Using Oracle BI Suite EE Plus with Oracle E-Business Suite

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Oracle Business Intelligence Suite Enterprise Edition Plus (OBI EE) provides a powerful BI platform. It includes many components that allow customers to meet all of their BI requirements for operational, tactical, and strategic reporting. Those needs can be met using a complementary combination of direct access to data in the Oracle E-Business Suite (EBS) transaction database and data that has been moved to a data warehouse. Through these two approaches (direct access + data warehouse) customers can achieve all of their BI objectives with OBI EE.

Noetix provides software that enables immediate access to data within Oracle E-Business Suite. Noetix accelerates the deployment of an enterprise-wide BI initiative by pre-populating OBI EE with essential business intelligence content for use in query, reporting and analysis.

Many customers who currently use Oracle Discoverer plan to migrate their reporting environments to OBI EE. Many of those customers will find that their needs are best met by using OBI EE to access data in the EBS database directly (as they currently do with Discoverer). For those customers, a two-step migration approach is likely to work well. First, they'll convert Discoverer's metadata model (called an End User Layer or EUL) into an OBI EE metadata model. Second, they'll convert their Discoverer reports (called workbooks) into equivalent reports in the OBI EE environment (either Oracle Answers or Oracle BI Publisher reports). A combination of technology plus professional services will typically provide the most efficient path for this migration.

Overview of Oracle Business Intelligence Suite Enterprise Edition Plus

[The following description is adapted from the introduction to Oracle's White Paper "Oracle Business Intelligence Suite Enterprise Edition Plus – Technical Overview." For a more complete description of the suite, please refer to that document and others published by Oracle.]

The Oracle Business Intelligence Suite Enterprise Edition Plus combines a BI server with BI presentation tools and specialty BI reporting tools (acquired from Hyperion acquisition). OBI EE is an integrated suite sharing a common service-oriented architecture; common data access services; common analytic and calculation infrastructure; common metadata management services; a common semantic business model; a common security model and user preferences; and common administration tools.
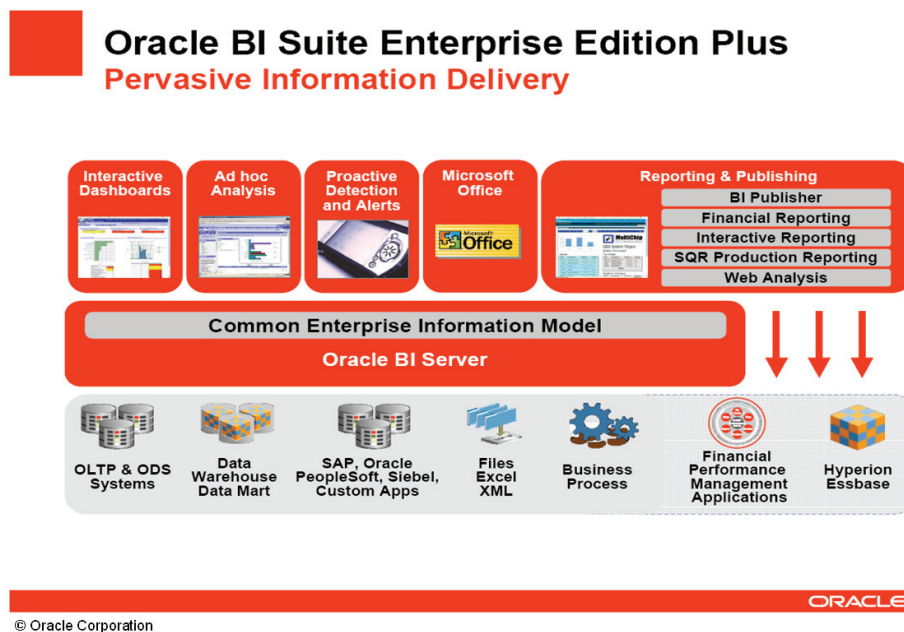

Figure 1 – OBI EE key components

OBI EE consists of several interdependent components, built around the Oracle BI Server. Key components (shown in figure 1) include:

- Oracle BI Server — a highly scalable, highly efficient query and analysis server that integrates data via sophisticated query federation capabilities from multiple relational, unstructured, OLAP, and pre-packaged application sources, whether Oracle or non-Oracle.

- Oracle BI Answers — a powerful ad hoc query and analysis tool that works against a logical view of information from multiple data sources in a pure Web environment.

- Oracle BI Interactive Dashboard — rich, interactive pure Web dashboards that display personalized information to help guide users in effective decision making.

