



9 Elements of a Battle Card

The marketing and sales of any product is enhanced when there is a clear understanding of the target customer, market, features, benefits, etc. That's where a Battle Card comes in.

The 9 elements of a Battle Card are:

- 1) Marketplace Conditions
- 2) Target Customers, Markets and Opportunities
- 3) Product Features
- 4) Competitor Analysis
- 5) Customer and Segment Specific Propositions
- 6) Objection Management
- 7) Golden Questions
- 8) Benefits and Success Stories
- 9) Additional Information

Dream Report Battle Card - Sales Cheat Sheet

Market Conditions

We are in the Fourth revolution of automation. The first revolution came with Programmable Control Systems. The second revolution came with HMI (and SCADA) solutions. The third revolution came with the introduction of Historians for long term data retention. We are now in the Information Revolution – beginning the process of turning all previous data from PLCs, HMI/SCADA and Historians into actionable information.

There is now a unique and purpose built solution to address reporting and dashboard requirements in the world of industry and automation. That solution is called Dream Report, by Ocean Data Systems.

We are taming your Ocean of Data.

Product Features

- Ease of Use – No programming – No Scripting – Configurable by Anyone
- Connectivity to Industrial Data – Over 70 Connectors to Data, Alarms, Hist.
- Statistics – Business Math Plus Automation and Vertical Market Statistics
- Data Presentation – Display and Interact with Data – Beautifully
- Deliver Results – PDF, Excel, CSV, HTML5, Web Portal, FTP, Email
- Manage Files – Organize, Purge, Transfer
- Web Portal – View, Generate, All Browsers & Mobile, One Button Setup
- Web Interactions – Date/Time, Tag, SQL Pickers, Data Entry and Corrections
- Security – User and Role Based, Defined Report Access & Domain Security
- Localization – 14 Languages, Date/Time/Data Formats, On-the-Fly
- Version Management – Report Versioning, Roll Forward/Back, Audit Trails
- Productivity Tools – Deployment, Templates, Virtual Instances

Typical Compliance Target Markets and Applications:

- EPA Reporting, Municipal Water Quality Reporting & Wastewater Discharge Reporting
- Power Industry – Stack Gas Reporting - Water Discharge Reporting
- Oil and Gas – Flare and Emissions Reporting – Water Discharge Reporting
- FDA Reporting - Food and Pharmaceutical – Sterilization (Validation) Reporting, Batch Quality Reporting, GAMP
- Leeds and EPBD Standards Reporting – Building and Facilities Energy Reporting
- Thermal Uniformity Testing – Heat Treat Standards – AMS 2750, Aerospace and Automotive Heat Treat Applications.

Typical Performance Target Markets and Applications:

- Any Market and Application that has a PLC, HMI, SCADA or Historian

Competitor Analysis

- **Microsoft Excel (with various automation oriented plug-ins)** – Typically difficult to use and typically oriented to interactive use by a user and not unattended / automated operation.
- **Microsoft SQL Server Reporting Services** – A powerful programming solution. This is a developer oriented solution and does not put report generation into the hands of those that need it, however anything can be done with enough time and effort.
- **SAP Crystal Reports** – A general purpose reporting solution for business applications. While a good business solution, it meets very few of the requirements in terms of features and benefits of value in industrial applications.
- **Analytic Products** - Tableau, Pentahoe, and Spotfire. (Not report products)

Customer Specific Propositions

While an Dream Report will add value EVERY automation application that already has a base of data to work with (and that can come from automation equipment, HMI/SCADA and Historians), there are some applications that are uniquely targeted by Dream Report.

