The New, Extended Oracle Business Intelligence -
A System for Enterprise Performance Management

Gavin Dupre
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BI Strategy

• Analyst session on BI strategy mid-July (Hyperion Q4 ends in June)
• We will offer a webcast as soon as possible after that to deliver more details of the product strategy
Oracle’s Rationale for Acquiring Hyperion
Why Did Oracle Acquire Hyperion?

Strategic Rationale

- **New Management System for Business**
  - Integrates Enterprise Resource Planning, Operational Business Intelligence, Financial Performance Management Systems

- **Enterprise Resource Planning Systems**
  - Automate Core Functions and Processes of Business

- **Operational Business Intelligence Systems**
  - Capture Operational Information to Enable Decision Making

- **Financial Performance Management Systems**
  - Defines Strategy, Plans, Metrics to Guide Organization
What Gartner is Saying

“The majority of customers are purchasing and implementing BI and CPM as disparate point solutions, which weaken their ability to achieve pervasive BI or to link BI platform and CPM suites capabilities into an integrated continuum to drive business transformation from the strategic level to the process level”

Source: Employ a Coordinated Approach to BI and CPM, April 2007
Oracle’s Product Strategy and Vision for an Enterprise Performance Management System
Leadership Product Strategy
Integrating Enterprise Performance Management and BI

• Provides industry’s first EPM System
  • Align operational intelligence with strategy: better insight
  • Align operational decisions with strategy: better decisions
  • From insight to action: drives better results more quickly

• Built on integrated and modern BI Foundation
  • Most complete and integrated BI tools and BI applications
  • With a unified and consistent view of business performance
  • For Oracle and non-Oracle systems

• Improves customer choice for BI solutions
  • First integrated, EPM System to combine Financial Performance Management and Operational BI Applications
  • Most complete, best-of-breed tools and analytic applications
Enterprise Performance Management System
Integrates Transaction, Intelligence, Financial Systems

Financial Performance Management

Enterprise Performance Management System

Transactional Systems

Operational BI Systems

Sales & CRM  Financials  Supply Chain  HR  Procurement

Data Warehouse  Data Integration  Query & Analysis  OLAP  Dashboards  Enterprise/Operational Reporting  Alerts & Workflow
Strategy – Provide the Industry’s First Enterprise Performance Management System

- Complete
- Hot Pluggable
- Pervasive
Customer Benefits
Enterprise Performance Management System

• **Better Strategy Formulation & Planning**
  • Use Operational History & Forecasts to Derive Plans

• **Better Strategic & Operational Insight**
  • Compare Operational Results to Plans in Real Time

• **Better Strategic & Operational Decisions**
  • Aligns Decisions with Strategic Objectives for Consistency

• **Better Financial Management Processes**
  • Faster Close & Financial Planning Cycles

• **Better Organizational Performance & Results**
  • Drive Insight to Action to Continually Improve Performance

• **With Lower Cost & Less Complexity**
  • Pre-Integrated to provide better Information & drive Actions
Introducing The Oracle Enterprise Performance Management System
Introducing: The Oracle Enterprise Performance Management System

- Web
- Office
- Desktop
- Mobile

Financial Performance Management Applications

Operational BI Applications

Business Intelligence Foundation

Fusion Middleware

- OLTP & ODS Systems
- Data Warehouse Data Mart
- Essbase
- SAP, Oracle, Siebel, PeopleSoft, Custom
- Excel XML
- Business Process
Most Complete Suite of Financial Performance Management Applications

Strategic Planning
- Set Strategic Objectives
- Treasury Strategies
- Corporate Development
- Long-Term Planning

Key Initiatives
- Planning Assumptions
- Actuals
- Performance Targets
- Master Data

Financial Close Process
- Data Cleansing
- Consolidate
- Internal Reporting & Analysis
- External Reporting & Compliance

Budgeting and Forecasting
- Cascade Targets
- Forecasting
- Allocate Resources
- Detailed Budgeting
Hyperion Planning

FEATURES
- Strategic Planning
- Modeling & Simulation
- What-if Analysis
- Excel Integration
- Enterprise Collaboration
- Native Reporting & Analysis
- Top Down & Bottoms Up

BENEFITS
- Speed
- Accuracy
- Align finance and operations
- Accountability
- Visibility to past, current and future business performance
Hyperion Financial Management

Financial Consolidation, Reporting & Analysis

#1

FEATURES

• Simple to Customize
• Easy to Integrate
• Financial Data Quality
• Complete Audit Trails
• Flexible Workflow
• Powerful Reporting
• Finance owned & operated

BENEFITS

• Confidence in the numbers
• Reduce cycle time
• Automate collection & validation
• Lower cost of compliance
• Speed and agility

