

# Harmony of Oracle Cloud for EPM and BI

## The Baxters Recipe for Success

**Andrew Mason**

**Qubix**





## Proven

- Oracle Platinum Partner
- 150+ Engagements
- 15+ Years of Success



## Global

- North America
- Europe
- Middle East
- Australasia



## Specialised

- Enterprise Performance Management
- Business Intelligence
- Cloud

## EPM With OBIEE – You don't know what you don't know..

- Purpose of this session:
  - Introduce some of the functionality – for those who are **discovering**
  - Provide some real life use cases – for those **exploring**
  - Share some tips and tricks – for those **neck deep!**

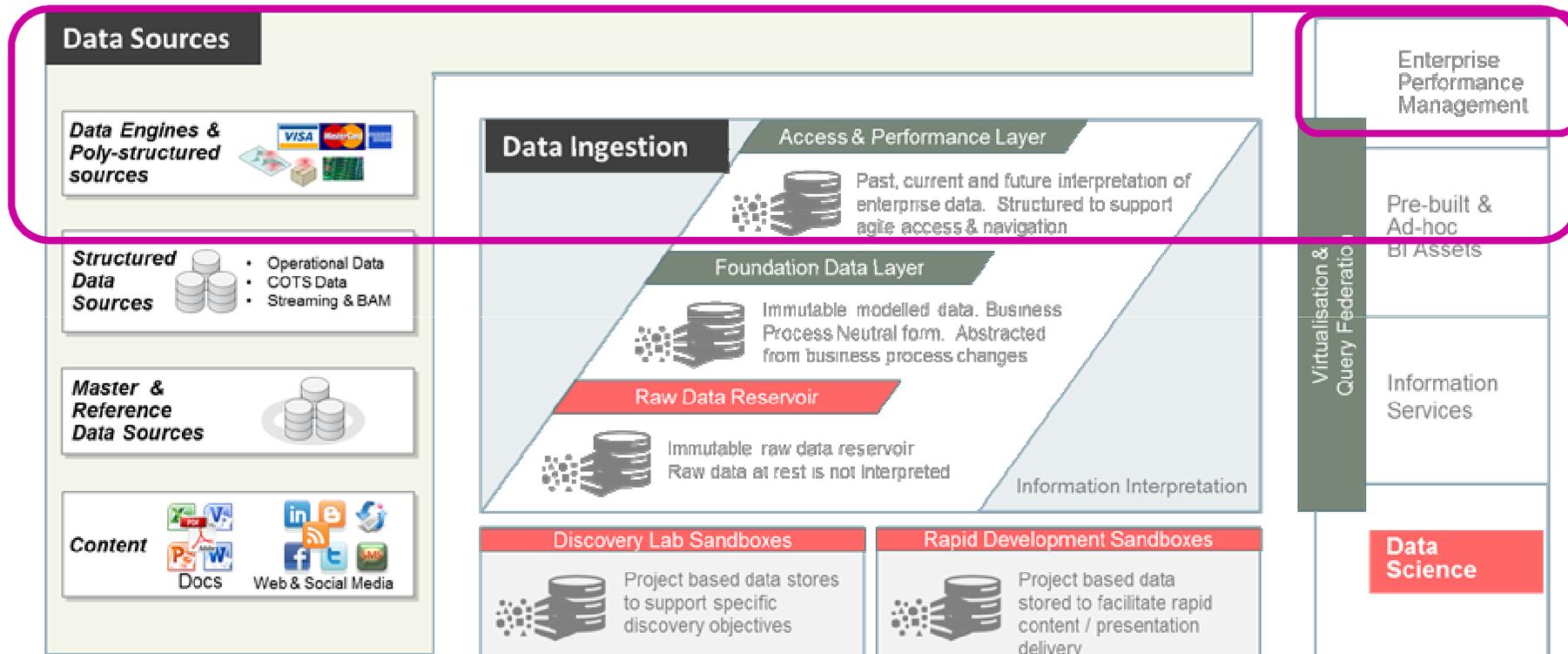
# Discovering



## Essbase & Planning (PBCS) - OBIEE

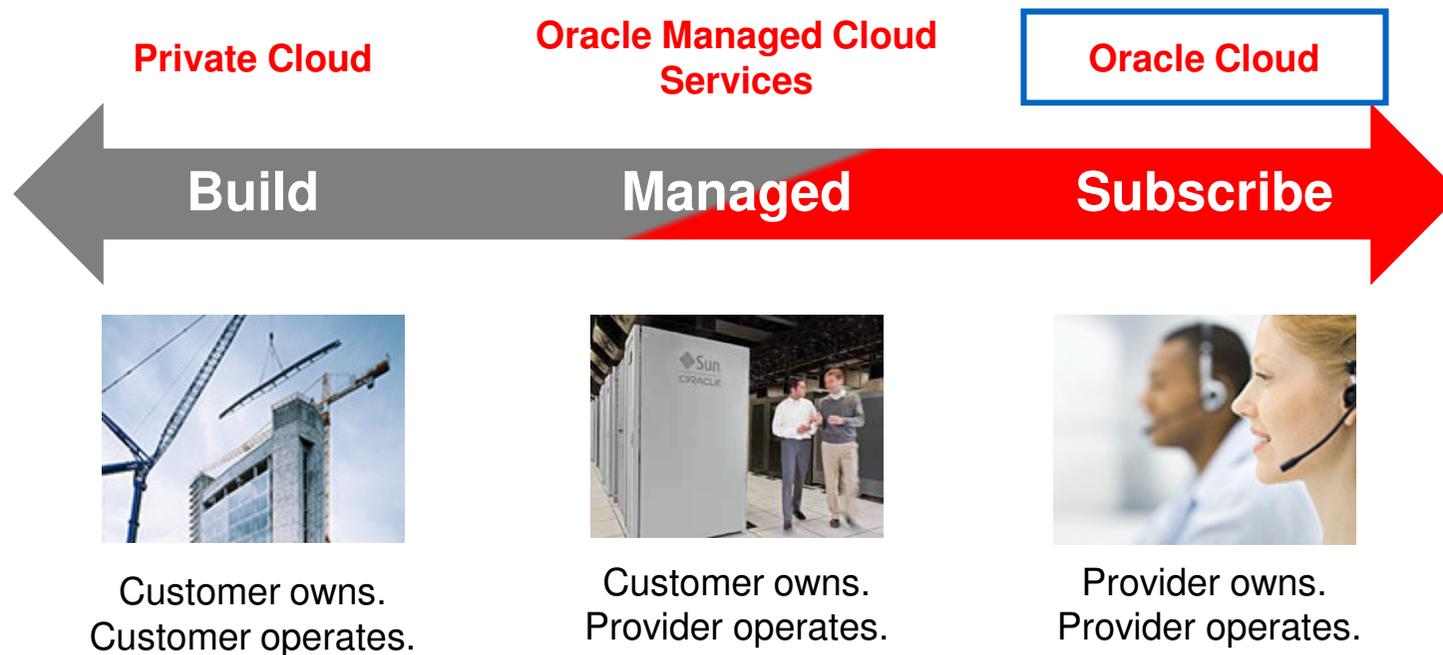
- Integration is nothing new
- Essbase and Planning has been in place for years, and improving
- OBIEE provides all the functionality you'd expect + scalability and versatility
- In a typical EPM scenario some of OBIEE's strengths are also weaknesses

# Logical EPM and BI Architecture



# Customers Have a Choice of Clouds

- Customer Owned, Managed by Oracle, Oracle Operated



# Oracle Cloud



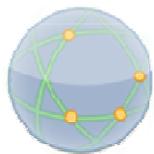
# Why Oracle Cloud?

- **Runs All the Applications You Need on the Platform You Trust**



### Most Complete

- Broad – spans Oracle’s application and platform portfolio
- Best-in-class – based on Oracle’s industry leading cloud products
- Integrated – built on a common, unified platform



### Most Flexible and Modern

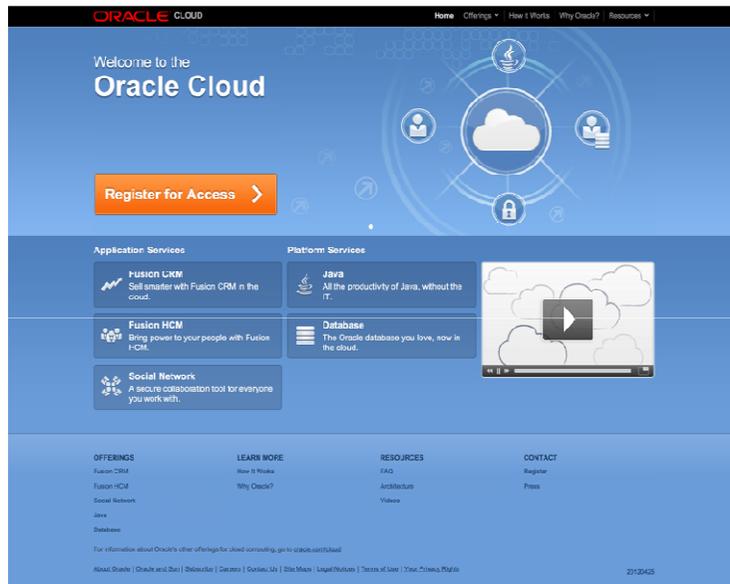
- Standards-based – built on industry standards: Java, SQL, HTML5, Web
- Extensible – build and deploy new apps or extend existing apps
- Portable – migrate apps to and from on-premise



