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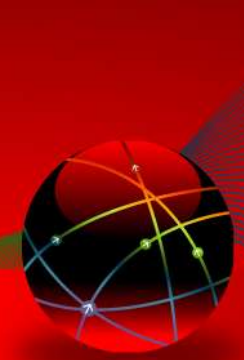

Oracle BI and Fusion Analytics

The Inside Scoop on Planning and Executing an Implementation

ORACLE OPEN WORLD

Presented by Gustavo González, IT Convergence Global IT Director
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Agenda

- Company Overview
- Business Issues
- Tools evaluation
- What Oracle solution, why selected?
- Deployment Details
- Benefits achieved
- Lessons Learned
- Future Plans

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Our Mission

Create value by improving business processes through better use of technology.

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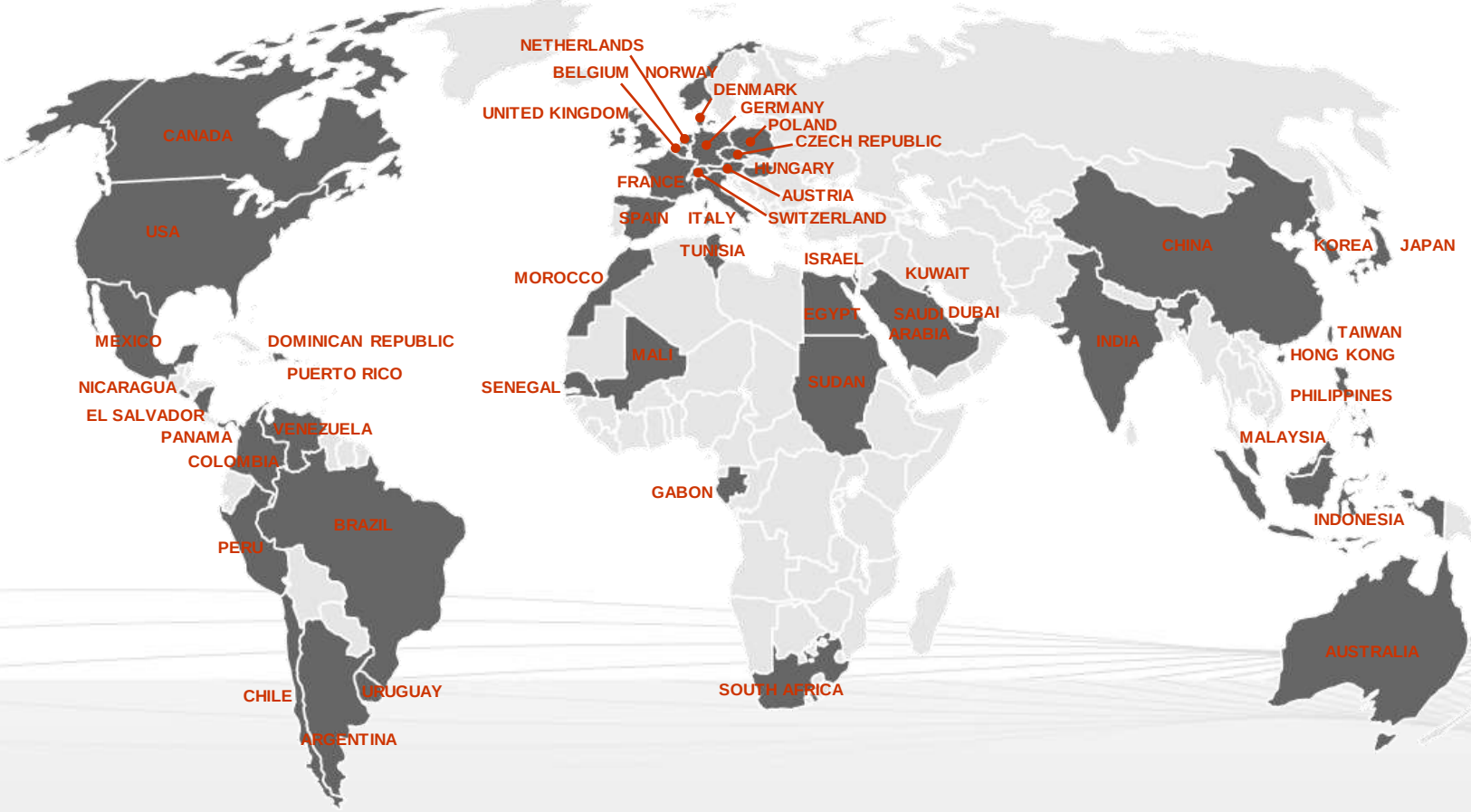
600+ Customers, Engagements in Over 50 Countries



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A True Full-Service Option

E-Business Suite, Technology and Fusion Middleware Consulting

Simplify the complexity and cost of IT management

Empower your staff with functional and technical education

Cost effective and accessible development

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English Proverb

"Beauty lies in Simplicity"

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Business Issues

- **Lack of visibility:**
  - Individual reporting tools failed to give global visibility by company and by business area
- **Not a single source of reporting:**
  - Usually, multiple reports were built on the same subjects with different parameters or grouping, causing lot of confusion
- **Efficiency:**
  - Reports ran on sporadic schedule; most took a long time to display information
- **Security:**
  - Maintaining security on a report-by-report basis was untenable

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IT Challenges – Deliver information

- Live information: Discoverer, Noetix Web Query
- Dashboards: Discoverer, Noetix Dashboards, Oracle Portal + Noetix, Links to reports
- Refreshable excel files: using Noetix
- Personal Web Pages