ORACLE
### Most Complete Suite of Operational BI Applications

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<tr>
<th>Sales</th>
<th>Service &amp; Contact Center</th>
<th>Marketing</th>
<th>Order Management &amp; Fulfillment</th>
<th>Supply Chain</th>
<th>Financials</th>
<th>Human Resources</th>
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<td>Pipeline Analysis</td>
<td>Churn Propensity</td>
<td>Campaign Scorecard</td>
<td>Order Linearity</td>
<td>Supplier Performance</td>
<td>A/R &amp; A/P Analysis</td>
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<td>Triangulated Forecasting</td>
<td>Customer Satisfaction</td>
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<td>Orders vs. Available Inventory</td>
<td>Spend Analysis</td>
<td>GL / Balance Sheet Analysis</td>
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<td>Sales Team Effectiveness</td>
<td>Resolution Rates</td>
<td>Product Propensity</td>
<td>Cycle Time Analysis</td>
<td>Procurement Cycle Times</td>
<td>Customer &amp; Product Profitability</td>
<td>HR Compliance Reporting</td>
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<tr>
<td>Up-sell / Cross-sell</td>
<td>Service Rep Effectiveness</td>
<td>Loyalty and Attrition</td>
<td>Backlog Analysis</td>
<td>Inventory Availability</td>
<td>P&amp;L Analysis</td>
<td>Workforce Profile</td>
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<tr>
<td>Cycle Time Analysis</td>
<td>Service Cost Analysis</td>
<td>Market Basket Analysis</td>
<td>Fulfillment Status</td>
<td>Employee Expenses</td>
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<tr>
<td>Lead Conversion</td>
<td>Service Trends</td>
<td>Campaign ROI</td>
<td>Customer Receivables</td>
<td>BOM Analysis</td>
<td>Cash Flow Analysis</td>
<td>Return on Human Capital</td>
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### Prebuilt adapters:
- Oracle BI Suite Enterprise Edition

- PeopleSoft
- Siebel
- SAP

### Other Operational & Analytic Sources
Hot-Pluggable With Existing IT Investments

Oracle Enterprise Performance Management System
Oracle Business Intelligence Foundation

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 ..

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
- Ascential
- Others ..
Pervasive Information Access Through a Unified BI Foundation

- Desktop Gadgets
- Ad-hoc Analysis
- Interactive Dashboards
- Search
- Reporting & Publishing
- Proactive Detection and Alerts
- Disconnected & Mobile Analytics
- MS Office & Outlook Integration

Common Enterprise Information Model

- Integrated Security, User Management, Personalization
- Multidimensional Calculation and Integration Engine
- Intelligent Request Generation and Optimized Data Access Services

OLTP & ODS Systems
Data Warehouse
Data Mart
Essbase
SAP, Oracle, PeopleSoft, Siebel, Custom Apps
Files, Excel
XML
Business Process
Hyperion Essbase
Extends Oracle BI Suite With Advanced OLAP Analysis

Custom analytic applications requiring...

<table>
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<th>Feature</th>
<th>Required</th>
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<tr>
<td>Powerful calculations</td>
<td>✔️</td>
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<tr>
<td>Multi-user write back</td>
<td>✔️</td>
</tr>
<tr>
<td>Financial Intelligence</td>
<td>✔️</td>
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<tr>
<td>Limited IT support</td>
<td>✔️</td>
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- Store Profitability
- Inventory Forecasting
- Volume Change Analysis

Belk
Johnson Matthey
Clorox
Oracle OLAP

- Further development of Oracle OLAP
  - Cost-based aggregation (store or calculate)
  - Cube organised materialised views (incl. Query re-write)
  - Storage optimizations incl. fine-grained partitioning
  - SQL optimizer support for cubes – any SQL generating tool should be able to access cubes
Oracle Data Integrator

Data Movement and Transformation from Multiple Sources to Heterogeneous Targets

**Conventional ETL Architecture**

- Extract
- Transform
- Load

**Next Generation Architecture**

- "E-LT"

**BENEFITS**
- Performance
- Flexibility
- Productivity
- Hot-Pluggable

**KEY DIFFERENTIATED FEATURES**
- Heterogeneous “E-LT”
- Active Integration Platform
- Declarative Design
- Knowledge Modules
OWB: Coming Releases - Highlights

- Three parallel releases are currently in development
  - 11g R1 DB Release
    - Tighter integration with Oracle DBMS
    - Siebel Connector
  - 11g + Release
    - Support Fusion Applications BI / Migration / MDM
  - 11g ++ Release
    - Support native heterogeneous sources and targets
    - OBI EE integration
Positioning OWB and ODI

**Oracle Warehouse Builder**

*OWB*...
- for building Oracle systems
- for Information Quality

**Oracle Data Integrator**

*ODI*...
- for data integration on heterogeneous targets

*Functional integration of the products:*
- Runtime Integration, Metadata Sharing, Knowledge Module Sharing, etc.
- In progress as we speak…
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