### Enterprise-Grade

- Secure – strict controls and policies to ensure data protection

# Extremely Easy to Use

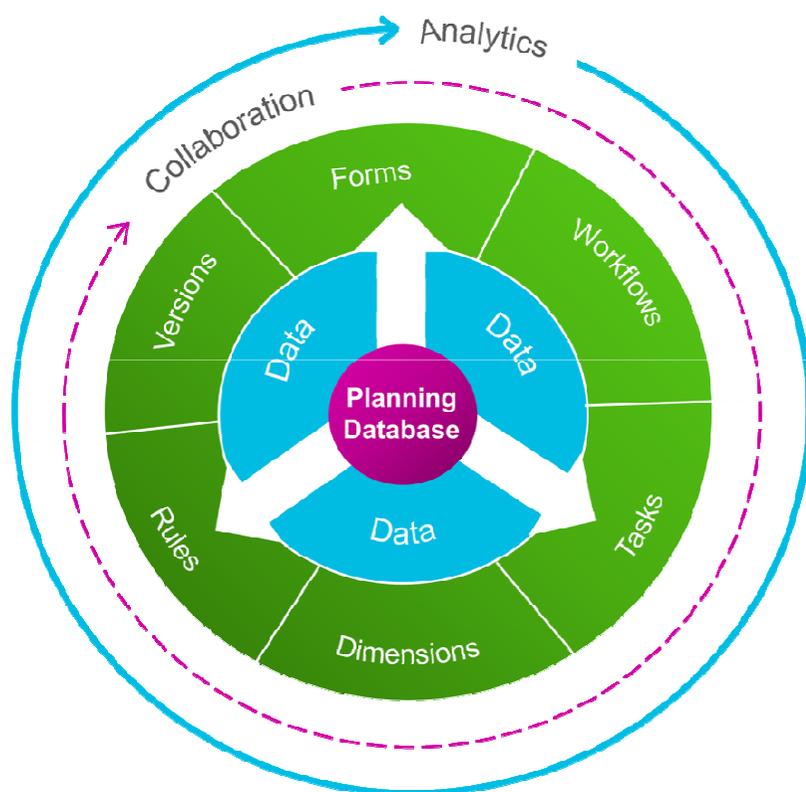


cloud.oracle.com

- Monthly subscription
- Partner Management
- Instant provisioning
- Self-service management
- Self-service monitoring

The Challenges  
5 Steps To Planning Brilliance  
Planning and Budgeting Cloud Service  
Live Demo  
Oracle Cloud Overview  
**Introduction to Qubix Cloud Planning**  
Closing Comments

# Planning & Budgeting Cloud Services



- **Time** – planning cycles are materially reduced as a result of process management
- **Quality** – data integrity issues are removed, standardisation is the norm and discussion happens everywhere
- **Flexibility** – complete responsiveness to changes, with ability to remodel and perform “what-ifs” easily
- **Cost** – all planning costs are minimised

# PBCS Key features...



## Powerful

Everything you need in a planning application with the worlds most powerful multi-dimensional database as the engine.



## Real-Time

Stay on top of critical business events, model potential impacts and course correct in real time for the best results.



## Collaborative

Anyone, anywhere, anytime. The most collaborative planning platform to drive user engagement.



## Connected

Integration with every major accounting and ERP system, existing cloud services, applications and legacy systems.



## Flexible

Designed to deliver the planning and user experience that works for your organisation. Ease of use without the compromise.



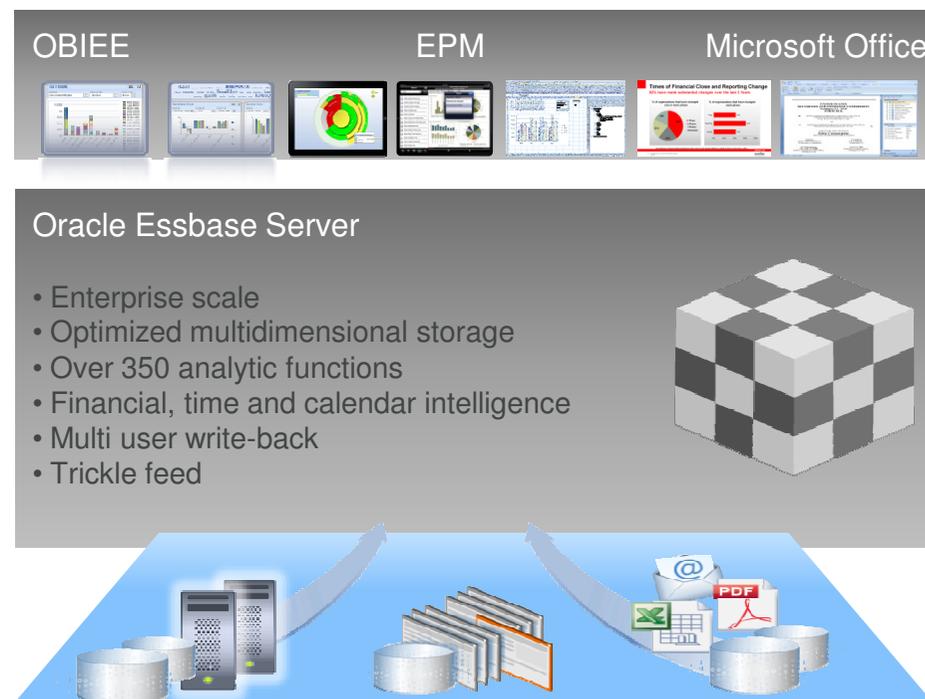
## Secure

World class multi-layered protection at a network, infrastructure, application, user and data layer.

# Business Intelligence Foundation Suite

## In the box

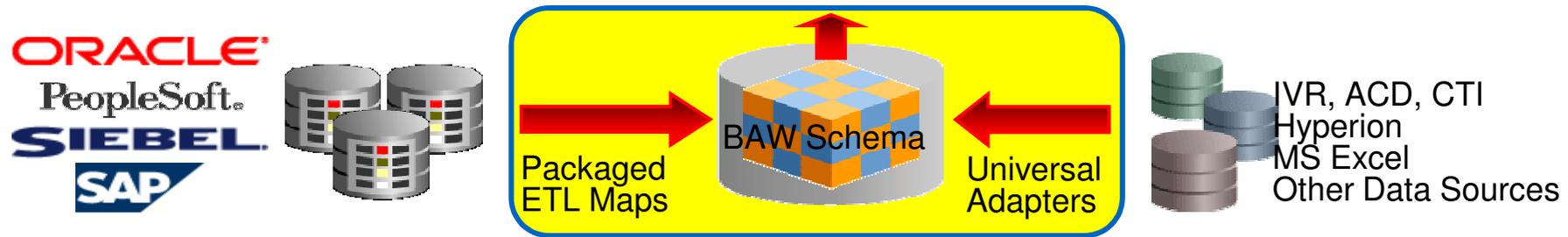
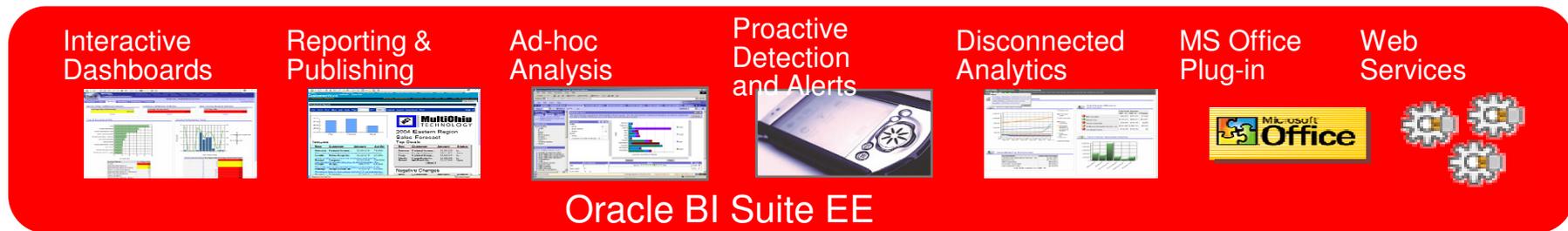
- OBIEE+
- Mobile
- Essbase
- Scorecard and Strategy Management
- Essbase Application Link for Hyperion Financial Management



# Open the Box

- Still have to make this Back-End effort before writing a report
- Some people still using Web Analysis, overly relying on SmartView or even looking at other 3<sup>rd</sup> party tools
- **WHY OPEN THE BOX?**

# Oracle BI Applications



# Exploring



# Neck Deep



# Reporting Performance Management Data

**Often overlooked as a key phase in the project**

- 📊 **Financial Reporting Studio** allows designers to produce formatted, book-quality financial and management reports viewed online or printed
- 📊 **Smart View for Office** provides ad-hoc analysis capabilities to design worksheets in Microsoft Excel to enter, format, analyze, and report on data in a Planning application.
- 📊 **Planning Dashboards**
- 📊 **Visual Analyzer** for EPM Reporting

# Adding Value to EPM

- Scope of what we are doing is increasing
  - More complexity
  - More volumes
  - More people
- Very hard to understand a “Flat” report
  - The need to visualize **is part of** the planning process – not just something that comes afterwards

# WHEN IS DATA VIZ VALUABLE?

Data visualization is about communicating an idea that will drive action.  
When is it valuable?



# WHEN TO USE VISUALIZATIONS OF DATA?

- To confirm an assumption
- To better understand circumstances and develop new insights
- For exploration...“gameification”

# 3 THINGS GOOD VISUALS NEED

- **Super quality data...**
- **Obvious context...**
- **Limited bias...**



The Value of Context



Chapter 1  
Rules of Civil Procedure

Former No.	New No.	Former No.	New No.	Former No.
1	1.101	38	1.254	63
2	1.201	39	1.255	64
3	1.202	40	1.256	68
4	1.203	41	1.257	69
5	1.204	42.1	1.261	70
7	1.205	42.2	1.262	71
8	1.206	42.3	1.263	72
9	1.207	42.4	1.264	73
10	1.208	42.5	1.265	75
11	1.209	42.7	1.266	78
12	1.210	42.8	1.267	79
13	1.211	42.9	1.268	80
14	1.212	42.10	1.269	81
15	1.221	42.11	1.270	82
16	1.222	42.12	1.271	83
17	1.223	42.13	1.272	84

Table 5a. Commercial landings of Gulf of Maine cod at age (numbers in 000's, weight in mt), 1982 - 2007.