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Personal Web Pages

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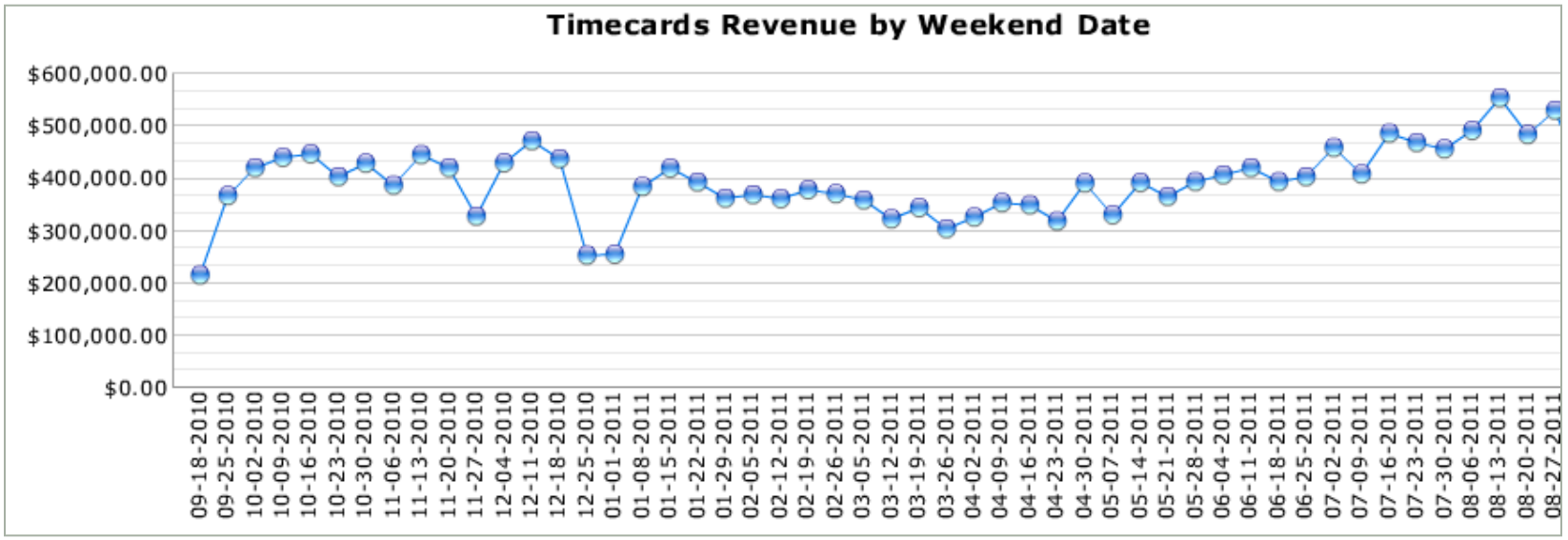
Noetix Dashboards



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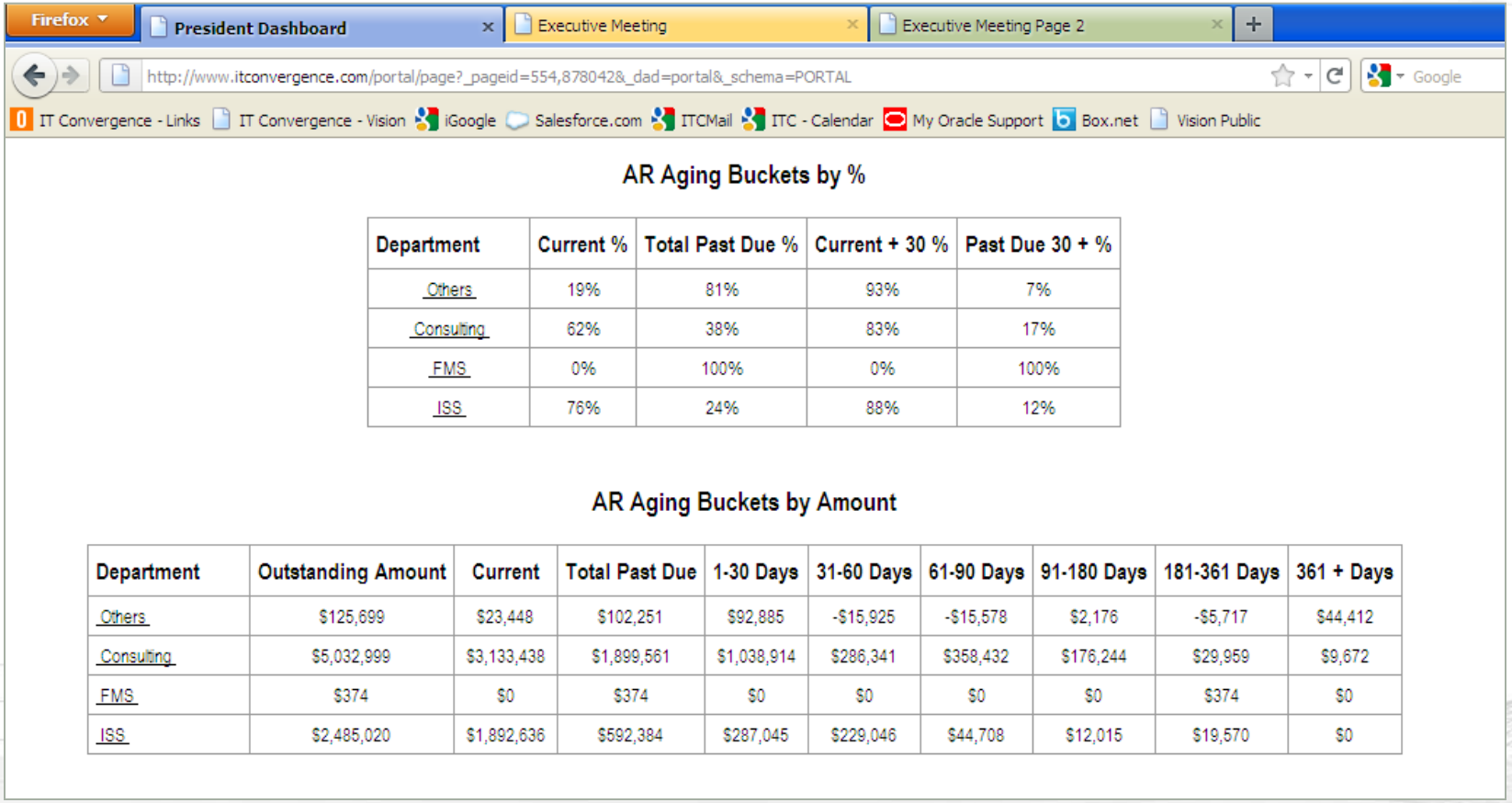
Portal + Noetix



AR Aging Buckets by %

Department	Current %	Total Past Due %	Current + 30 %	Past Due 30 + %
Others	19%	81%	93%	7%
Consulting	62%	38%	83%	17%
FMS	0%	100%	0%	100%
ISS	76%	24%	88%	12%

