Benefits of Packaged Business Intelligence Solutions

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InFocus

Overview

- InFocus is a worldwide leading brand and projection technology company
  - Founded in 1986, Publicly Held since 1990
  - Headquartered in Wilsonville, Oregon
  - 310 employees worldwide
  - 2006 revenue of $375 million
  - Operations in China, Singapore, with regional sales offices worldwide
- Focused on design, development, marketing of large format projection products with solutions for business, education, government and home entertainment
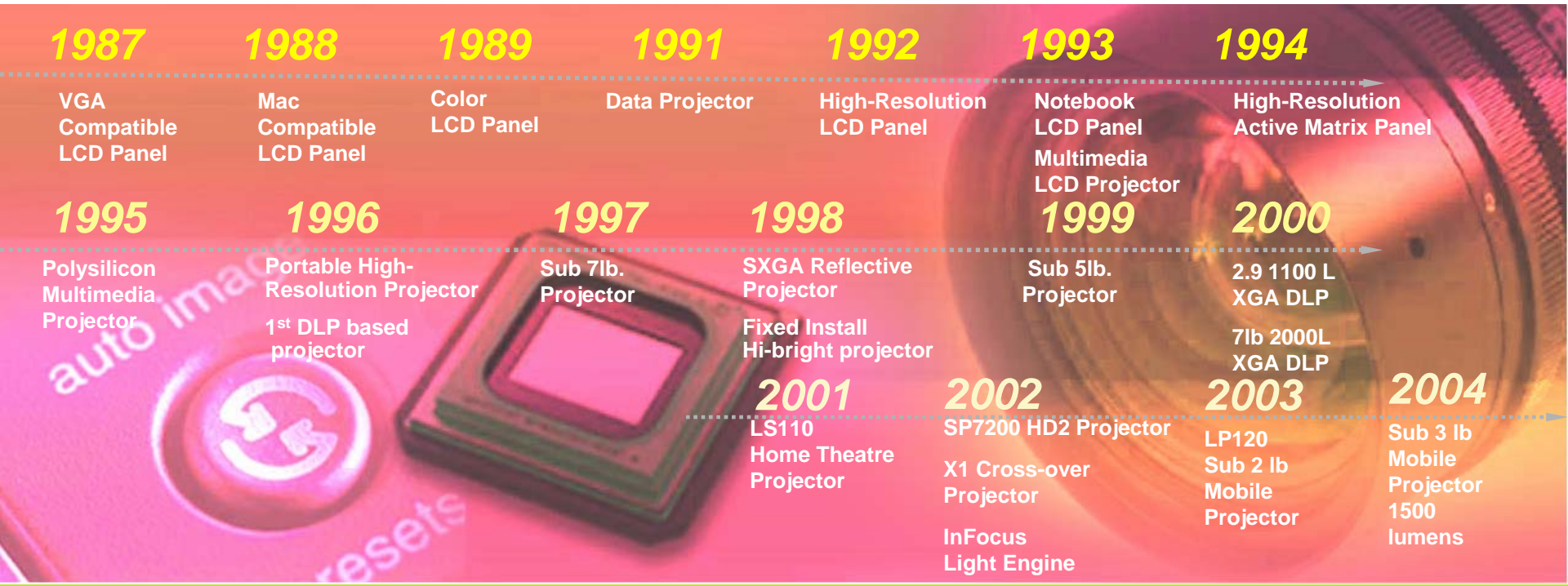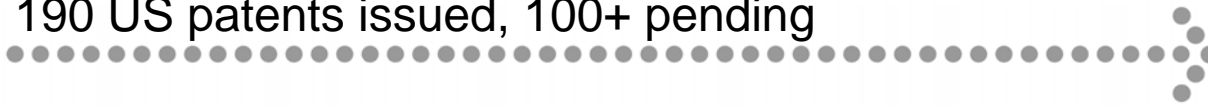- More than 3 million units installed worldwide

Corporate Values

- **V**alue Quality
- **O**perational Excellence
- **I**ntegrity
- **C**ustomers & Partners
- **E**mployees

20 Years of Innovation

- Numerous innovative industry firsts

- Continued R&D investment in areas of projection, illumination, complementary products, software

- Leveraging ODM partners for mainstream platform development

- 190 US patents issued, 100+ pending

1987	1988	1989	1991	1992	1993	1994
VGA Compatible LCD Panel	Mac Compatible LCD Panel	Color LCD Panel	Data Projector	High-Resolution LCD Panel	Notebook LCD Panel Multimedia LCD Projector	High-Resolution Active Matrix Panel

1995	1996	1997	1998	1999	2000
Polysilicon Multimedia Projector	Portable High-Resolution Projector / 1st DLP based projector	Sub 7lb. Projector	SXGA Reflective Projector / Fixed Install Hi-bright projector	Sub 5lb. Projector	2.9 1100 L XGA DLP / 7lb 2000L XGA DLP

2001	2002	2003	2004
LS110 Home Theatre Projector	SP7200 HD2 Projector / X1 Cross-over Projector / InFocus Light Engine	LP120 Sub 2 lb Mobile Projector	Sub 3 lb Mobile Projector 1500 lumens

InFocus Core Strengths

- Pioneer in the industry
- Consistent leadership for past decade
- Globally recognized brand
- Focused R&D
- Innovative products
- Depth and breadth of channel partnerships
- Strong management team and dedicated employees

Who Am I?

