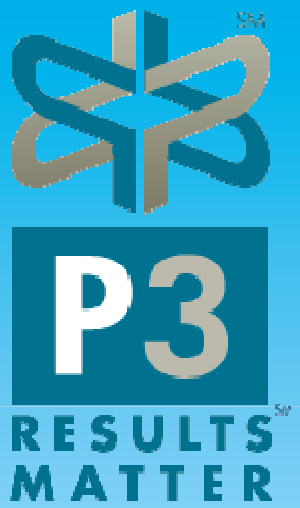


Extending the capabilities of Oracle Business Intelligence Applications (OBIA)

January 19, 2010

ORACLE CERTIFIED PARTNER

Agenda

- Introduction
- Overview of OBIEE & OBIA
- How to extend OBIA?
  - Simple Gaps
  - Complex Enhancements
- Lessons learned
- Q&A

P3 Overview

- 3+ years in operation
- 50+ years of Oracle implementation (R8 to R12)
- Oracle, KPMG, Deloitte, Hackett, Corio, AppShop

EXPERIENCE

EXPERTISE

- Project Management
- Business Process design
- App Implementation, Integration and Business Intelligence
- System Administration
- Custom Development

SUCCESS

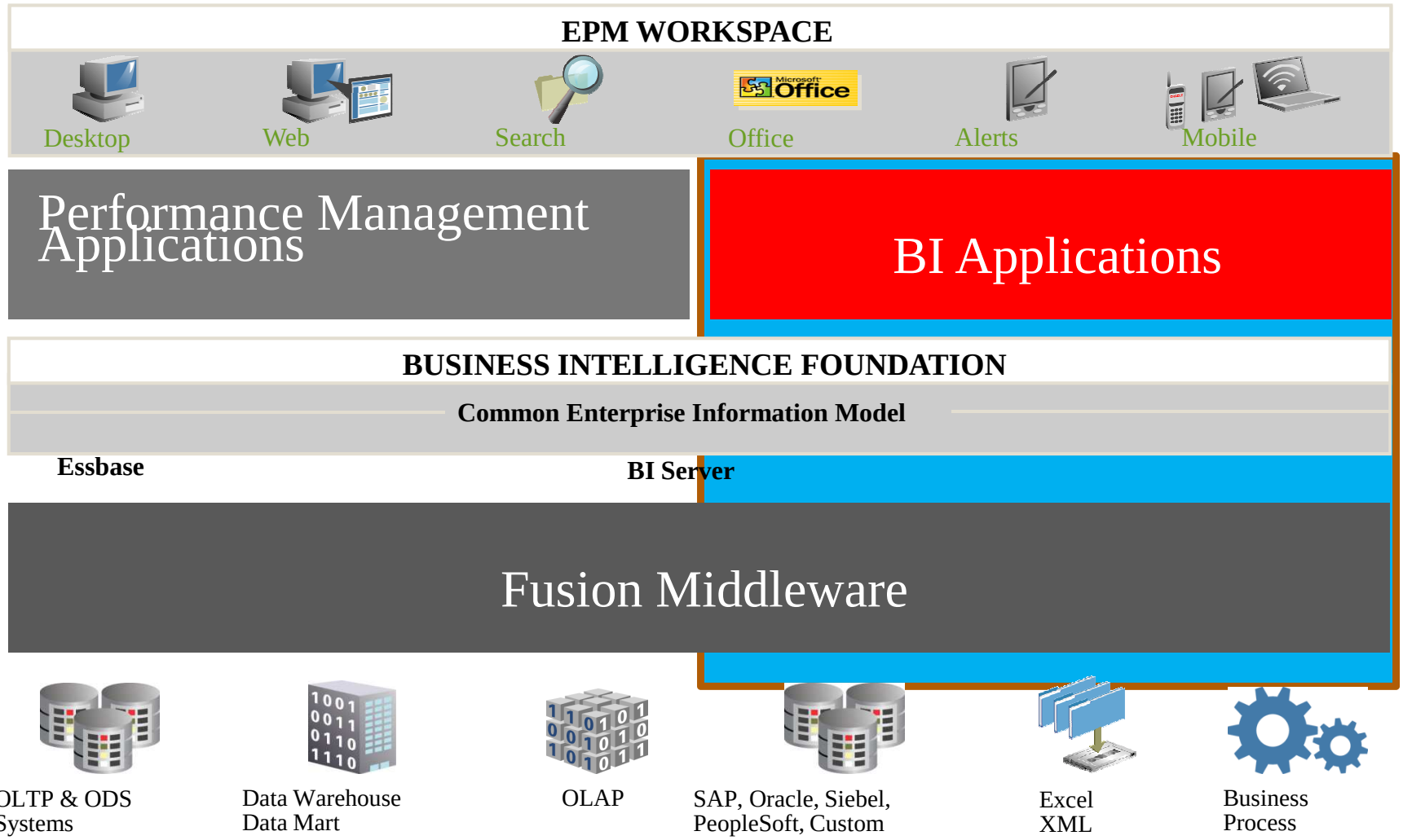
DIONEX, equinix, Rackable systems, Sun microsystems, FOUNDRY NETWORKS, UTSTARCOM, CISCO, VERITAS, SONICWALL, NetApp, STRATFORD SCHOOL, KANA

FOCUS

- Oracle EBS
- OBIEE
- Hyperion
- Remote Management
- Custom Development

P3 RESULTS MATTER

Overview of Oracle BI Architecture



OBIEE Apps

Resident Expertise

Resources Available

Sales	Service & Contact Center	Marketing	Order Management & Fulfillment	Supply Chain	Financials	Human Resources
Pipeline Analysis	Churn Propensity	Campaign Scorecard	Order Linearity	Supplier Performance	A/R & A/P Analysis	Employee Productivity
Triangulated Forecasting	Customer Satisfaction	Response Rates	Orders vs. Available Inventory	Spend Analysis	GL / Balance Sheet Analysis	Compensation Analysis
Sales Team Effectiveness	Resolution Rates	Product Propensity	Cycle Time Analysis	Procurement Cycle Times	Customer & Product Profitability	HR Compliance Reporting
Up-sell / Cross-sell	Service Rep Effectiveness	Loyalty and Attrition	Backlog Analysis	Inventory Availability	P&L Analysis	Workforce Profile
Cycle Time Analysis	Service Cost Analysis	Market Basket Analysis	Fulfillment Status	Employee Expenses	Expense Management	Turnover Trends
Lead Conversion	Service Trends	Campaign ROI	Customer Receivables	BOM Analysis	Cash Flow Analysis	Return on Human Capital

Prebuilt adapters: ORACLE PeopleSoft SIEBEL SAP Other Operational & Analytic Sources