AR Aging Buckets by Amount

Department	Outstanding Amount	Current	Total Past Due	1-30 Days	31-60 Days	61-90 Days	91-180 Days	181-361 Days	361 + Days
Others	$125,699	$23,448	$102,251	$92,885	-$15,925	-$15,578	$2,176	-$5,717	$44,412
Consulting	$5,032,999	$3,133,438	$1,899,561	$1,038,914	$286,341	$358,432	$176,244	$29,959	$9,672
FMS	$374	$0	$374	$0	$0	$0	$0	$374	$0
ISS	$2,485,020	$1,892,636	$592,384	$287,045	$229,046	$44,708	$12,015	$19,570	$0

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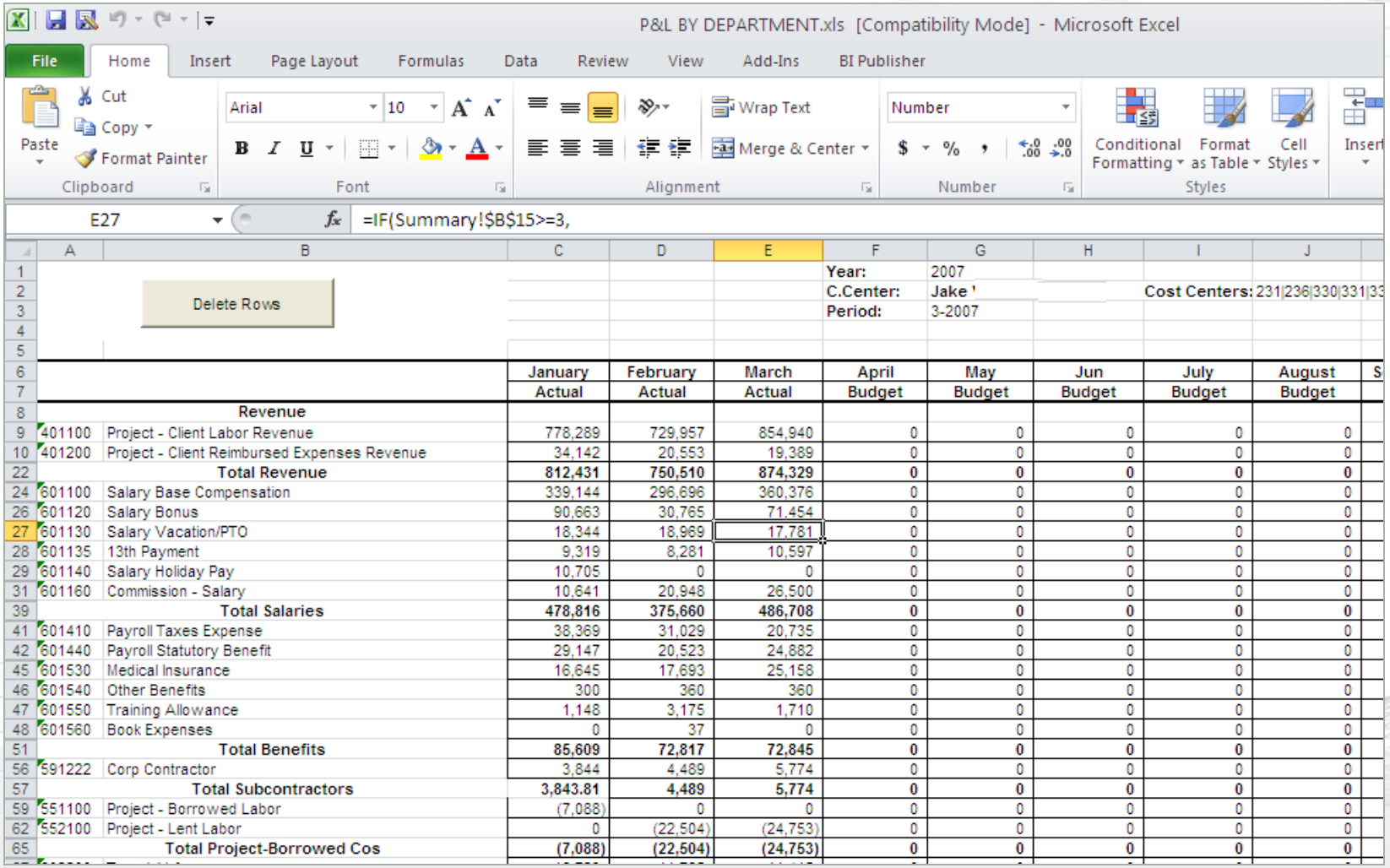
Refreshable Excel



		January Actual	February Actual	March Actual	April Budget	May Budget	Jun Budget	July Budget	August Budget
	Revenue								
401100	Project - Client Labor Revenue	778,289	729,957	854,940	0	0	0	0	0
401200	Project - Client Reimbursed Expenses Revenue	34,142	20,553	19,389	0	0	0	0	0
	Total Revenue	**812,431**	**750,510**	**874,329**	**0**	**0**	**0**	**0**	**0**
601100	Salary Base Compensation	339,144	296,696	360,376	0	0	0	0	0
601120	Salary Bonus	90,663	30,765	71,454	0	0	0	0	0
601130	Salary Vacation/PTO	18,344	18,969	17,781	0	0	0	0	0
601135	13th Payment	9,319	8,281	10,597	0	0	0	0	0
601140	Salary Holiday Pay	10,705	0	0	0	0	0	0	0
601160	Commission - Salary	10,641	20,948	26,500	0	0	0	0	0
	Total Salaries	**478,816**	**375,660**	**486,708**	**0**	**0**	**0**	**0**	**0**
601410	Payroll Taxes Expense	38,369	31,029	20,735	0	0	0	0	0
601440	Payroll Statutory Benefit	29,147	20,523	24,882	0	0	0	0	0
601530	Medical Insurance	16,645	17,693	25,158	0	0	0	0	0
601540	Other Benefits	300	360	360	0	0	0	0	0
601550	Training Allowance	1,148	3,175	1,710	0	0	0	0	0
601560	Book Expenses	0	37	0	0	0	0	0	0
	Total Benefits	**85,609**	**72,817**	**72,845**	**0**	**0**	**0**	**0**	**0**
591222	Corp Contractor	3,844	4,489	5,774	0	0	0	0	0
	Total Subcontractors	**3,843.81**	**4,489**	**5,774**	**0**	**0**	**0**	**0**	**0**
551100	Project - Borrowed Labor	(7,088)	0	0	0	0	0	0	0
552100	Project - Lent Labor	0	(22,504)	(24,753)	0	0	0	0	0
	Total Project-Borrowed Cos	**(7,088)**	**(22,504)**	**(24,753)**	**0**	**0**	**0**	**0**	**0**