Table 8. Percentages of 1995 S&E Ph.D. recipients using various numbers of support modes, by institutional control and field

Institutional control and field	Number of support modes					Total
	1	2	3	4	5	
<b>Public institutions</b>						
<b>Total S&amp;E</b>	16	41	24	13	4	100
Agricultural sciences.....	27	45	19	6	3	100
Biological sciences.....	18	41	24	13	4	100
Health sciences.....	18	36	26	15	4	100
Engineering.....	19	47	22	9	2	100
Computer & information sciences.....	12	46	27	12	2	100
Mathematics.....	18	45	23	11	3	100
Physical sciences.....	11	46	26	12	3	100
Earth, atmospheric, & ocean sciences.....	16	38	27	13	5	100
Psychology.....	9	31	29	21	9	100
Social sciences.....	14	35	23	18	8	100
<b>Private institutions</b>						
<b>Total S&amp;E</b>	16	42	24	12	4	100
Agricultural sciences.....	25	45	20	9	0	100
Biological sciences.....	22	43	22	11	2	100
Health sciences.....	20	42	21	10	5	100
Engineering.....	19	48	22	9	2	100
Computer & information sciences.....	14	47	28	10	2	100
Mathematics.....	14	47	28	9	2	100
Physical sciences.....	12	50	26	9	2	100
Earth, atmospheric, & ocean sciences.....	13	43	24	15	3	100
Psychology.....	17	35	26	15	6	100
Social sciences.....	10	32	26	19	10	100

**NOTE:** Rows may not total 100 percent due to rounding and/or to the exclusion of more than five funding modes. 1,779 Ph.D.s did not report any mode of support. Percentages are based on those reporting at least one mode of support.

**SOURCE:** National Science Foundation/Division of Science Resources Studies, Survey of Earned Doctorates.

Age	Revised LAA 1994+						Jul-08 11+	Total
	5	6	7	8	9	10		
13.0	69.0	91.0	61.0	41.0	4.0	33.0	5118.0	
18.0	422.0	47.0	61.0	23.0	9.0	15.0	5496.0	
17.0	194.0	74.0	19.0	15.0	11.0	17.0	3957.0	
10.0	126.0	76.0	32.0	4.0	11.0	11.0	3737.0	
10.0	177.0	39.0	24.0	20.0	4.0	8.0	3593.0	
7.0	66.0	51.0	9.0	8.0	8.0	3.0	2344.0	
16.0	43.0	9.0	17.0	1.0	2.0	1.0	3035.0	
19.0	81.0	35.0	6.0	3.0	5.0	7.0	3960.0	
10.0	157.0	27.0	30.0	10.0	15.0	17.0	6380.0	
11.0	143.0	41.0	30.0	6.0	1.0	1.0	6512.0	
18.0	202.0	62.0	7.0	12.0	3.0	0.0	3631.0	
19.0	457.0	28.0	6.0	2.0	0.0	0.0	2825.0	
15.3	69.5	84.2	29.2	6.6	0.6	1.2	2742.3	
12.5	26.8	13.9	18.3	0.8	1.6	0.2	2443.2	
15.4	36.6	4.4	0.5	1.2	0.0	0.0	2734.0	
10.6	68.3	5.0	2.6	0.3	0.7	0.1	1628.6	
16.2	175.7	25.2	3.8	0.4	1.1	0.4	1372.7	
11.3	16.2	22.4	2.3	0.0	1.5	0.0	486.5	
12.0	66.0	11.1	5.5	0.0	0.0	0.0	1066.7	
11.9	68.0	38.5	5.7	9.3	0.9	0.4	1187.4	
12.4	106.4	42.9	12.1	4.0	4.2	0.4	898.1	
13.4	124.2	53.7	20.7	9.4	4.8	3.4	870.1	
15.5	178.3	54.1	27.7	14.6	7.8	2.1	7994.4	
14.9	181.3	85.1	22.5	13.2	5.5	5.5	855.6	
17.0	22.3	65.7	30.7	11.0	6.3	5.0	760.8	
11.4	186.9	6.3	16.9	8.1	4.1	4.6	1077.2	

# EXAMPLE – FLIGHT PATHS



Between 1974 and 2009, cumulatively, Europe was responsible for 38% of aviation traffic, Asia/Pacific was responsible for 29%, and North America for 20%.

Source: Michael Markieta, ARUP

## EPM and BI

- **“I just want a report”**
- Already have Dimensions, hierarchies, calculations in the cube
- Some real improvements in integration - OBIEE 11.1.1.x
  - Publisher Integration
  - Writeback
  - Ragged hierarchies
  - EPM Workspace
  - Building Essbase from OBIEE

# Smart View Integration



The screenshot shows Microsoft Excel with the 'Smart View' ribbon selected. The active analysis is named 'Customer Segment'. A data table is displayed with columns for Product, Data, and Total. A 'Save Analysis' dialog box is open, showing a list of existing analyses and their creation details.

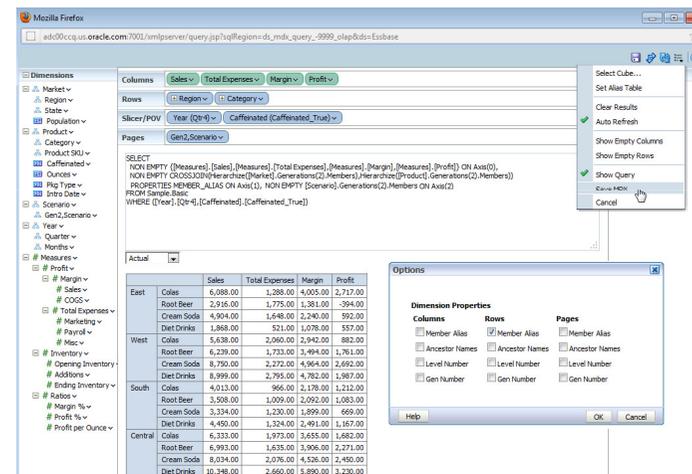
Product	Data	Total
Customer Segment	(All)	
Products - Default	Data	Total
7 Megapixel Digital Camera	Sum of Gross Margin	-84068.4
	Count of Discnt_Value	
Accessories	Sum of Gross Margin	-1301542
	Count of Discnt_Value	
Audio	Sum of Gross Margin	42735.7
	Count of Discnt_Value	
BizTech	Sum of Gross Margin	-1878401.1
	Count of Discnt_Value	

Name	Created By	Created
1. Quick Demos	System Account	9/8/2011 4:06:43 PM
10. Higher Education	System Account	7/2/2012 6:46:59 PM
11. Healthcare	System Account	7/2/2012 6:47:10 PM
12. Retail	System Account	6/18/2012 3:08:26 PM
3. Analysis and Dashboards	System Account	8/9/2012 3:39:40 PM
5. Performance Management	System Account	9/11/2012 7:31:13 PM
Automotive	System Account	9/8/2011 4:06:47 PM
Communications	System Account	9/8/2011 4:06:47 PM
Consumer Sector	System Account	9/8/2011 4:06:48 PM
Contact Center Telephony	System Account	9/8/2011 4:06:50 PM
Demo HE	System Account	9/8/2011 4:06:50 PM

# BI Publisher and EPM

- GUI for building MDX queries against Essbase
- Easily report against Essbase & Planning cubes without the need to introduce them into the RPD
- Combine data coming directly from Essbase/Planning on OBI dashboards
- Combine Essbase/Planning data with data from other sources in the same report
- Use BI Publisher for production style reporting against Essbase



Service Detail | Oracle BI Cloud Service | Oracle Visual Analyzer | **hroug** | ziga.vaupot@qubix.com

**ORACLE** Business Intelligence Cloud Service

Search  **ZV\_my\_first\_project**

- SampleApp
  - Revenue Metrics
  - Customers
  - Payment Metrics
  - Products
  - Geography
  - Orders
  - Time
  - Profit Metrics
  - Advanced Calcs
  - SF Dim Opportunity Owners
  - SF Fact Actuals
  - SF Dim Lead Sources
  - SF Dim Opportunit
  - SF Dim Accounts
  - SF Dim States
  - SF Dim Types
  - SF Dim Create Dates
  - SF Dim Close Dates
  - My Calculations
  - Value Labels

Country Name: Austria, Croatia, Slovenia

50 Tile | Values | Revenue

### AVG Revenue per Customer by Year, Brand

Year	BizTech	FunPod	HomeView
2011	11.5K	10.5K	5.5K
2012	6.2K	6.5K	4.5K
2013	7.5K	8.5K	3.5K

### Revenue

**7M**

### Revenue by Region, Product Type

Product Type	Revenue
Accessories	0.8M
Audio	0.8M
Camera	0.8M
Fixed	0.8M
Install	0.8M
LCD	0.8M
Maintenance	0.8M
Phones	0.8M
Plasma	0.8M
Portable	0.8M
Smart Phones	0.8M

### Country-wise Revenue

### Revenue by Region, Product Type, Billed Units

Product Type	Revenue	Billed Units
Camera	~3.5M	~19K
Portable	~3.5M	~19K
Audio	~1.5M	~19K
Phones	~1.5M	~19K
Plasma	~1.5M	~19K
LCD	~1.5M	~19K
Smart Phones	~1.5M	~19K
Fixed	~1.5M	~19K
Accessories	~1.5M	~19K
Maintenance	~1.5M	~19K

Add Calculation

# Demo



## Formulating a Recipe for Analytic Success



# Baxters Food Group



- Baxters Food Group is a 4th generation family owned business, established in the Highlands of Scotland in 1868.
- They make premium quality food products in a wide range of packaging formats.



- Products range from the No 1 market share in the UK of pickled beetroot to jams , sauces, to ready to serve meals, organic pasta sauces and beetroot juice
- For 12 years Audrey Baxter has led the business with an ambition to excel in what we do and extend our footprint globally
- They now have a turnover of USD \$½ Billion and their ambition is to reach USD \$1Billion within the next 10 years.