- Ten years history with BI tools
- "Two worlds" understanding both business needs and system capability.
- Passionate about getting folks to the "ah ha!" moment
- Believe that BI should reach all levels of the business, from the line level to the corner executive office.

Who Am I?

- Not directly affiliated with any software vendor
- Oracle apps background, but discussion today holds true to BI on any ERP platform
- Have faced the challenges and opportunities of leveraging BI in a dynamic business environment
- With you on this journey of the BI space that is under fairly rapid change & player consolidation

Business Intelligence

- *"Business processes, data capture and software deployment strategies that are leveraged to enable the transformation of raw data to refined information that is used for improving operational, financial and customer service performance."*
  - *-My definition*

The Stone Age (1997-1999)

- Views on Oracle 10.7 ERP
  - Cognos Impromptu
  - ODBC
  - Live production queries only

The Stone Age (1997-1999)

- +(Pros)
  - Real-time query
- -(Cons)
  - Slow
  - No historic analysis of "open" trends.
  - Penalized ERP production performance

The Bronze Age (2000-2001)

- ## Data Mart 1.0
  - ### SQL Server OLAP
    - ProClarity UI
    - 24 hour update cycle
    - GL Summary
    - Financial Summary
    - Product Quality Summary
      - Field failures, repair metrics

- ## Live query
  - ### Via ODBC & Discoverer

The Bronze Age (2000-2001)

- +(Pros)
  - Summary OLAP analysis
  - Historic analysis of 'open' trends

The Bronze Age (2000-2001)

- -(Cons)
  - All detail reporting still via live query
  - OLAP 24 hour update cycle
  - OLAP performance issues
  - Multiple ERP systems with no common data consolidation other than monthly and for financial summary only

The Iron Age (2002)
AKA "Show Me the Money"

- Single Global Oracle Instance (11.5.7/11i)
- Tuned DTS workflows
- 12 hour update cycle
- Expanded OLAP analytical areas
  - Live ERP query continues, but fewer

The Iron Age (2002)

AKA "Show Me the Money"

- +(Pros)
  - OLAP expansion reduces live query use
  - ERP consolidation consolidates DM detail

The Iron Age (2002)

AKA "Show Me the Money"

- -(Con)
  - OLAP performance challenges
    - Large # of dimensions
    - 12 hour cycle impacts DM performance

The Neo-Classical Age 2003-2005

- SQL Server reporting services
  - Leveraging DM flat summary tables
- In house Excel app
  - Pushes refreshed files to global remote fileshares
- Continued DTS tuning & more OLAP
  - 12 hour process takes 5 hours to complete

The Neo-Classical Age 2003-2005

- +(Pros)
  - Builds on historic DM design
  - Leverages DM data
    - Further reduces live query use
    - Excel app resolves WAN issues
    - OLAP performance issue resolved

The Neo-Classical Age 2003-2005

- -(Cons)
  - Several analytic areas missing
    - AP, for example
  - Service DM built by different team
    - Does not integrate with financial DM
  - Excel remote app
    - Requires heavy report customization
    - Securing remote fileshares

The Age of Enlightenment (2005)

- Pitfalls of customization
  - Our benefit and our curse
- Factors at play to reconsider strategy
  - Aging hardware
  - Radical change in ETL technology
  - Inefficient nightly processes, not near real time
  - Single developer held most system knowledge
  - Annual corporate structure changes caused radical system changes
  - 2 Independent and different data marts

