


# Oracle Applications Reporting--How Can I Get What I Need?

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**Oracle Apps Reporting**

How Can I Get What I Need?

Presented by Dan Shannon  
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**FMT Systems Inc.**

- Technical and functional consultants since 1990 with experience in applications development, IT management, and financial controller positions for Fortune 500 and World 200 companies.
- Oracle Beta Testers for numerous programs, such as Applications 11i, Discoverer 3i/9i/10g, and Warehouse Builder
- Provide consultants for Oracle Applications 11i financial (GL, AP, AR, FA, BIS, DBI, OFA, Discoverer) implementations, with a specialization in data warehousing, business intelligence, and reporting
- Continuously involved with OAUG, BI/DW SIG, OracleWorld, AppsWorld, ODTUG, NCOAUG, SCOUG, KCOUG
- Not endorsing any products

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**Agenda**

- **Reporting and BI definitions**
- Requirements Analysis
- IT Reporting Skill Sets
- Reporting Products Marketplace
- Oracle's Corporate Performance Management (BI)
  - BIS and DBI
  - Financial Analyzer and EPB
  - Discoverer
- Summary and Questions

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# Oracle Applications Reporting--How Can I Get What I Need?

### Recent Reporting/BI Trends

- Shift from departmental to enterprise-wide
- BI Systems pressured to operate in (near) Real-Time
- **Interoperability and integration is key trouble spot**
  - BI and DW embedded in Applications
  - BI use in Portals – BI dashboards access the DW
  - BI has expanded from the traditional On Line Analytical Processing (OLAP) to now include Query and Reporting, ETL, Data Mining, and Data Visualization.
- Return on Investment (ROI) for analytic applications range from 17% to more than 2,000% per IDC December 2002 study, document #dg20021202.

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### Common Strategic Reporting Objectives

- Detailed Data Analysis
  - –Complete & Accurate View Across Many Subject Areas
  - –Subject Areas Spread Across Multiple Sources
- Data Summarized via Hierarchies
- Simplify Data Access
- Resolve Data Quality Issues
- Historical / Trending Analysis
- Timely Access to Data
- Minimize Transactional System Performance Impact
- Access via the Entire (including Extended) Enterprise

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## Requirements Analysis

- Once strategy is known, the requirements analysis performs the following processes:
  - Define Scope—Data, Activities, Organizations, Locations, Timing, and Motivation
  - Plan the Analysis—SME, team
  - Gather Information—conduct briefing, conduct interviews, conduct Joint applications development, obtain industry information, review range of available software
  - Describe the Enterprise—create data models, create activity models, create location models, create people and org models
  - Take Inventory of Current Systems
  - Define What Is Required of New System
  - Plan for Transition

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## Five W's and the H

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| <ul style="list-style-type: none"><li>□ Zachman Framework (circa 1987)<ul style="list-style-type: none"><li>■ Objectives (planner's view)</li><li>■ Enterprise Model (business owner's view)</li><li>■ Model of Fundamental Concepts (Architect's view)</li><li>■ Technology Model (designer's view)</li><li>■ Detailed Representation (builder's view)</li><li>■ Functioning System</li></ul></li></ul> | <ul style="list-style-type: none"><li>□ System Development Life Cycle (circa 1996)<ul style="list-style-type: none"><li>■ Strategic Planning</li><li>■ Requirements Analysis</li><li>■ Requirements Analysis</li><li>■ Design</li><li>■ Construction</li><li>■ Transition/Production</li></ul></li></ul> |
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## Common Oracle ERP Reporting Scenario

- ERP Team Beliefs:
- Basic reporting will be provided by standard and FSG reports
  - Discoverer, OFA, DBI, etc. could be installed later for more complex reporting
- Reality is that:
- Neither assumption is correct
  - Implementing an ERP system without planning for reporting is like building a house without considering plumbing or electrical connections

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## ERP Reporting "Golden Rule"

Planning AHEAD requires:

1. Performing a reporting needs analysis
2. Designing a reporting solution, matching needs against best products
3. Incorporating your reporting requirements into ERP applications design and configuration

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## Typical Oracle Reporting Scenario

Executive wants to know **revenue and backlog** (relative to **forecast**) and **margin** by **reporting product line**, by **customer, month to date, quarter to date, year to date**

### Sources of Data:

• Revenue	3 AR Tables
• Backlog	8 OE Table
• Customer	8 Cust Tables
• Item	4 INV Tables
• Reporting Product Line	1 Table (Excel)
• Accounting Rules	5 FND Tables
• Forecast	1 Table (Excel)
• Costing	11 CST Tables
Totals	41 Tables

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## User Type Categories (Who and Why?)

