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## Business Intelligence Applications

# Business Intelligence Session Agenda

- **Welcome – Mike Hynard (Asparona)**
- **Welcome NZOUG – Doug Cockroft (NZOUG)**
- **Introducing Asparona – Ian Rogers (Asparona)**
- **Implementing BI – Darren Wenham (Asparona)**
- **Oracle BI Applications demo – Sanjiv Bansal (Oracle)**
- **Open Q&A Session – Mike Hynard (Asparona)**

# Implementing Business Intelligence

## Session Agenda

**“Business Intelligence”**

Term popularised by Gartner research analyst Howard Dresner in 1989

- **Evolution of Business Intelligence**
- **Oracle’s BI solutions**
- **Differentiators and Value Propositions**
- **BI applications demo**



# Birth of Business Intelligence

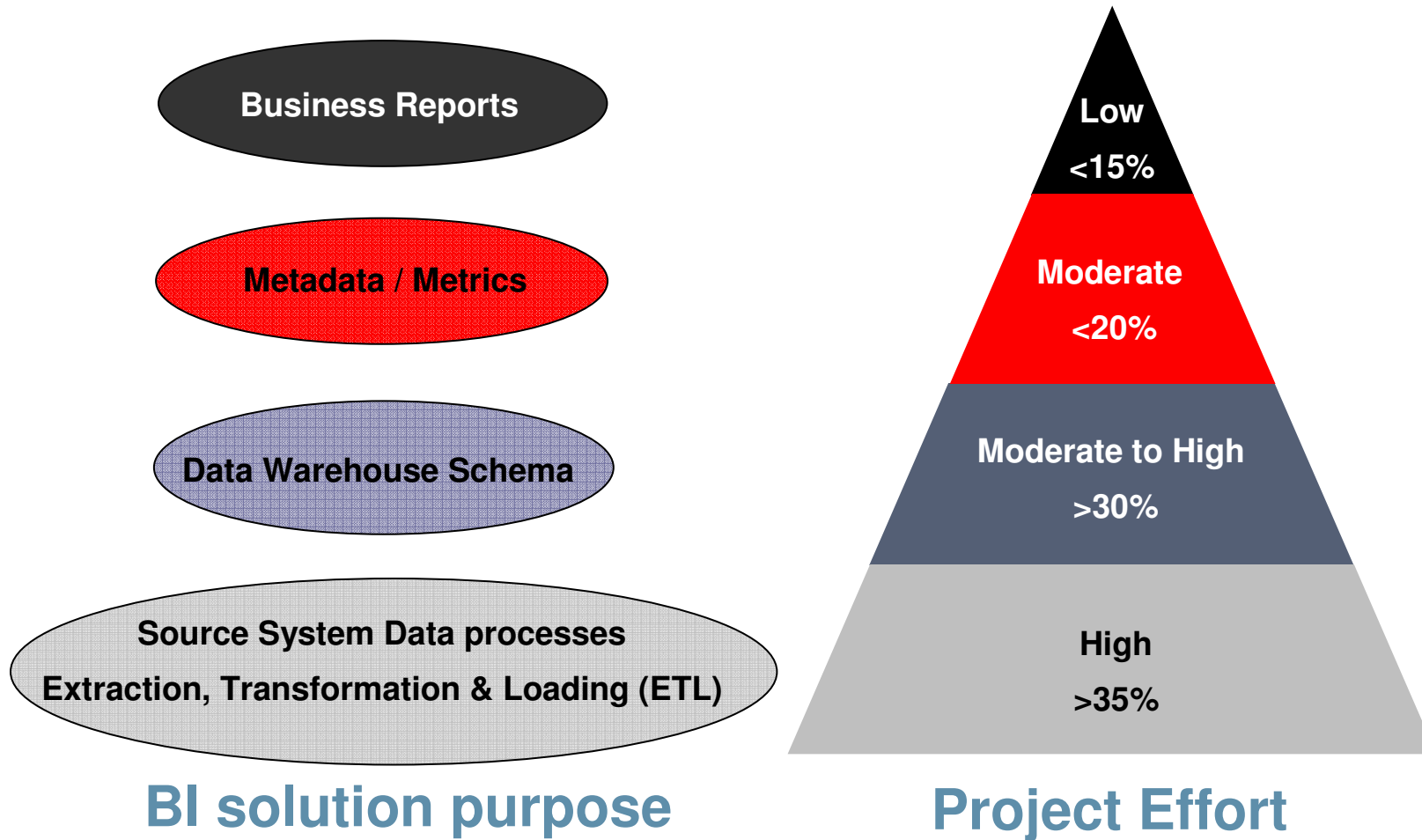
## The “BUILD” era of BI

- Technology provided the Building blocks
- Business employed Data-Warehousing specialists
- Bespoke Data-warehouses / DSS solutions
- Projects typically; High Complexity / High TCO / High Failure / Iterative
- IT centric Solutions / Rigid Reporting / Limit UI Management

## Adopters of BUILD era BI

- Large corporations with large IT budgets
- Businesses surviving on competitive advantage
- Government / Utilities