- Oracle BI Publisher — a highly scalable reporting engine capable of generating reports from multiple data sources in multiple formats via multiple delivery channels.

- Oracle BI Office Plug-In — automatically synchronizes information from Answers to Microsoft Word, Excel, and PowerPoint.

Meeting Reporting Needs with OBI EE Plus

Business intelligence experts typically identify three basic kinds of reports that every business needs -

- Operational Reports - these reports support the normal operations of the organization. Typical reports include transaction-level reports for billings, support incidents, inventory levels, order tracking, and head count. Operational reports provide information at a very granular level, typically getting their data directly from an operational transaction system.

- Tactical Reports: Tactical reports are intended for monitoring and responding quickly to a variety of short-term situations. Examples of reports in this category may include payroll summaries for the past week and projections for this week, or inventory levels for last week and projections for this week. Sometimes these reports combine information from multiple transactional systems.

- Strategic Reports: Strategic reports may measure similar information as tactical reports but often stretch their analysis over longer periods of time. Typical examples include analyzing sales by region, by time period, or by product line and project profitability, by project type, or by division or by customer. Strategic reports often compare data in year over year or other comparisons over long time periods.

Because OBI EE's architecture is so powerful and flexible, it provides a solid foundation for all three types of reporting. For operational and tactical reporting, Oracle BI provides the capability to access information directly from the transaction databases themselves. For strategic reporting, OBI EE provides an integrated data warehouse. Oracle offers products that include ETL scripts to populate the data warehouse along with reports and dashboards that access its information.

This point is essential — customers can rapidly realize value from their investment in OBI EE without building a data warehouse. Delivering operational and tactical reports through direct access to the transactional systems is completely compatible with delivering strategic reports through data in a data warehouse.

Using NoetixViews with OBI EE Plus

The Oracle E-Business Suite (like other enterprise applications) is designed and optimized to process transactions, resulting in complex data structures that are not conducive to reporting. As a result, end users rely upon specialized IT staff to meet their ad hoc and operational reporting needs.

Noetix provides software, NoetixViews, that deciphers the maze of tables for you, joins them properly, and conducts the necessary data transformations. Technical knowledge of the underlying database is not necessary to be able to create ad hoc and operational reports. In simple terms, NoetixViews literally finds the data for you.

Noetix technology has a patented intelligent search capability that automatically picks up the site-specific setups in the database and includes this information in Noetix's business views. Key and descriptive flexfields and lookup values from are included automatically. The result is easy-to-understand, intuitive business content.

Reports developed directly against the database risk expensive rework after an application upgrade. Noetix protects reports from these database changes by automatically remapping to the new database structures. This feature reduces costly maintenance and development time, freeing their technical

resources to focus on other tasks.

In 1999, Noetix launched Noetix Generator for Oracle Discoverer. This generator automatically creates business areas for Discoverer's End User Layer (EUL), simplifying setup and ad hoc retrieval of database information from Oracle EBS. Administrators and users are presented with pre-built and customized business areas within the end user layer that enhance their ability to view their data in an intuitive format. Noetix Generator for Oracle Discoverer automatically generates predefined drills, predefined joins, lookup values, and folder and item descriptions.
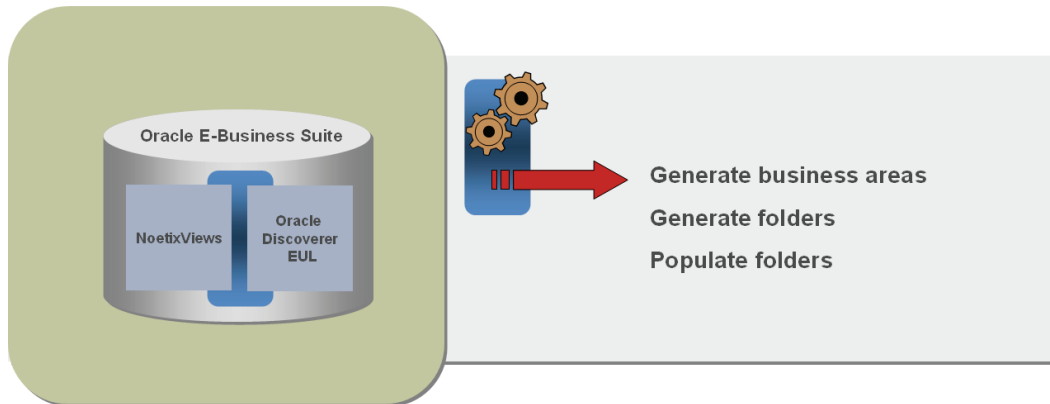

