALAN GOLDING

Who is APOS?

- Formed in 1992
- Software solutions for BI & Analytics
  - Simplify, automate & extend
- Report publishing
- Data connectivity
- Platform management
- Strategic SDK development and consulting
- Hundreds of customers globally

HOUSEKEEPING

You will have access to the slides via email

You will get the recording within 24 hours

Download the handouts in the panel

Tell us how we did in the survey

APOS

Report Information Access

- Pull
- Push

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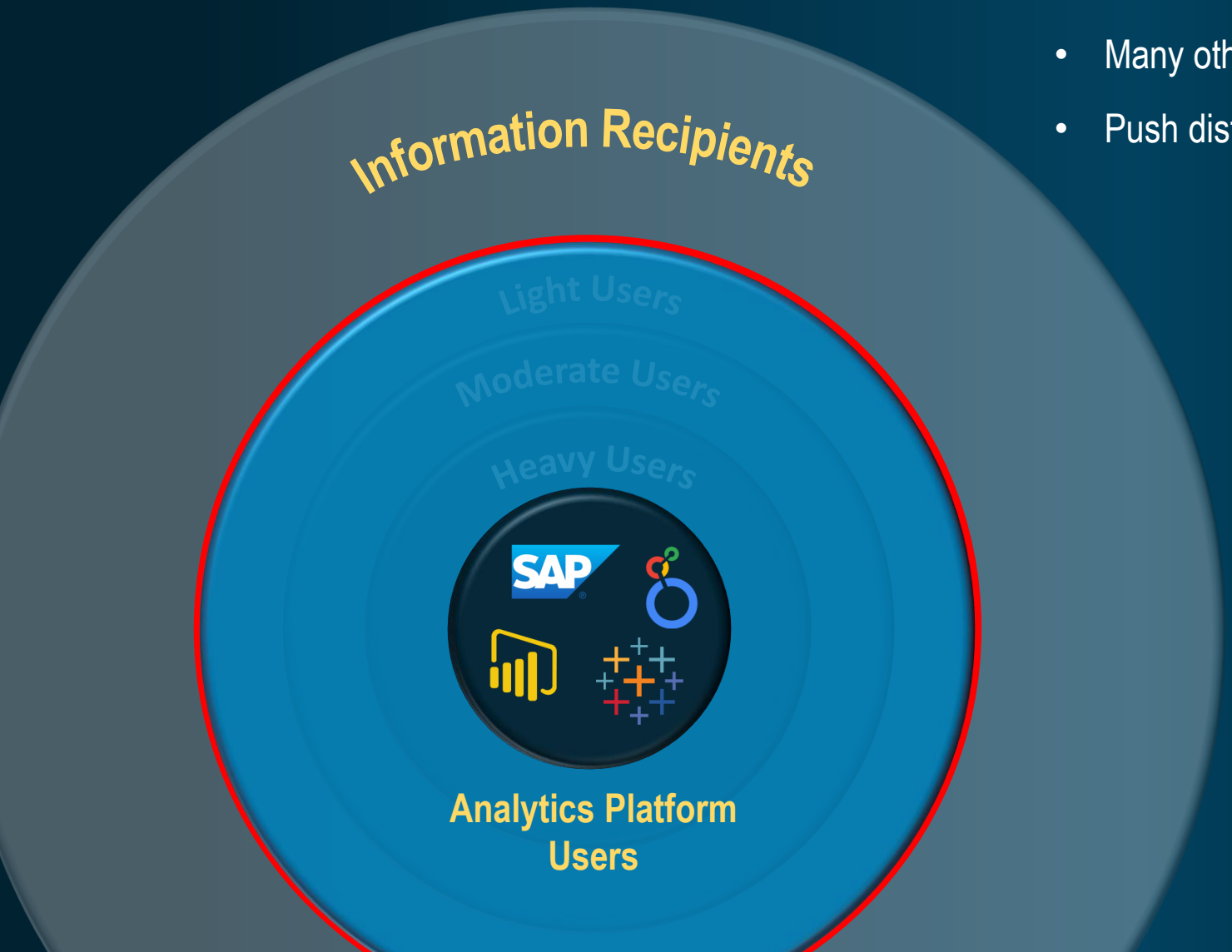
Report Information Access