# Typical “Build” era project





# Today's BI applications

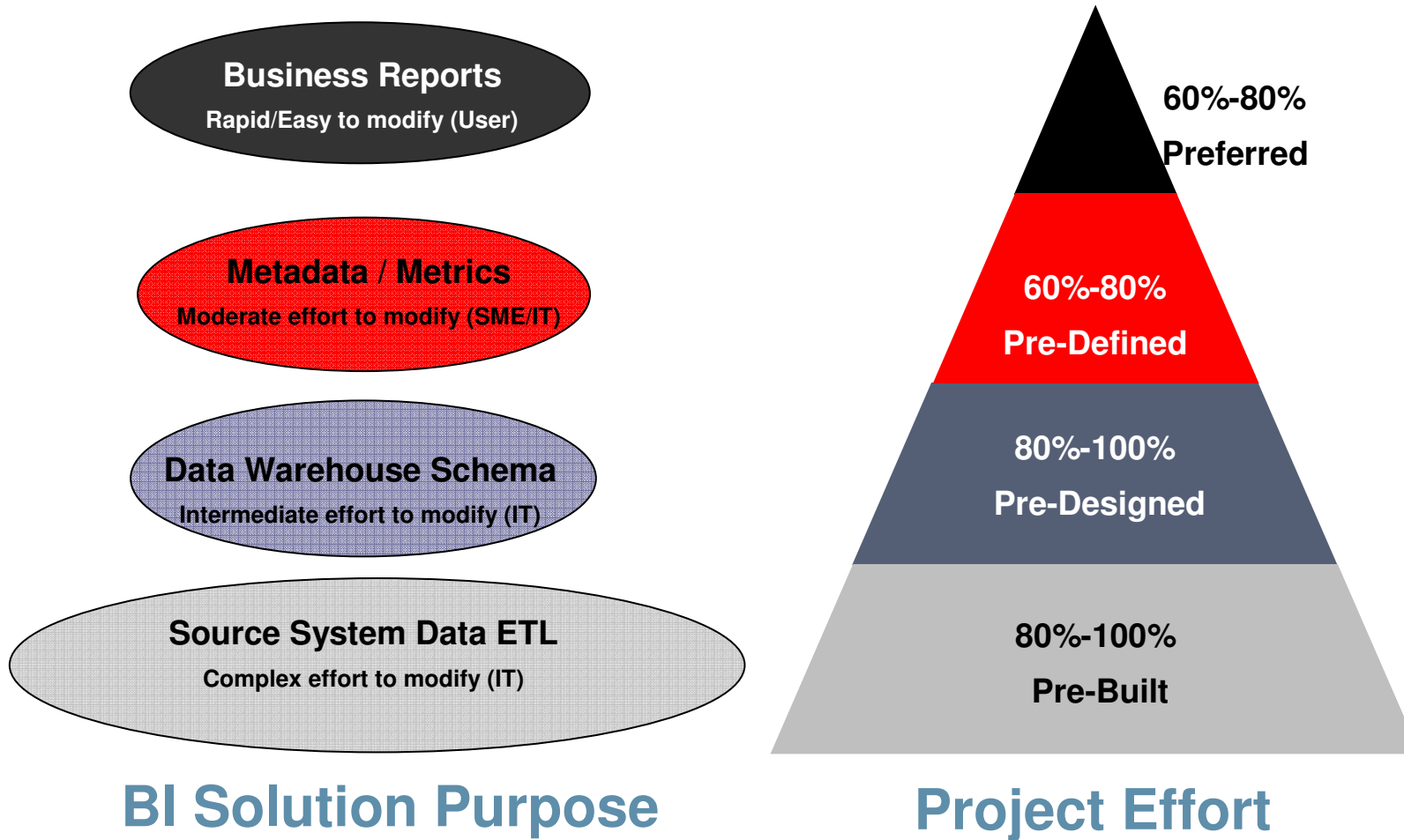
## The “BUY” era of BI

- Technology matured
- Vendor market consolidated
- Pre Packaged BI solutions offered by Major BI Vendors
- Business focus on Analysis and Process improvement
- Projects typically; Low Cost / Low TCO / Rapid Implementation
- Business centric Solutions / Agile Reporting
- User definable Reports / Metrics / KPIs / Dashboards

## Today's adopters of BI

- Affordable to all Business

# Typical "Buy" era project



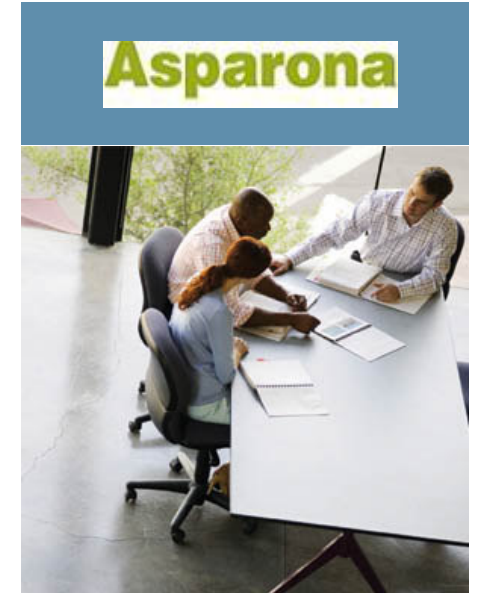


# Oracle's BI Applications

EPM

Business Intelligence Applications





OBIEE





# Oracle BI & EPM

**EPM WORKSPACE**

 Desktop	 Web	 Search	 Office	 Alerts	 Mobile
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**PERFORMANCE MANAGEMENT APPLICATIONS**