P3 RESULTS MATTER

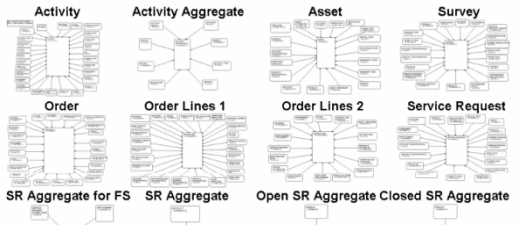
OBIA Components

PRESENTATION LAYER

- User Roles, Preferences
- Simplified View
- Logical SQL Interface

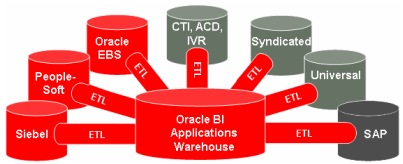
SEMANTIC OBJECT LAYER

- Dimensions
- Hierarchies
- Measures
- Calculations
- Aggregation Rules
- Time Series



PHYSICAL LAYER

- Map Physical Data
- Connections
- Schema



ORACLE PeopleSoft JDEDWARDS SIEBEL SAP

Custom OLTP & ODS

Custom DW, Data Mart

Essbase

Business Process

Files Excel XML

- Customize role-based views, data integration, reports, dashboards, alerts, mobile delivery and MS Office/Outlook integration
- End-user training

- Tailor std models and metadata
- Define custom models, calculations, subject areas etc.
- Performance optimization
- Access security

- Configure standard extracts
- Define custom extracts (ETL)
- Propagate Flexfields
- Schema optimization & security

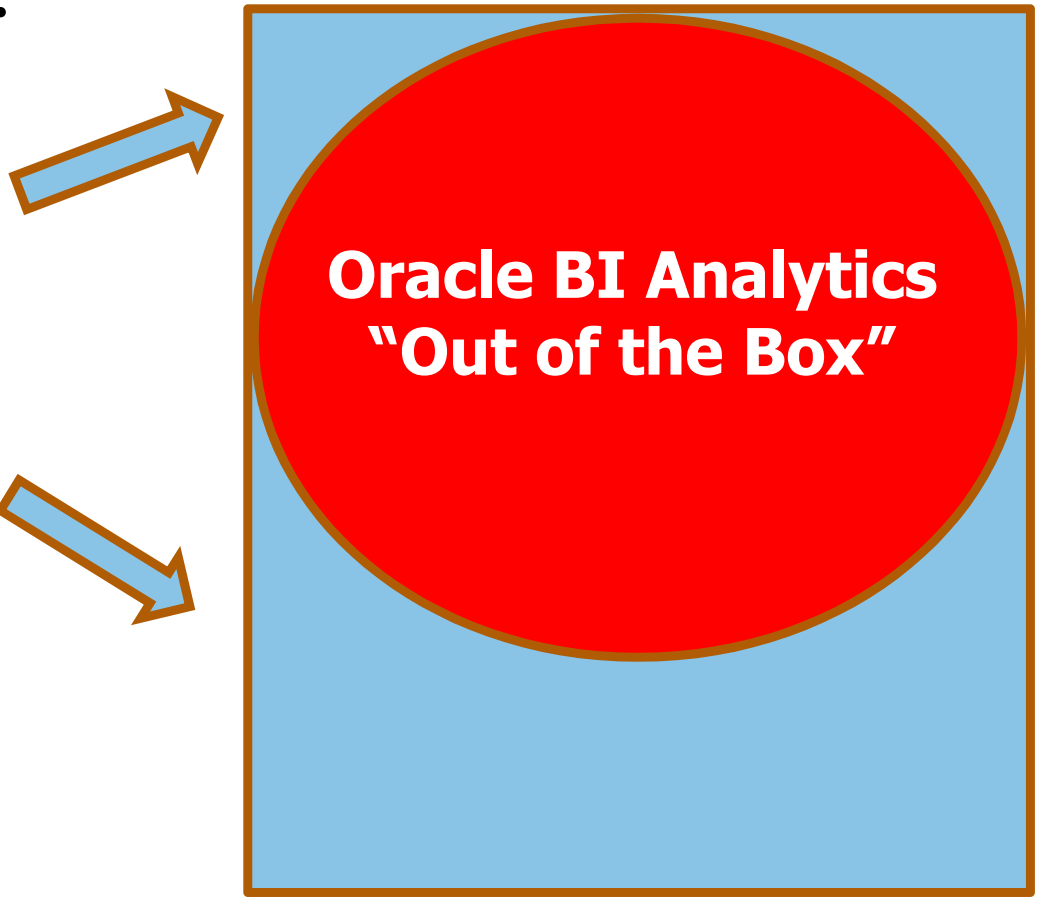
- Leverage standard adapters
- Define custom adapters
- Resident expertise in Oracle, Siebel
- Resources available for JD Edwards, Peoplesoft and SAP

P3 RESULTS MATTER

How do you extend OBIA?

The good news, OBIA has a lot of "out of the box" metrics However, for every business you can expect some gaps that you might need to fill.

We are going to show you examples of both <u>Simple</u> and <u>Complex</u> gaps.



Example of Gaps

- Simple
  - View product cost by historical time frame
  - Configure OBIA to support “PTO” “Pick To Order “ & “ATO” product structure
  - Compare Freight Charges VS Invoiced freight, by freight carriers and freight terms
  - Inclusion of Drop Shipments data to Shipment Fact
  - Created new dimensions, “Fulfillment Status”, “Hold Types” to review backlog metrics
  - Extend Financial Analytics to create FSG reports
- Complex
  - Quoting Analytics
  - RMA Failure Analysis
  - Integration with 3rd party cloud applications

Small Gap Example - Add "Drop Shipment data to Shipping Metrics"

Informatic Designer
- Identify the shipment SDE mapping "SDE_ORA_SalesPickLinesFact"
- Edit the mapplet's "mplt_BC_ORA_SalesPickLinesFact" - find the existing SQL query

EBS
- Identify the drop shipment query
- Ensure the number of columns/ports selected matches with the existing query

Informatica Designer
- Edit the mapplet "**mplt_BC_ORA_SalesPickLinesFact" -A**dd the new SQL query