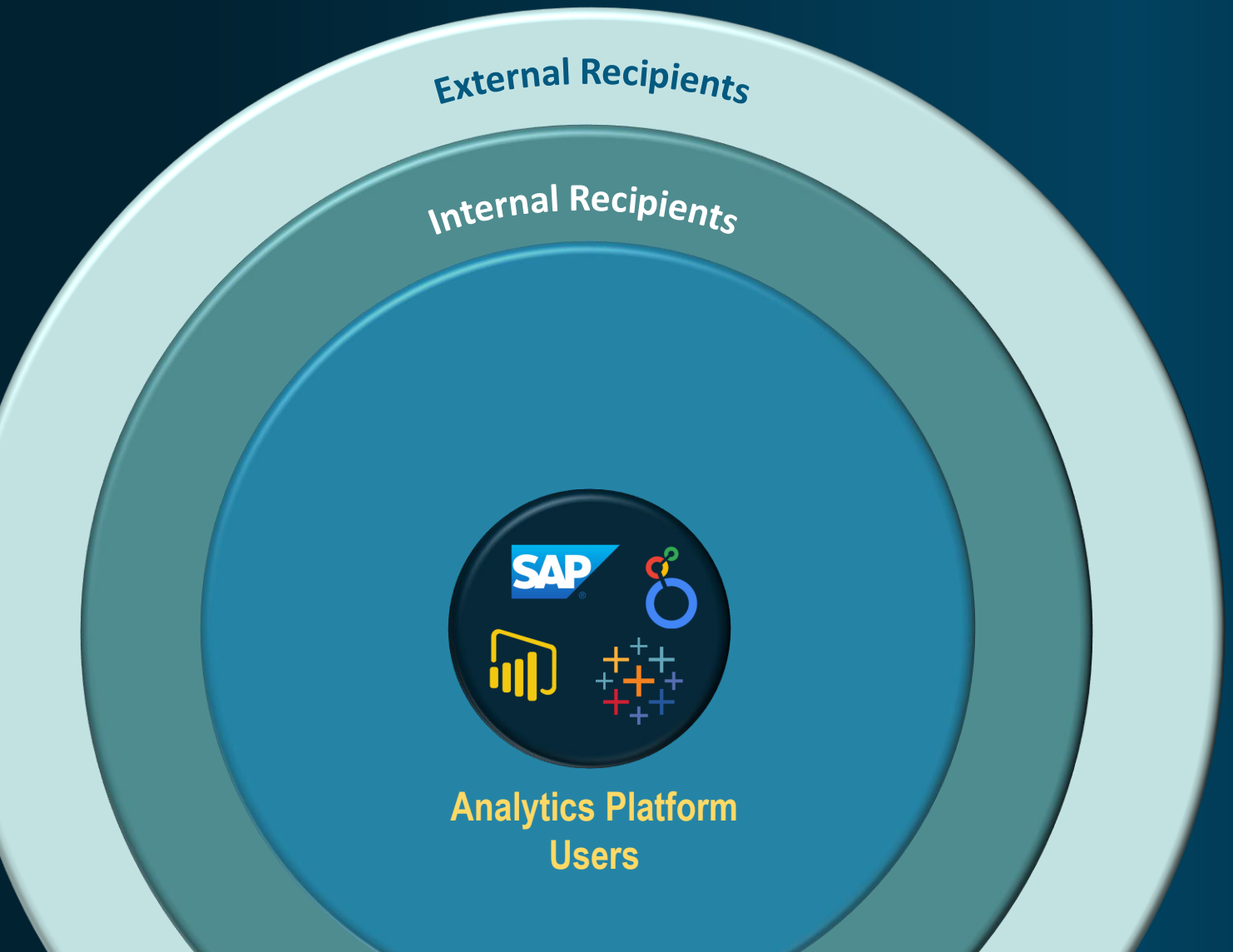


Information Recipients

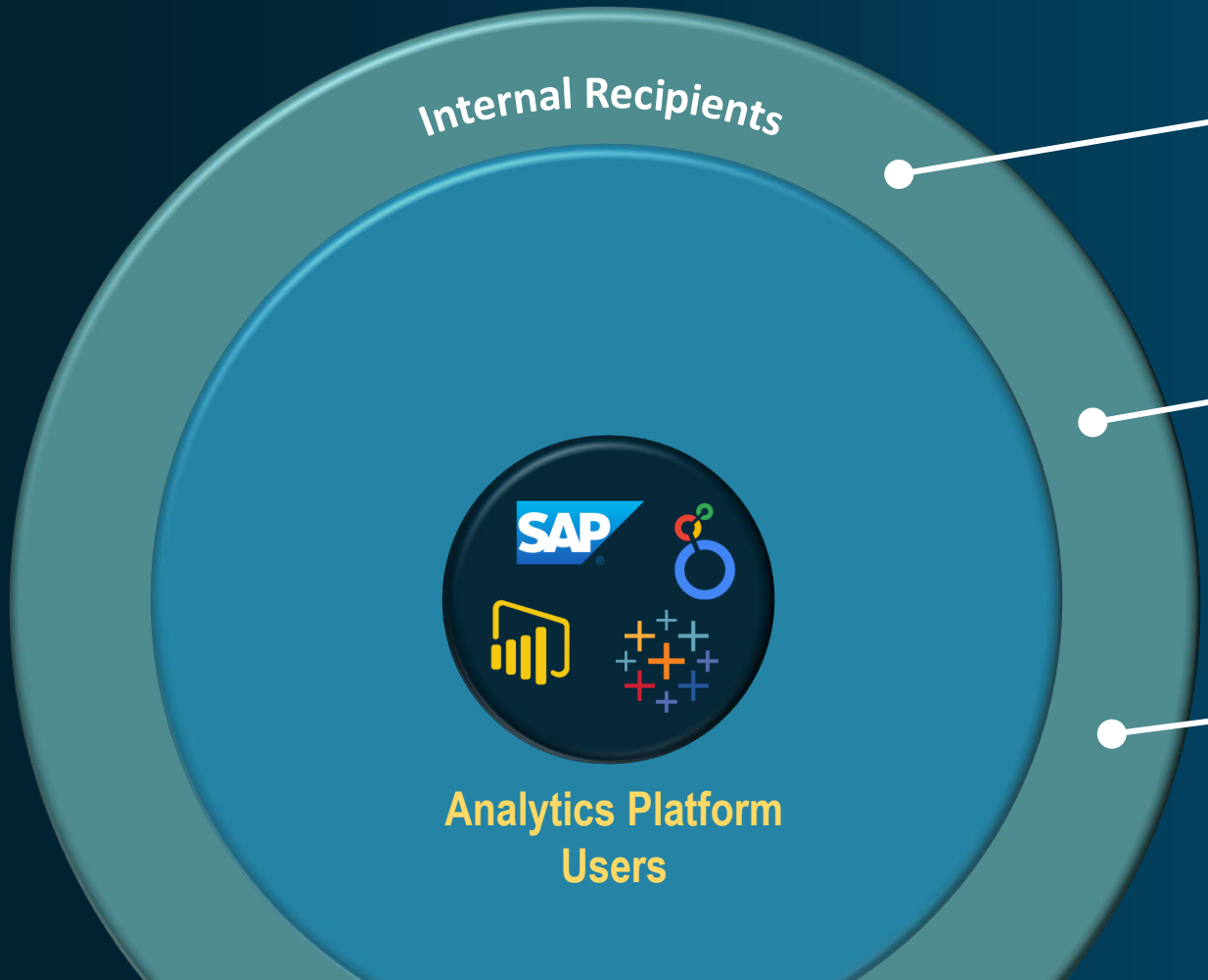
- Many other report needs exist beyond Analytics Platform Users
- Push distribution is required if there is no analytics platform access

Push Distribution - Analytics Platforms Limitations:

- No push capabilities
- Push only to platform users
- Volume limits
- Timing limits
- Format limits
- No dynamic processes