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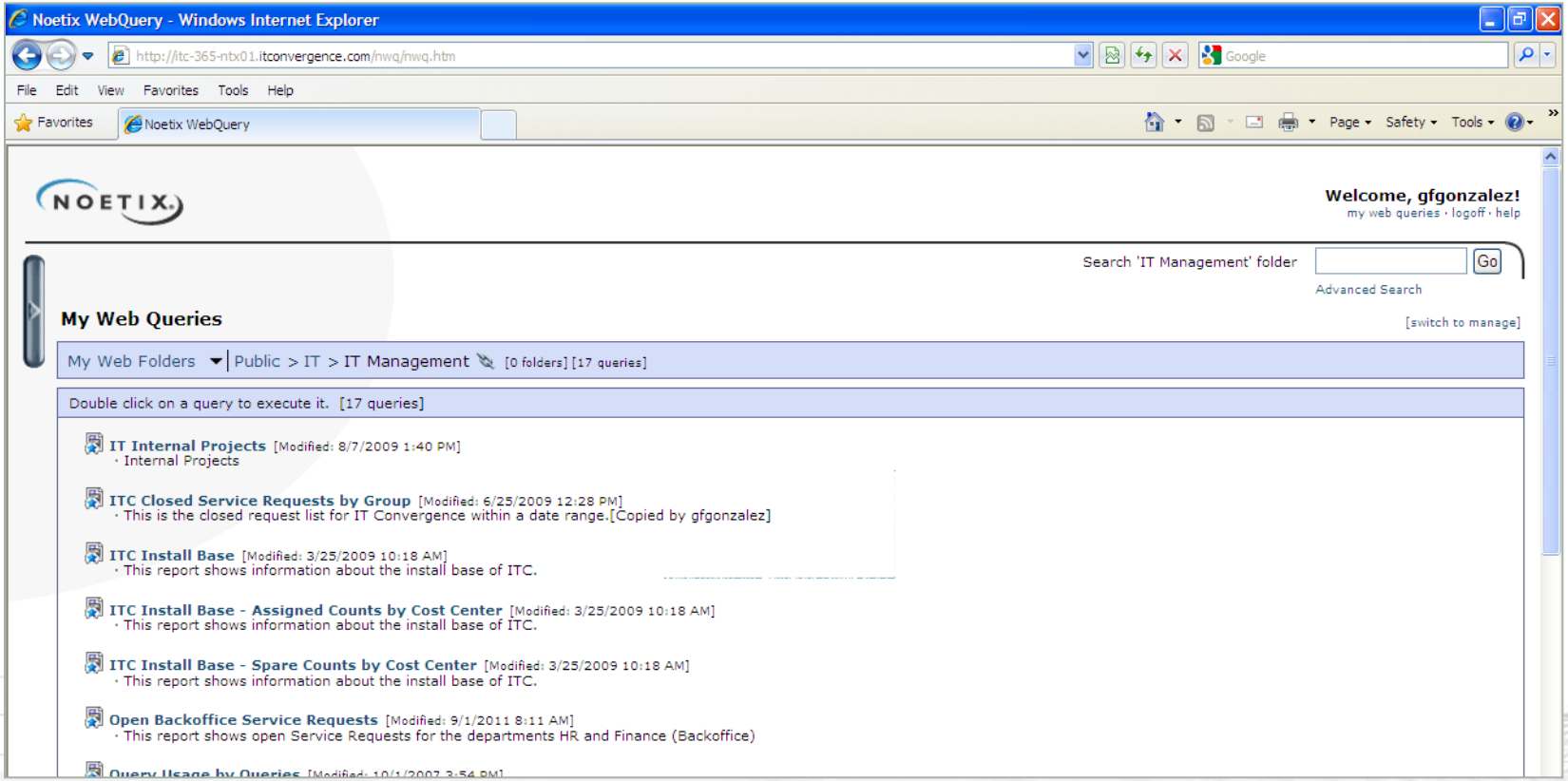
Noetix WebQuery



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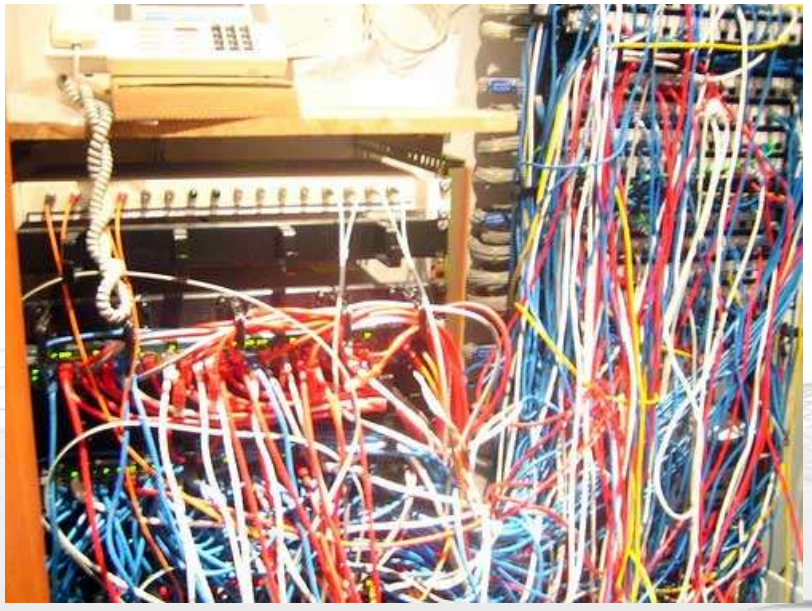
Results…

- Too many tools
- Too many ways of accessing the information
- Performance on complex reports
- Information not connected (drill down)
- High maintenance
- And mobile?