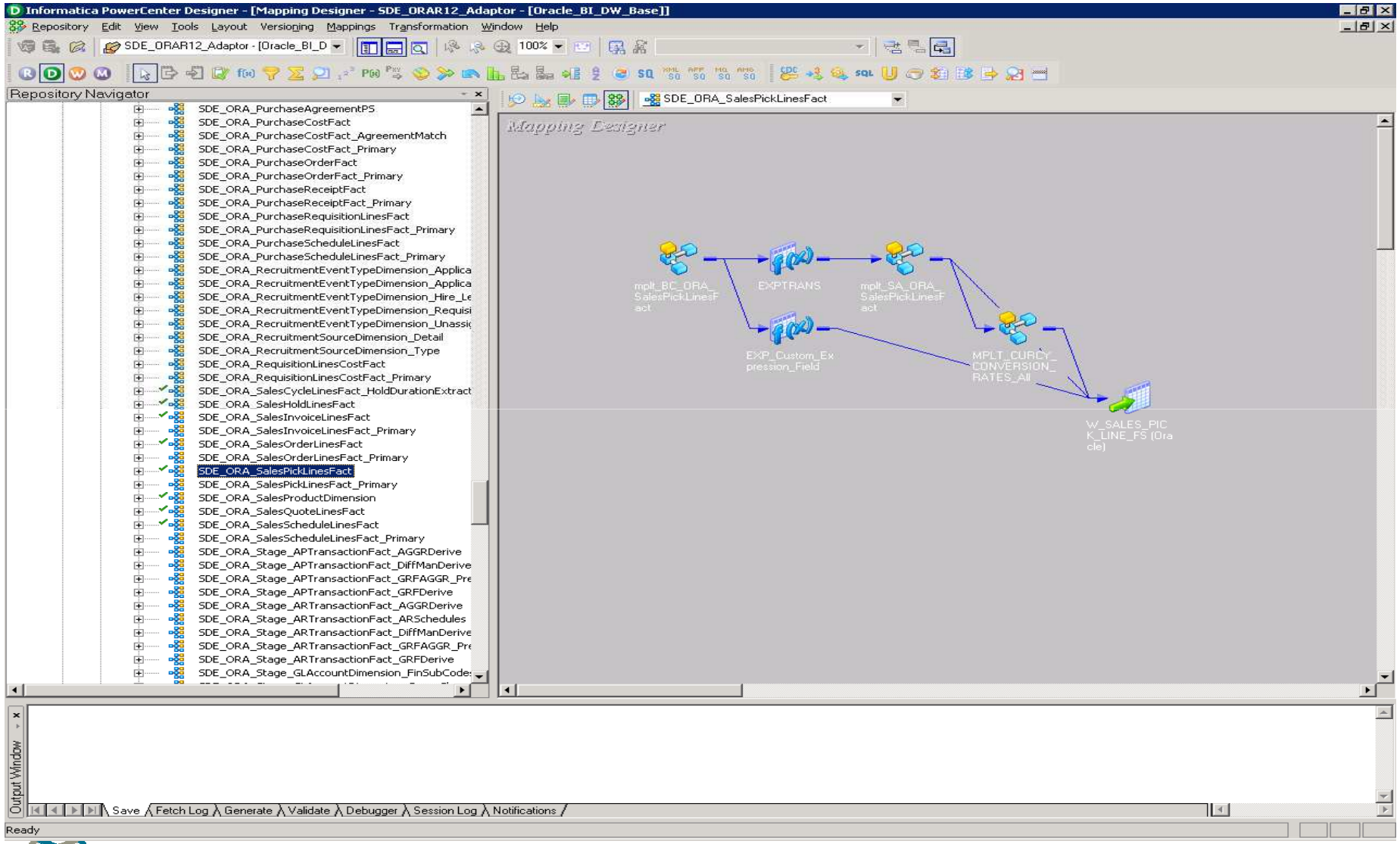
Informatica Workflow Manager
- Edit the reusable session to add the new query to the "Full" workflow

Informatica Workflow Monitor
- Test the modified map to see it runs correctly

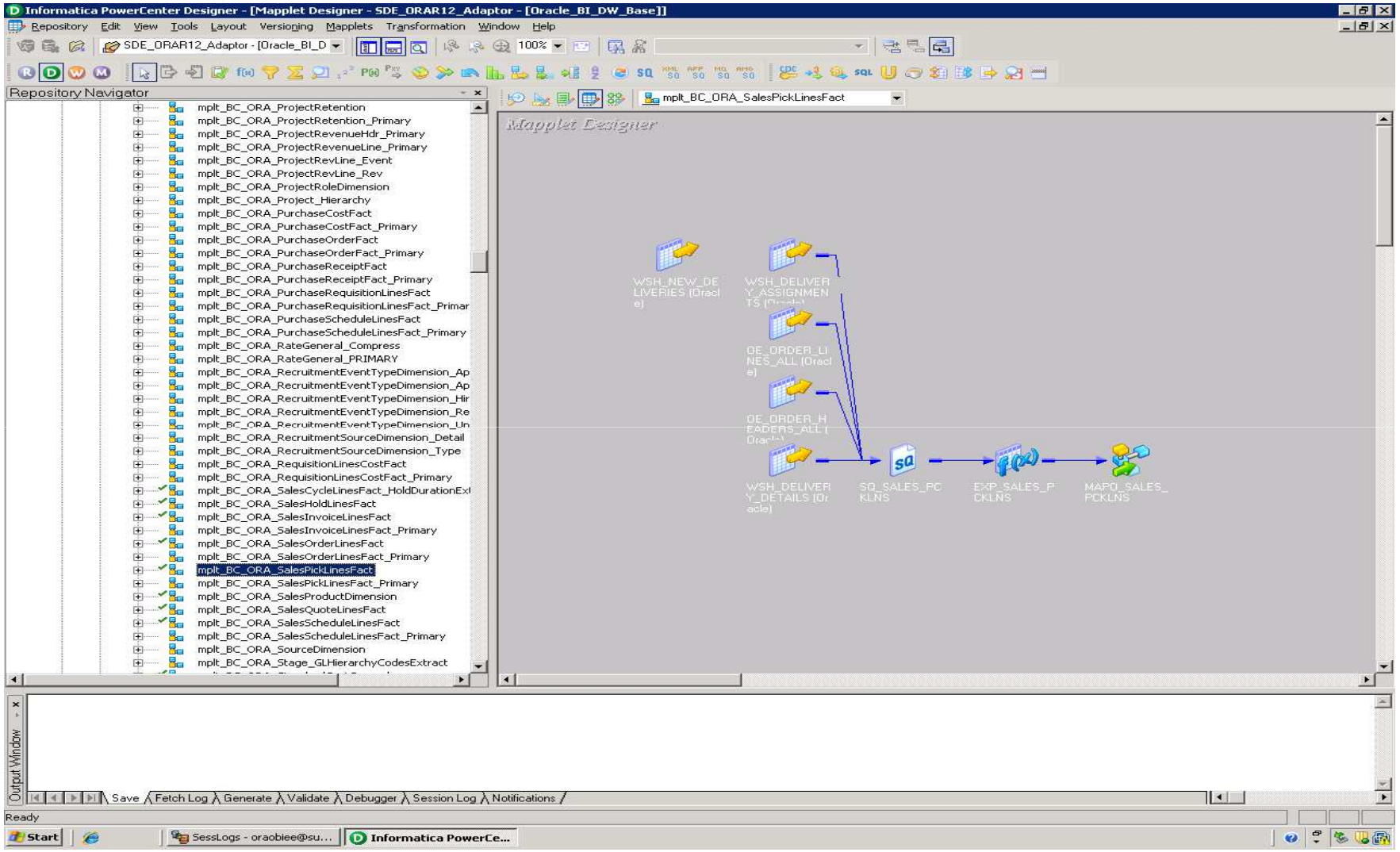
DAC
- Using the DAC client, execute the task to do a unit testing.

OBIEE
- Edit the OBIEE repository, to create/modify metrics in the BMM Layers.