- Pharma and Biotech – FDA & 21 CFR Part 11, Batch, Lethality, Validation
- Building Automation – Energy Statistics, BACnet, FCI, EPBD, Leeds
- Municipal Water – EPA Reports, Turbidity, Monthly Operating, Lab Data
- Municipal Waste Water – EPA Reports, Monthly Operating, Discharge
- Critical Infrastructure – ICS-Cert Listed, Data Diodes, Secure
- Thermal Markets – Setpoint Analysis, AMS-2750, Profile Monitoring

Objection Management

- **We already use “Pick your BI solution”** – Your cost of maintenance of that existing solution alone, will pay for the purchase, installation and long term ownership of Dream Report.
- **We are looking at Advanced Analytics** – That should be the step after putting in an information delivery solution like Dream Report.
- **We have IT Staff for this** – Are you getting all the reports you want? It must take both your time and IT time to get to the desired result through specification iteration.
- **How do I know Dream Report is the right solution** – Dream Report is the most widely recommended “Purpose Built” solution in industry. Dream Report is the OEM solution of choice for leading vendors and “Proven Partners” that recommend it as their preferred solution.

Golden Questions

- **Are you getting all the visibility you want into your operations?** No – Dream Report can help.
- **Are you using “Pick your BI Tool”?** – Yes – We have an easier and more cost effective solution
- **Do you have Automated Reports?** No – That is the best way to drive Continuous Improvement
- **Using Excel with Plug-ins?** That is old technology and Dream Report is a far more valuable solution for creating and delivering information.
- **Reports part of your project?** They come at the end when time and money is running out. You can reduce your risk by using Dream Report. Instead of spending lots of time in technology integration, stay focused on end user value.

Benefits and Success Stories

- Ocean Data Systems – Taming that Ocean of Data.
- In the 21st century, there’s no room for programming or extensive system integration.
- In Feb of 2015, Dream Report was recognized with Control Engineering’s “Engineers’ Choice Award.”
- Dream Report is the most resold and recommended solution for reports and dashboards in industry. There is no other purpose built solution that delivers the value and capabilities of Dream Report.
- Dream Report has a 10 year history (2015) and proven in thousands (over 6000) applications and used in every vertical market around the world.
- Already proven in every application. How about yours?

The Dream Report Battle Card Details

Marketplace Conditions

We are in the Fourth revolution of automation. The first revolution came with Programmable Control Systems. The second revolution came with HMI (and SCADA) solutions. The third revolution came with the introduction of Historians for long term data retention. We are now in the Information Revolution – beginning the process of turning all previous data from PLCs, HMI/SCADA and Historians into actionable information. Some would argue that we are in the Analytics Revolution, layering simulation and modeling solutions on top of our systems in order to spot areas of improvement and react faster to anomalies.

In reality, the vast majority of applications in industry will benefit most from the distribution of information both automatically and broadly within an organization. This information can be acquired and transformed using report generator statistics, or it can be queried from advanced analytic solutions and contrasted with current conditions. Either way, the need for automated information delivery is undeniable for the establishment of a continuous improvement program. Why must it be automatic? Because you'll gain greater efficiencies from automated delivery triggering reactive responses by personnel, rather than requiring them to be proactive in the use of an analytics environment. Advanced Analytic solutions are a powerful tool once an anomaly has been established. A simple KPI (Key Performance Indicator) reporting and dashboard solution is typically (for the majority of markets and applications) all that's required to initially recognize, and even diagnose, a problem.

The majority of information delivery solutions in industrial applications are currently being met through the use of BI (Business Intelligence) tools such as Microsoft Excel (with various automation plugins), SAP Crystal Reports and Microsoft SQL Server Reporting Services (SSRS). All three solutions are generic tools that are being applied to specific markets and applications through significant system integration efforts. This makes them costly to implement, costly to maintain, and a compromise with respect to fit for purpose. Even so, it is estimated that 80% of the current market is exploiting BI tools for industrial applications. When asked why, the answer is always the same – “We didn't know there is a better way.”

Clearly, there is a better way. There is now a unique and purpose built solution to address reporting and dashboard requirements in the world of industry and automation. That solution is called Dream Report, by Ocean Data Systems. We are taming your Ocean of Data.



Dream Report®

In the 21st century, there's no room for programming or extensive system integration. Dream Report delivers the best reports and dashboards for compliance and performance monitoring, with unparalleled ease of use and flexibility. We're taming your Ocean of Data.