A BETTER WAY

A Better Way

- Request for Proposal (RFP)
  - 15 Companies participated
- Rigorous selection process. Result:
  - 5 Finalists shared compelling solutions
  - 1 Selected
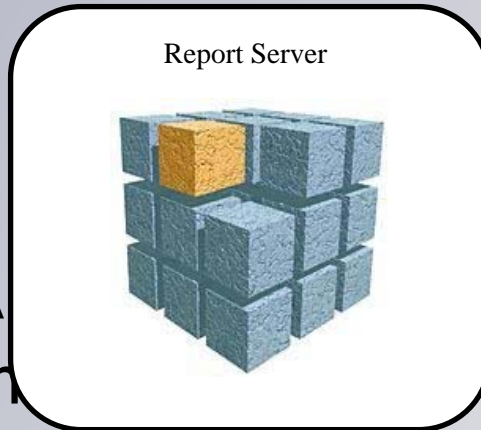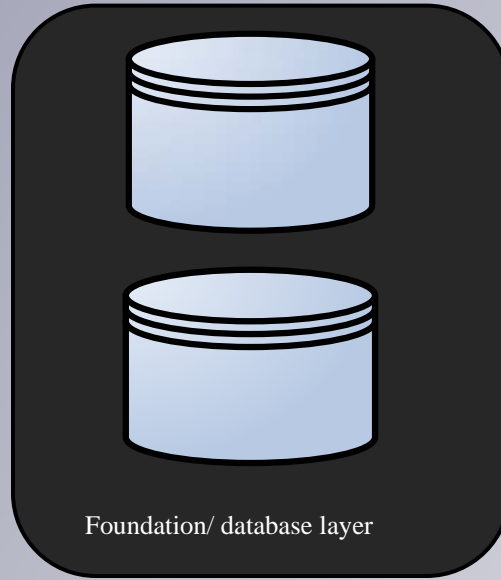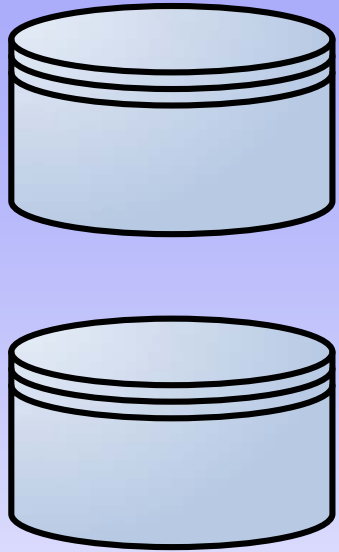   - Jaros Technologies

A Better Way

- Module-based approach
  - Financials, Order Management, Manufacturing, Inventory, Purchasing, Service & Contracts
    - Standards based Operational Data Store (ODS) and Data Mart – Kimball approach
    - 80% of the way to what I needed
      - Shifted focus of implementation to InFocus unique areas
    - BI / Query tool agnostic

- Captures changes in Oracle Apps
  - Instead of being period/time based

Source Systems	Staging Area	Output/Application

COGNOS®

Foundation/ database layer

Report Server

• **Cognos Consumers** use Cognos Connection to view, schedule, output reports"
• **Cognos Analysts** use PowerPlay Web and Query Studio to create/modify/perform ad-hoc analysis
• **Cognos Super-users** use Report Studio to create/modify reports"

PowerPlay

Analysis Users use PowerPlay to view reports

Oracle (A................ng, GL, In................ Management, Manufacturing, Service & Contracts)

The Age of Implementation (2006)

- **Benefits realized**
  - Rapid deployment
  - "Big Bang" reporting approach
  - Focus on InFocus business unique instead creating system architecture
  - Fewer internal resources required

The Age of Implementation (2006)

- Challenges
  - Change is hard – users prefer the familiar
    - Sunset date of old solution(s) is critical
  - Not all users will be happy despite your best effort
  - New solutions bring new surprises
    - Analysis Studio in Cognos 8 example
  - Users do not always know what they really want/need until they see it
  - WAN Environment

Results

- Breadth of detail
  - *"We have far more information about AR than we had in the previous solution."*

- Timely
  - *"The executive dashboard sent to my blackberry each morning is great."*
  - *"I now have access to product quality data on a daily basis that I used to have monthly. This helps us respond more quickly to issues."*

- Event driven / alert based report:
  - *"I think it's a good report you have here and it's something that can help avoid having to make the long journals that has one line for every country/channel. I wish I had it when I did the inventory accounting 5-6 years ago."*

Results

- ## Time savings:
  - *"In EMEA I am told that this report will save 2 people almost 1 full day of work EVERY week. Another great reference why this solution changes InFocus for the better."*
  - *"A report that I used to have to spend an hour updating for our partners each week now only takes one minute."*

- ## User adoption:
  - *"With all the benefits this provides, I see a lot more people using it. I also see a lot of people requesting reports from various analysts throughout the company. How great it is to have a tool that everyone can pull data easily."*

The Modern Age (2007 – Today)

- Partnering with vendor on new subject areas
  - Oracle Service & Contracts
  - Retired our legacy system
  - Expanded subject areas

The Modern Age (2007 – Today)

- Dashboard & Portals for specific subjects
  - Executive performance metrics
  - Financials, Sales performance, customer/partner performance
  - Brings data specifics important to particular user groups to the fore, rather than sifting through multiple report subject areas.
- Event & Schedule based reporting
  - Reveals issues without sifting through reports to find the problem – costing example

Summary of Benefits

- Support
- Other companies utilize same base product
    - Broader base of testing captures any bugs sooner and all benefit from additional enhancements
- Rapid Implementation cycle
- Standards-based approach that still allows customization & path for business changes
    - Near real-time ODS, multiple source systems
- Ends re-invention of the wheel
    - From scratch is expensive, incomplete, takes longer and the project is at greater risk of failure

Questions?

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