External Recipients
Internal Recipients
Analytics Platform Users

Report Distribution – Internal Recipients



Executive Board

Monthly profitability & performance reports

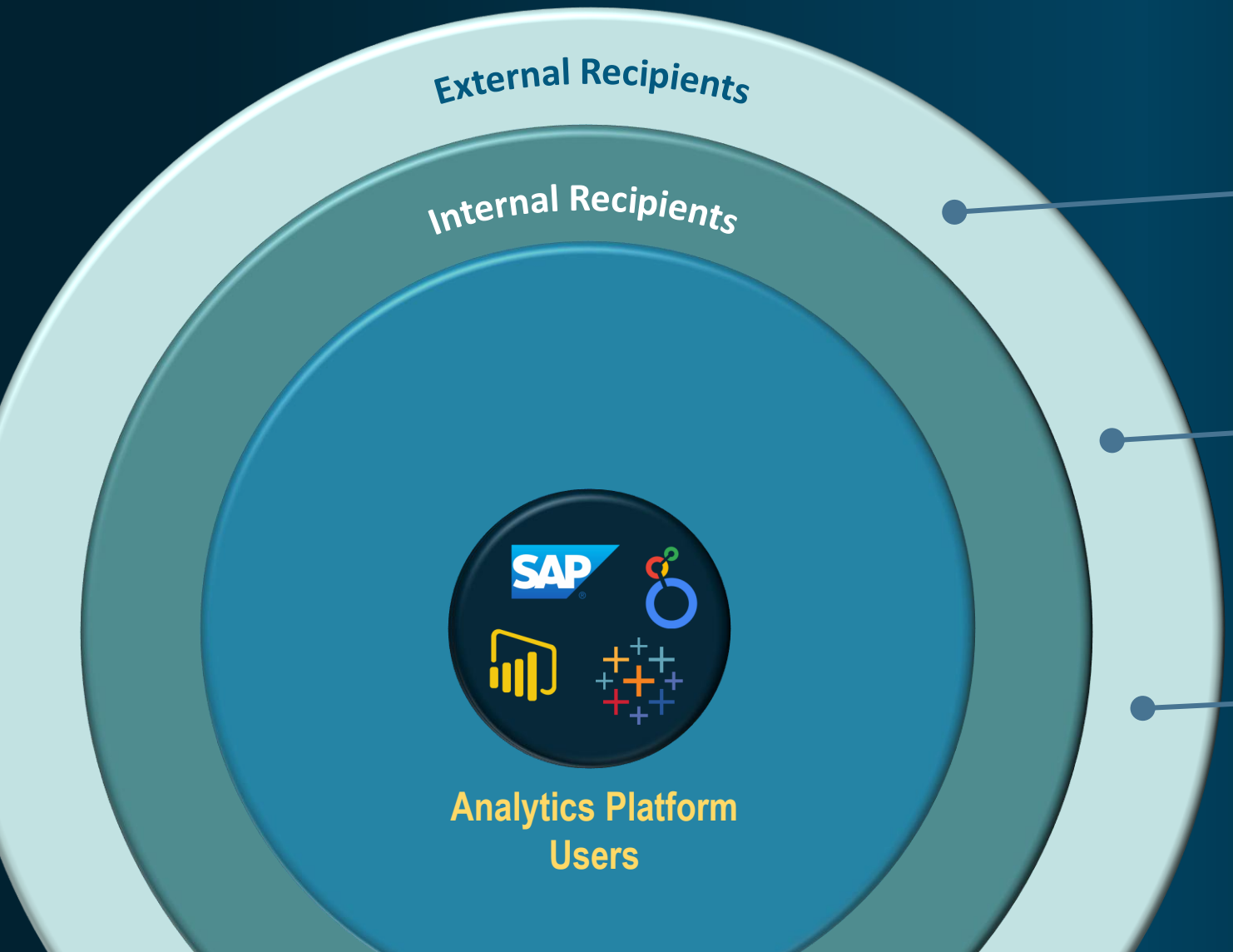
Store Managers

Daily sales report for each store manager

Field Managers

Weekly labor hours & crew utilization reports

Report Distribution – External Recipients



Suppliers

Quality, performance & defect reports

Customers

Weekly order shipment status reports

Regulators

State-level compliance & performance reports

Report Distribution – Platform User Recipients

External Recipients

Internal Recipients

Analytics Platform Users

Executives

Daily performance snapshot reports

Division Directors

Divisional P&L, forecast & variance reports

Sales Teams

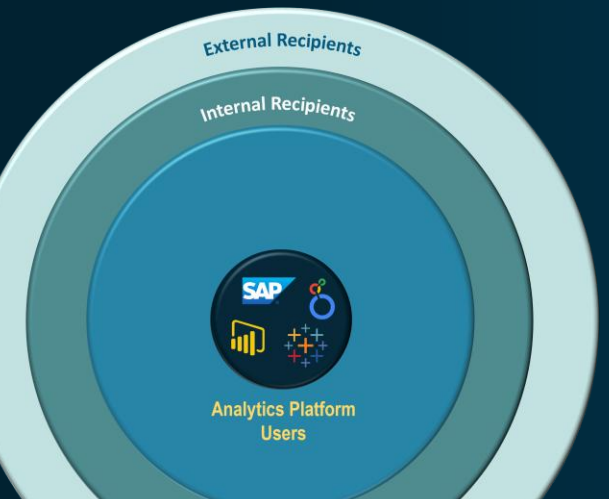
Daily order status & shipping reports

Common Report Distribution Factors

- **Unified Information Needs**

Teams or networks need to receive the same report information

  - Small strategic teams

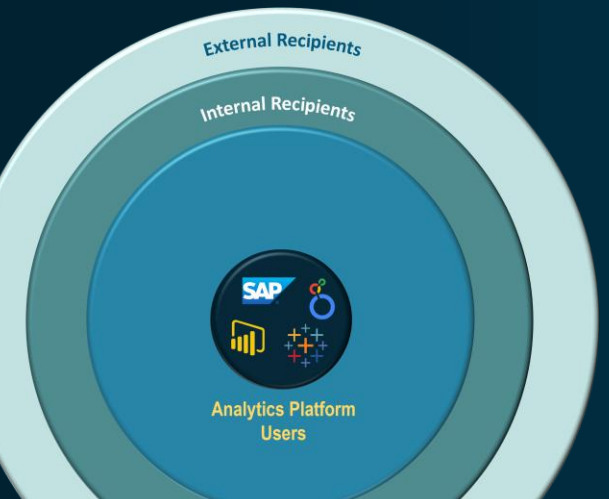


Common Report Distribution Factors

- **Unified Information Needs**

Teams or networks need to receive the same report information

- Small strategic teams
- Networks of many recipients



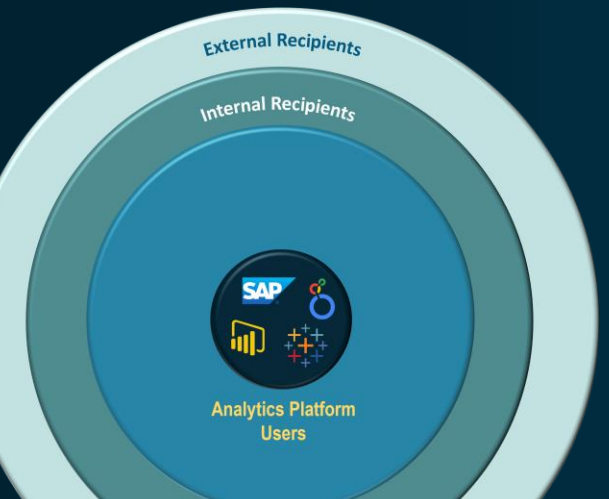
Example:
Branch Managers

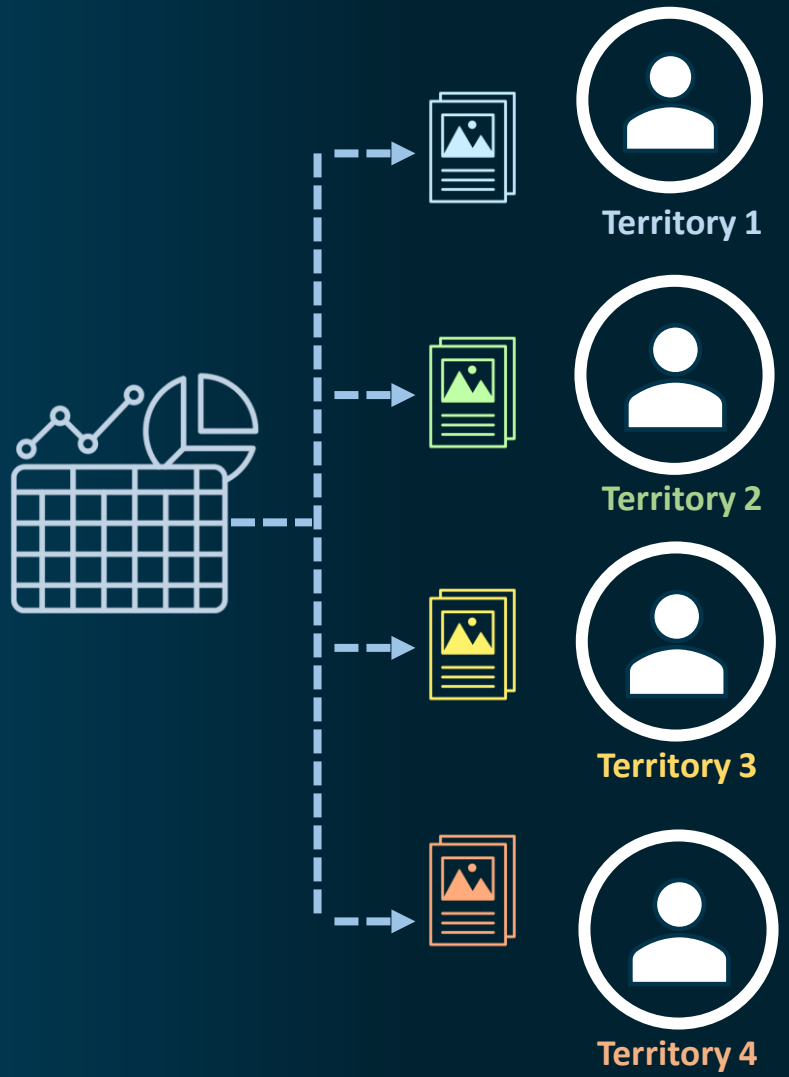
Common Report Distribution Factors

- Unified Information Needs
- **Personalized Reports**

Reports must be tailored to each recipient

- Secure Data Filtering - by profit center, region, customer etc.
- Distribution Destination – Email, Network, FTP, SharePoint, etc.
- Report Format – PDF, XLS, PPT

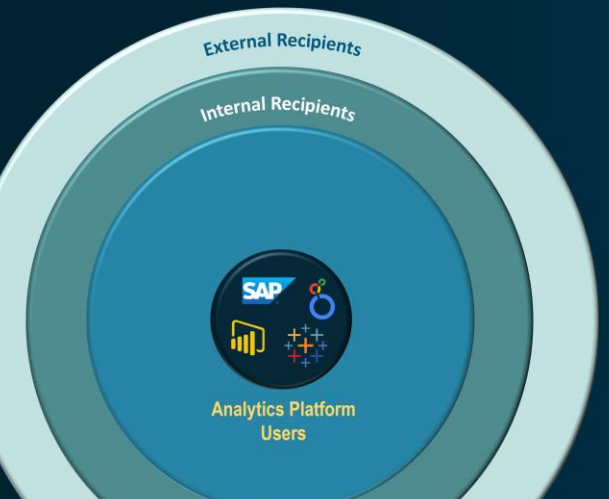




Common Report Distribution Factors

- Unified Information Needs
- Personalized Reports
- **Consistent & Predictable Cycles**