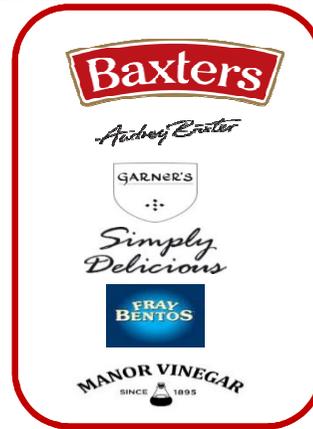
# Global footprint



North America



Europe



Australia





Statistics

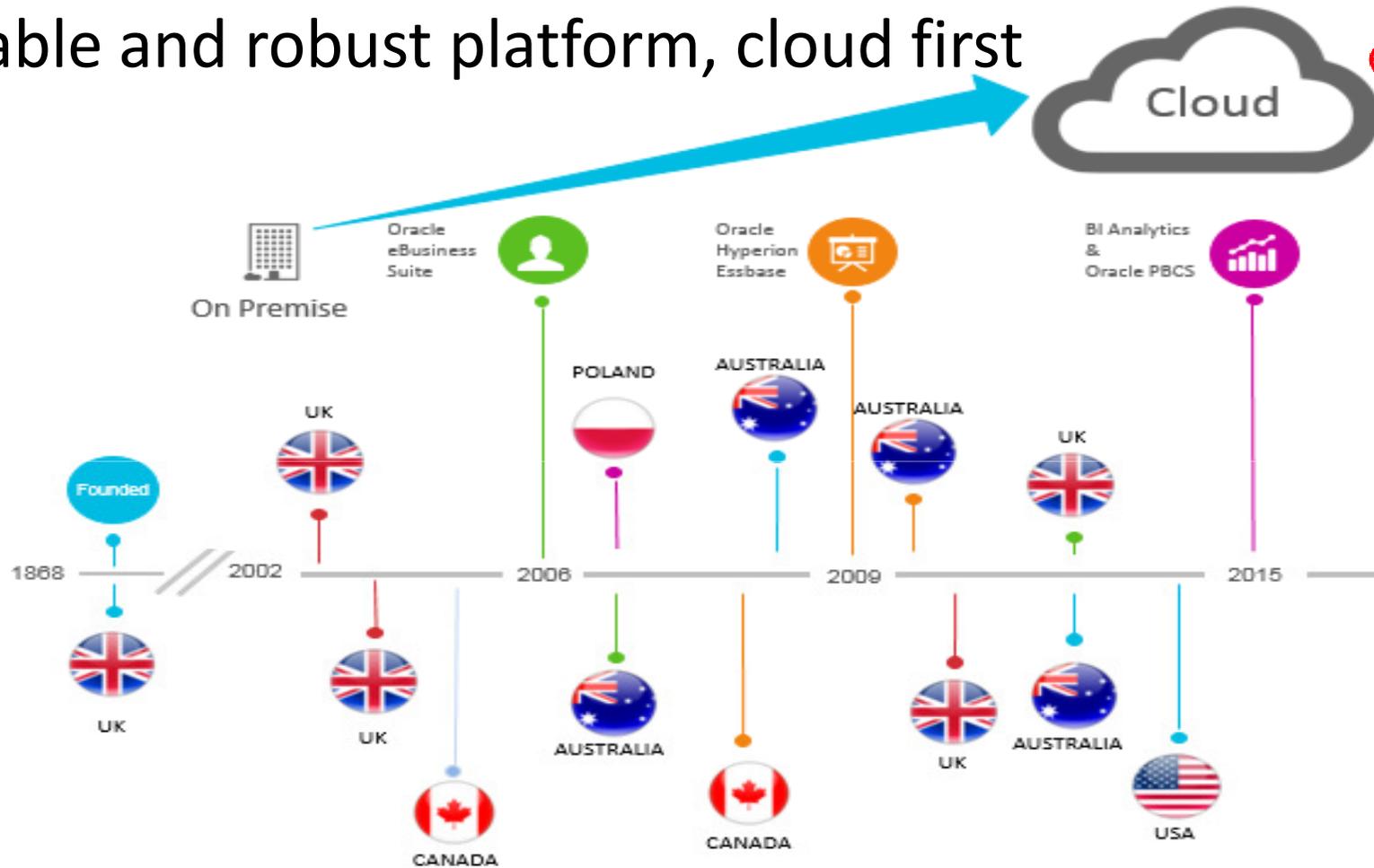
Sales



Analytics



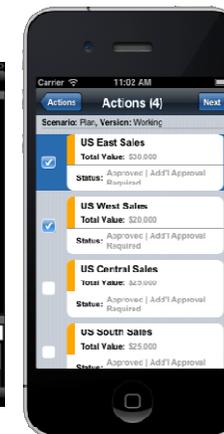
# Scalable and robust platform, cloud first



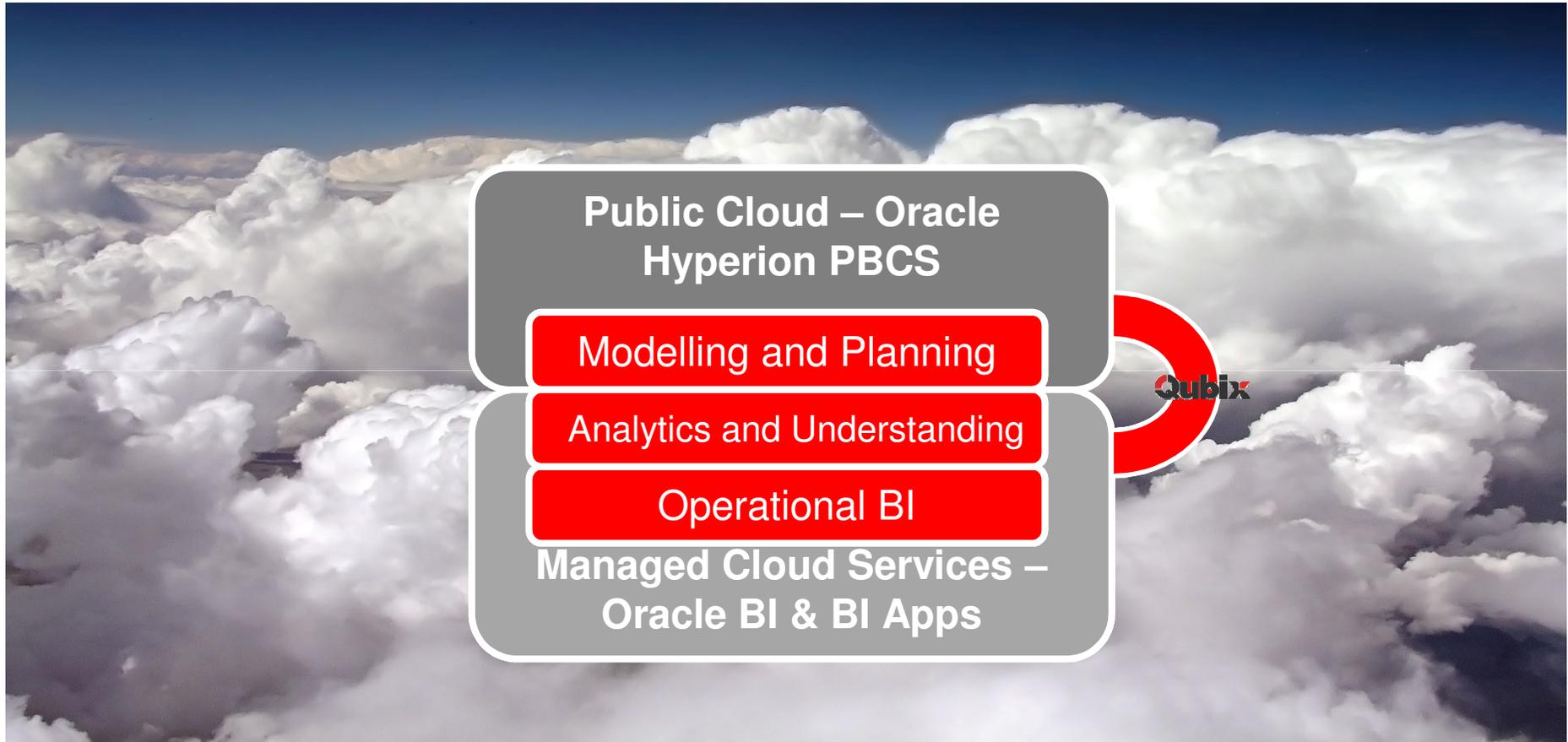
# Embracing new technologies



- Tools to enable the business to make informed decisions
- Fast , consistent and accurate information
- Visualisation formats to suit the management style
- Drive the focus on the delivery requirements