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BI Strategy Goal

- Think Big
- Start Small
- Foster Business-IT Partnership
- Clean Up
- Provide A Portfolio Of Tools

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Think Big

Don’t think of BI as synonymous with query tools; instead, think about how information can be used to improve everything about your business

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Start Small

- A focused project will yield a fast win, garner executive enthusiasm, and provide greater insight into BI's complexities

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Foster Business-IT Partnership

- Learn what drives the business. Staff, BI teams jointly with business and tech experts.

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Clean Up

- If your source systems are a mess, your BI platform will be, too. Use a data governance program to improve data integrity.

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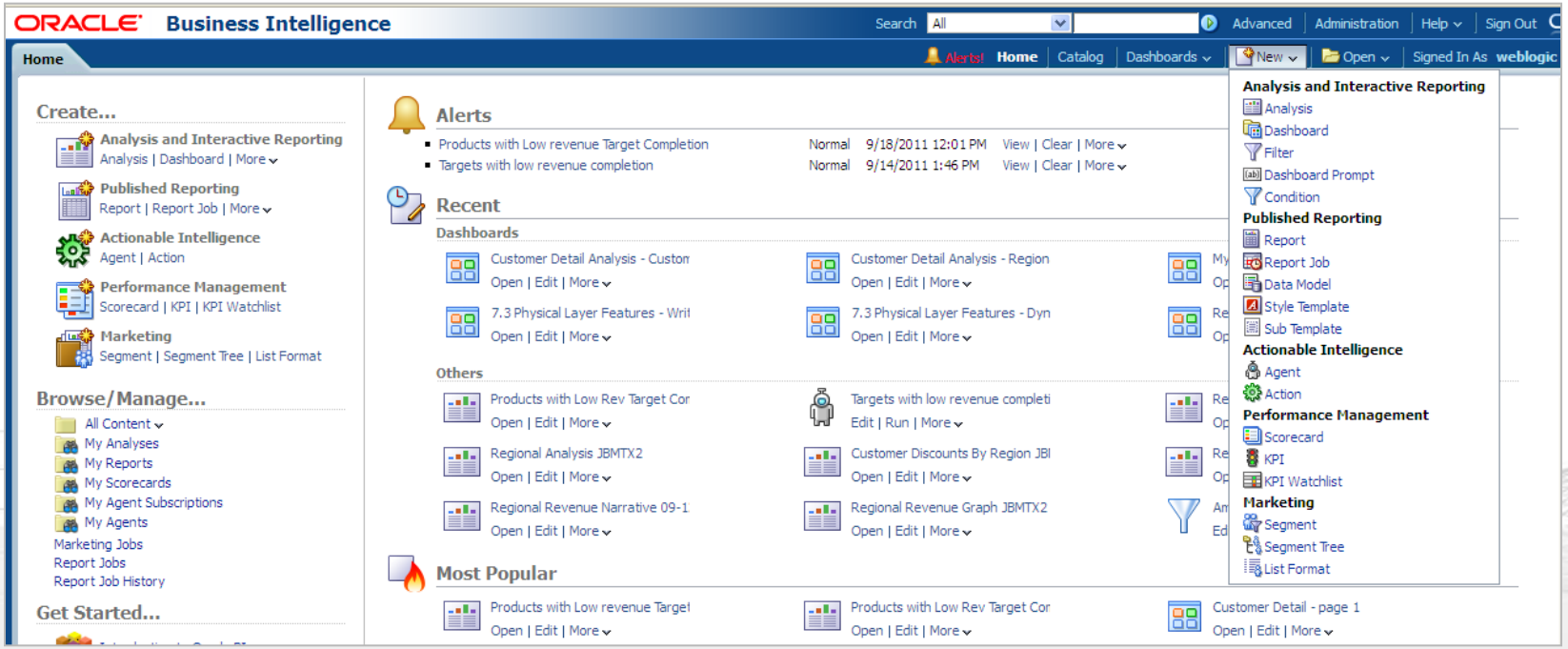
Provide a Portfolio of Tools

- BI interfaces are optimized for different users and applications. Don't underestimate the importance of interface appeal.



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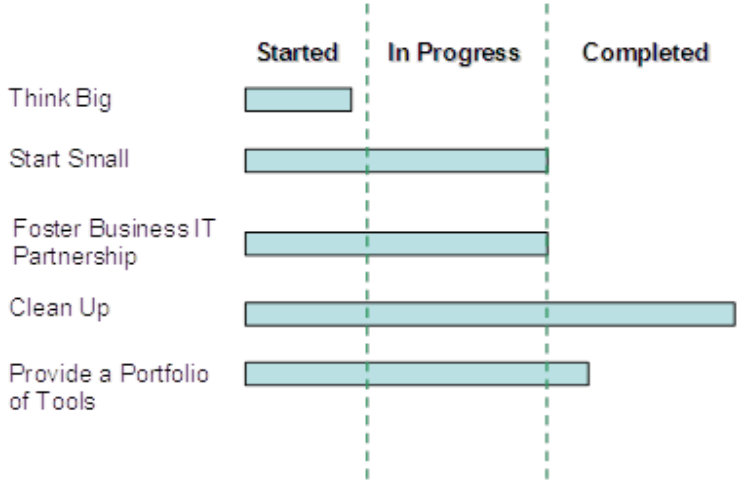
Architecture, Goal and constrains



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What we really wanted was…

- Dashboards
- Reports and publishing
- Ad-hoc Analysis
- Alerts
- MSOffice plugin
- Mobile
- Connection to EBS Database and DW