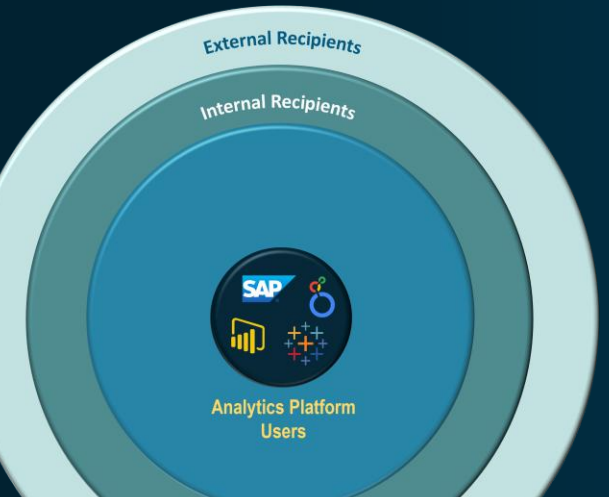
Report content and timing of information needs are often consistent and predictable – daily, weekly, monthly, quarterly



Common Report Distribution Factors

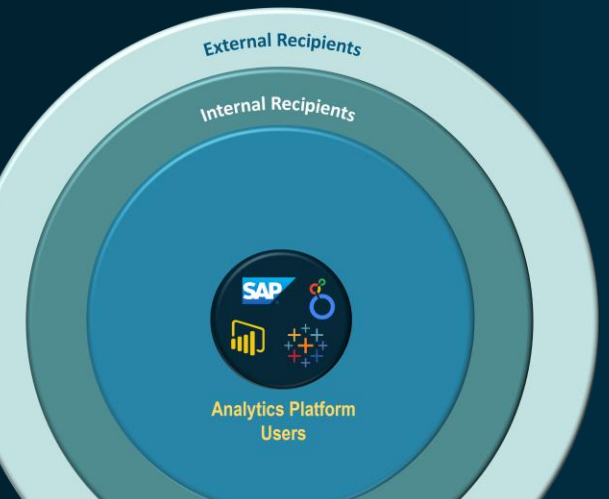
- Unified Information Needs
- Personalized Reports
- Consistent & Predictable Cycles

Automation is required to meet these requirements!



Automated Report Distribution Process

- Automated Report Generation – the right report content
- Automated Report Distribution – to the right people
- Automated Process Timing – at the right time



APOS Publisher for Cloud

APOS Publisher for Cloud is a software solution that automates the generation of personalized versions of reports, and then distributes the reports out to targeted users and locations.

The right information to the right people, in the right format, and at the right time.

"Report Bursting"
"Report Broadcasting"

Supported Platforms:

- SAP Analytics Cloud
- SAP Analysis for Office
- Power BI
- Tableau
- Google Looker

ALAN GOLDING

Solution Consulting Manager

APOS

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Supercharge your Report Broadcasting?

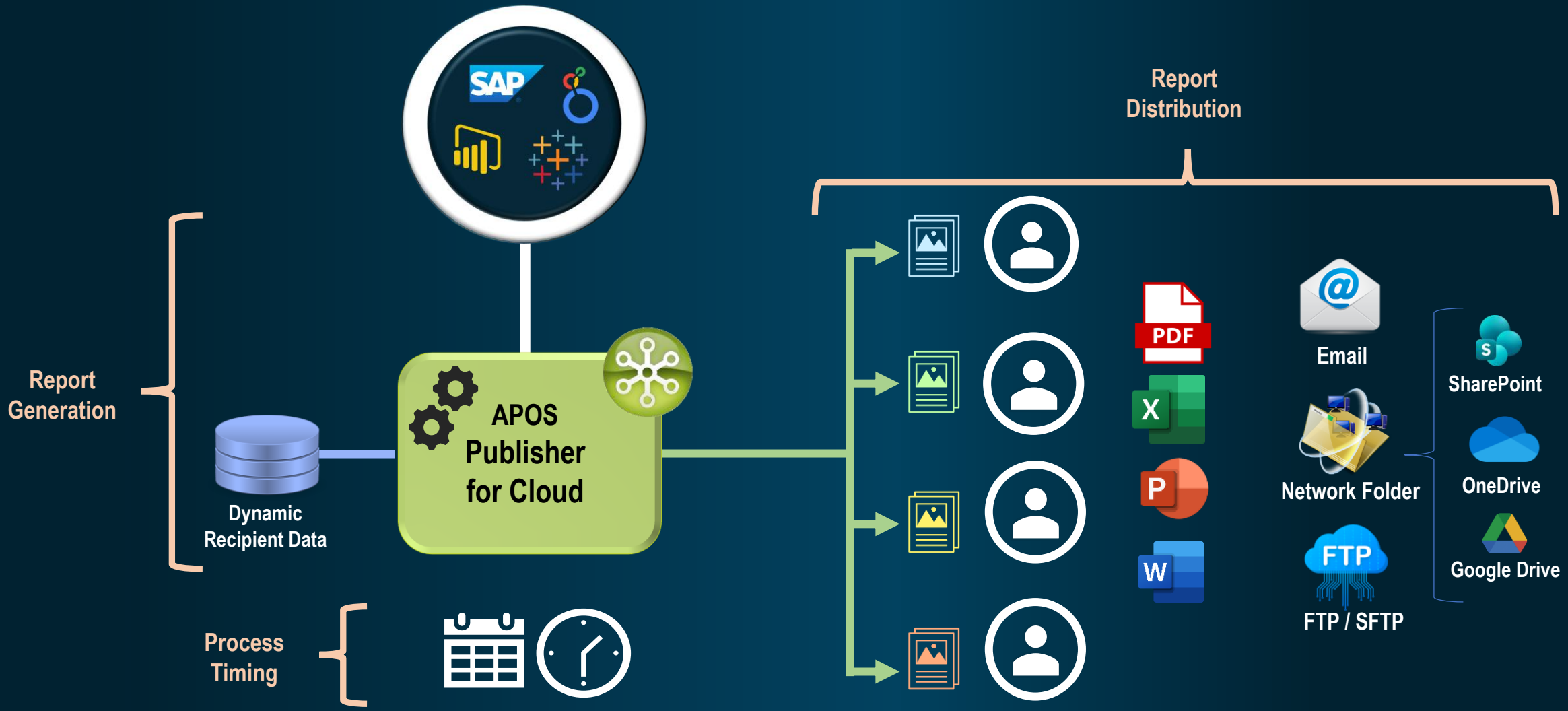
Multi–Platform Support

One solution for report bursting across several BI platforms

- Powerful new capabilities for these platforms
- Single solution deployment
- Common methodology
- Centralized management
- Unified governance

Poll question…

Automated Report Distribution Process



Report Generation

…the right information to the right people

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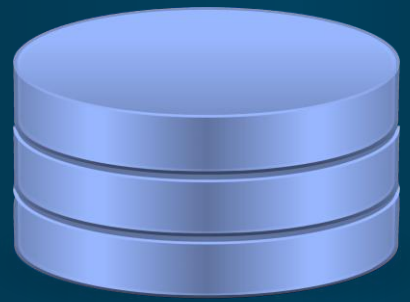
Dynamic Recipient Data

A data source provided by customer which contains values to drive dynamic report filtering and control report distribution.

Any ODBC / OLE DB data source
- Excel
- SQL Server, Oracle, etc.
- S/4HANA, Datasphere, BW, BW/4HANA



Dynamic Recipient Data

The Publisher for Cloud bursting definition creates the framework and rules for the broadcast.

The Dynamic Recipient Data drives the specific values of the broadcast.