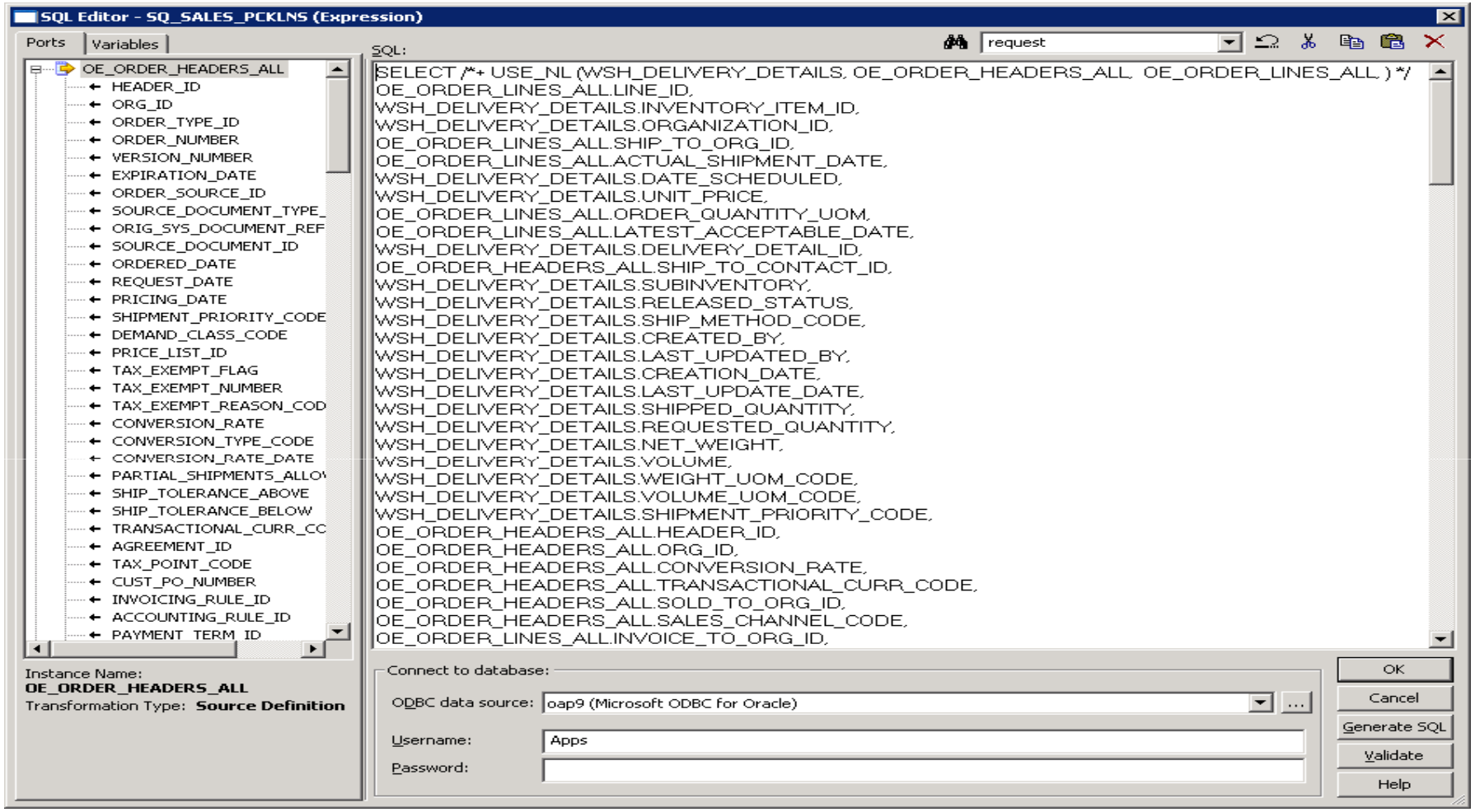
Informatica Designer – SDE Mapping



Informatica Designer – SDE Mapplet



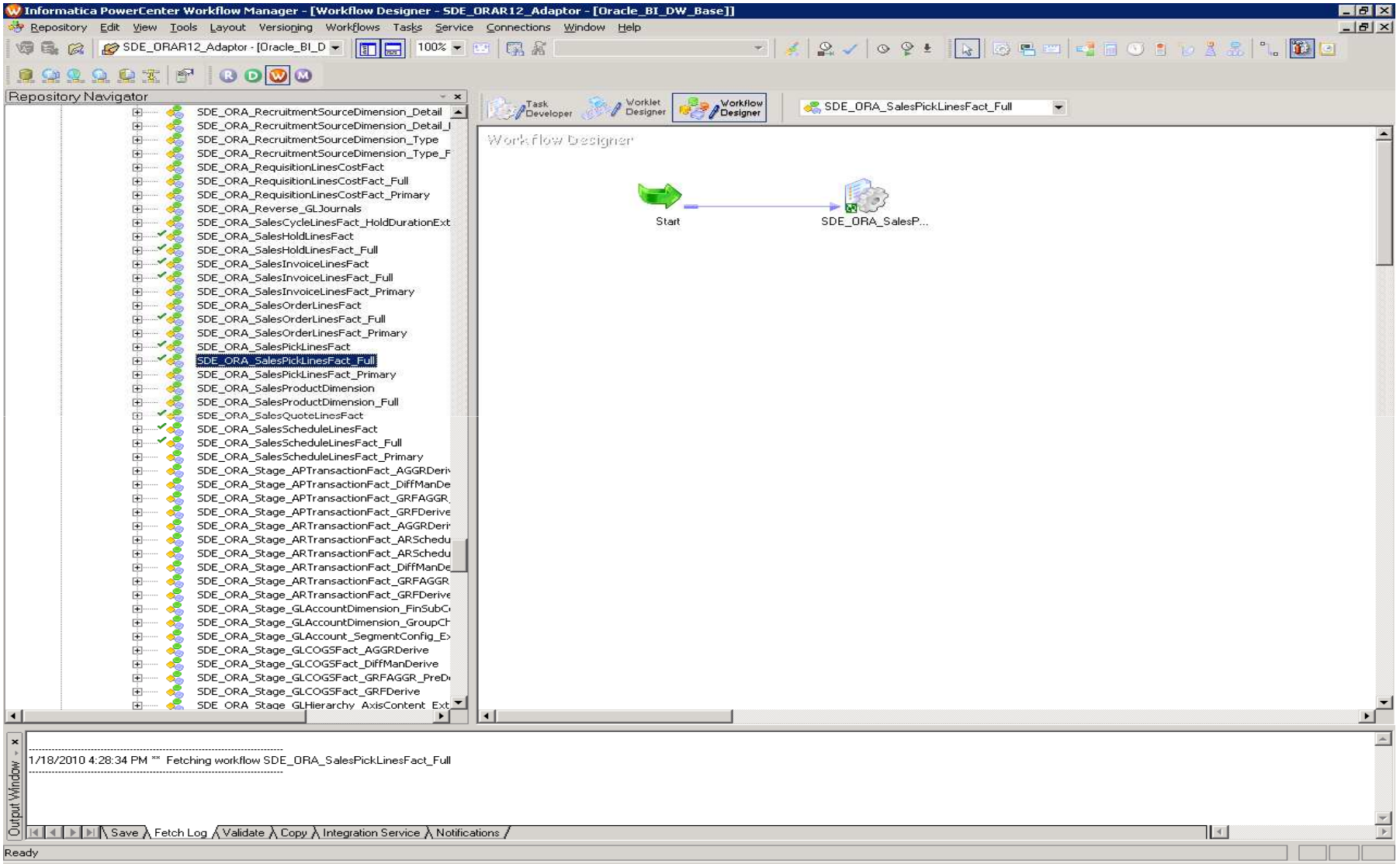
Informatica Designer – Modify the source qualifier