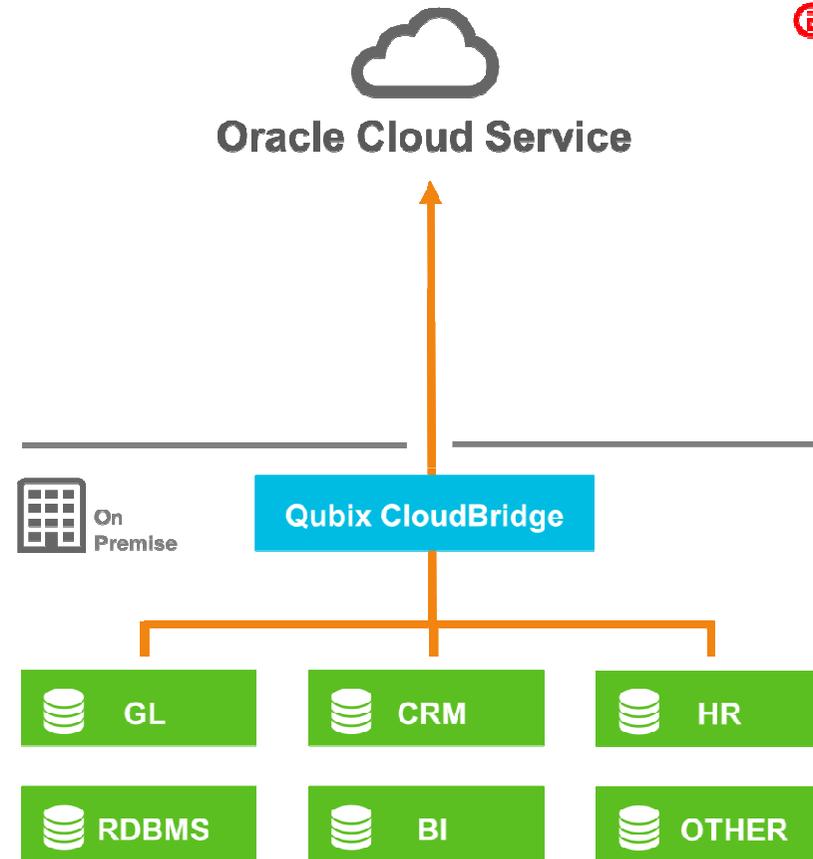
# Functional Architecture



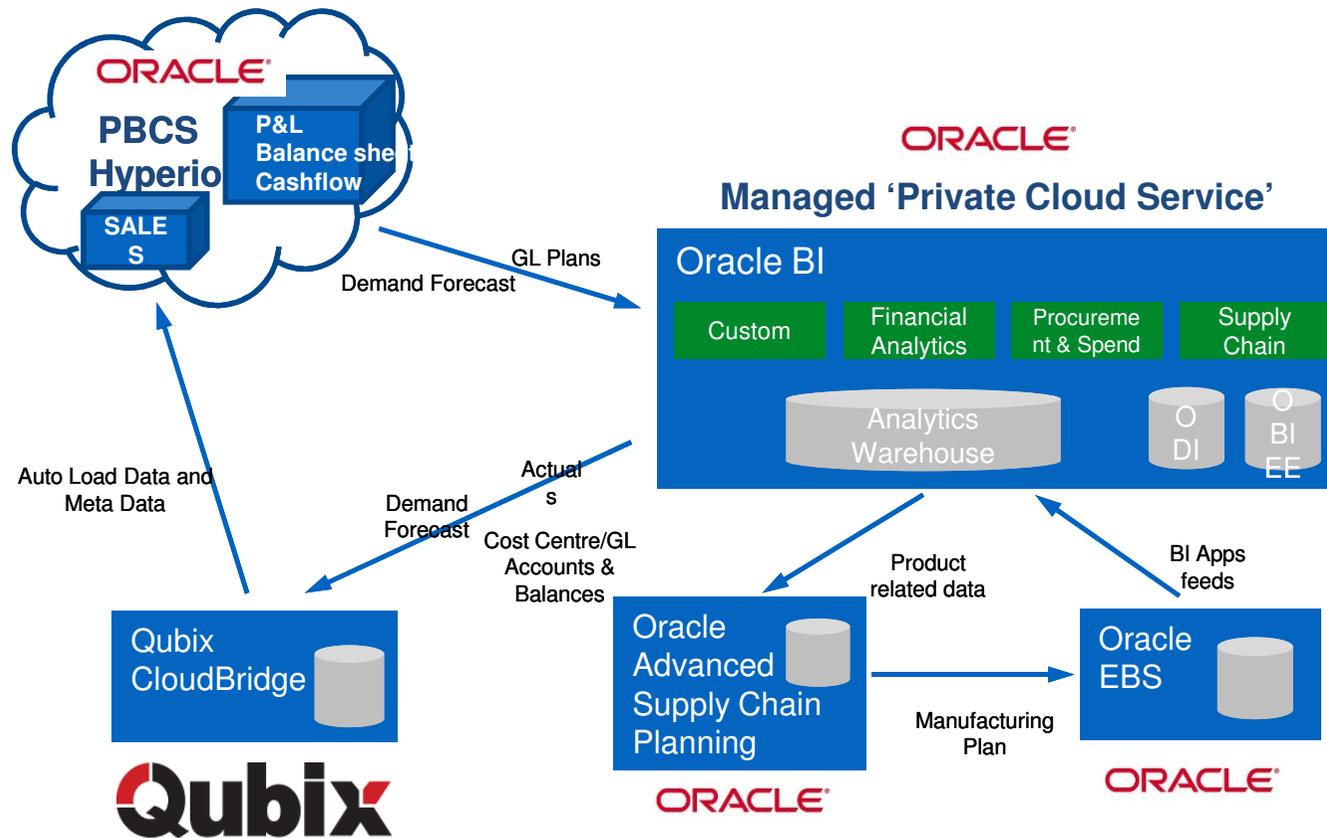
# Qubix CloudBridge



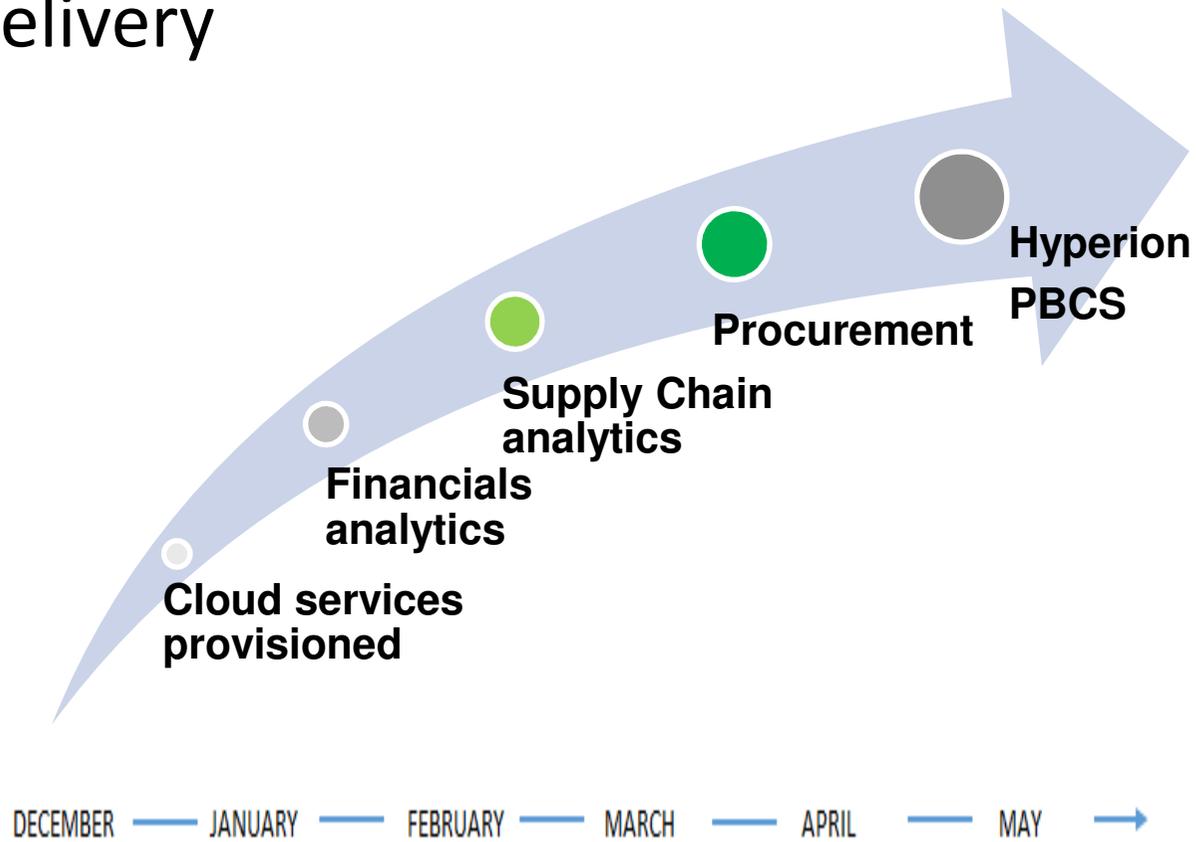
A Package to get your “On Premise” source systems and Excel spreadsheet data structured and through to PBCS quickly and easily.



# Baxters integrated cloud solution



# Rapid delivery



# Measure of success

## Planning

- Reduce time spent on planning process- allowing more time for analysis and challenge.
- Process consistency across Group
- Improved accuracy of forecast

## Business Analytics and Reporting

- Improved decisions - faster
- Improved availability of business information
- Preventative alerts rather than after-the-event reports

## Ownership

- Fast route to deployment
- Lower total cost of ownership
- Provide Secure and scalable environment

# Ingredients for analytic success



PUBLIC Cloud solution for forecast and budget planning



MANAGED Cloud for the Business Intelligence Foundation Suite



BI Application packs – financials , supply chain and procurement



PARTNERSHIP with Qubix with common goals and drive to succeed



RESOURCE – internally focusing on the value added tasks

# Closing Comments

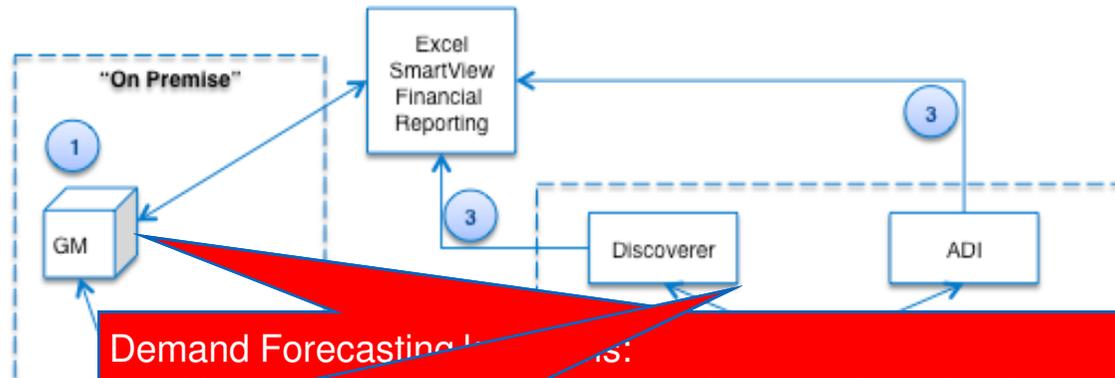
- There is very real value that BI adds to EPM
- Making it part of the process and not just what happens afterwards
- Driving value takes vision and innovation
  - The BI Builder
  - PBCS / EPRCS
  - Big Data Architectures
  - CloudBridge
  - Free Training