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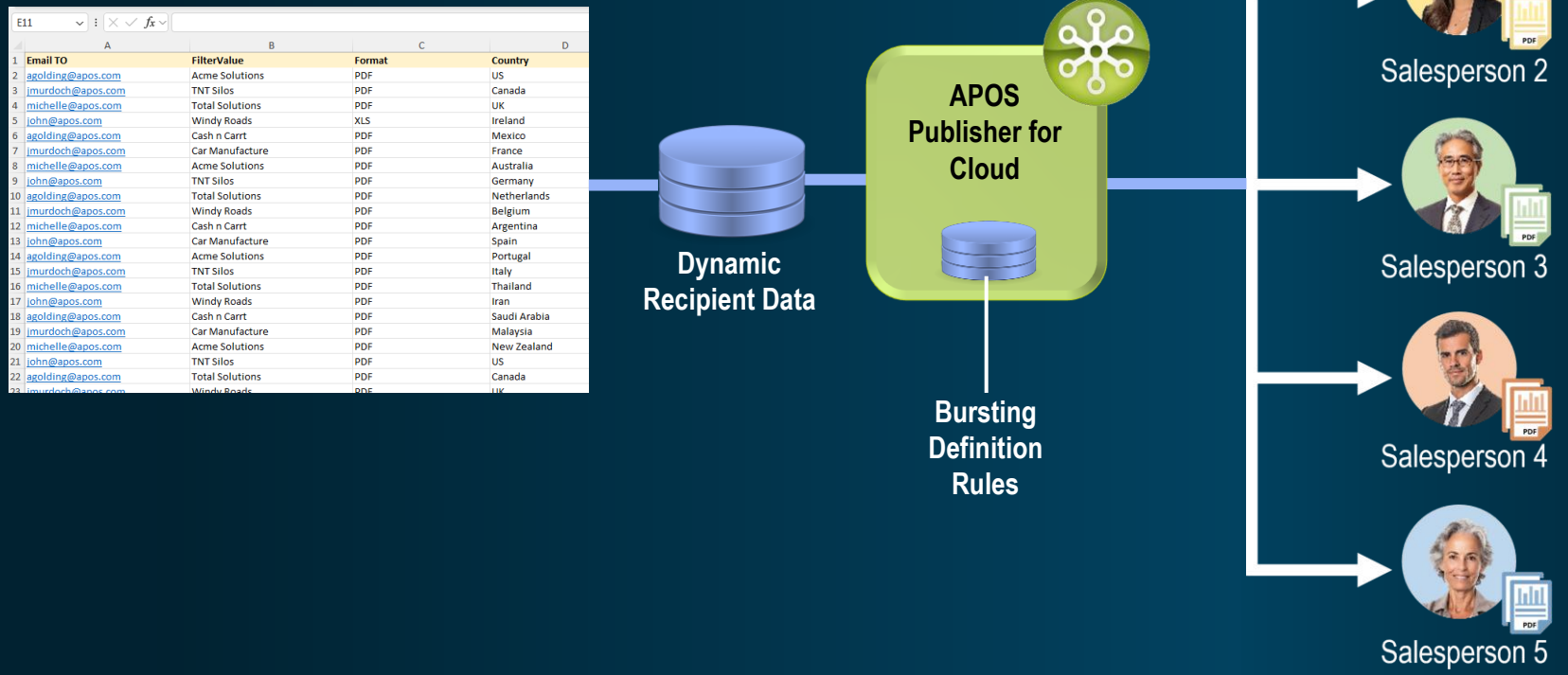
Dynamic Recipient Broadcasting



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4	michelle@apos.com	Total Solutions	PDF	UK
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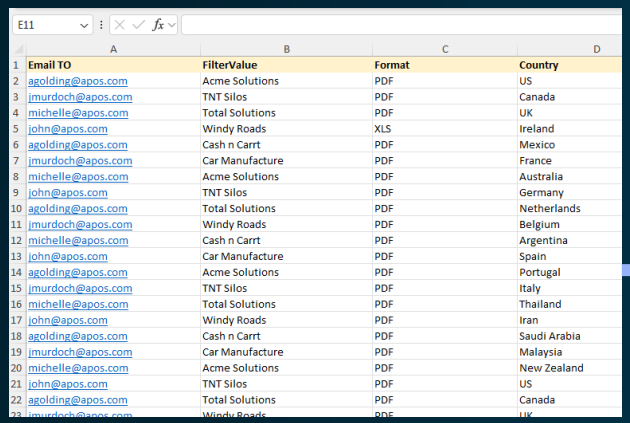
Dynamic Recipient Broadcasting



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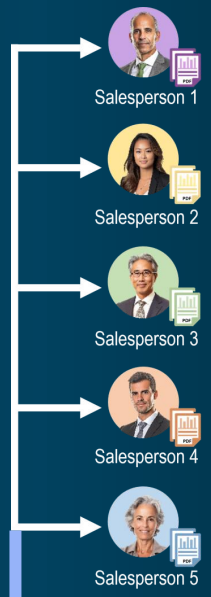

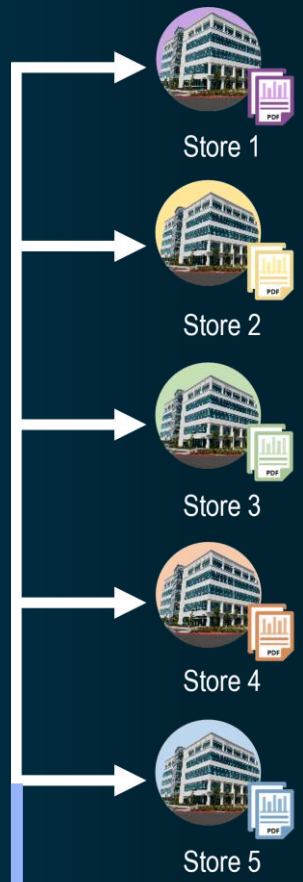

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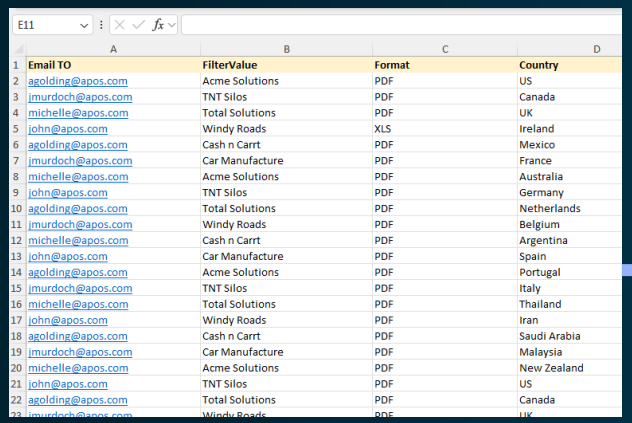
Dynamic Recipient Broadcasting



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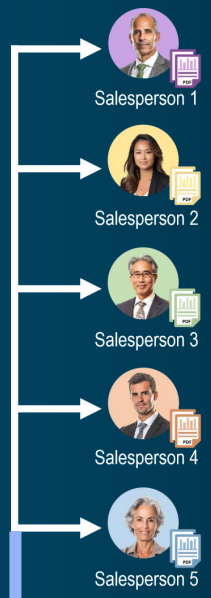
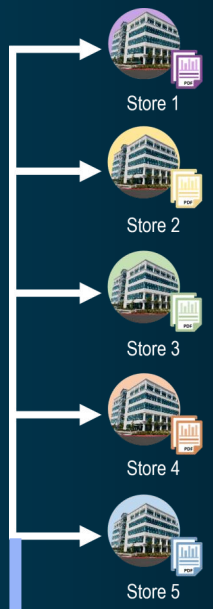
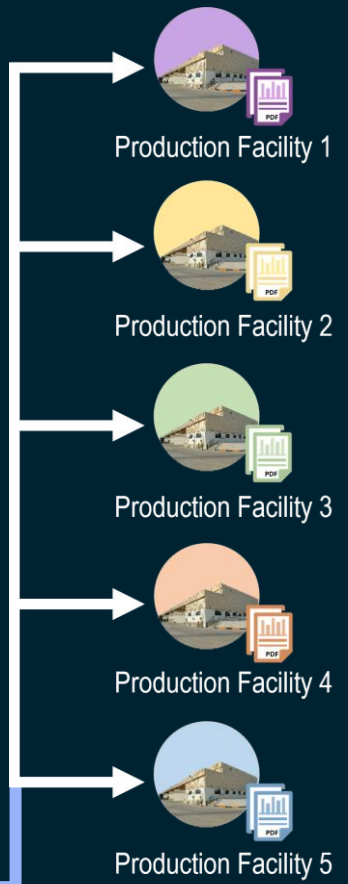
Dynamic Recipient Data