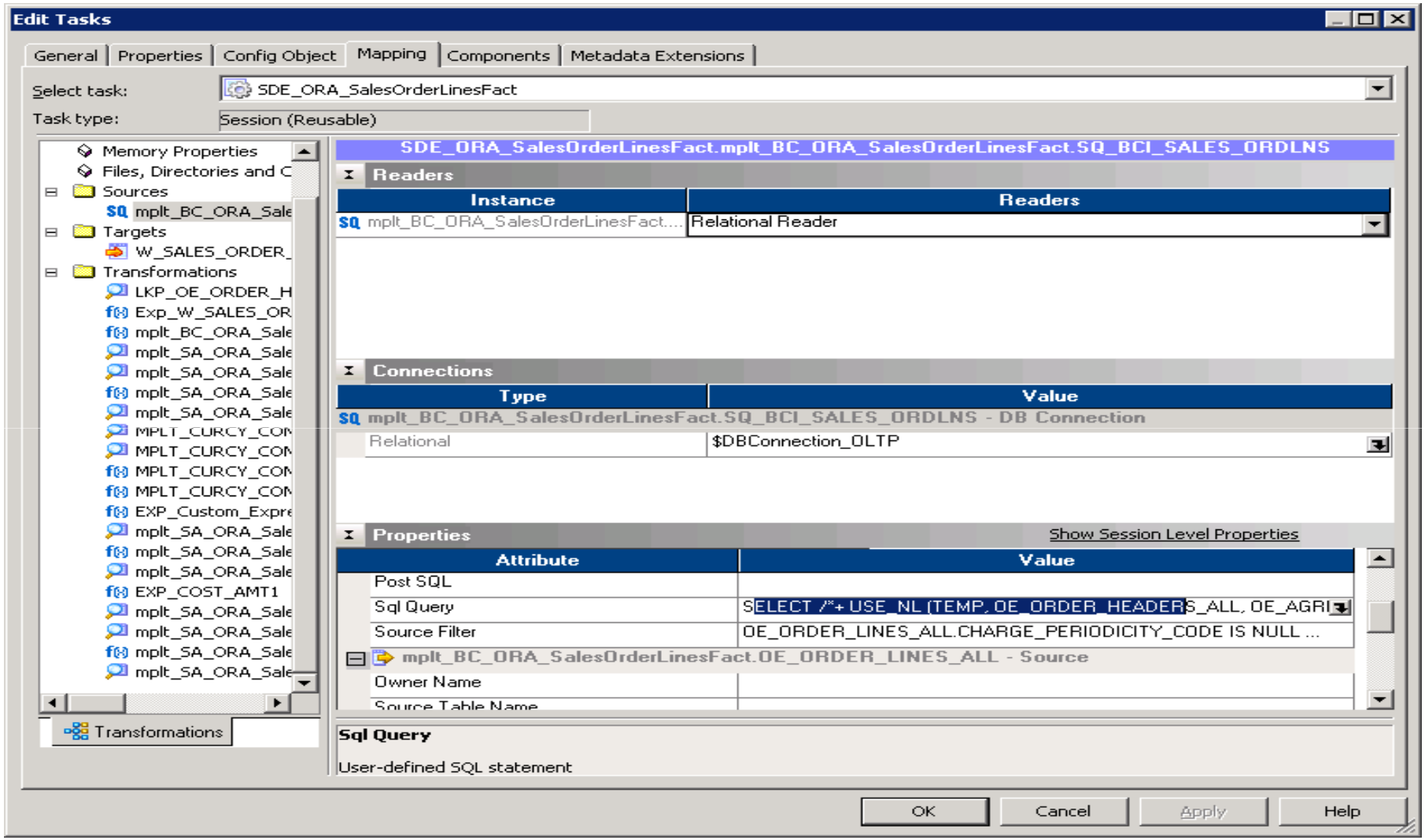
Informatica Designer – Add the drop-shipment query

```
UNION
SELECT /*+ USE_NL (OE_ORDER_HEADERS_ALL,  OE_ORDER_LINES_ALL, ) */
OE_ORDER_LINES_ALL.LINE_ID,
OE_ORDER_LINES_ALL.INVENTORY_ITEM_ID,
OE_ORDER_LINES_ALL.ship_from_org_id,
OE_ORDER_LINES_ALL.SHIP_TO_ORG_ID,
OE_ORDER_LINES_ALL.ACTUAL_SHIPMENT_DATE,
OE_ORDER_LINES_ALL.SCHEDULE_SHIP_DATE,
OE_ORDER_LINES_ALL.UNIT_SELLING_PRICE,
OE_ORDER_LINES_ALL.ORDER_QUANTITY_UOM,
OE_ORDER_LINES_ALL.LATEST_ACCEPTABLE_DATE,
OE_ORDER_LINES_ALL.LINE_ID*1000 DELIVERY_DETAIL_ID, --UNIQUE KEY
OE_ORDER_HEADERS_ALL.SHIP_TO_CONTACT_ID,
OE_ORDER_LINES_ALL.SUBINVENTORY,
'R' RELEASED_STATUS,
OE_ORDER_LINES_ALL.SHIPPING_METHOD_CODE,
OE_ORDER_LINES_ALL.CREATED_BY,
OE_ORDER_LINES_ALL.LAST_UPDATED_BY,
OE_ORDER_LINES_ALL.CREATION_DATE,
OE_ORDER_LINES_ALL.LAST_UPDATE_DATE,
OE_ORDER_LINES_ALL.SHIPPED_QUANTITY,
OE_ORDER_LINES_ALL.ORDERED_QUANTITY,
0 NET_WEIGHT,
0 VOLUME,
NULL WEIGHT_UOM_CODE,
NULL VOLUME_UOM_CODE,
OE_ORDER_LINES_ALL.SHIPMENT_PRIORITY_CODE,
OE_ORDER_HEADERS_ALL.HEADER_ID,
OE_ORDER_HEADERS_ALL.ORG_ID,
OE_ORDER_HEADERS_ALL.CONVERSION_RATE,
OE_ORDER_HEADERS_ALL.TRANSACTIONAL_CURR_CODE,
OE_ORDER_HEADERS_ALL.SOLD_TO_ORG_ID,
OE_ORDER_HEADERS_ALL.SALES_CHANNEL_CODE,
OE_ORDER_LINES_ALL.INVOICE_TO_ORG_ID,
OE_ORDER_HEADERS_ALL.ORDERED_DATE,
OE_ORDER_LINES_ALL.FREIGHT_TERMS_CODE,
OE_ORDER_HEADERS_ALL.PAYMENT_TERM_ID,
```