# BI Builder



The screenshot shows the Qubix website's landing page for Oracle Business Intelligence Cloud Service. At the top left is the Qubix logo. To its right is a navigation menu with links for Home, Clients, Services, Why Us, Insights, and Contact Us. The main heading reads "ORACLE BUSINESS INTELLIGENCE CLOUD SERVICE". Below this is a sub-heading: "Agile business intelligence in the cloud for everyone. Oracle BICS is a proven platform for creating powerful business intelligence applications, enabling users across the enterprise with a pre-designed cloud BI Apps." Two green buttons are present: "Get in Contact" and "Arrange a Demo". The background of the main section features a person's hands interacting with a tablet displaying various data charts. Below this section, there is a "BUILD YOUR SOLUTION NOW" heading, followed by a paragraph explaining that building a BI solution shouldn't be difficult and that Qubix BI Builder provides a custom solution including software, hardware, backup, tuning services, and training. To the right of the text are images of a tablet and a laptop, both displaying BI dashboards with charts and maps. A final green button, "Build Solution Now", is located at the bottom of this section.

# Baxters' Information System in December 2014

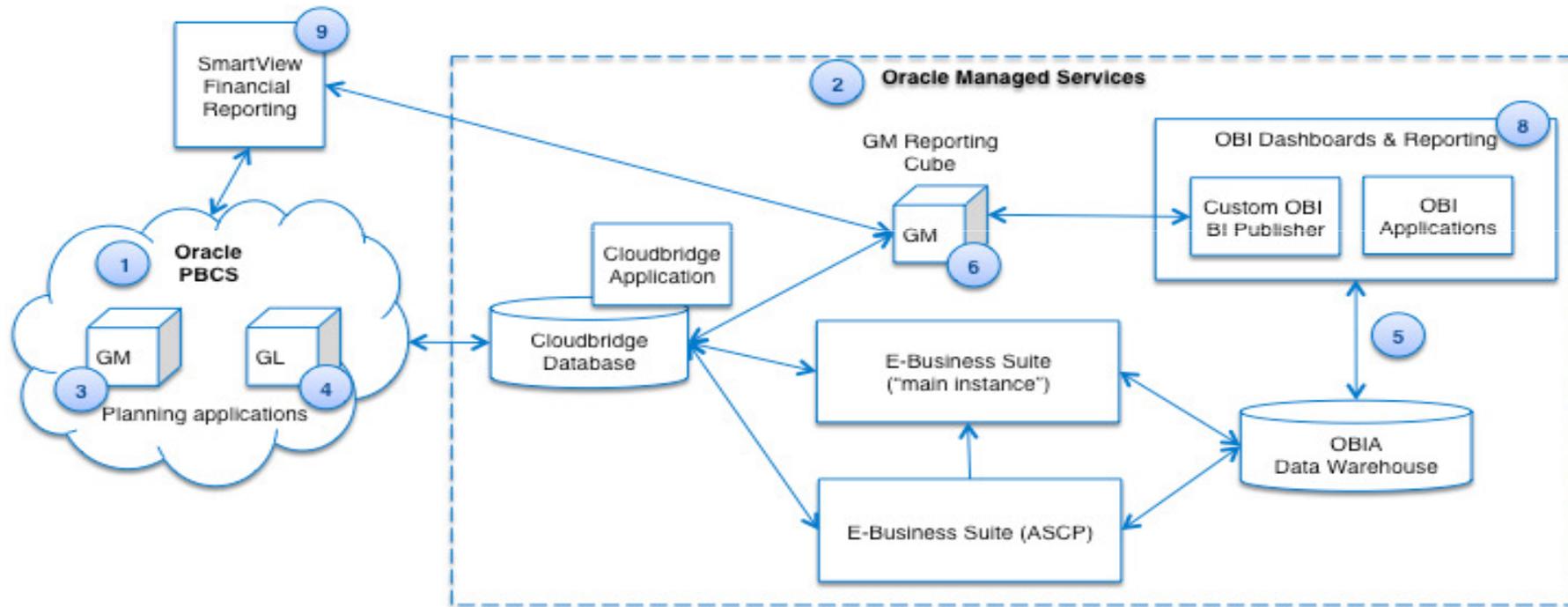


**Management Reporting key pains:**

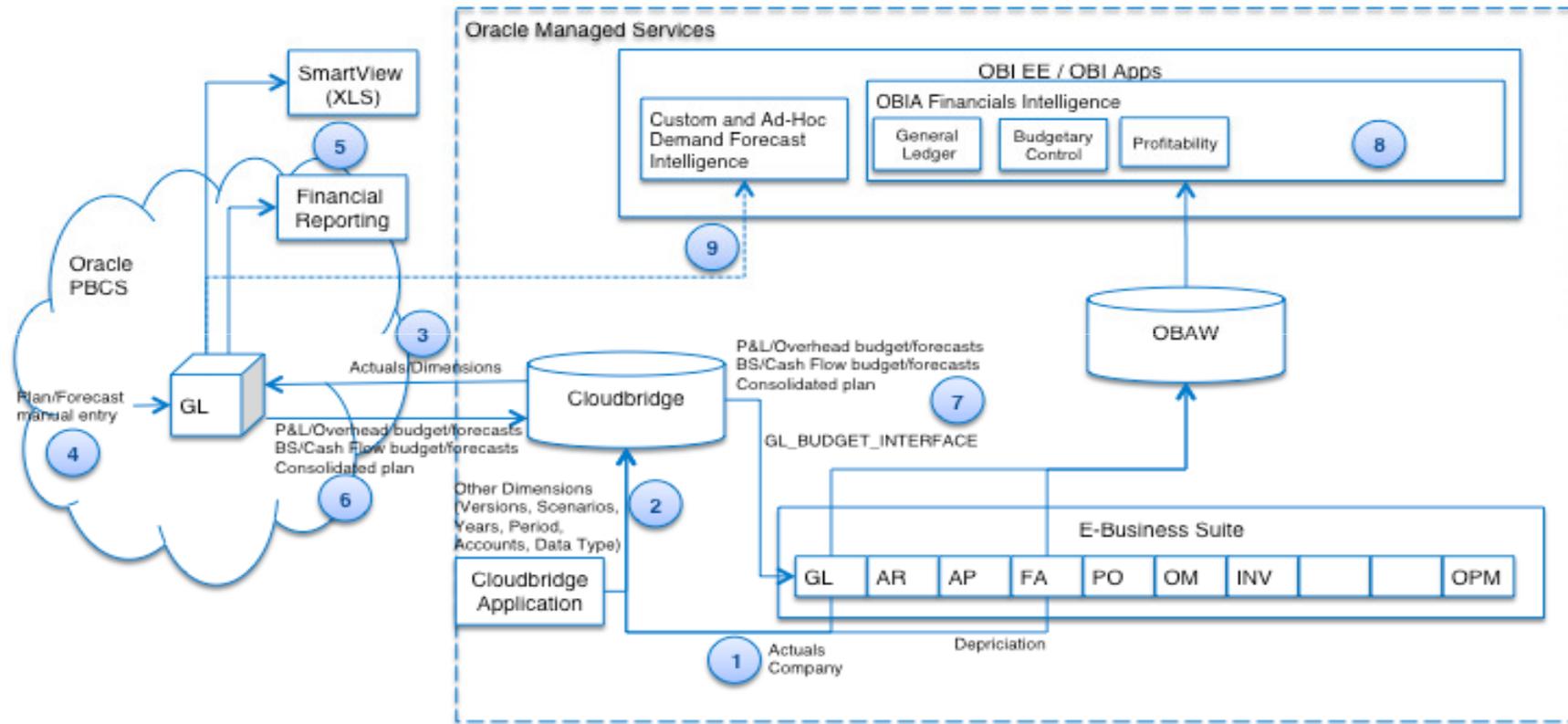
- Workday 3 - 2 Days effort to compile, 1 day to disseminate:
- Thick paper based report
- Summary sheet
- Many pages of detail behind providing splits and drill through
- No commentary, just numbers
- EBS source, mostly ADI report extract

the manufacturing forecast ie. New SKU's added, SKU's. ar, difficult to manage if Baxters supplier has a st to ensure no availability issues. e but forecast is held in Excel and combined es not hold enough history of forecasts. Excel and joining/combining the results in report count manager responsible for the demand