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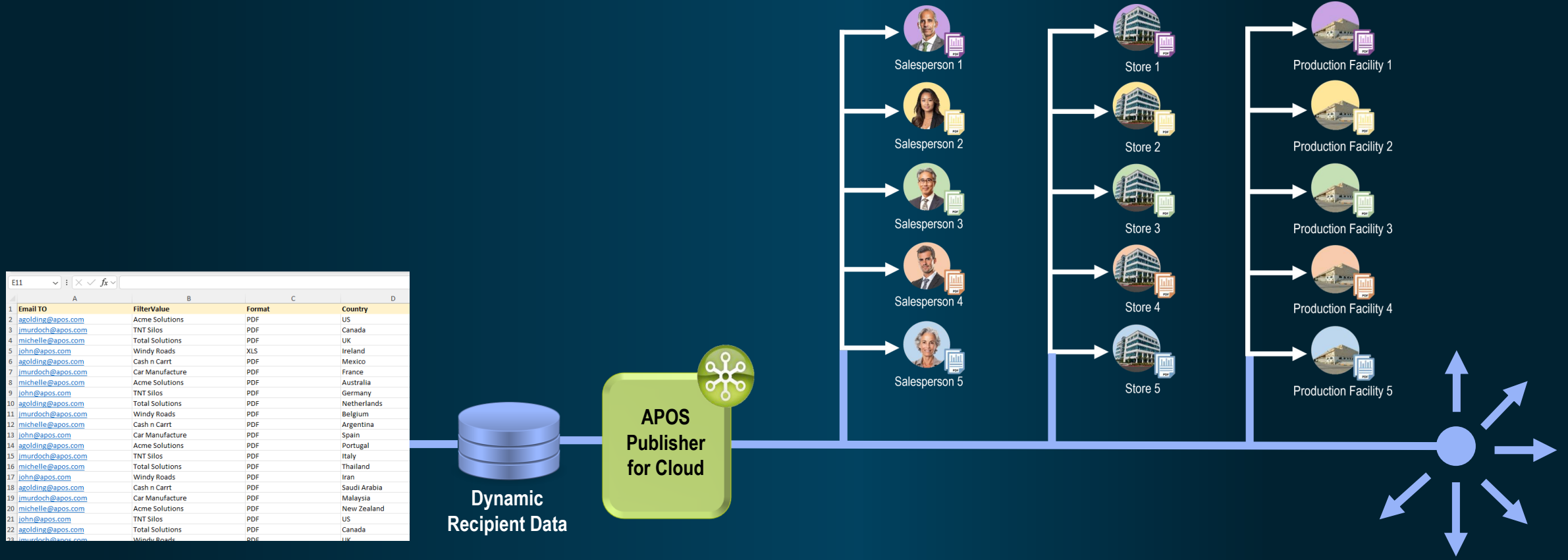
Unlimited Use Cases



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Report Distribution

…the right location, the right format

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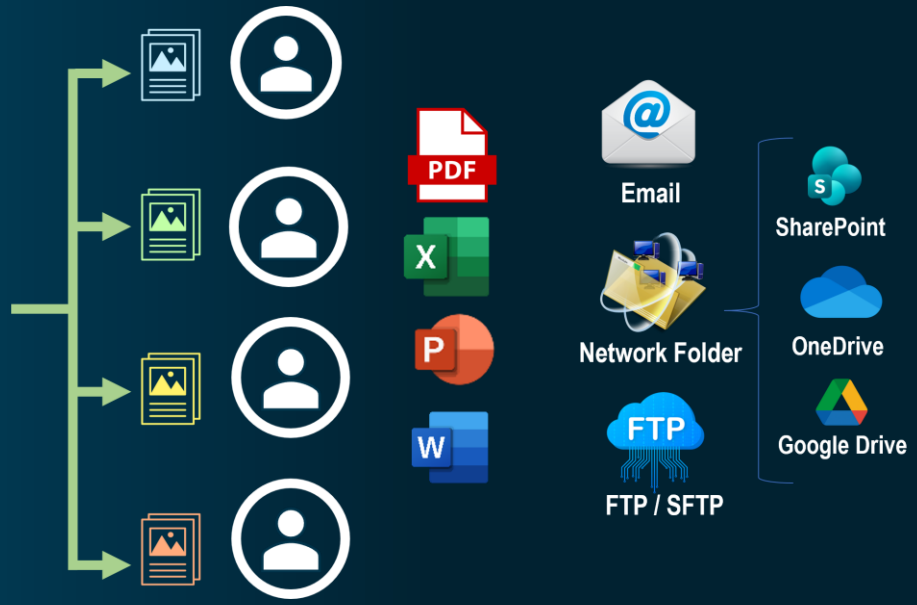
Report Distribution

Formats

- PDF
- Excel
  - xls, xlsx, xlsm, xlsb
- CSV
- PowerPoint
- Word
- Image



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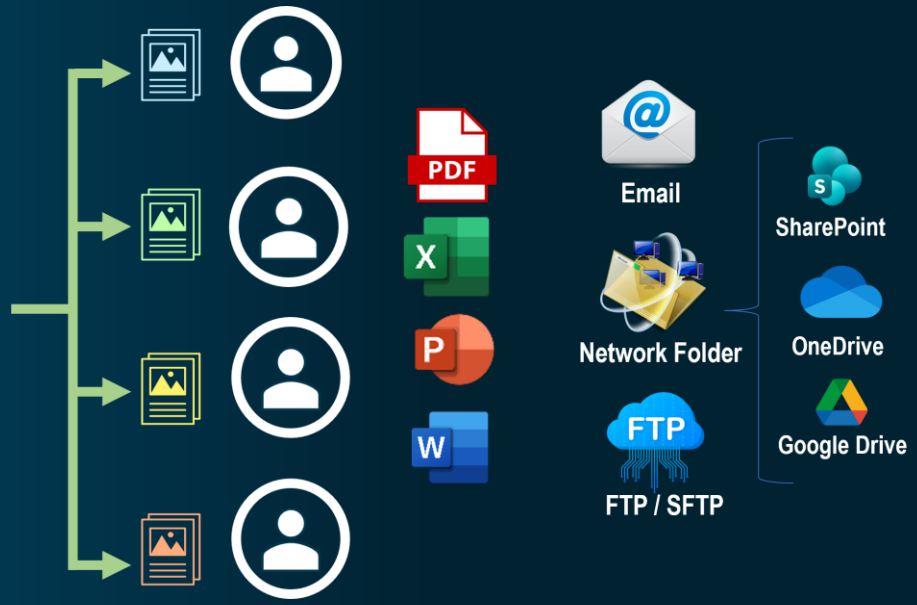
Report Distribution

Destinations

- Email - as attachment
- Email - as body of email
- FTP/SFTP
- Network File
- Sharepoint
- OneDrive
- Google Drive



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Process Timing

…at the right time

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Process Timing - Execution Triggers