**Executive Perspective: "What will happen?"**  
Encompasses the full enterprise, the "Big Picture."

**Middle Management Perspective: "Why did it happen?"**  
Encompasses a department or area.

**End-User Perspective: "What happened?"**  
Deals with end-customer commitments and internal company relationships.

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## Report Level Categories (What and Where?)

**Strategic:** Enterprise-Wide reports: Line of business/division/Region quarterly and yearly reporting, dashboards, balanced scorecards, reports in finance/sales/operations, industry statistics and market share, regulatory and audit compliance, summary and aggregate data.

**Tactical:** Line of Business/Division/Region Monthly reporting, actual versus budget comparisons with commentary/notations/graphs, packaged analytical apps (BIS/DBI/OFA/EPB), OLAP (OFA/TM1/data mining), Key Performance Indicators (KPIs), Portal red/yellow/green stoplights and gauges, three or more dimensions in ad hoc query and reporting

**Operational:** Daily and weekly reporting, Detail data from GL/AP/FA/PO, two dimensions in reporting, scheduled reporting, Departmental/cost center measurements against objectives, account and inter-company reconciliations

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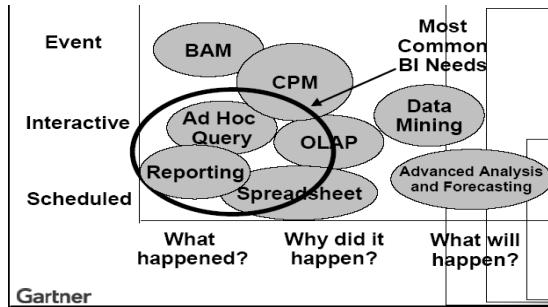
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## Frequency of Update (When?)



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# Oracle Applications Reporting--How Can I Get What I Need?

## Process for Apps Reporting Success (How?)

- ❑ Establish the Vision
- ❑ Evangelize the Vision
- ❑ Prioritize the Portfolio
- ❑ Allocate Sufficient Resources
- ❑ Align Business and IT for Long Haul
- ❑ Build Trust in System

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## OLTP versus DW/BI—Different skills

- ❑ OLAP/BI is iterative in modeling, design, and implementation
- ❑ Frequent exposure of unknown data quality problems
- ❑ Multiple source systems (OLTP) converge into one or more target (DW/OLAP/BI) systems
- ❑ Multiple lines of business use different business rules, assumptions, terminology
- ❑ Quantity of data that will reside in DW/OLAP/BI is typically unknown
- ❑ Difficulties in loading and aggregating data
- ❑ Different challenges in performance tuning

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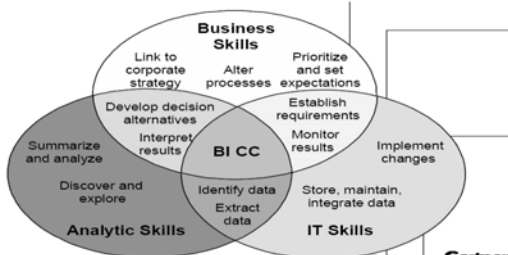
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## Reporting/BI skills required

### Skills in a BI Competency Center



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- ❑ IT Reporting Skill Sets
- ❑ **Reporting Products Marketplace**
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- ❑ Summary and Questions

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## Types of End Users

### The Strata of Analytic End-users

<b>IT Users (2%)</b>	98% producer 2% consumer
<b>Power Users (5%)</b>	85% producer 15% consumer
<b>Business Users (25%)</b>	15% producer 85% consumer
<b>Casual Users (30%)</b>	5% producer 95% consumer
<b>Enterprise Users (38%)</b>	1% producer 99% consumer

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## BI Deployment

### Enterprise BI Deployment Map

IT	Data Mining	Application Development	Metadata Design
	Power Users	OLAP	Statistical Analysis
Business Users	Packaged An Apps	Business Reporting	Analytic Reporting
	Casual Users	Scorecards	Perform Management
Enterprise Users	Enterprise Reporting	Dashboards	
	Mobile/Wireless	Extranets/B2B B2C	

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# Oracle Applications Reporting--How Can I Get What I Need?