Figure 2 - Noetix Generator for Oracle Discoverer

The newest addition to the Noetix Generator family of applications, Noetix Generator for OBI EE, brings those same values to customers using Oracle's new BI platform. Noetix Generator for OBI EE will automatically generate a repository model for OBI EE. This repository model includes metadata for the physical layers, the logical model, and the presentation layer. It replicates the key capabilities of Noetix Generator for Oracle Discoverer: predefined drills (achieved through the creation of dimension in the logical model), predefined joins, lookup values, and folder and item descriptions.
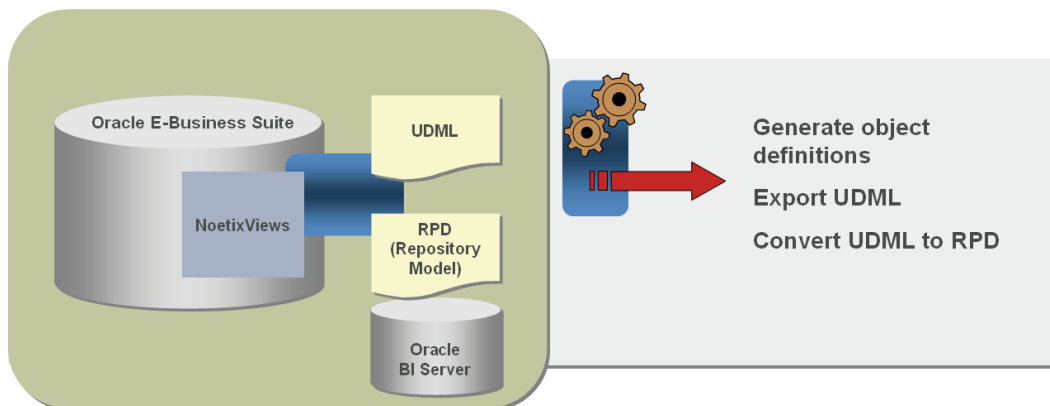

Figure 3 - Noetix Generator for Oracle BI Suite EE

By using NoetixViews together with Noetix Generator for OBI EE, users can rapidly achieve a reporting environment that provides access to their EBS information. This value is achieved within days, without the need to create a data warehouse. As a result, customers can quickly deliver success in operational and tactical reporting and realize value from their BI investments.

Migrating from Oracle Discoverer to OBI EE Plus

Many customers using Oracle Discoverer are interested in migrating to Oracle's new BI platform. The key technical components of that migration involve converting the Discoverer EUL to an OBI EE model and then converting the Discoverer Workbooks into OBI EE Answers.

Discoverer's End User Layer manages information describing relational data in business terms, facilitating end-user ad hoc query and reporting. Discoverer provides this by storing multiple "Business Areas" within each EUL. Business areas can represent one or more subject areas, simplifying tables and columns into easy to understand folders and items of data. Similarly, the OBI EE Repository Model manages information about data that is available through the Oracle BI Server. Oracle has announced the intention to provide a utility that will automatically convert a Discoverer EUL to an OBI EE model. Typically, customers will still need to use the OBI EE Administrator to complete the conversion, managing the objects in all 3 layers (Physical, Logical and Presentation) to meet the needs of their users.
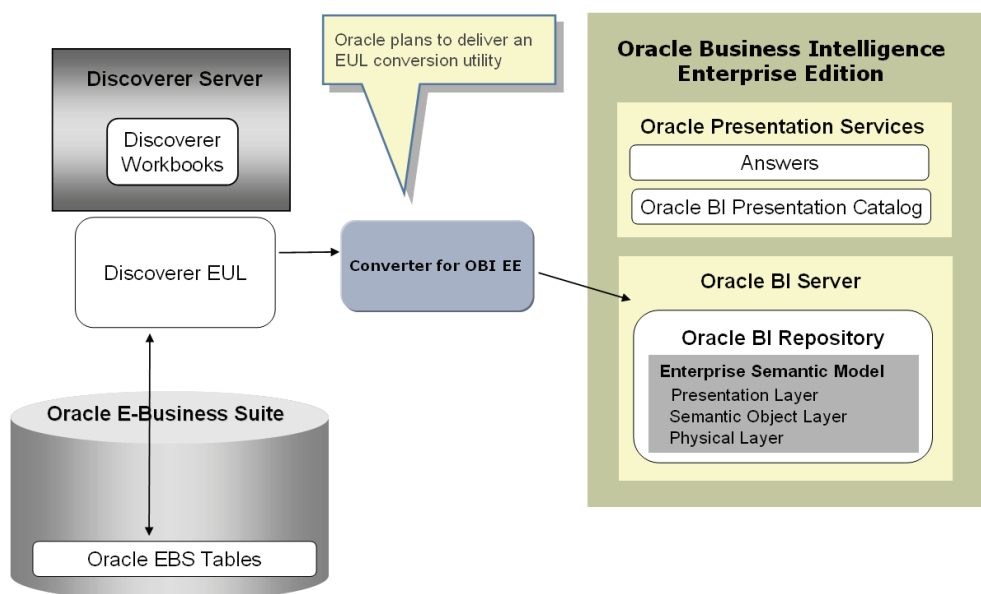