Free Demo: www.DreamReport.net/Next

On Counter: 134
Off Counter: 134

Running Time
Down Time
System Availability

Monthly Availability: 85.8%

Weekly Availability Information

2015

OCEAN DATA SYSTEMS
THE ART OF INDUSTRIAL INTELLIGENCE

Target Customers

Target customers will fall into markets and roles. It's also important to understand the overall market of information generation. There are two reasons to generate information. One is because you have to and the other is because you want to. The first is called Compliance information and that is the information you need to be in business. You can't do business without it. That's the information you need for regulatory compliance and standards purposes; FDA, EPA, EPBD, ASM, GAMP, etc. The second is called Performance information. That's the information you need in order to run your business better. To be more competitive, to improve product quality, to reduce costs, be more agile, reduce downtime or improve throughput.

Compliance reports and dashboards have driven the reporting market from the start. As compliance reports are in the line of business, required and indispensable, they will be had at any cost. As a result, the idea of grabbing BI tools and applying excessive amounts of system integration labor and cost for implementation and long term maintenance doesn't seem unreasonable.

Performance reports are nice to have, and difficult to justify. You would like to see certain information... You think that will drive behaviors or enhance knowledge, but you can't prove it ahead of time. With BI reporting tools as costly to implement as they are today, it's no wonder that the state of performance reporting for continuous improvement is as dismal as it is. The application of today's BI tools for industrial reporting is just too costly for simple performance reporting, but everyone acknowledges and endorses the importance of performance reporting.

An easy to use reporting and dashboard solution would literally usher in the next revolution of information delivery. That's the state of today's market and the opportunity for a purpose built information solution for industry. This solution should be added to any application that has a PLC, HMI, SCADA, or Historian. That solution is here and it's called Dream Report, by Ocean Data Systems.

Typical Compliance Target Markets and Applications:

- EPA Reporting, Municipal Water Quality Reporting & Wastewater Discharge Reporting
- Power Industry – Stack Gas Reporting - Water Discharge Reporting
- Oil and Gas – Flare and Emissions Reporting – Water Discharge Reporting
- FDA Reporting - Food and Pharmaceutical – Sterilization (Validation) Reporting, Batch Quality Reporting, GAMP
- Leeds and EPBD Standards Reporting – Building and Facilities Energy Reporting
- Thermal Uniformity Testing – Heat Treat Standards – AMS 2750, Aerospace and Automotive Heat Treat Applications.

Typical Performance Target Markets and Applications:

Any Market and Application that has a PLC, HMI, SCADA or Historian. The purpose is to drive continuous improvement through the automated delivery of information through reports and dashboards.

- Improve Quality
- Reduce Downtime
- Increase Throughput
- Reduce Costs
- Improve Employee Effectiveness

Product Features

The attributes of a purpose built information solution for industry (Dream Report) are:

- **Ease of Use** – Reports and Dashboards should be created by those that need them and not require extensive system integration, specialists or IT professionals. The solution will not require the use of programming or scripting to accomplish reporting needs. Programming and Scripting may exist, to deliver the ultimate in flexibility and to handle fringe applications, but they will not be required for the majority of use cases.
- **Data Sources** – Information usually exists in various databases, both standards based and in proprietary repositories. The solution will offer the ability to connect and acquire data from these various sources without the need to replicate data. There will be one version of the truth. Connectivity will include business standards – ODBC - OLE-DB – Excel - CSV, Industrial Standards – MODBUS – SNMP – BACnet – OPC DA - OPC AE – OPC HDA, Proprietary Drivers to industry leading vendors and their products
- **Statistics** – The automation world requires a superset of statistics starting with those common to the business world and adding specialized statistics relating to industrial systems and vertical markets. Examples include equipment Performance Statistics – Uptime/Downtime – Runtime – Utilization – Cycles, Energy Statistics – BTU Calculations – Emissions Calculations – Yearly Quarterly Monthly Weekly Daily Hourly Batch Based Calculations, and Vertical market statistics such as Thermal Uniformity – Lethality – Setpoint Analysis – Mean Kinetic Temperature, etc.
- **Result Formatting** – Information needs to be presented in informative and visually pleasing ways. Predefined configurable objects will have easy to use attribute settings and will not require programming or scripting. They will include Text Displays, Gages, Bars, Bar Graphs, Trend Charts, Data Tables, Alarm Tables, Barcodes, Date/Time and Pagination Objects and Electronic Signature Boxes
- **Information Delivery** – Information needs to be delivered in different forms for different purposes. For example, PDF records are used for review and long term records retention. Excel Files are used for raw data and statistic results transfer and additional analysis. CSV files are used to import data into other programs and systems. HTML formatted data is used for interactive operation in a Web Portal. The definition of reports and dashboards must include the output in these various forms. In addition,