## Sample DIY Compatible Suppliers

- Cognos
  - Type 1 — Impromptu
  - Type 2 — PowerPlay, DecisionStream ETL
- Business Objects
  - Type 1—Crystal Reports
  - Type 2—Business Objects
  - Type 3—Dashboard Manager, Data Integrator ETL
- Information Builders
  - type 1 — Focus
  - type 3 — WebFocus, iWay ETL
- Hyperion
  - type 1—Brio
  - type 3—Essbase, Application Link ETL
- Oracle
  - type 1—Oracle Reports and FSG
  - type 3—Discoverer 4i+ and Daily Business Intelligence, Warehouse Builder ETL, Designer 2000 ERD

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## Financial Statement Generator (FSG)

- Report Writer for GL (only) – Type 1 tool
- New in 11.5.10, can publish FSG reports in XML format
- Has two required components created by an IT developer
  - Row set – typically contains accounts and
  - Column set – often contains time periods for trend reports.
  - (Optional) third component is content set, which allows you to limit your data, for example, to a single cost center, business line, division etc.
- Using ADI to publish reports allows you to present the content set data as separate pages in an excel workbook so each cost center would have it's own sheet for instance.
- Re-Use same components or combine components in ad hoc reports or with multiple reports
- Able to combine several books into a single report prior to consolidation

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## Oracle Reports

- Type 1 Tool -- Supports all Oracle Apps modules
- Standard or static reports come pre-defined with Oracle Apps
- New in 6i, can create reports from Oracle's Relational or Multidimensional Databases from same tool, and can publish reports in XML or PRT formats
- Can allow Super Users to Create Basic Reports
- Unlimited Data Formatting and High-quality Presentation
- Disadvantage – IT Developers Will Need to Create the Complex Reports, such as reports involving cross-module reporting, multiple database schemas, or using multiple data sources.

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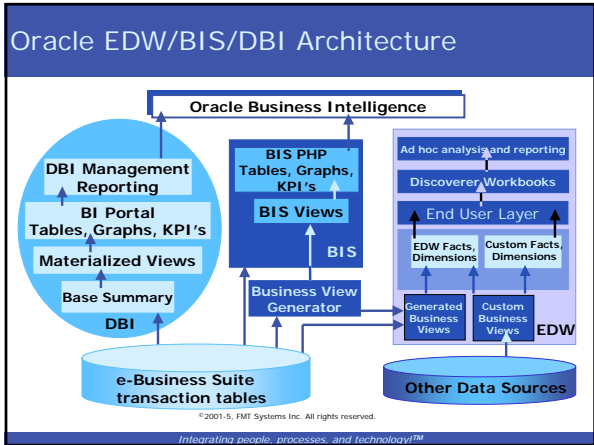
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## Business Intelligence System

- First shipped in 1998, currently in maintenance mode, last enhancements made in 11.5.4
- Predefined views and predefined discoverer workbooks using five common dimensions (Organization, Product, Geography, Sales Channel, and Time)
- A Flexfield Mapping form is provided to handle the mapping of customer-specific descriptive Flexfield or key Flexfield segments to any of the common dimensions

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## Business Intelligence System

- ❑ Uses standard Oracle Apps security profiles
- ❑ Covers GL, AP, AR, HR, PO, Projects, CRM, Manufacturing—process and discrete modules
- ❑ Standard advice on performance problems—setup BIS on a separate reporting instance
- ❑ Uses Discoverer technology stack and Oracle Applications schema containing the Oracle Applications Foundation (FND) tables under the covers

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## Oracle's Embedded Data Warehouse

- ❑ Content: GL, AP, AR, PO, HR, OM--partial
- ❑ GA in 2001, now in maintenance mode on 11.5.8 with release 4.1 in approximately 30 customers
- ❑ Integration of multiple instances / versions of Oracle Apps (10.7, 11.0.x, 11i) via API
- ❑ Leverage 9i common architecture and data warehousing features, primarily SQL Analytic commands and Materialized Views
- ❑ Conforms to Common Warehouse MetaModel (CWM), specifications adopted by Object Management Group (OMG--composed of IBM, Oracle, Microsoft, and Informatica)
- ❑ Will only support Discoverer as reporting tool

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## Oracle Enterprise DW Requirements