Strategy Management	Enterprise Planning	Profitability Management	Financial Reporting & Compliance
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**BI APPLICATIONS**

Sales	Svcs.	Mktg.	Contact Center	Order Mgmt.	Supply Chain	HR	Finance
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**BUSINESS INTELLIGENCE FOUNDATION**

Common Enterprise Information Model

Essbase	BI Server	Predictive Analytics
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**MIDDLEWARE**

Data Quality	Data Integration	MDM	Identity Management	Content Management	Business Process Management
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OLTP & ODS Systems

  
Data Warehouse Data Mart

  
OLAP

  
SAP, Oracle, Siebel, PeopleSoft, Custom

  
Excel XML

  
Business Process

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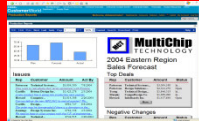
# Oracle BI Applications

Multi-source Analytic Apps Built on BI Suite EE Plus

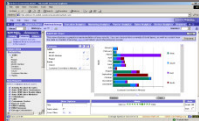
Interactive Dashboards



Reporting & Publishing



Ad-hoc Analysis



Proactive Detection and Alerts



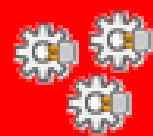
Disconnected Analytics



MS Office Plug-in



Web Services



Sales

Service & Contact Center

Marketing

Procurement & Spend

Supply Chain & Order Management

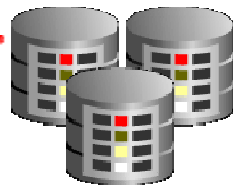
Financials

Human Resources

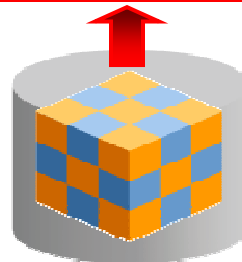
Oracle BI Applications

Oracle BI Apps built on Oracle BI EE Plus

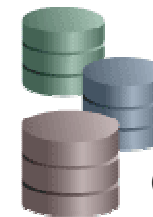
- Common Enterprise Information Model
- Prebuilt Hierarchies, Drill Paths, Security, dashboards, reports
- Based on industry and analytic best practices



Packaged ETL Maps



Universal Adapters



IVR, ACD, CTI  
Hyperion  
MS Excel  
Other Data Sources

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# Oracle BI Applications Suite

## Complete, Prebuilt, Best Practice Analytics

### CRM ANALYTICS

#### SALES

- Pipeline Analysis
- Forecast Accuracy
- Up-sell/Cross-sell
- Cycle Times
- Lead Conversion
- Sales Team Effectiveness

#### MARKETING

- Campaign Effectiveness
- Customer Insight
- Product Propensity
- Market Basket Analysis
- Campaign ROI

#### SERVICE & CONTACT CENTER

- Service Effectiveness
- Customer Satisfaction
- Resolution Rates
- Service Rep Efficiency
- Service Cost
- Service Trends

#### PRICE

- Price Segments
- Price Waterfall Analysis
- Deal Life Cycle
- Deal Desk Analysis
- Product Pricing Performance

#### LOYALTY

- Member Demographics
- Membership Trends
- Program Revenue
- Promotion Effectiveness
- Points Analysis

### ERP ANALYTICS

#### FINANCIALS

- General Ledger
- Accounts Receivable
- Accounts Payable
- Cash Flow
- Profitability
- Expense Management

#### PROCUREMENT & SPEND

- Direct & Indirect Spend
- Buyer Productivity
- Contract Compliance
- Supplier Performance
- Purchase Cycle Time

#### SUPPLY CHAIN & ORDER MGMT

- Revenue & Backlog
- Inventory Analysis
- Fulfillment Status
- Customer Status
- Order Cycle Time
- BOM Analysis

#### PROJECTS

- Project Funding and Budget
- Product Cost
- Project Revenue
- Project Billing
- Project Profitability

#### HUMAN RESOURCES

- Employee Productivity
- Compensation
- Talent Management
- Recruiting Analysis
- Learning Analysis
- Workforce Profile

### ORACLE BI SUITE ENTERPRISE EDITION PLUS

SOURCE ADAPTERS:

**ORACLE**

PeopleSoft

**SIEBEL**

J D EDWARDS

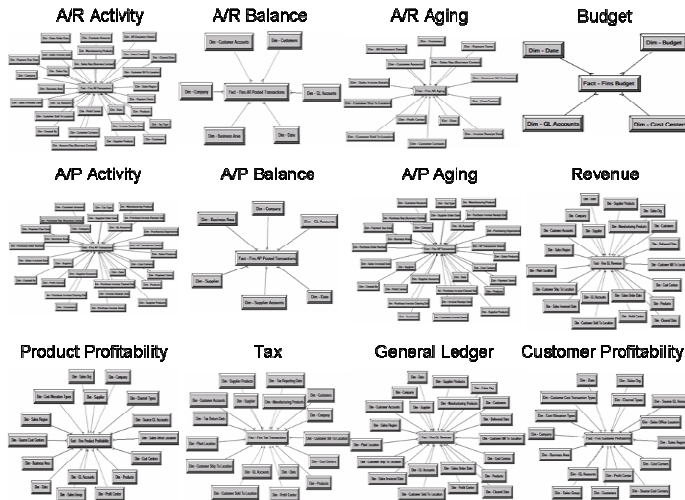
**SAP**

AND OTHER OPERATIONAL AND ANALYTIC SOURCES

**ORACLE**

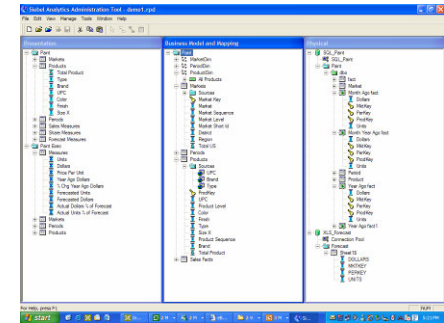
# Oracle Financial Analytics Product Components

- 1 Pre-built Data Warehouse schema  
16 star-schemas  
Designed for Financial Analysis / Reporting

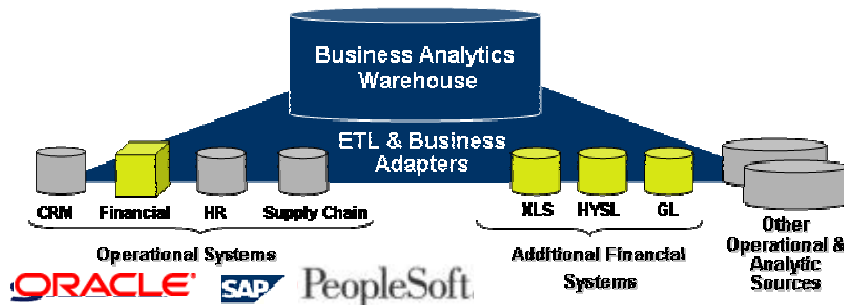


- 3 Pre-mapped metadata  
Best-Practice Industry Calculations / Metrics  
Defined by Industry / Functional specialists

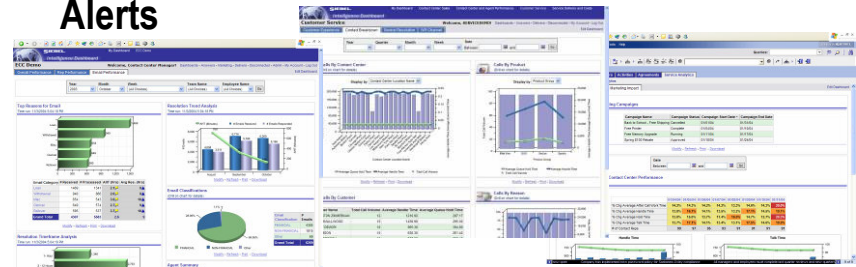
- Presentation Layer
- Logical Business Model
- Physical Sources



- 2 Pre-built ETL  
Extract data from >3,000 operational tables  
Load into DataWarehouse  
PreBuilt: SAP, PSFT, Oracle EBS, JDE, others



- 4 “Best Practice” library  
Built for CFO’s, Finance Controllers,  
Analysts, AR/AP Mgrs, Executives & more  
>360 pre-built metrics, 30 Intelligent  
Dashboards, 200+ Reports, Performance  
Alerts



# Oracle Financial Analytics

## Example Financial Analytics Metrics

Receivables	Payables	General Ledger	Profitability
<u>AR Balance</u> <ul style="list-style-type: none"> <li>• DSO</li> <li>• Closing Group Amt</li> <li>• Credit Limit Used %</li> <li>• Total AR Overdue Amt</li> </ul> <u>AR Aging</u> <ul style="list-style-type: none"> <li>• AR Aging 1-30 Amt</li> <li>• AR Due 1-30 Amt</li> <li>• AR Overdue 1-30 Amt</li> </ul> <u>Payment Performance</u> <ul style="list-style-type: none"> <li>• AR Payment Days</li> <li>• AR Weighted Days</li> <li>• Times Paid Before Due</li> </ul> <u>AR Transactions</u> <ul style="list-style-type: none"> <li>• AR Avg Invoice Amt</li> <li>• AR Credit Memo Amt</li> </ul>	<u>AP Balance</u> <ul style="list-style-type: none"> <li>• DPO</li> <li>• Closing Group Amt</li> <li>• Total AP Overdue Amt</li> <li>• Overdue Amt to Total %</li> </ul> <u>AP Aging</u> <ul style="list-style-type: none"> <li>• AP Aging 1-30 Amt</li> <li>• AP Due 1-30 Amt</li> <li>• AP Overdue 1-30 Amt</li> </ul> <u>Payment Performance</u> <ul style="list-style-type: none"> <li>• AP Payment Days</li> <li>• AP Weighted Days</li> <li>• Times Paid Before Due</li> </ul> <u>AP Transactions</u> <ul style="list-style-type: none"> <li>• AP Avg Invoice Amt</li> <li>• AP Avg Payment Amt</li> </ul>	<u>Balance Sheet</u> <ul style="list-style-type: none"> <li>• Cash</li> <li>• Accounts Receivable</li> <li>• Debt to Equity Ratio</li> <li>• Current Ratio</li> </ul> <u>Asset Turnover</u> <ul style="list-style-type: none"> <li>• AR Turnover</li> <li>• AP Turnover</li> <li>• Inventory Turnover</li> <li>• Cash Cycle</li> <li>• Fixed Assets Turnover</li> </ul> <u>Cash Flow</u> <ul style="list-style-type: none"> <li>• Operating Cash Flow</li> <li>• Investing Cash Flow</li> <li>• Financing Cash Flow</li> <li>• Net Cash Flow</li> </ul>	<u>Profitability Returns</u> <ul style="list-style-type: none"> <li>• Return on Equity</li> <li>• Return on Assets</li> <li>• Return on Capital</li> </ul> <u>Margins</u> <ul style="list-style-type: none"> <li>• Gross Margin %</li> <li>• Operating Margin %</li> <li>• EBT Margin %</li> <li>• Net Income Margin %</li> </ul> <u>Product Profitability</u> <ul style="list-style-type: none"> <li>• Revenue</li> <li>• Product Gross Profit</li> <li>• Product Operating Profit</li> </ul> <u>Customer Profitability</u> <ul style="list-style-type: none"> <li>• Revenue</li> <li>• Customer Gross Margin</li> </ul>