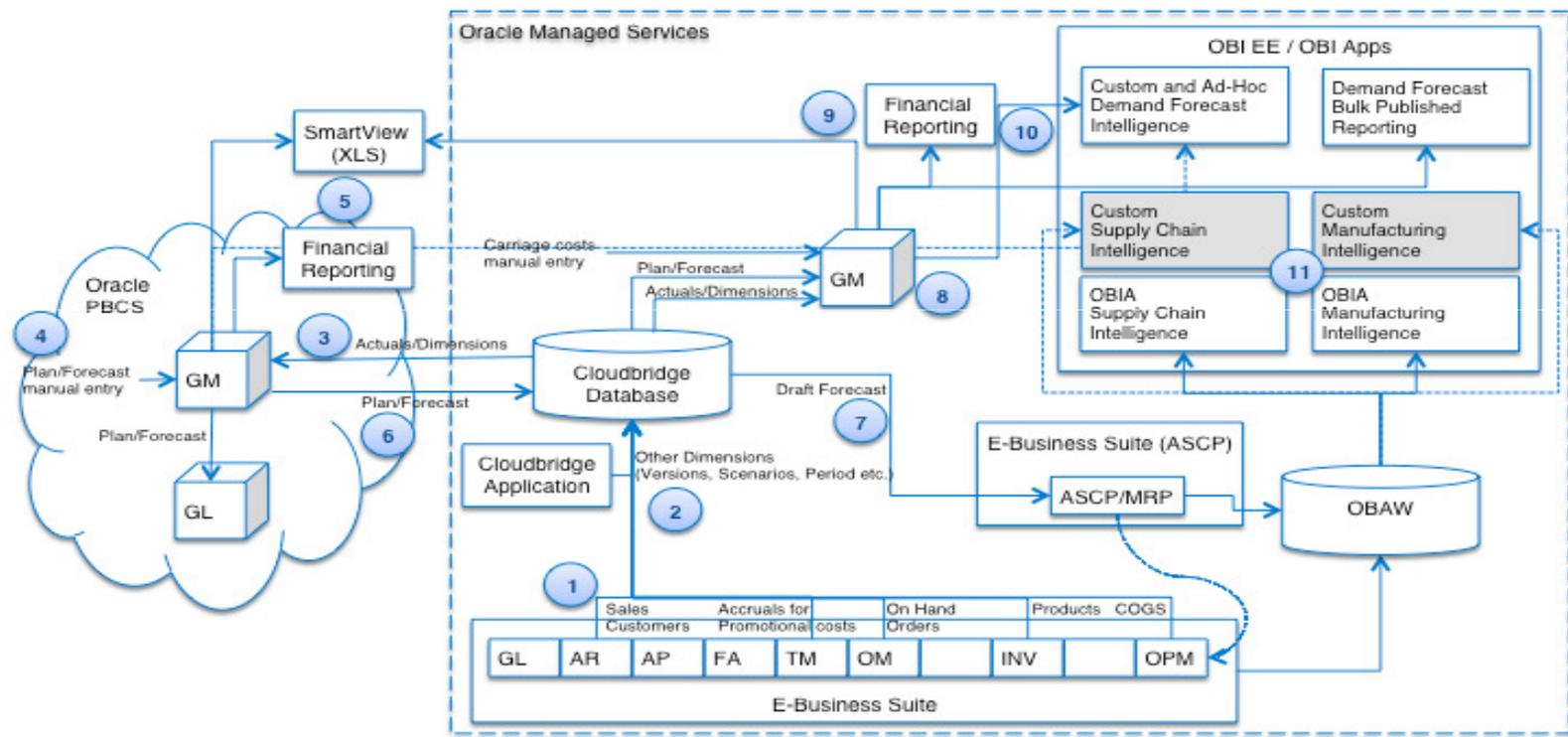
# Baxters' Information System in May 2015