- ❑ Support for non-Oracle Apps data is difficult as must load data via API into Oracle Apps tables first. If you use OWB and load non-Oracle data directly into EDW tables, you are in a custom non-supported solution
- ❑ Modules not supported yet→ WIP, BOM, MRP, FA
- ❑ Separate security from apps security due to separate db instance on separate box
- ❑ EDW 4.1 (applicable to apps 11.5.8) requires 9iAS 9.0.2+, OWB 9.0.3.5+, and Discoverer 4.1.37+
- ❑ Requires Oracle VP approval to implement via Oracle Consulting as EDW is in maintenance mode

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### Daily Business Intelligence

- ❑ First shipped as Early Adopter in February 2003, had roughly 10 Early Adopters using versions 5.0, 5.1, and 6.0 in beta testing. Now in GA status with 11.5.10 with version 7.0
- ❑ Uses same HTML server as Performance Analyzer and Enterprise Planning and Budgeting, not same as Discoverer
- ❑ Covers GL, AP, AR, OM, HR, discrete and process mfg, INV, ASCP, PO, Projects, Sales, Marketing, contracts
- ❑ Uses same security model as Oracle Apps if installed in same instance
- ❑ Designed to be intuitive, and therefore no end user training should be necessary

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### DBI limitations

- ❑ Since materialized views must be synchronized on a schedule (time or event driven), each html page in viewer must have all data updated at same time.
- ❑ Not allowed to extend or customize views or viewer; must wait for next release which includes a designer and toolkit; in meantime, you can create EUL on top of materialized views and use Discoverer for customizations.
- ❑ Requires 9.2.0.4+, 11.5.10 and FP 'D', Apps SSO, BIBeans 2.7.5, PMV and PMF 4.0.7; prefer RAC for performance reasons; if do not have RAC, then can use a bigger box.

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### DBI Limitations

- ❑ Expect 3-6 weeks to get up and running for each module
- ❑ If need to incorporate external data sources, you are currently outside of DBI support.
- ❑ If want to customize MV in FEM schema, then copy and make changes to copy for ongoing support.

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## Oracle Sales Analyzer

- ❑ Server-centric Approach for the Express Databases
- ❑ Read-only Application
- ❑ Ability for End-users to Create Custom Measures and Aggregates
- ❑ Ability to Deploy in Any OLAP Mode:
  - ROLAP
  - MOLAP
  - HOLAP
- ❑ Not Integrated with Any of the Modules of the E-Business Suite

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## Oracle Financial Analyzer

- ❑ Distributed Approach in Using Express
- ❑ Allows Users the Autonomy to Create and Manipulate Own Scenarios of Data
- ❑ Ability to Write Data Back
  - Budgets and Forecasts
- ❑ Ability to Create Asymmetric Reports
- ❑ OFA integrates with the Oracle General Ledger via GL Link, or can customize to use non-Oracle data sources
- ❑ Custom Facts (FDIs), But Knowledge of Express Language Needed may be needed

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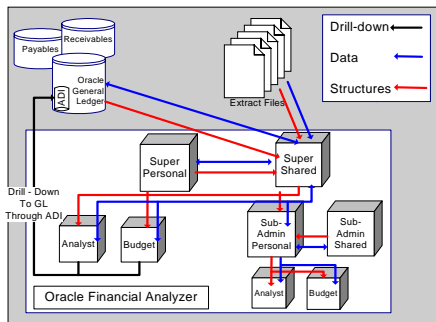
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## OFA Architecture



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**Buy versus Build in Oracle (Reporting Infrastructure)**

- ❑ Packaged Analytic Applications using Oracle
  - Oracle EDW\*
  - DecisionPoint Applications
  - Jaros Analytics
  - Noetix NETS
  - Cognos Performance Management
  - Business Intelligence System (BIS)\*
  - Financial Analyzer\*
- ❑ Custom Analytic Applications using Oracle
  - Do-it-Yourself with Discoverer & OWB
  - DBI (when 2.0 released)

\*these products are in "maintenance mode"

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**Discoverer**

- ❑ Ad-hoc Query Tool Used to Analyze Data on the fly From Oracle's Relational Database
- ❑ Integration With Oracle Warehouse Builder, Oracle Reports, and Oracle Designer
- ❑ Uses Drill-down and Pivoting
- ❑ Discoverer Manager defines the following 4 types of drills:
  - Item to item drills (item hierarchies)
  - Date to date drills (date hierarchies)
  - Drill to detail item class (hyperdrills)
  - External application drills (hyperdrill plug-ins)

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**Discoverer Integration Methods**