## Sample Pre-Built Dashboards

Financial Controller	Receivables Manager	Payables Manager	Department Manager
<ul style="list-style-type: none"> <li>• Balance Sheet</li> <li>• Cash Flow</li> <li>• Budget Vs Actual</li> <li>• P&amp;L</li> </ul>	<ul style="list-style-type: none"> <li>• AR Balance</li> <li>• Payments Due</li> <li>• Effectiveness</li> <li>• Invoice Details</li> </ul>	<ul style="list-style-type: none"> <li>• AP Balance</li> <li>• Payments Due</li> <li>• Effectiveness</li> <li>• Invoice Details</li> </ul>	<ul style="list-style-type: none"> <li>• Budget Vs Actual</li> <li>• P&amp;L</li> <li>• Product Profitability</li> <li>• Customer Profitability</li> </ul>

# Role-Based Best Practices

Relevant and Actionable Insight for Everyone

## Financial Analytics - Key Objectives and Questions by Role

**Controllers  
& Finance  
Managers**



### ***Optimizing Management of Financial Performance***

- How can I reduce the time it takes to generate periodic financial statements and reports?
- How can I get early notification of material events?
- How effectively are we managing our payables to our key suppliers?
- How is DSO being impacted by certain customers and by each receivables aging bucket?

**CFO &  
Executives**



### ***Actionable Insight for Improving Shareholder Value***

- Which business units and product lines are enhancing company profitability and which are detracting from it?
- Are our profitability and balance sheet ratios improving relative to historical trends?
- How can I get early warnings about revenue misses so I can manage costs and still make earnings?
- How well are we meeting our financial goals and increasing shareholder value?

**Department  
Managers**



### ***Complete Insight into Departmental Revenue and Cost Drivers***

- Which customer segments are most profitable and why?
- What operating expenses are over budget?
- How do my division's results compare to the previous quarter?
- How are my headcount / product costs tracking?



# #1 Differentiator – Pre Built BI

Rapid implementation

Lower TCO

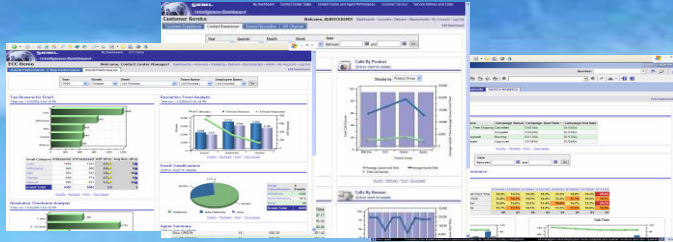




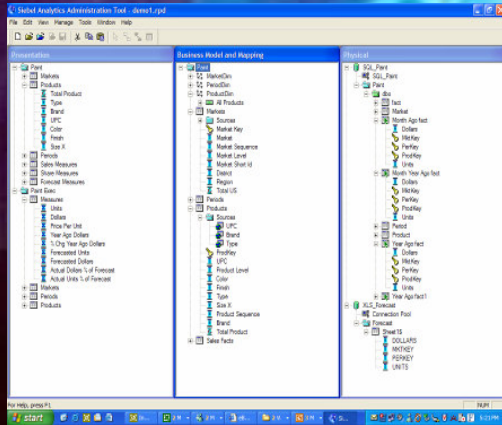
# Pre-built BI Application

Rapid deployment, immediate benefit

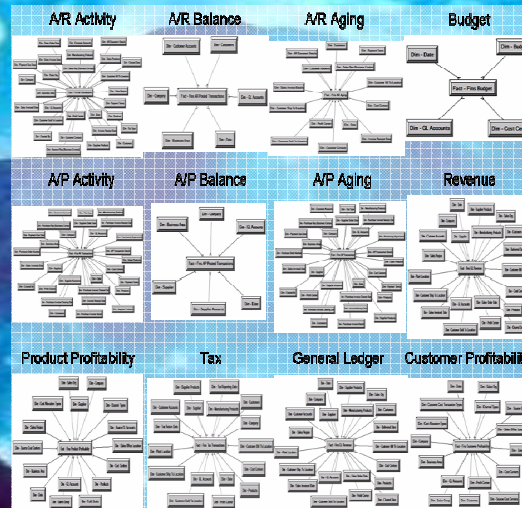
Pre-built  
Dashboards / Reports / Metrics / Alerts