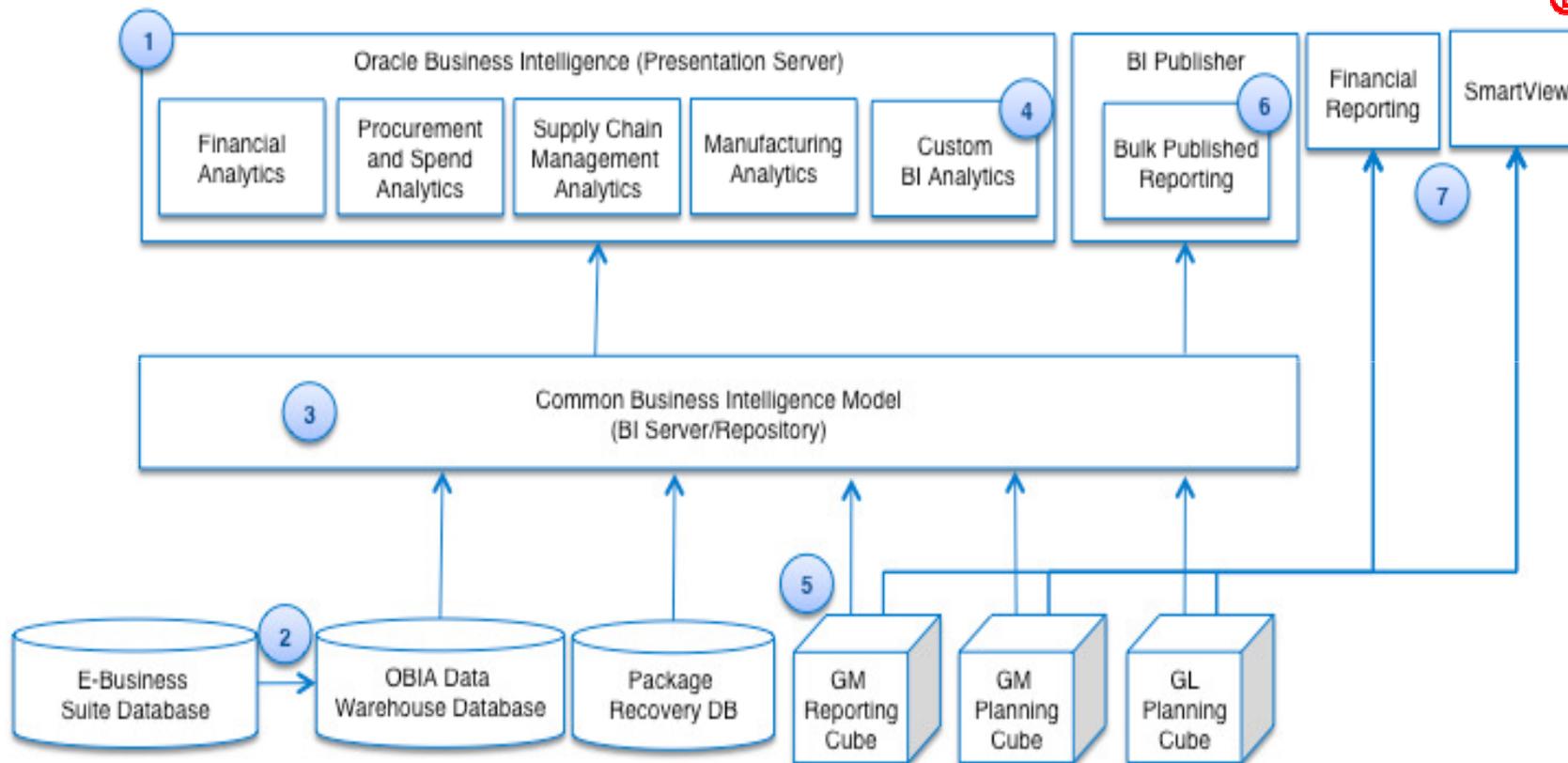
# General Budgeting and Forecasting



# Demand and Gross Margin Forecasting (GM)



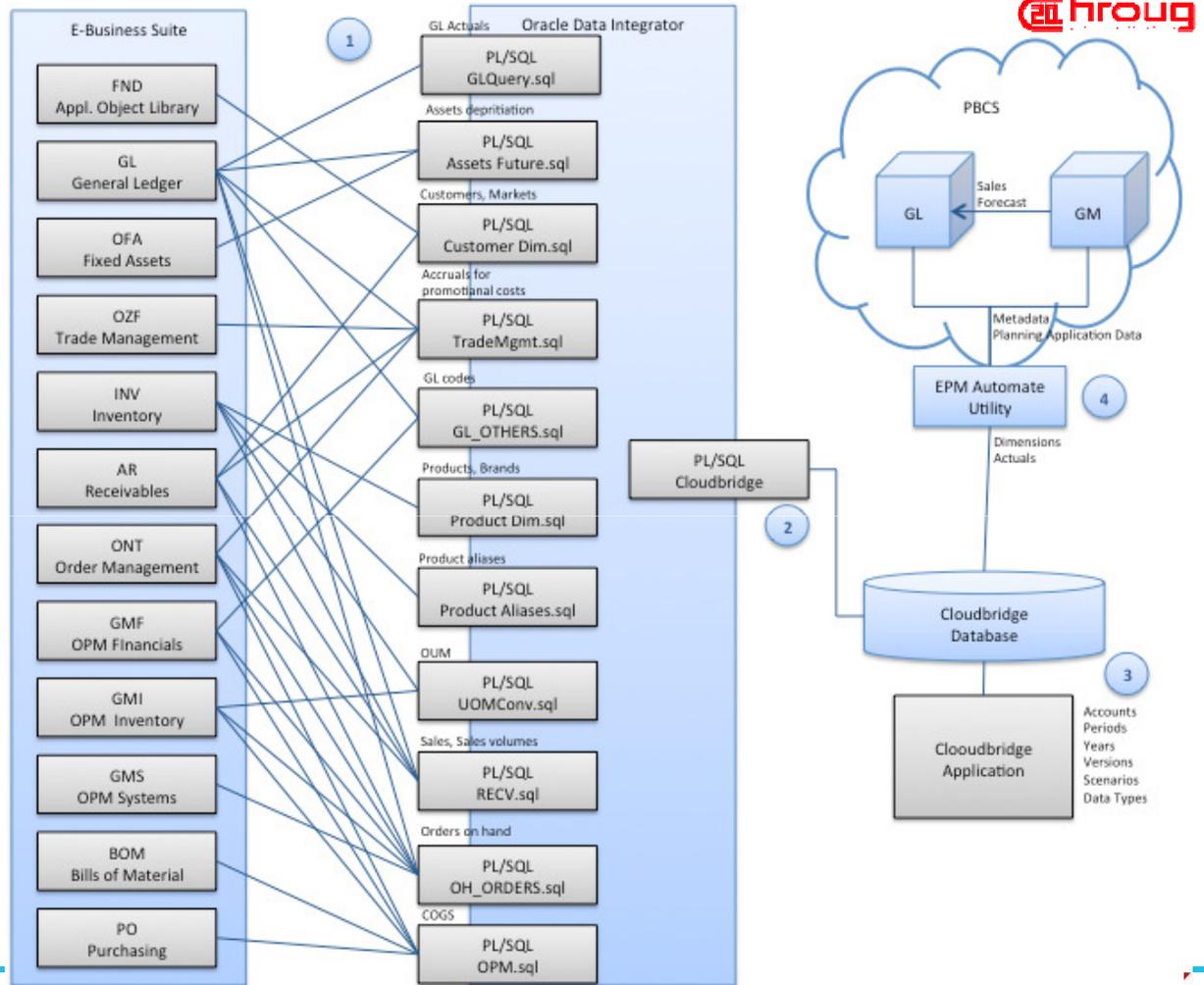
# Management and Operational Reporting



# Data Flow: EBS → PBCS



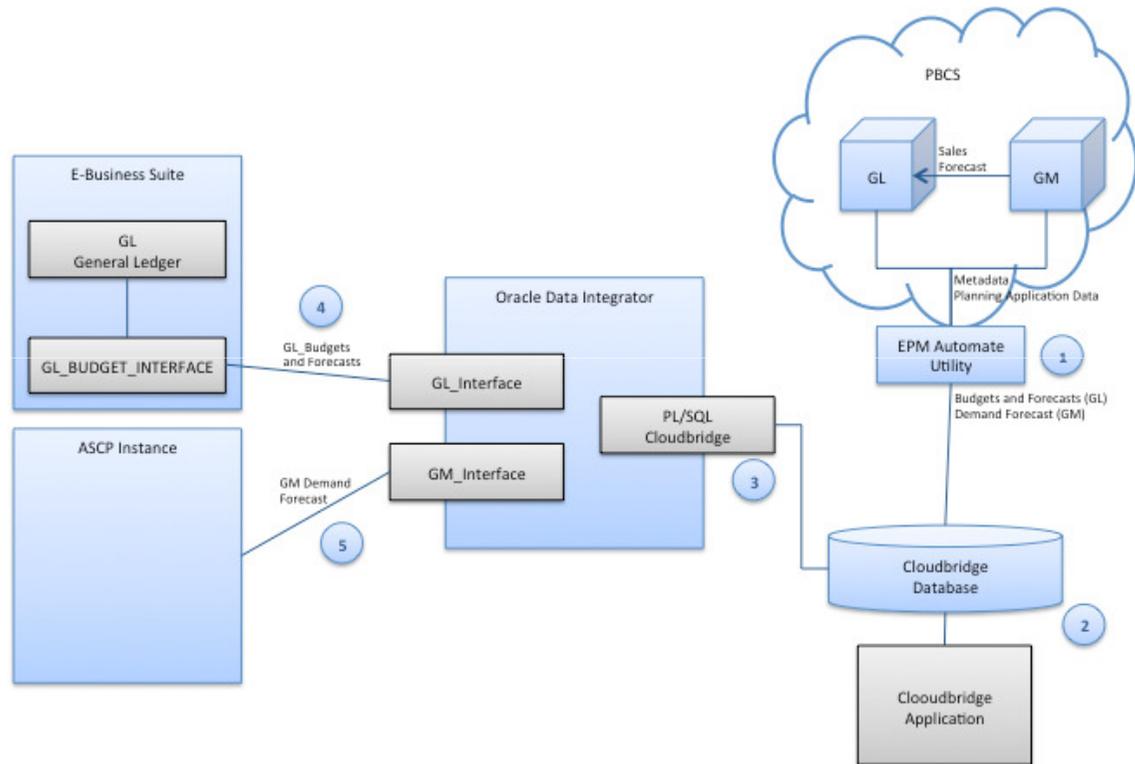
Qubix CloudBridge



# Data Flow: PBCS → EBS



Qubix CloudBridge



# Oracle Business Intelligence Applications



- “Ready to be used” and extendable BI applications
  - Dashboards and reports for different business areas (GL, HR, Supply Chain, Procurement ...) based on Oracle Business Intelligence including repository (RPD) and security model
  - Business Analytics (data) Warehouse including ETL processes implemented in Oracle E-Business Suite
  - BIACM – BI Apps Configuration Manager
- Supported ERP/CRM applications include:
  - EBS (from 11.5.10 forward), Oracle Fusion, JD Edwards (from 9.0 forward), Oracle Agile Product Lifecycle Management, PeopleSoft (9.0 forward), Siebel (8.1.1 forward), Universal (flat files)

# ETL and Data Lineage

**OBIA Data Lineage**

Lineage Summary | Dashboard Implementation | Report Implementation | Presentation Layer Implementation | Ware

Warehouse Table Name: W\_GL\_BALANCE\_A  
Warehouse Column Name: BALANCE\_LOC\_AMT

**Warehouse Lineage Summary**

Warehouse Table Name	Warehouse Column Name	Source Tab
W_GL_BALANCE_A	BALANCE_LOC_AMT	

[Analyze](#) - [Edit](#)

**Warehouse Implementation Source Independent ETL Interface Details**

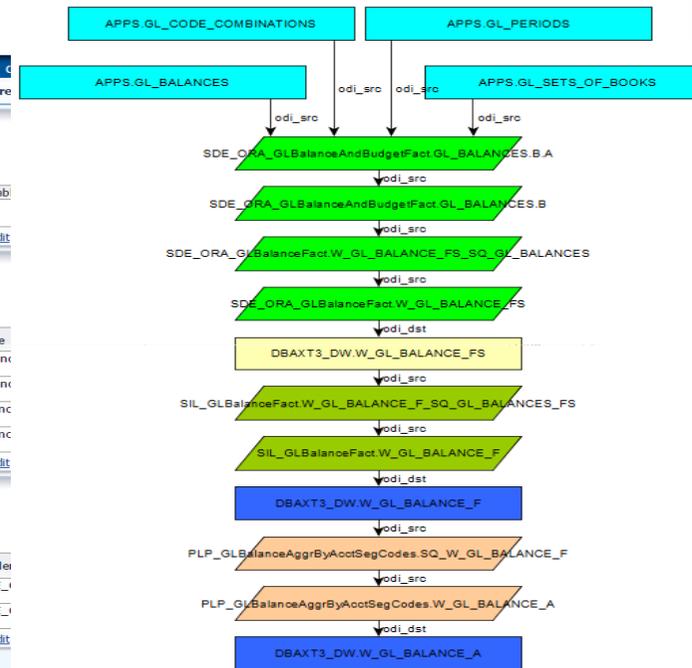
Warehouse Table Name	Warehouse Column Name	Adaptor Name	Interface Level Number	Folder Name
W_GL_BALANCE_A	BALANCE_LOC_AMT	PLP	0.00	PLP_GLBalanc
			1.00	PLP_GLBalanc
		SILOS	2.00	SIL_GLBalanc
			3.00	SIL_GLBalanc

[Analyze](#) - [Edit](#)

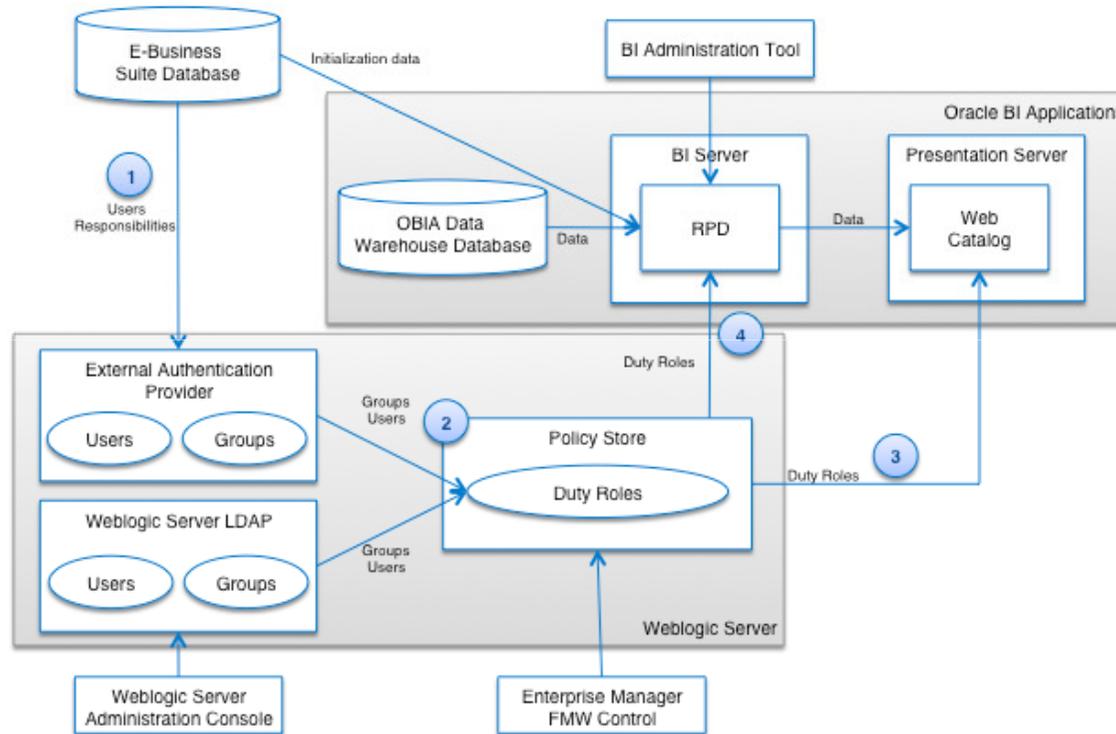
**Warehouse Implementation Source Dependent ETL Interface Details**

Warehouse Name	BIACM - Business Intelligence ...	Adaptor Name	Interface Level Number	Folder
W_GL_BALANCE_A	BALANCE_LOC_AMT	SDE_ORA11510_Adaptor	4.00	SDE_I
			5.00	SDE_I

[Analyze](#) - [Edit](#)



# Security





## Proven

- Oracle Platinum Partner
- 150+ Engagements
- 15+ Years of Success



## Global

- North America
- Europe
- Middle East
- Australasia



## Specialised

- Enterprise Performance Management
- Business Intelligence
- Cloud

# Thank you



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