information delivery will include email, File Transfer – both local to Windows destinations and remote destinations via FTP.

- **Information Management** – Files need to be managed and organized. They will be automatically named based on user specifications. They will be stored in automatically named directories. They will be managed for volume, deleted by age or by number of files.
- **Information Access** – Information will be accessible via a Web Portal. The Web Portal will use the Microsoft IIS that is installed with any Windows Operating System. The Web Portal will not require any maintenance and will be automatically configured by the information system. The Web Portal will allow skinning to brand it for the specific application. The Web Portal will also offer tailored support for a full browser experience and a mobile device experience, delivering optimized operation for each use case.
- **Interactive Information** – Web Portal users will have the requirement to view past information that is generated automatically or manually and will have the need to generate new information based on user selected dates, times, batches and data tags. Users will also have the need for manual data entry and manual data will be validated for type and ranges. Corrections will also be allowed.
- **Security** – Information solutions for automation require a high degree of security. Security will apply to the configuration environment, the runtime environment and the Web Portal. Security will be role based and user based. Security will offer implementation on a node basis and with a Windows Domain Server using Active Directory. Web Portal operation will limit the logged-in user to the reports that have been assigned to them. It will also limit Web Portal operations to the functions that have been assigned to the user. Markets are becoming more and more sensitive to meeting Cyber Security requirements. The information solution will have been tested and listed in the ICS-CERT.GOV database.
- **Localization** – The solution will be available in multiple languages and will offer the ability to change on-the-fly both in the configuration and the runtime environments, including the Web Portal. Localization settings will support all common date/time and decimal handling. Default Languages will be assigned to logged-in users. At least 14 languages will be supported.
- **Version Management** – Many markets require tight control over documents and their versions to meet best practice or regulatory standards. The information solution will offer version management of documents and an audit trail to track who changed what and why.
- **Productivity Tools** – As applications grow, users will encounter repetition in the report configurations and it will be a major benefit to have report templates as starting points for report development. It will also be valuable to have a concept of report re-assignment for repetitive applications where a report template can support many instances of use with various data definitions and output settings. This will all be accomplished without the need for programming or scripting. As applications grow, the need for deployment tools will become more valuable and the solution will provide the ability to offer a first time deployment with the solution and its application, and an update deployment with application updates. The deployment will be in the form of a simple executable that any user with basic computer skills can use.

Competitor Analysis

Competitive solutions take the form of BI (Business Intelligence) products being applied to industrial applications. These solutions typically require an extensive level of system integration and long term support. As a result, solutions based on BI tools are costly and have a very high long term cost of ownership.

Typical BI Reporting Tools:

Microsoft Excel (with various automation oriented plug-ins) – Typically difficult to use and typically oriented to interactive use by a user and not unattended / automated operation. Excel based solutions also lack the security and scalability often required in industrial applications. An Excel based solution will not meet the security requirements for CIP applications.

Microsoft SQL Server Reporting Services – A powerful programming solution (requires the installation of Microsoft Visual Studio programming environment). This is a developer oriented solution and does not put report generation into the hands of those that need it, however anything can be done with enough time and effort.