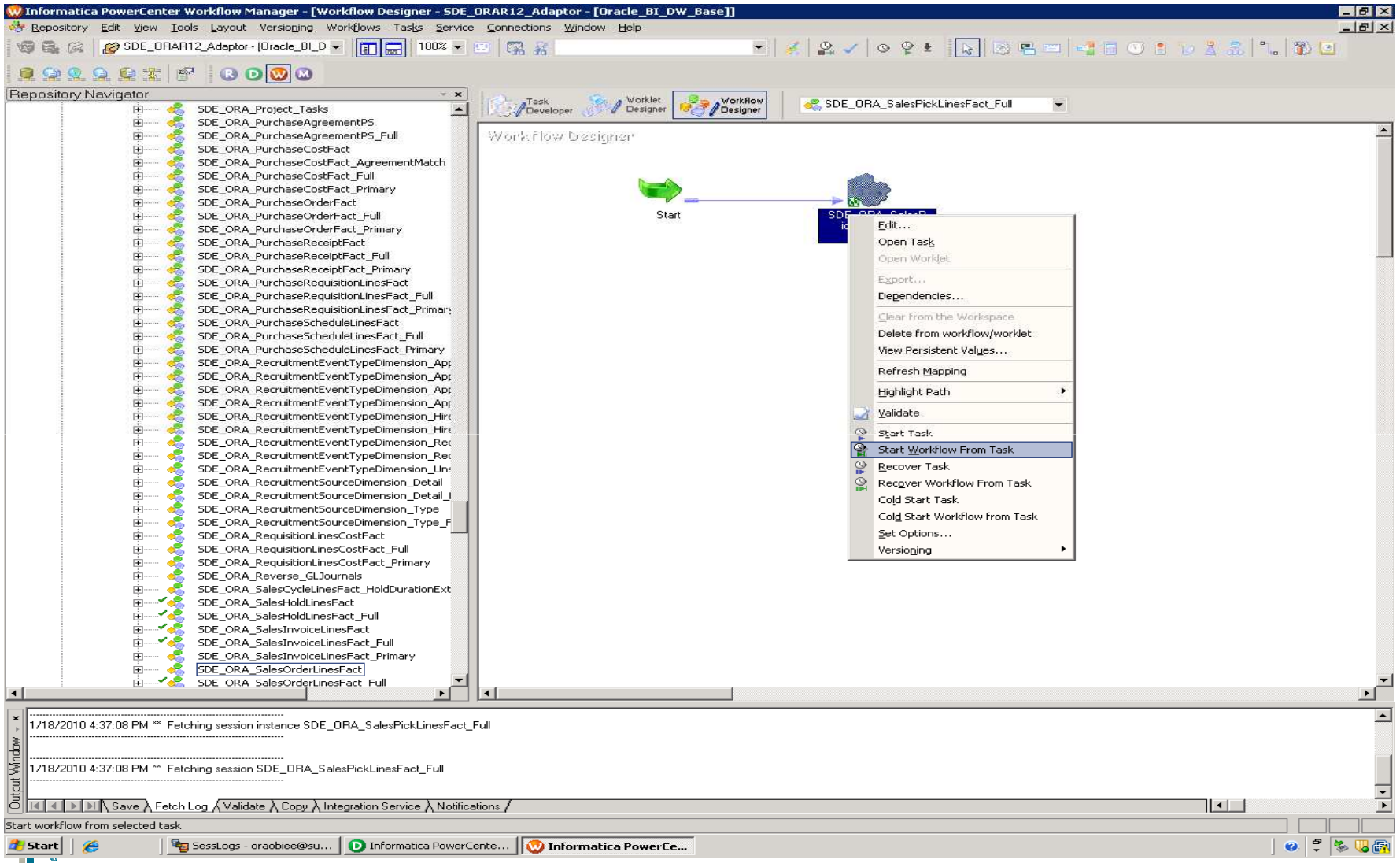
Informatica Workflow – Modify the workflow - SDE_ORA_SalesPickLinesFact_Full



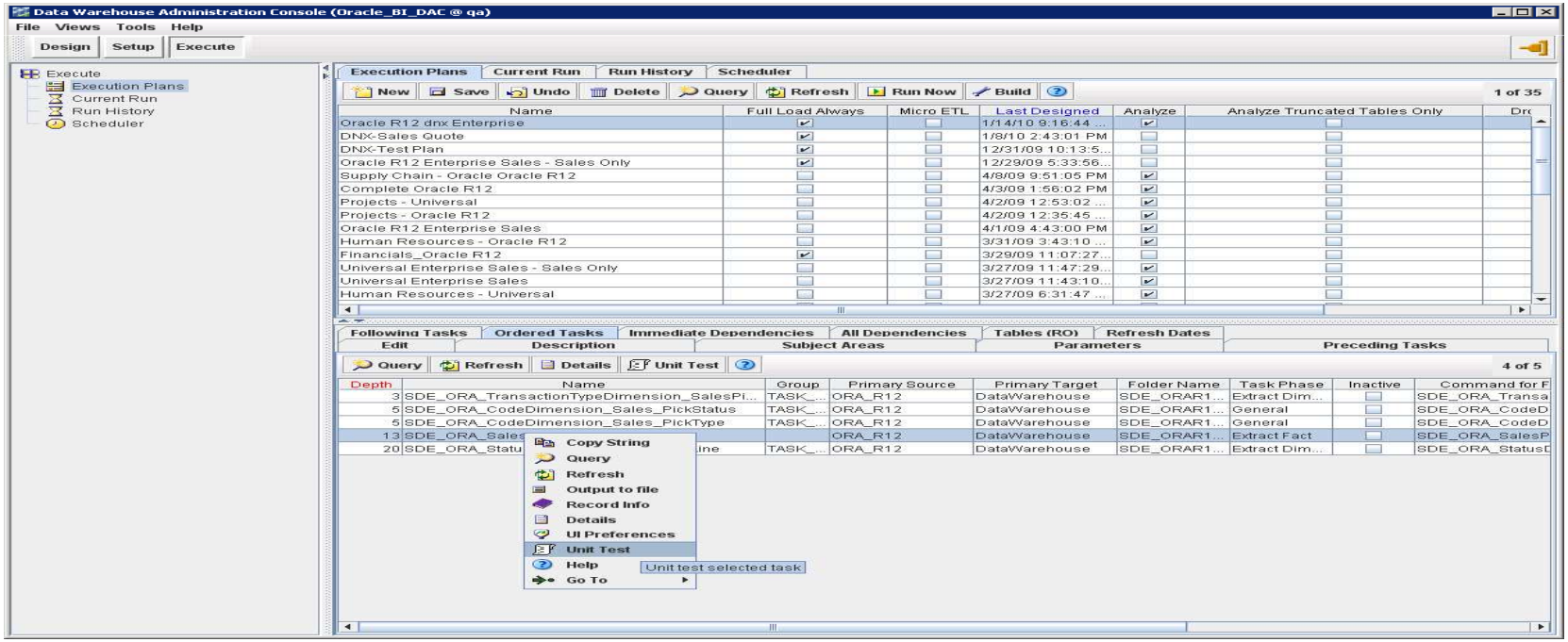
Informatica Workflow – Modify the workflow session- SDE_ORA_SalesPickLinesFact_Full