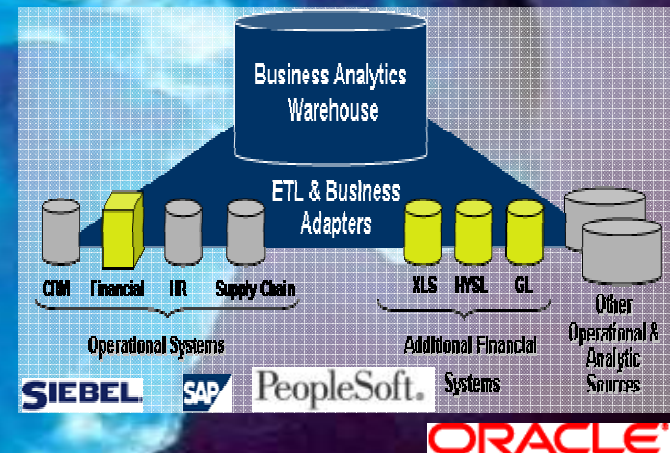
Pre-built  
MetaData



Pre-built  
DataWarehouse



Pre-built  
ETL





# BI Applications - Business Content

Over 8,000 pre-defined assets

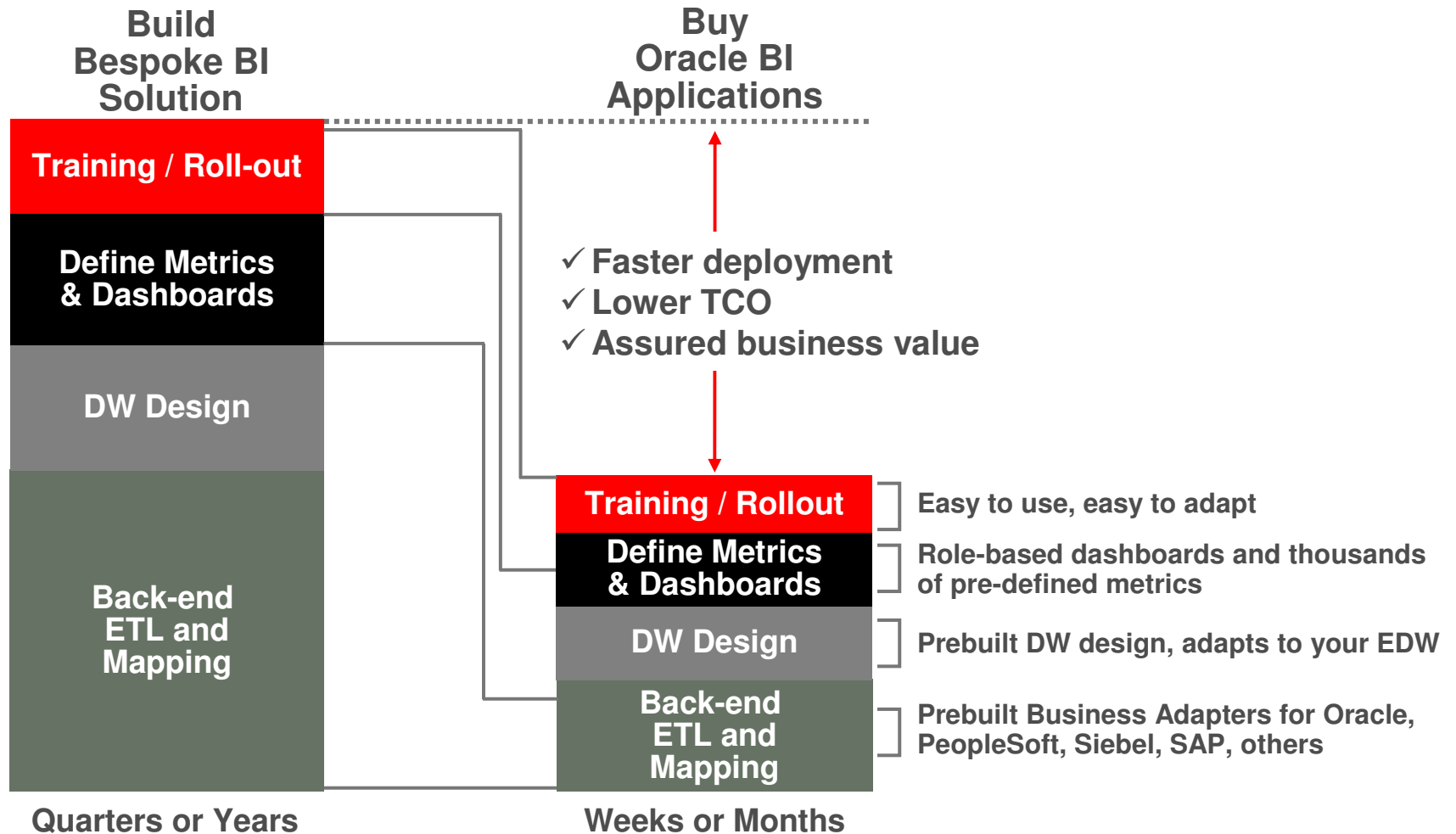
BI Application	Dashboards	Dashboard Pages	Reports	Metrics
Sales	14	33	620	596
Price	5	32	92	453
Marketing	5	27	124	325
Loyalty	4	15	60	194
Service	8	15	102	308
Contact Center	5	17	72	209
Financials	6	36	255	488
HR	9	45	238	335
Supply Chain & Order Mgmt	4	22	157	235
Procurement & Spend	5	25	266	264
Project	3	15	146	323
All Industry Apps	44	147	1,117	1,216
<b>Total</b>	<b>109</b>	<b>430</b>	<b>3,250</b>	<b>4,946</b>