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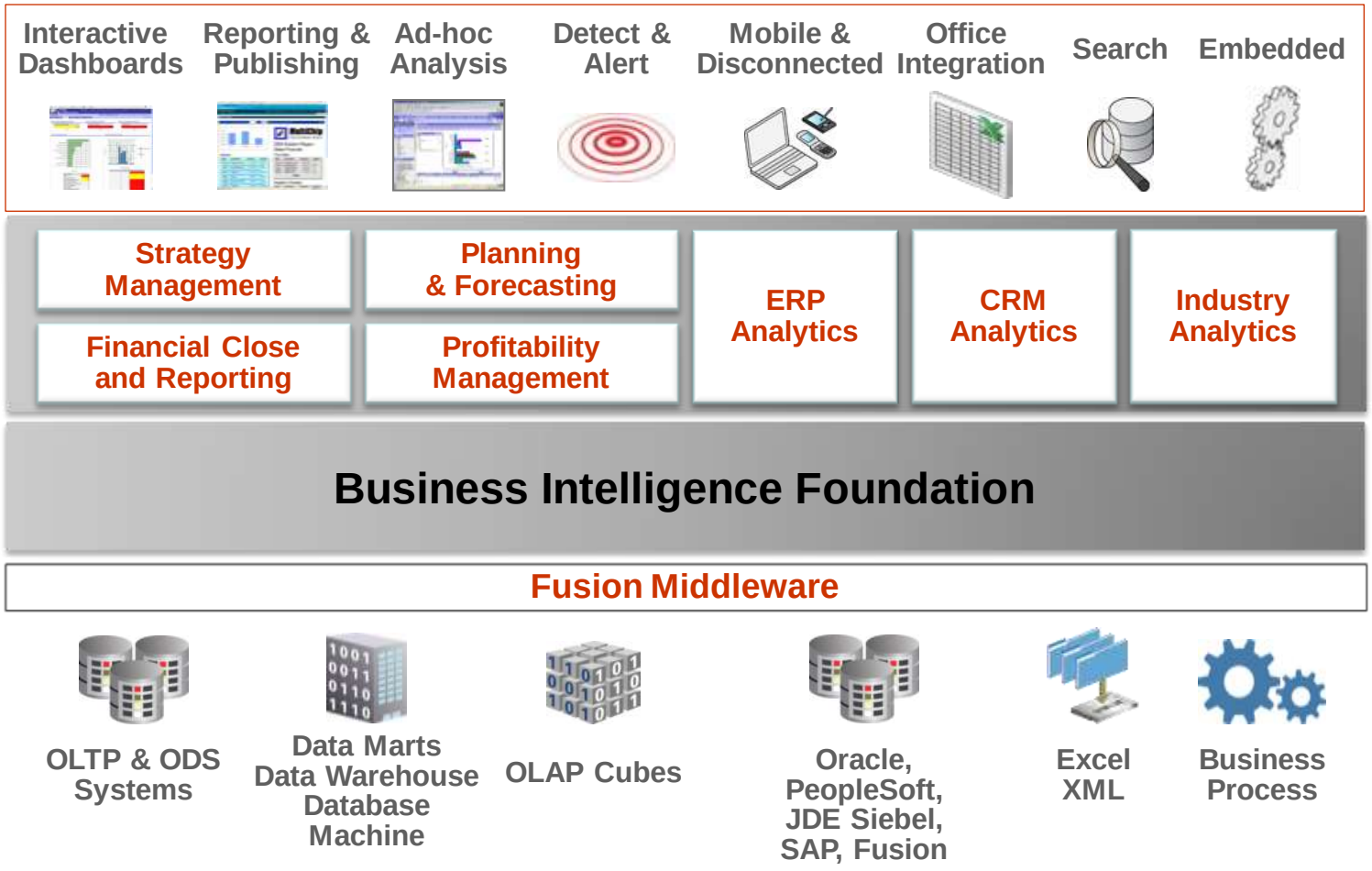
Oracle Business Intelligence Enterprise Edition



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Oracle BI Applications

ORACLE BUSINESS INTELLIGENCE

CRM ANALYTICS

CASE MANAGEMENT	MARKETING	SERVICE & CONTACT CENTER
▪ Case Processing ▪ Service Requests ▪ Incidents ▪ Activity Management ▪ Resolution ▪ Organizational Efficiency	▪ Campaign Effectiveness ▪ Customer Insight ▪ Product Propensity ▪ Market Basket Analysis ▪ Campaign ROI	▪ Service Effectiveness ▪ Customer Satisfaction ▪ Resolution Rates ▪ Service Rep Efficiency ▪ Service Cost ▪ Service Trends

PRICE	LOYALTY
▪ Price Segments ▪ Price Waterfall Analysis ▪ Deal Life Cycle ▪ Deal Desk Analysis ▪ Product Pricing Performance	▪ Member Demographics ▪ Program Revenue ▪ Membership Trends ▪ Promotion Effectiveness ▪ Points Analysis

ERP ANALYTICS

FINANCIALS	PROCUREMENT & SPEND	SUPPLY CHAIN & ORDER MGMT
▪ General Ledger ▪ Accounts Receivable ▪ Accounts Payable ▪ Cash Flow ▪ Profitability ▪ Expense Management	▪ Direct & Indirect Spend ▪ Buyer Productivity ▪ Contract Compliance ▪ Supplier Performance ▪ Purchase Cycle Time ▪ Employee Expense	▪ Revenue & Backlog ▪ Inventory Analysis ▪ Fulfillment Status ▪ Customer Status ▪ Order Cycle Time ▪ BOM Analysis

PROJECTS	HUMAN RESOURCES
▪ Project Funding and Budget ▪ Product Cost ▪ Project Revenue ▪ Project Billing ▪ Project Profitability	▪ Employee Productivity ▪ Compensation ▪ Talent Management ▪ Recruiting Analysis ▪ Learning Analysis ▪ Workforce Profile

SOURCE ADAPTERS: ORACLE PeopleSoft SIEBEL JDEDWARDS SAP **AND OTHER OPERATIONAL AND ANALYTIC SOURCES**

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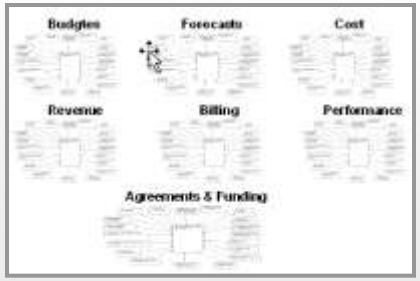
Oracle BI Applications Components

1

Pre-built warehouse with star-schemas designed for analysis and reporting.



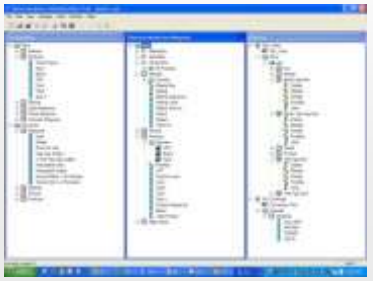
2

Pre-built ETL to extract data from a large number of operational tables and load it into the DW, sourced from sourced from CRM, ERP, and other sources.

3

Pre-mapped metadata, including embedded best practice calculations, and over 500 pre-built metrics for the project organization.