Date + Time

- Single or Recurring
- Hourly, Daily, Weekly, Monthly

Command Line

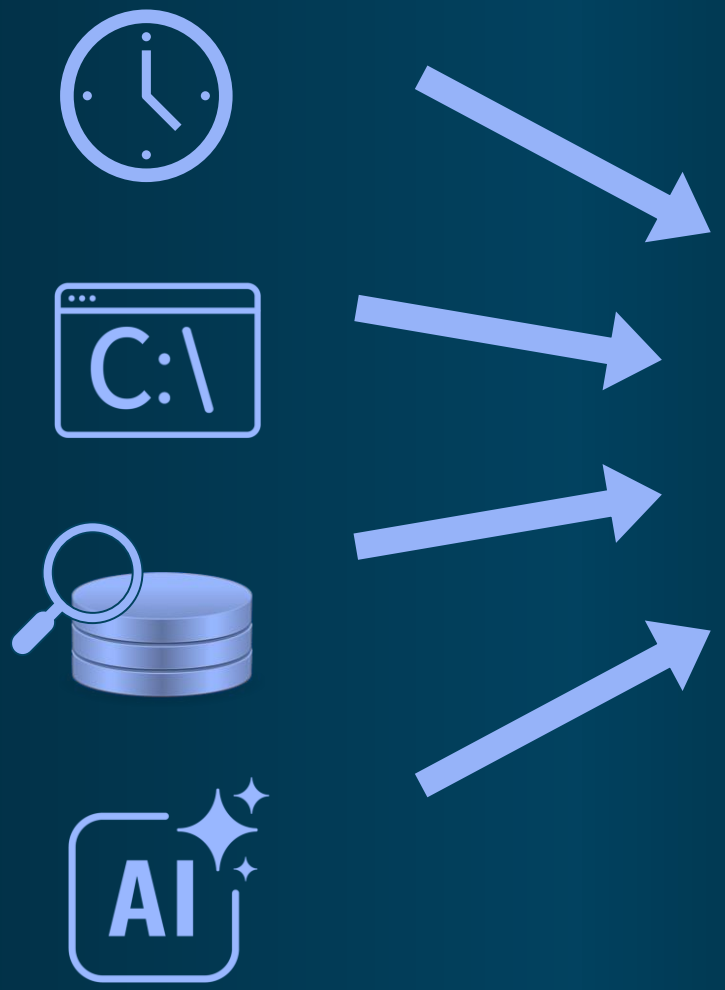
- Process chain integration
- Automation tool integration
- Bot integration

Conditional

- Business rules driven trigger
- Execution by threshold value criteria
- Data load completion triggers

Agentic AI

- Integration with Agentic AI
- AI can drive broadcast with dynamic selection of reports, recipients, filters



APOS Publisher for Cloud

Automated Execution

Information Recipients

Reports Delivered & Consumed

(PDF, XLS, PPT, DOC, +)

Multi-Platform Broadcasting Demonstration

To view this demonstration, watch this webinar on demand

APOS

Supercharge your Report Broadcasting?

Agentic AI Integration

‘Next level’ automation and process orchestration

- Harness agentic AI scenario tracking & monitoring
- Conditional execution based on AI analysis logic
- AI driven broadcasts – dynamic selection of reports, recipients, filters
- Unlimited use case possibilities

Poll question…

Agentic AI Integration

Agent tracks & monitors a wide range of conditions & metrics

When trigger conditions exist, Agent writes key details into Dynamic Recipient Data

AI Agent

Dynamic Recipient Data

APOS Publisher for Cloud

Publisher for Cloud triggers processing and executes burst based on report, recipient & filter instructions from Agent

Targeted recipients receive personalized, proactive report

Information Recipients

Agentic AI Use Case

GlobalNest COMMERCE

GlobalNest:

- **High-volume products supplier & logistics**
- **Supplier to global B2B customers**
- **Operates a network of global warehouses**

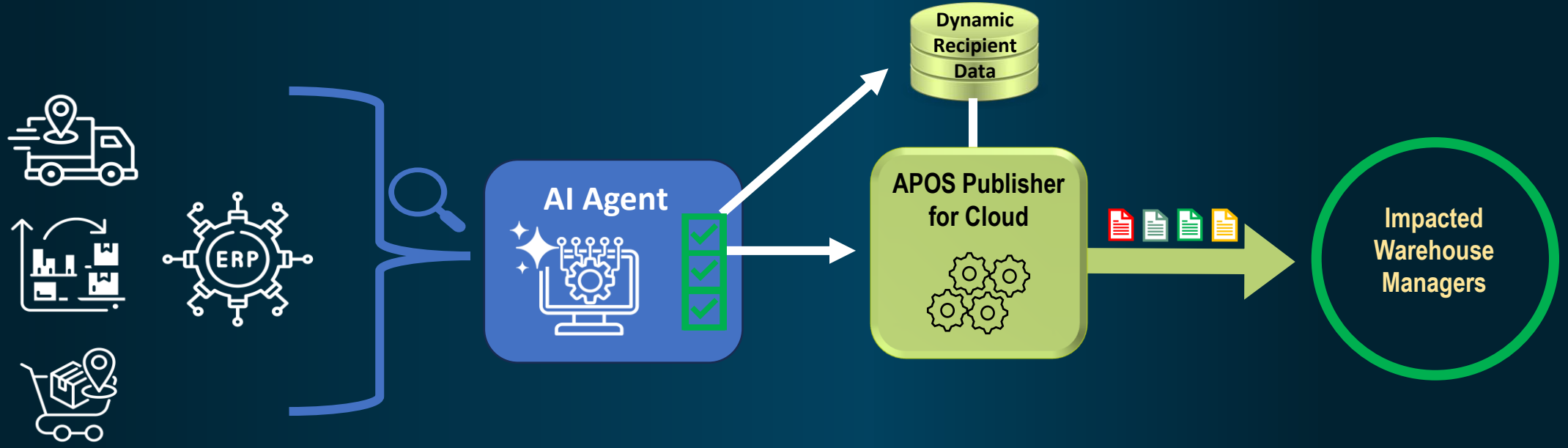
Proactive Intelligence Scenario

GlobalNest Commerce – Inventory Management

AI Agent: Agent monitors inventory levels and projected deliveries across hundreds of warehouses.

Trigger:
- The Agent detects projected warehouse inventory shortages
- The Agent passes impacted warehouse data to Publisher

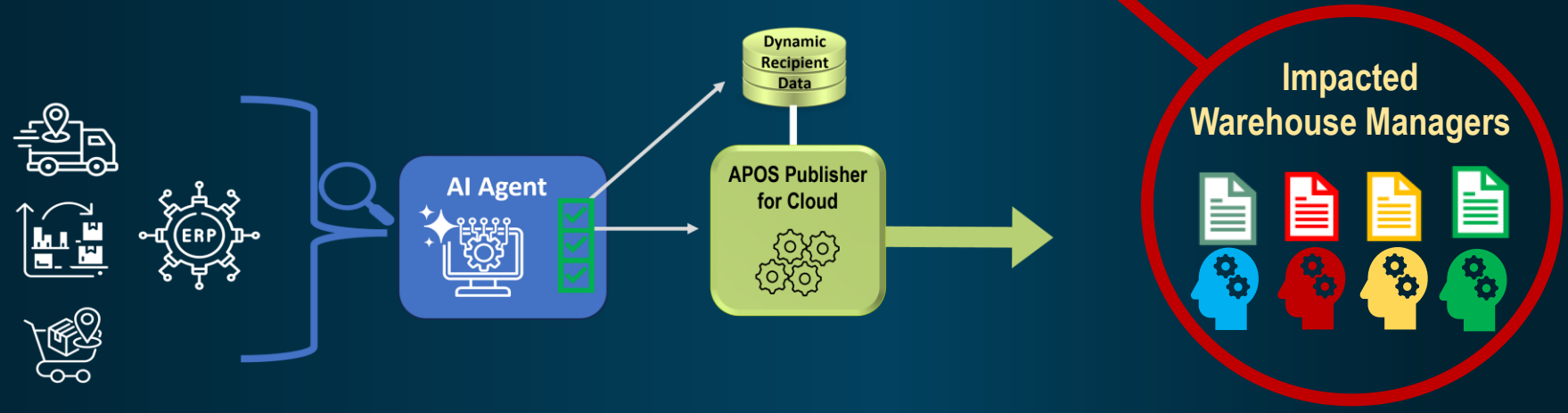
Burst Action by Publisher:
- Publisher receives critical trigger information from Agent
- Generates & sends report to impacted warehouse managers
- Includes delivery volumes, schedules and recommendations



Proactive Intelligence Scenario

GlobalNest Commerce – Inventory Management

Proactive Intelligence: Warehouse Manager of each impacted warehouse is equipped to act on replenishing needed stock in advance of inventory shortage.