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# Packaged Solution

Fast Deployment, Lowers TCO













Source: Patricia Seybold Research, Merrill Lynch, Oracle Analysis

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# Rapid Deployments

	➔	5 weeks: 120 users live with Oracle BI EE
	➔	6 weeks: Exec Team live with Oracle BI EE
	➔	6 weeks: Oracle BI EE for Credit Risk Group
	➔	9 weeks: Oracle BI EE for sales reporting
	➔	8 weeks: Order Management Analytics
	➔	10 weeks: Sales Analytics for 1,200 users
	➔	16 weeks: OM & Financial Analytics
	➔	3 months: Oracle BI EE for mobile sales team
	➔	3½ months: Sales, Service, Marketing Analytics
	➔	100 days: 1,200 users live with Oracle BI EE

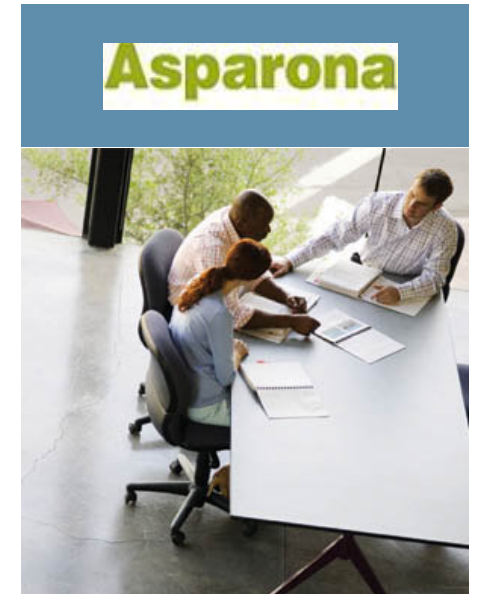
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## #2 Differentiator

Integration with Operational Applications



# Action Links Integration with Applications

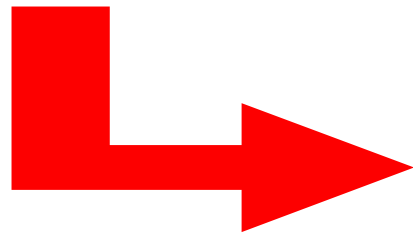
Navigate from analytical to operational while maintaining context



## Invoice Transaction Details

Time run: 4/14/2009 9:16:38 PM

Fiscal Date	Sales Invoice Number	JDE Action Link	AR Transaction Sub Type	Customer Name	Invoice Cleared Fiscal Day Date	Payment Due Fiscal Day Date	AR Amount
12/15/2008	99006~RC~3226		CASH APPLICATION	Address Number-Customer 9900150	12/15/2008	01/14/2009	(\$500.00)
12/15/2008	99006~RI~3226		INVOICE	Address Number-Customer 9900150	12/15/2008	01/14/2009	\$800.00
12/15/2008	99006~RC~3225		CASH APPLICATION	Address Number-Customer 9900150	12/15/2008	01/14/2009	(\$100.00)
12/15/2008	99006~RI~3225		INVOICE	Address Number-Customer 9900150			



### Work with Customer Ledger Inquiry

Select Find Add Delete Close Form Row Report Tools

Customer  Address Number-Customer 9  
Parent  Batch Nur

Invoice No From  Thru   All  P

Date From  Thru   Invoice Date  
 G/L Date

As Of Date   Recurring Invoice  Summarize

Records 1 - 5

	Document Number	Doc Type	Doc Co	Pay Item	Invoice Date	Gross Amount	Op Am
<input type="checkbox"/>	3226	RI	99006	001	12/15/2008	500.00	
<input type="checkbox"/>	3226	RI	99006	002	12/15/2008	300.00	

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# Seamless Integration with Oracle Apps