SAP Crystal Reports – A general purpose reporting solution for business applications. While a good business solution, it meets very few of the requirements that are outlined above in terms of features and benefits of value in industrial applications. It also requires add-on products to deliver all the functionality to be expected in an industrial solution.

Typical Advanced Analytics Tools:

This is a new category of software product that is finding its way into industrial applications. Most advanced analytic products do not offer automated information generation and delivery (reports). They are designed as interactive environments to enable the slicing and dicing of data in order to generate new insights. Products in this category include – Tableau, Pentahoe, and Spotfire.

While these are valuable tools, the value of these tools will be enhanced by the introduction of an information generation and delivery solution such as Dream Report that can deliver KPIs broadly to an organization and then trigger the use of Advanced Analytics to uncover the root cause of an anomaly.

The logical life cycle progression of automation installations should follow:

- 1) PLC and Basic Controls enhancement to generate information
- 2) HMI/SCADA use to deliver real-time visibility
- 3) Historians to generate a long term data repository
- 4) Information Solution (Reports and Dashboards) for KPIs and Compliance**
- 5) Advanced Analytics to assist in root-cause analysis
- 6) APC (Advanced Process Control) solutions for Simulation and Modeling

Customer Specific Propositions

While Dream Report will add value to EVERY automation application that already has a base of data to work with (and that can come from automation equipment, HMI/SCADA and Historians), there are some applications that are uniquely targeted by Dream Report.

- **Pharmaceutical and Biotech Applications** – These have specific FDA requirements (21 CFR Part 11) that are exactly met with features delivered by Dream Report. There is NO OTHER solution that can address these automation applications as cleanly. Dream Report also delivers a set of productivity features that are an additional benefit within these markets – Lethality calculations for sterility assessment, Virtual Report Instances for information management across like equipment instances. Batch reporting – the ability to identify batch operations and report against them automatically.
- **Building Automation Systems (BAS)** – Dream Report offers a variety of features specifically for the building and facilities management environment. These include both calculations such as energy statistics as well as performance display objects to meet European standards (EPBD). Energy allocation by departments are easily managed. The understanding of meters and roll-overs is built into Dream Report.
- **Water Reporting for EPA** – Water Quality Reporting is one of the major markets for Dream Report. Dream Report can generate all the required reports for state and federal EPA reporting. These reports include calculations done based on daily, monthly and yearly calculations. Dream Report offers very unique “Step” calculation capability to perfectly address this market. In water filtration backwash operations, Dream Report easily performs turbidity reporting on an event, not just time basis.
- **Waste Water Reporting for EPA** – Waste Water Discharge Reporting is one of the major markets for Dream Report. Dream Report can generate all the required reports for state and federal EPA reporting. These reports include calculations done based on daily, monthly and yearly calculations. Dream Report offers very unique “Step” calculation capability to perfectly address this market.
- **Critical Infrastructure Protection** – Typically involving Power Generation and Distribution applications. NERC-CIP regulations define processes that are critical to society and the protections that should be followed with implementing solutions in these processes. An information solution should be tested for Cyber Security, be listed in the ICS-CERT.gov database and should also be supported for use with common CIP security devices such as Data Diodes.
- **TUS (Thermal Uniformity Surveys)** – Any heat treat operation requires a periodic validation of the oven or furnace. This applies to aerospace applications with furnaces and autoclaves, heat treating of parts in the automotive industry or the validation of sterilization chambers in food, pharmaceutical and biotech markets. Dream Report delivers a powerful and flexible “Setpoint Analysis” set of statistics and display charts, purpose built to address thermal uniformity analysis applications.

Objection Management

The Status Quo is your number one competitor. It is easier to do nothing, than to make a decision and implement a new solution. As such, it's important to identify the pain a potential customer is experiencing in order to relieve that pain with a Dream Report solution.