PulseTech
INDUSTRIAL SOLUTIONS

PulseTech is a global manufacturer of industrial equipment and machinery

- Manufacturing plants worldwide
- Global production and distribution network
- Efficient supply chains and reliable delivery
- Customers and partners in a wide range of industries

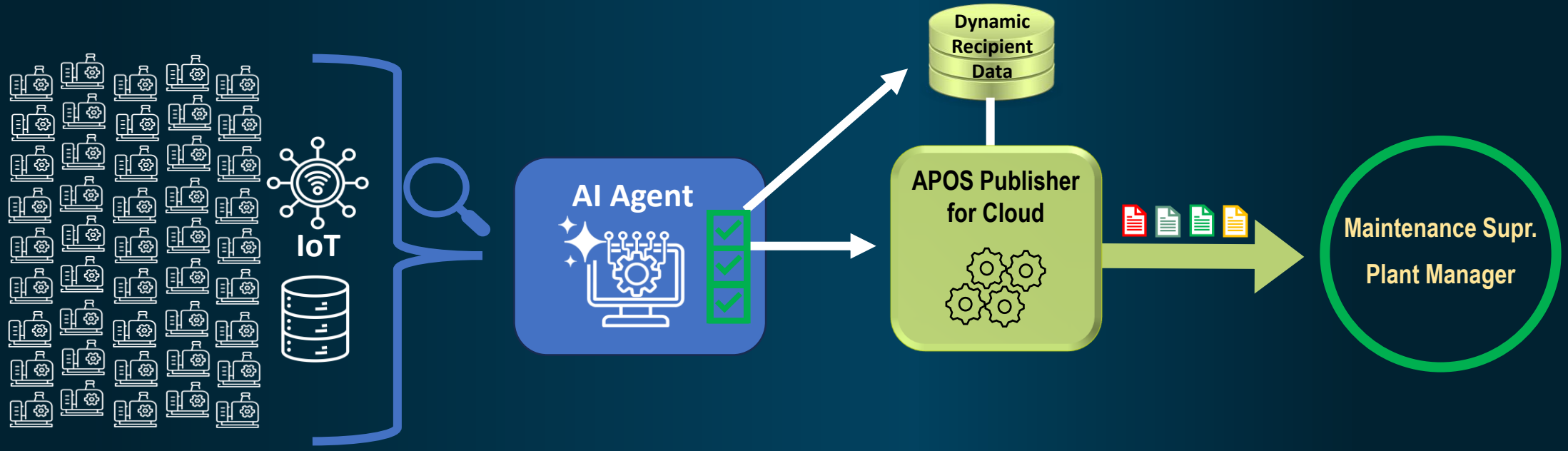
Proactive Intelligence Scenario

PulseTech Industrial Solutions – Machinery Equipment Maintenance

AI Agent: AI agent monitors multiple variables within IoT machine data and performance metrics in real time.

Trigger:
- The Agent detects indicators of a potential machine outage or equipment failure.

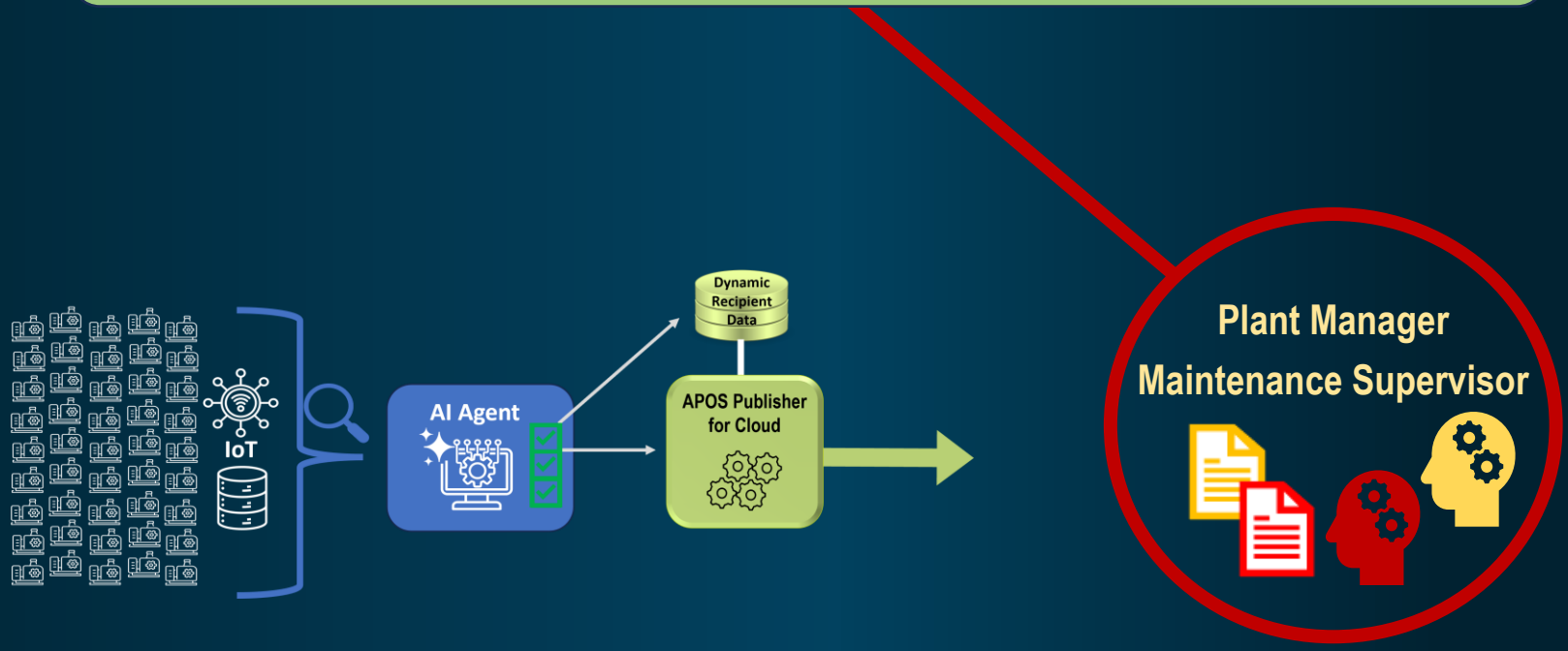
Burst Action by Publisher:
- Publisher receives critical trigger information from Agent
- Generates & sends tailored reports to Maintenance Supervisor & Plant Manager highlighting risk and preventive action needs



Proactive Intelligence Scenario

PulseTech Industrial Solutions – Machinery Equipment Maintenance

Proactive Intelligence: Maintenance Supervisor alerted and engaged to take preventive action & avoid production downtime. Plant Manager informed throughout.



Agentic AI Integration Demonstration

To view this demonstration, watch this webinar on demand

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Resources

- SCN Blog: (SAP) Enhanced SAC Report Scheduling & Broadcasting
- Video: (SAP) Functions & Limitations of SAC Scheduling & Broadcasting
- Whitepaper: Report Broadcasting Orchestration in Cloud-Based Analytics
- Whitepaper: Analytics Report Broadcasting
- Whitepaper: BEx Broadcasting Replacement Strategy

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Next Steps

- Review Solution Resources
- Webinar Recording
- Discovery Call
- Solution Use Case Assessment
- Solution Technical Review

Upcoming Event

Visit us at FABCON – SQLCON – March 16-20

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on LinkedIn and request to join

QUESTIONS?

Please enter your questions in the Q&A panel.

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Thank you!

Get in touch

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