Drilldown - BI Dashboard directly into operational applications

## ACTION LINKS – “INSIGHT TO ACTION”

Seamless navigation from analytical information to transactional detail

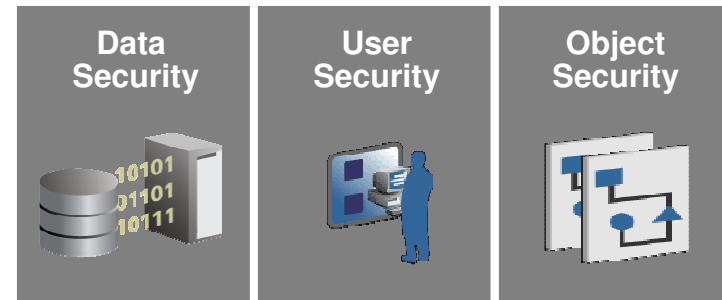
Sales Order Number	EBS Action Link	Customer Name	Source Order Status Description	Total Ordered Amount *
100173		Computer Service and Rentals	Closed	\$739,418
100174		Business World	Closed	\$738,893
120043		Imaging Innovations, Inc.	Closed	\$74,063
200133		Imaging Innovations, Inc.	Closed	\$69,548
120018		Hilman and Associates	Closed	\$54,149
100037		Imaging Innovations, Inc.	Closed	\$54,100
120040		Imaging Innovations, Inc.	Closed	\$50,578

Line Num	Item	Item Description	Ordered Quantity	UOM	Fulfilled Quantity	UOM
1.1	#2000	Consulting/Training	420	Ea	420	Ea

## INTEGRATED SECURITY

One login. Right content for each user.



## INTEGRATED WORKFLOW

Intelligence-driven business processes



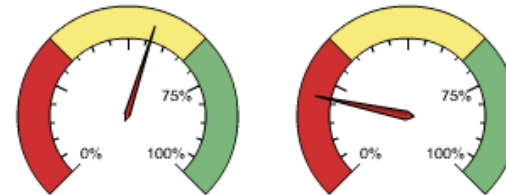
BPEL, ESB

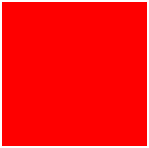


Oracle BI

## INTEGRATED WITH PLANNING AND EPMS

View performance “in-context” with budgets and plans

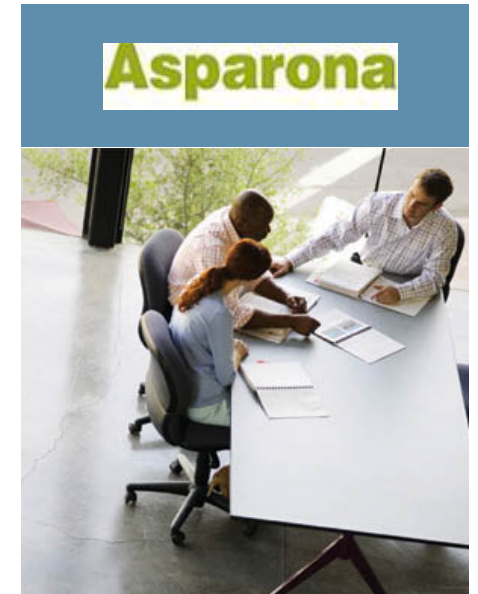




## #3 Differentiator

Leverage your existing IT investment

Extensible technology



# Hot Pluggable

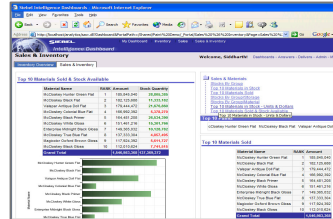
Integrates with your existing IT Architecture / Investment

## PORTALS



Any JSR 168 Portal

## DATA MINING



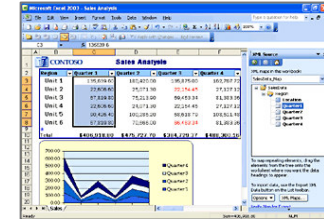
Oracle Data Mining,  
SPSS, SAS

## APPLICATIONS



Oracle EBS, Siebel, SAP,  
PeopleSoft, JD Edwards...

## DESKTOP TOOLS



Excel, Outlook,  
Lotus Notes...

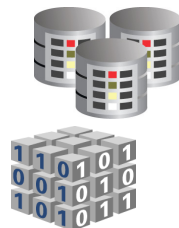
## Oracle Enterprise Performance Management System Oracle Business Intelligence Foundation

## SECURITY



Oracle Kerberos  
iPlanet  
MSFT AD  
Novell  
Custom  
Others...

## DATA ACCESS



Oracle RDBMS  
Oracle OLAP Option  
Microsoft SQL Server  
& Analysis Services  
IBM DB2  
Teradata  
Essbase  
SAP BW  
XML, Excel, Text

## DATA INTEGRATION



Oracle Data Integrator  
(Sunopsis)  
Oracle Warehouse Builder  
Informatica  
Ascential  
Others...

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# Summary

## Build vs. Buy

- Lower TCO
- Faster to implement and deploy
- Industry / Role based Best-Practice Solutions

## ERP / Desktop Integration

- Drill from BI to source data within native application
- Seamless reporting via Microsoft Excel, PowerPoint etc
- Critical to support business operations
- Increased effectiveness of business process improvement

## Leverage existing IT

- Integrate within existing IT Infrastructure / Technology/ Architecture

## Extensible Technology / Solution

- Extend solution to include your specific requirements
- Integrate data from disparate applications / data sources





# Oracle BI Applications Demonstration