- → **Presentation layer**
- → **Logical business model**
- → **Physical sources**



4

A “best practice” library of over 100 pre-built intelligence dashboards, reports and alerts for project managers, program managers, project accountants, and executives.

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Why OBI Applications?

- **OBI Applications Positioned as a cost-effective, BI Solution and predicted to gain traction in the market**
  - ITC Wanted to Gain 1st Hand Expertise with OBI Applications and the OBIEE platform
- **Applicable to size/nature of ITC's operation**
- **Short Deployment Time vs. building from scratch**
- **Impressive out of the box functionalities paired with ease of adaptability**
- **Seamless integration with the E-Business Suite**

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Deployment Process

- Time frame – 6 months
- Project phases
- Resources used –functional + technical (OBI Applications + E-Business Suite)
- Modules deployed: Financials, Projects, Human Resources, Services

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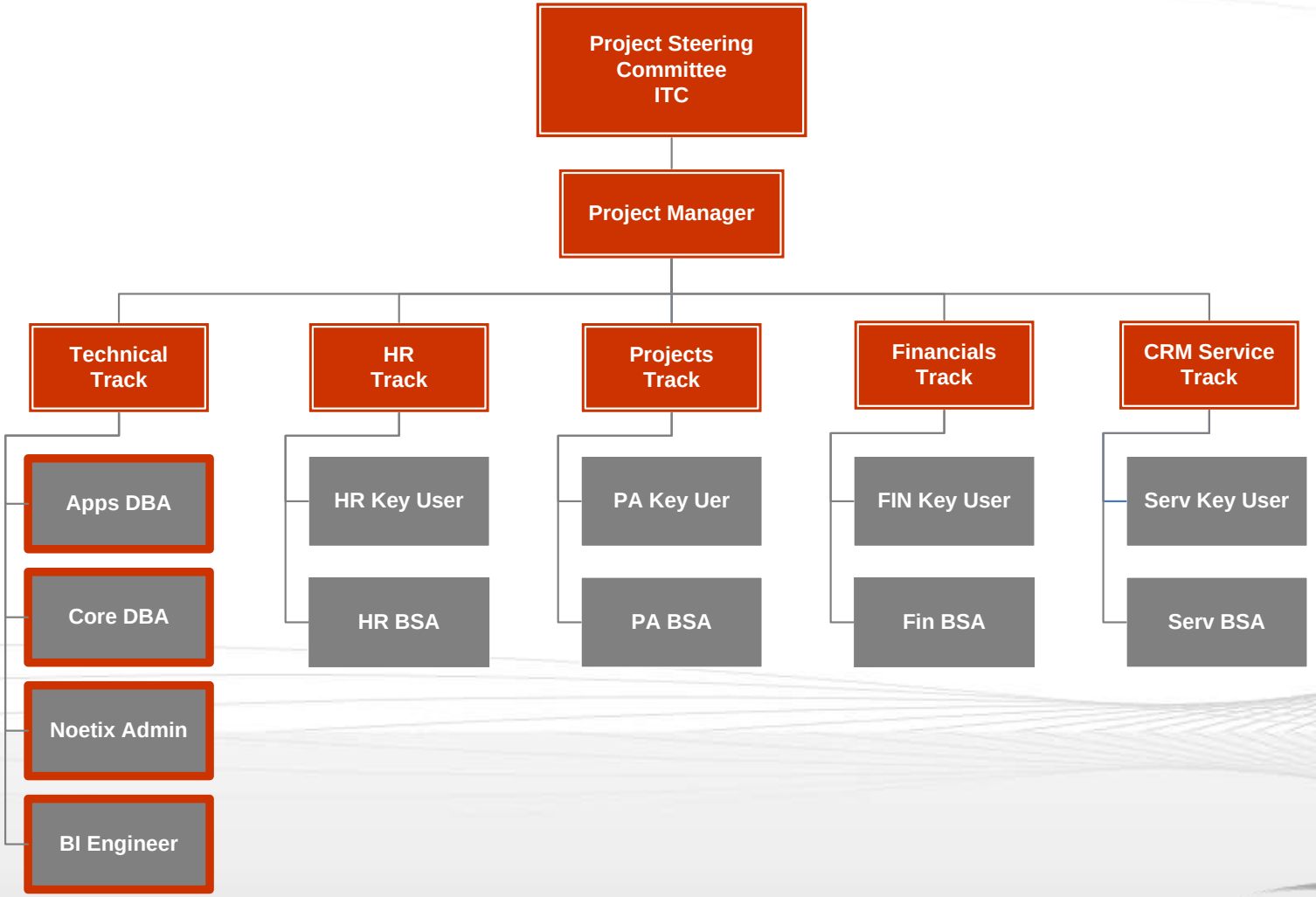
ITC BI Project Team



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BI Components – to be licensed

- Weblogic / BI Admin
- Informatica
- Database
- BI Apps
  - Financials
  - Projects
  - Human Resources
  - Service

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Project Phases:
Phase 1 – Focus on Revenue and Cashflow

- **Installation**
- **New insfrastructure Setup**
- **BI Server built (BIApp)**
  - HW and OS identified
  - HW configured
  - OS Installation and admin access
- **BI DB Server built (BIDB)**
  - HW and OS identified
  - HW configured
  - OS Installation and admin access
- **Software Install**
  - Definition of Databases and Environments
  - "BI DB creation, DB users and roles and Passwords in test environment"
  - Preparation for OBI Applications installation
  - Installation of JDK 1.6x
  - Installation of OBI Applications apps 10.1.3.4
- **Installation of Oracle Fusion Middleware 7.9.6**
  - Informatica configuration
  - Importing and configuring domain and repository
- **Configuration of DAC**
  - Setting up DAC server and Client
  - Verification of OBI Applications/DB components