- ❑ Four possible methods:
  - Create EUL against Business Views
  - Oracle BIS
  - Create Datamart
  - Enterprise Data Warehouse

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## Applications Certification – DIY approach

- ❑ Discoverer 3i, 4i and 9.0.2 work against Oracle Applications 11i, 11.0 and 10.7
- ❑ 11.5.7+ rapid install contains Discoverer 4i (4.1.48+ as part of iAS 1.0.2.2.2)

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## Applications Certification “out of the box” approach

- ❑ Customers who use BIS/EDW are certified to use 4i against 11i if iAS 1.0.2.2.2 installed on separate machine (metalink note 139516.1, ARU 1834171)
- ❑ Customers who use BIS/EDW and want iAS 1.0.2.2.2 in same Apps Oracle Home can use the 11.5.7 rapid install (metalink note 146468.1)
- ❑ Debugging and Troubleshooting (metalink notes 186981.1, 130091.1, 216208.1, 165195.1, 175287.1)

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## Discoverer Limitations

- ❑ Disadvantage - Need For Users to Know Underlying DB structures and/or SQL
- ❑ Weak security, either public or private, unless installed as part of Oracle Apps

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## OSA, OFA, and Discoverer Share

- ❑ Tables and graphs
- ❑ Drag-and-drop rotation
- ❑ Drill-down/up
- ❑ Easy to use interface
- ❑ Cache data
- ❑ Conditional formatting (**color-coding**)

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## Typical Environments and Reporting Tools

Function	RDBMS OLTP	DSS or Warehouse	MDBMS OLAP
Analytical Requirements	Low	Medium	High
Data Level	Detail	Detail and summary	Summary and Derived
Age of data	Current	Historical and current	Historical, current and projected
Business Events	React	Anticipate	Predict
Typical Tools In Use	FSG, Reports, BIS, DBI, Noetix, Crystal Reports	Discoverer, PowerPlay, MicroStrategy, Business Objects	OFA, EPB, Hyperion, SPSS

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# Oracle Applications Reporting--How Can I Get What I Need?

BI Strategic Maturity: Where Are You?			
	Opportunistic	Tactical	Strategic
<b>Business</b>	<ul style="list-style-type: none"> <li>- Focused: increase operational efficiency</li> <li>- Scope: department</li> </ul>	<ul style="list-style-type: none"> <li>- Operational: improve business effectiveness</li> <li>- Scope: multi-department</li> </ul>	<ul style="list-style-type: none"> <li>- Strategic: integrated business execution &amp; mgm</li> <li>- Scope: enterprise, partners, customers</li> </ul>
<b>Organization</b>	<ul style="list-style-type: none"> <li>- Single user type, limited skills required</li> <li>- Managed and funded by IIT</li> </ul>	<ul style="list-style-type: none"> <li>- 2 or 3 user types</li> <li>- Higher level of skills</li> <li>- BI competency center</li> <li>- Managed and funded by IT or business unit</li> </ul>	<ul style="list-style-type: none"> <li>- All user types</li> <li>- BI competency center</li> <li>- Funded at executive level</li> </ul>
<b>Infrastructure Functionality</b>	<ul style="list-style-type: none"> <li>- 1 or 2 sources</li> <li>- Reporting-centric</li> <li>- Limited data quality</li> </ul>	<ul style="list-style-type: none"> <li>- 2 or more sources</li> <li>- 2 or 3 tool types</li> <li>- Data quality is important</li> <li>- Data mart, data warehouse, OLAP</li> </ul>	<ul style="list-style-type: none"> <li>- Multiple sources</li> <li>- Multiple data warehouses</li> <li>- Standards</li> <li>- Multiple tool types</li> </ul>
<b>Failure Modes</b>	<ul style="list-style-type: none"> <li>- Scalability</li> <li>- Accuracy and quality</li> <li>- Consistency</li> <li>- Inflexibility</li> <li>- Expectations</li> </ul>	<ul style="list-style-type: none"> <li>- Skills</li> <li>- Politics, funding</li> <li>- Data access</li> <li>- Timeliness</li> <li>- Ability to evolve</li> </ul>	<ul style="list-style-type: none"> <li>- Cultural</li> <li>- Complexity, integration</li> <li>- Sponsorship and priority</li> <li>- Politics</li> <li>- Mission critical</li> </ul>

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More Questions?



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**Oracle Apps Reporting**

How Can I Get What I Need?

Presented by Dan Shannon  
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