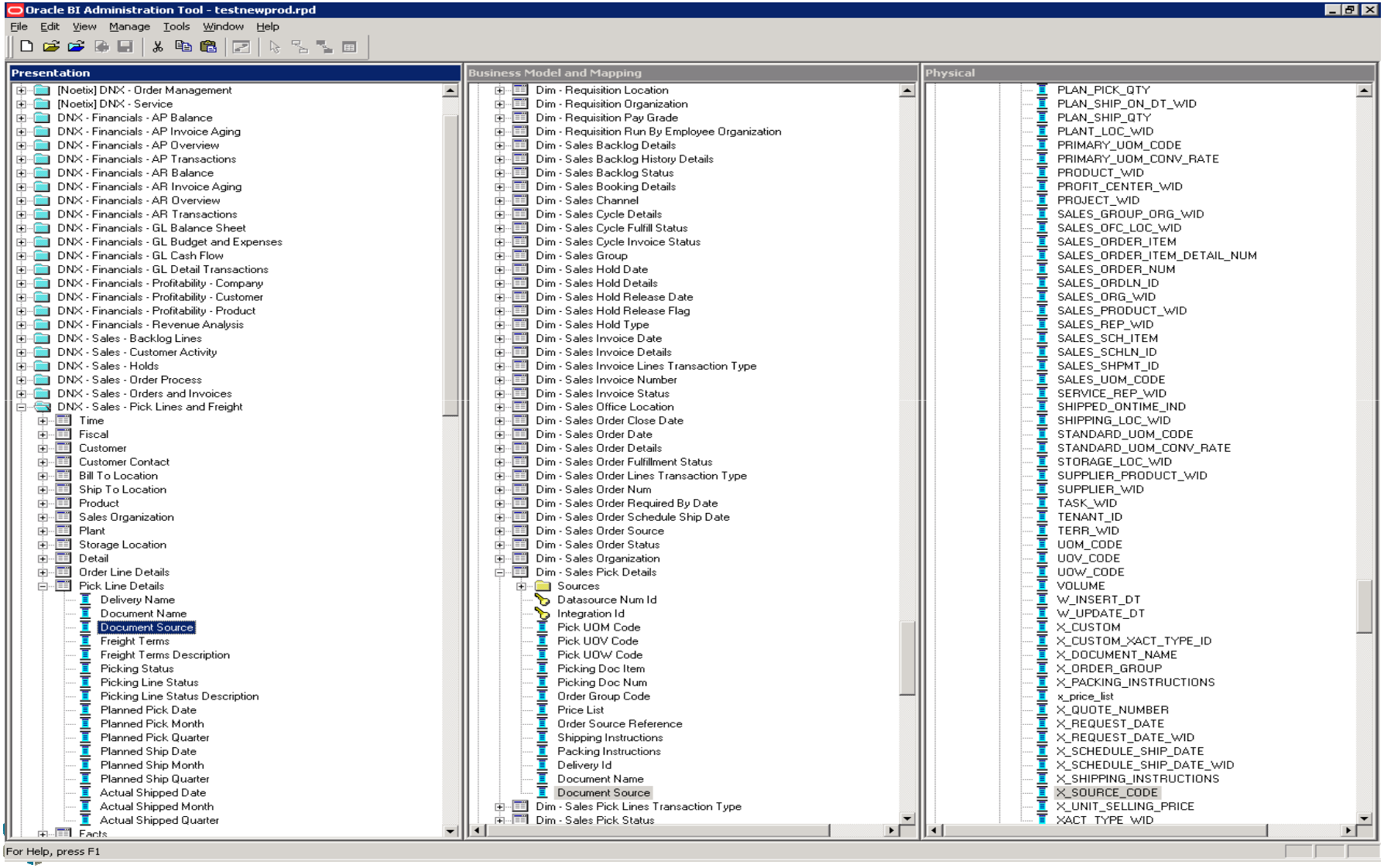
Informatica Workflow Monitor – Unit Test the workflow session



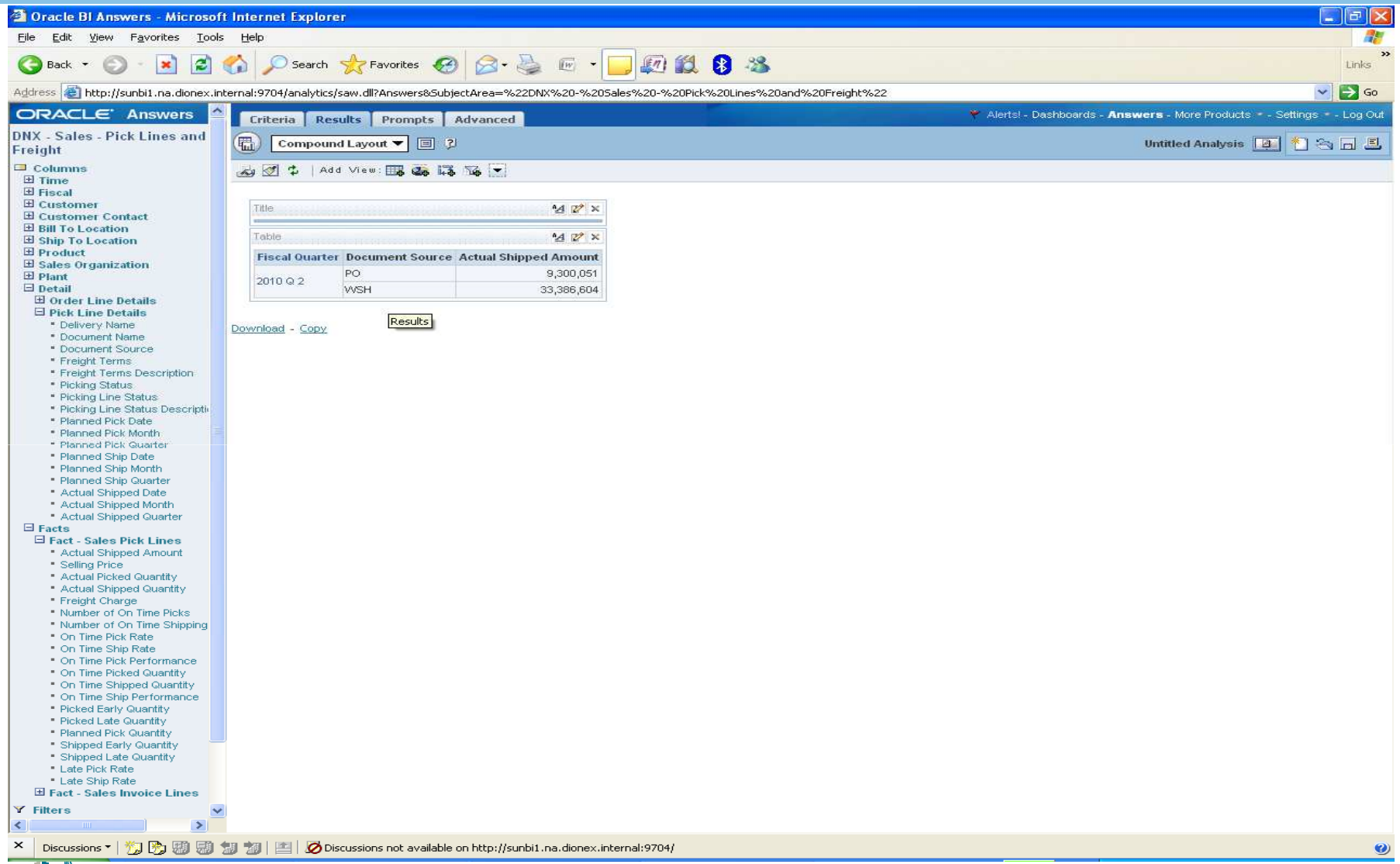
DAC "Data Access Control"– Unit Test the workflow session