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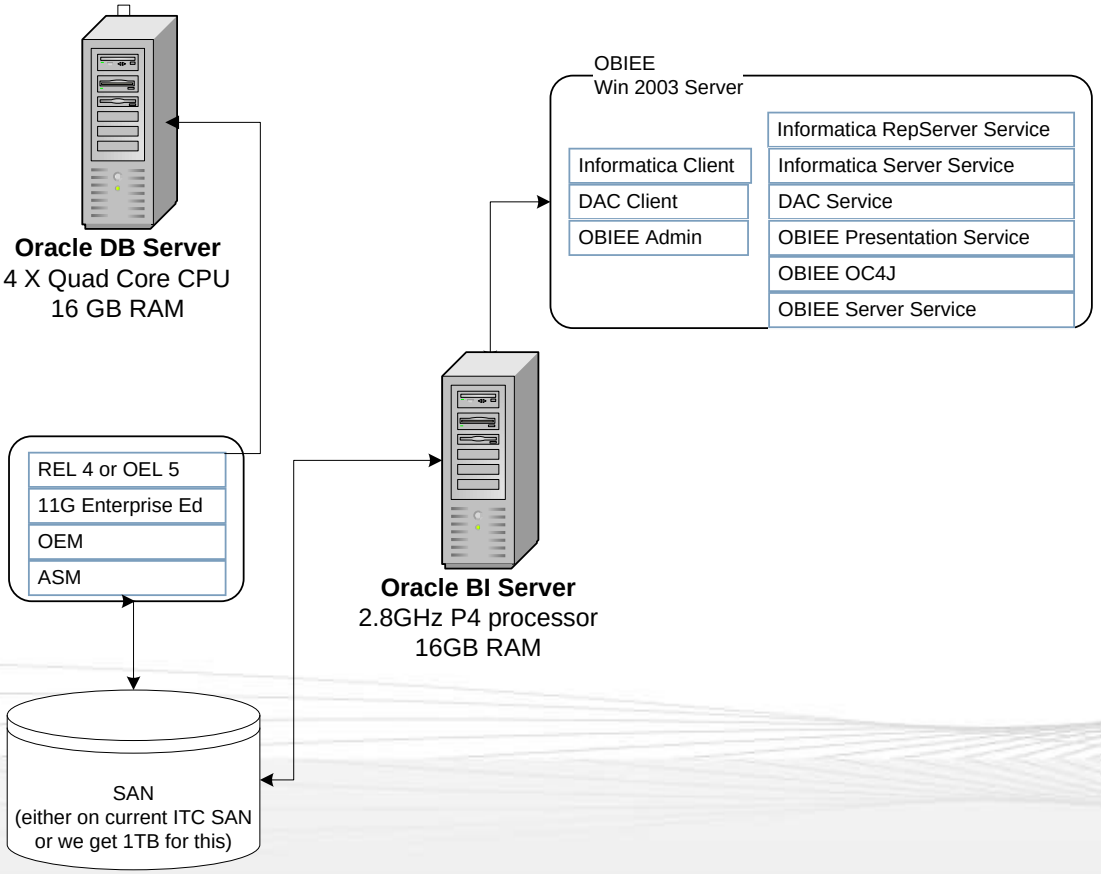
ITC BI Footprint

IT Convergence Production– Business Intelligence Footprint



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Phase Zero

- Pilot of the tool with users
- Training IT and Users

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Project Phases
Phase 1 – Focus on Revenue and Cashflow

Configuration

- **Configuring ETL run**
  - **CheckPoint for connections**
  - **Run ETL for Financials, Projects"**
  - **Troubleshooting ETL Process**
  - **Configure the default RPD**
  - **Data Transfer and Load for test**
    - Reloading full data
    - Verify data load
    - Finance
      - Functional team review and support of datasets
      - Configure Source & Lookup Files for Oracle Analytics
      - Refresh ETL for module
      - Check Dashboard and Data in warehouse
    - **Projects**
      - Functional team review and support of datasets
      - Configure Source & Lookup Files for Oracle Analytics
      - Refresh ETL for module
      - Check Dashboard and Data in warehouse
  - **Security Strategy**
    - Evaluate different options and features
    - Test options
    - Implement solution

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Project Phases
Phase 1 – Focus on Revenue and Cashflow

User Acceptance

- Finance UAT
  - Unit Test
    - Test by Functional Project Team
  - Integration Test
    - Present OBI Applications Finance to key users
    - Validate Dashboards
  - Acceptance from finance key users
- Projects UAT
  - Unit Test
    - Test by Functional Project Team
  - Integration Test
    - Present OBI Applications Finance to key users
    - Validate Dashboards
  - Acceptance from projects key users
- Training
  - Training to key users
  - Train the trainers
  - Users trained
- Go Live
  - Training documentation
  - Communication on support
  - Go live

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Benefits Achieved

- Gained visibility into each business area
- One Source of Truth for project management information
- Secure access to information by role or responsibility
  - All levels of the company gain access to valuable information within security parameters
- Managers and supervisors access their own information and maintain its accuracy
  - OBI Applications immediately helped detect and correct multiple errors
- Key dashboards, reports and performance indicators are available upon login

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Project Management Reporting, Now and Then…

- Maintenance of OBI Applications Dashboards is almost nill
- Previously we developed new reports, every two weeks, depending on who requested them
- Users have confidence in data from OBI Applications Dashboards
  - Leads to faster, better decision making

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Lessons Learned

- OBI Applications ≠ a replacement of more detailed reporting tool
- The information shown in OBI Applications is grouped and summarized to make it more efficient to run and display
  - Due to specific needs, we've kept the lowest level of information in another reporting tool for reconciliation and audit purposes
- OBI Applications historical data vs. live data: Immediate changes in Oracle are not reflected in OBI Applications until the next update is run. Usually this happens once a day

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Customization Considerations

- **Created an ETL-based view to show HR, Project Assignment, and Cost data on a daily basis**
  - Flexibility to Group by Data Range or Employee to calculate utilization
    - Caveat – Performance impact of working this tremendous volume of data
- **Development Time Due Diligence**
  - Hours needed for development could be significant, and should be carefully estimated depending on the layer (Webcat Vs ETL) that needs configuration

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10 things we must do

- Choose a C-level sponsor (who's not the CIO)
- Create common definitions
- Assess the current situation
- Create a plan for data storage
- Understand what users need
- Decide whether to buy or build the analytical data model
- Consider all business intelligence components
- BI implementations require guidance from who has deep experience
- Think "actionable" and "baby steps"
- Choose low-hanging fruit to start

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Thank You!

ORACLE APPLICATIONS WORKSHOPS

ORACLE R12

- Preparing for an Oracle R12 Upgrade
- Oracle R12 Financials New Features
- Subledger Accounting
- E-Business Tax

BUSINESS INTELLIGENCE

- OBIEE 11g for Administrators
- OBIEE 11g for End Users
- Reporting Options for Oracle E-Business Suite

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