Figure 4 – Converting the model

Once the model has been converted, new reports will need to be created in the OBI EE environment to match the functionality of the workbooks in the Discoverer environment. There isn't an equivalent automated utility to convert workbooks, but there are technology tools that can assist. Much of the detail of a Discoverer Workbook is available in an XML format. Similarly, Oracle Presentation Services objects

can also be defined in an XML format. Therefore, some straightforward mapping between the different XML formats can help automate some of the conversion process. Noetix offers some conversion utilities to provide this assistance, along with Professional Services resources to complete the conversion (manually) using OBI EE Presentation Services.
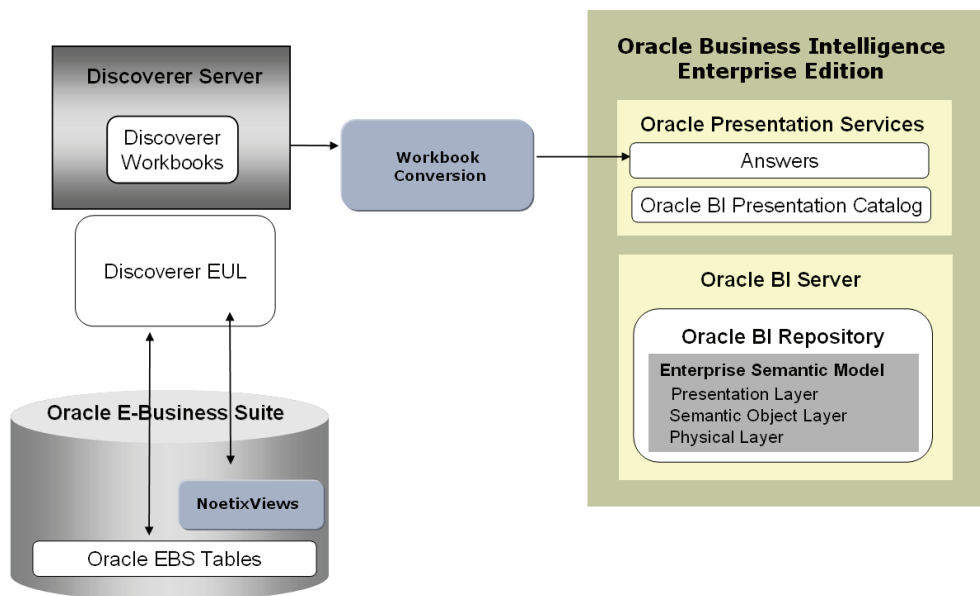

Figure 5 – Converting the reports

Summary

Oracle Business Intelligence Suite Enterprise Edition Plus provides a powerful, flexible, robust BI platform. It is suitable as the foundation for meeting virtually all of an organization's BI needs, spanning operational, tactical, and strategic reporting requirements. At its center, the Oracle BI Server provides access to both relational and non-relational data sources.

Because of that power in the BI Server, customers don't need to wait until they've completed a data warehouse implementation before they begin to realize value from their BI investments. Instead, they can adopt an approach that addresses operational and tactical reporting requirements by directly accessing the data in their transactional systems.

When that transactional system is the Oracle E-Business Suite, Noetix provides a family of products that accelerate that "time to value," allowing customers to access the information in their EBS database quickly and easily. The combination of NoetixViews and Noetix Generator for OBI EE provides a strong accelerator for customers who want to achieve value quickly from their investment in OBI EE.

Finally, customers who have previously used Oracle Discoverer can also accelerate the time to achieve value from OBI EE. By employing an orderly, partially automated conversion process for their BI models and for their reports, those customers can transfer their key BI information from their Discoverer environment to OBI EE.