OBIEE Administrator – Modify the RPD file



OBIEE Answer – Shipment Amount for the current Quarter "By Source"

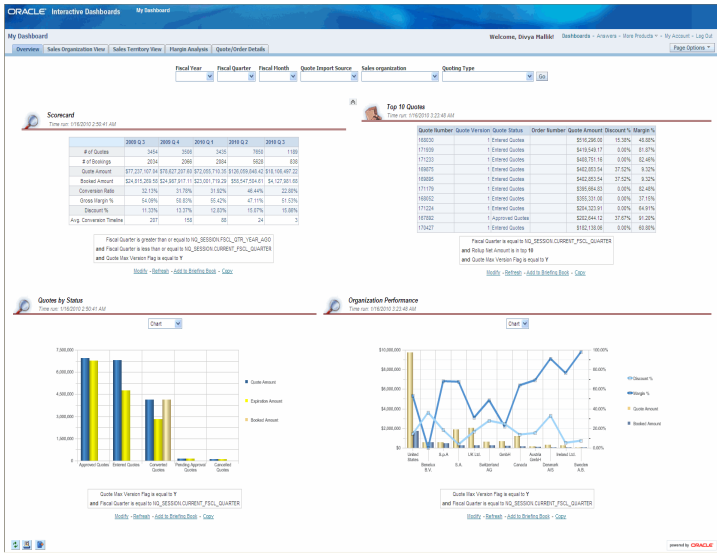


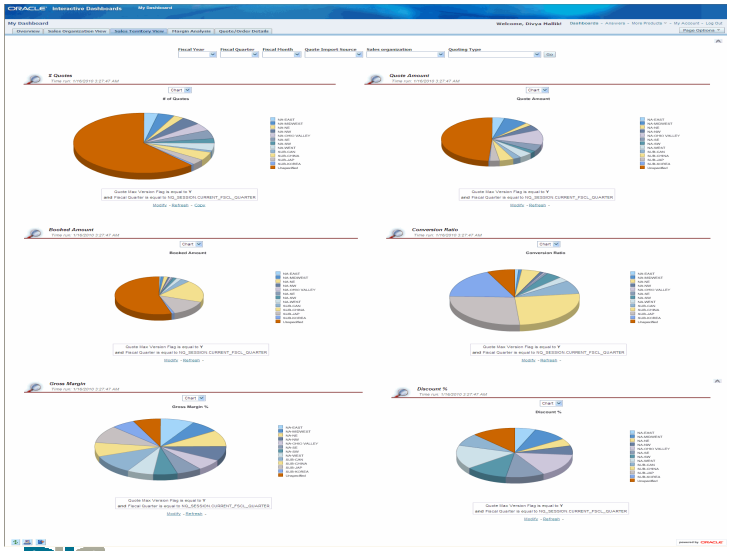
Complex Gap Example – Extend Order-to-Cash Process

Supply Chain & Order Management Analytics

- Provides insight into critical Order Management business processes and key information, including Orders, Order Fulfillment, Invoices, sales effectiveness and customer scorecards.
- The delivered analysis of every step in the back-office sales processes from Order to Cash, enables companies to respond more quickly to customer issues and resolve them before they become problems.

Extending O2C Process with Q2C “Quote To Cash”





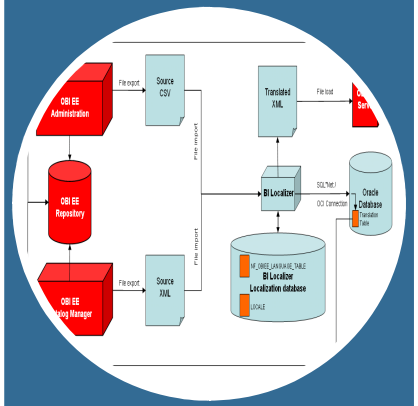
Quoting Analytics

- Currently supports iSupport and Oracle Quoting data model
- Provides insight into critical metrics :
  - Conversion Ratio
  - Gross Margin % of a Quote
  - Discount % of a Quote
  - Average Conversion Timeline
- Supports common dimensions
  - Time, Customer, Product, Sales Organization, Sales Reps, Inventory Organization
- New dimensions supported
  - Quote Import Source
  - Quote Statuses
  - Quote Expiration Date
  - Sales Group
  - Quote Versions
- All metrics are available in multi-currency

“Knowing the Source” - Critical

EXPERTISE

- R8 to 11i to R12
- Over 100 projects
- Strategic Business Process knowledge
- Technical prowess
- Deep Oracle connections

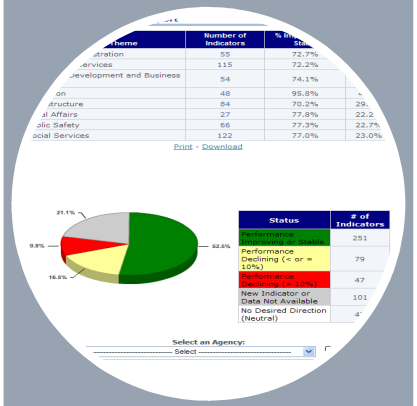


FLEXIBILITY

- Predictable cost
- Flexible pricing
- Onsite, offsite
- Onshore, Offshore
- Configurable service levels

BEST PRACTICES

- System performance
- Security
- Incremental implementation
- User adoption and training



INTELLECTUAL PROPERTY

- Rapid reuse
- Common change libraries
- Gap analyzer
- Impact analyzer
- Auto-brander

☞ *IP under development*

◆RAPID VALUE ◆ PREDICTABLE COST ◆ BUILT-IN QUALITY ◆ WARRANTED SUPPORT

P3 RESULTS MATTER

Key Success Factors and Best Practices

- **IMPLEMENTATION**
  - Engage C-level exec support on key metrics and indicators
  - Incremental releases by subject area (Order Entry, CRM etc.)
    - Phase 1: General OBIEE features … dashboards, reports, column/view selectors (do not rollout Answers right away for adhoc reporting)
    - Phase 2: "Answers" with training for underlying metadata
    - Phase 3: Delivers, Alerts etc.
    - Implement "current state" KPI's before moving to "what if's"

- **USER ADOPTION/TRAINING**
  - UI Branding
  - Customized/CBT training
  - "Train-the-trainer" approach
  - Usage tracking
  - Manage slowly changing dimensions

- **PERFORMANCE**
  - Leverage existing Data warehouse Analytics friendly data model to the maximum extent.
  - Reliance on caching should be used wisely based on the KPI

- **SECURITY**
  - Adopt to Oracle's SSO strategy when appropriate
  - Column level security … associate roles or individual user accounts to specific columns (e.g. SS# column is accessible by very few users).
  - Rollup security … regions or groups of users see one slice of information for their specific region etc.
  - Usage tracking … audit the access to the system.

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Q & A

THANK YOU OAUG!