Examples of Pain:

- Lack of process visibility leading to unscheduled downtime and process inefficiencies
- Operator errors due to data transposition and lack of validated operator data entry
- Lack of process documentation or inability to reliably meet compliance reporting needs
- High cost of doing things manually – need error proofing
- Risk associated with silos of knowledge – retiring employee specialists

Typical Objections:

- **We already use “Pick your BI solution”** – Your cost of maintenance of that existing solution alone, will pay for the purchase and installation and long term ownership of Dream Report, which will deliver better information with less effort and can be maintained by those that need the information and not your BI specialist.
- **We are looking at Advanced Analytics** – That should be the step after putting in an information delivery solution like Dream Report. Ideally, you will want a solution that will enable your staff to be reactive to KPI changes. They can then turn to their Advanced Analytic solution (but only if Dream Report didn't already give you a clue to the problem), for root cause analysis.
- **We have IT Staff for this** – Are you getting all the reports you want? It must take both your time and IT time to get to the desired result through specification iteration. Does your current solution give you all the benefits of Dream Report without all that integration work? How quickly can IT respond? Wouldn't you like to be in charge of your own destiny? Your TCO is much higher than you know.
- **We don't have a budget for this** – Do you have a maintenance budget for your current solution? It is likely that will pay for this upgrade and you will save \$\$\$ in the long run.
- **How do I know Dream Report is the right solution** – Dream Report is the most widely recommended “Purpose Built” solution for reports and dashboards in industry. Dream Report is the OEM solution of choice for leading vendors in automation and has a significant base of “Proven Partners” that recommend it as their preferred solution. With that kind of backing and support, we're sure Dream Report is right for you.
- **I don't have a budget to try it** – A FREE DEMO is available on our website. It is fully operational and you can connect it to your data sources. There are lots of videos on our website to help you learn, and Dream Report offers excellent and very detailed documentation. After playing with it, we're sure you'll find a budget. If you'd like a demo, contact Ocean Data Systems for a FREE Webinar.

Golden Questions

These questions highlight that you're in the right place with End Users.

- **Are you getting all the visibility you want into your operations?** No – Dream Report can help.
- **Are you using “Pick your BI Tool”?** – Yes – We have an easier and more cost effective solution
- **Do you have Automated Reports?** No – That is the best way to drive Continuous Improvement
- **Are you evaluating Analytics?** Yes – you should put in Dream Report first, then Advanced Analytics. Dream Report will be your solution to justify Advanced Analytics.
- **Using Excel with Plug-ins?** That is old technology and Dream Report is a far more valuable solution for creating and delivering information.

System Integrators have their own unique challenges:

- **Reports part of your project?** They come at the end when time and money is running out. You can reduce your risk by using Dream Report. Instead of spending lots of time in technology integration, stay focused on end user value.
- **Spending too much time with Report Integration?** Dream Report will keep your staff focused on end user value instead of the integration of technologies.
- **Want one reporting solution for all automaton systems?** Dream Report is the most widely used solution purpose built for automation. It will connect to all applications you will ever work with through a set of over 70 interfaces.
- **Looking for a way to penetrate new accounts?** Dream Report is a logical addition to bring value to any automation system. There isn't any application that wouldn't benefit from a Dream Report.

Benefits and Success Stories

Ocean Data Systems – Taming that Ocean of Data. That's what we're all about.

In the 21st century, there's no room for programming or extensive system integration. That one logical statement is the most significant reason to select Dream Report over business intelligence alternatives.

In Feb of 2015, Dream Report was recognized with Control Engineering's "Engineers' Choice Award." We're very proud of that accomplishment and it will be the start of many more good things.

Dream Report is the most resold and recommended solution for reports and dashboards in industry. There is no other purpose built solution that delivers the value and capabilities of Dream Report.

Dream Report has a 10 year history (2015) and proven in thousands (over 6000) applications and used in every vertical market around the world. Already proven in every application. How about yours?



Additional Information

Website – www.DreamReport.net

All documents, manuals, application notes, videos and blogs are on the website.

Twitter - @OceanDataSys

Linked-In Groups – 6 available Groups for specific audiences – Pick the ONE that fits you best.

Dream Report Demonstration Download – 30 Minute Run-time that restarts, 100 Tags & Web Portal