Data Availability with Data Confidence

How to Get Cross Functional Reporting with an Enterprise Data Warehouse

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Presenter

Christian Screen, Global Analytics Practice Director, VP

- Technologist with 15 Years in analytics, data warehousing, and data integration
- Previously of Art of BI (artofbi.com) fame
- Innovator in analytics and data warehousing design, best practices, and delivery
- Co-author of the first book on Oracle BI 11g and Oracle BI 12c
- Managed, been engaged in, and successfully delivered several of the most complex implementations of Oracle BI, Oracle BI Analytics Applications (OBIA), Hyperion Planning, and Hyperion Essbase, anywhere in the world

@christianscreen

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Agenda

- How well do you know your data?
- Basic Metrics: Measuring the business accurately
- Importance of an Enterprise Data Warehouse
- Data Confidence: Importance of data reconciliation
- Getting Started

Who is Datavail?

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Our Range of Data Services

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Project Services

- Health Checks & Assessments
- Upgrades
- Data Migration
- OBIEE & Hyperion Consulting

Operational Managed Services

- 24x7 In-Office Coverage
- Monitoring & Incident Response w/ SLAs
- Service Requests (Patch, Modify, etc.)
- Multi-factor Monitoring
- Proactive Services (Health, Tune)
- Structured Service Review

Data Development Services

- Development, Tuning, Automation
- Data Warehouse Build & Optimize
- DevOps (Deploy & Automate)

How Clients say we are Different

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Talent

- Largest data specialist firm in North America
- Senior resources in 32 states and 4 countries
- Attrition rate in India less than 2% per quarter

Investment

- $80 million in capital raised:
  IP, acquisitions, delivery model & capabilities expansion

ISO 27001

All India locations ISO 27001 Certified

Other Security:

- PCI SAQ-D, Self Accensement
- U.S. – EU Safe Harbor Framework Certification Mark
- Type II SSAE16 / SOC1 - Type II SOC2
- Executed and adhere to numerous HIPAA Business Associate Agreements
- US only delivery models for ITAR controlled data

IP-Enabled

- A core component of Datavail's strategy has been – and will continue to be – developing and applying IP to all our service offerings

Visit us at our vendor booth

Visit our booth to **WIN** a pair of Bose QuietComfort Noise Canceling **Headphones.**

Mention you attended our presentation for an additional entry.

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How well do you know your data?

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Your data is out there, somewhere!

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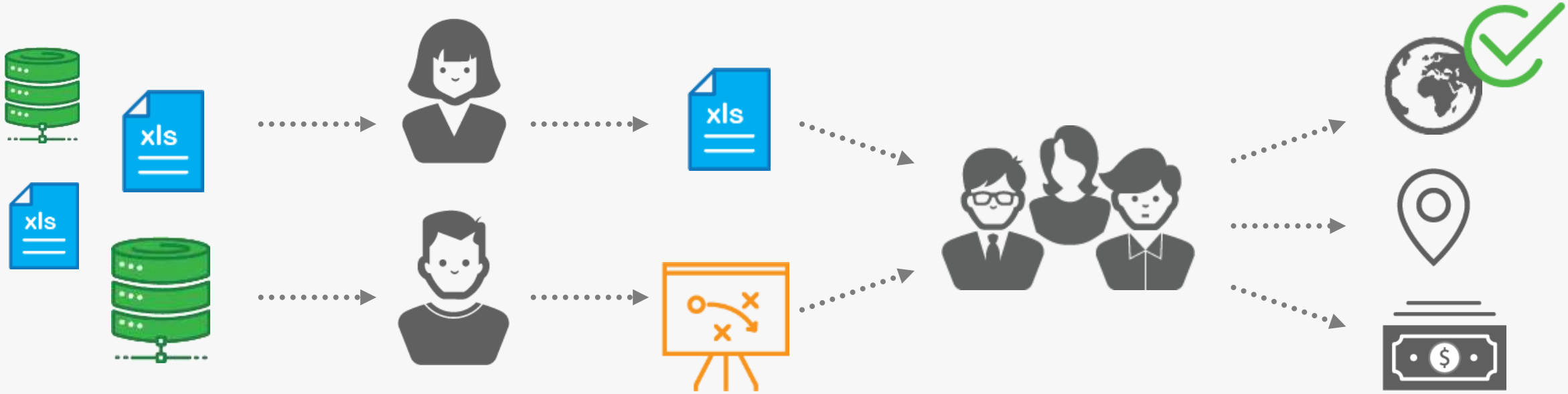
- Many of us need data and reporting to do our jobs
- Business analysis at the CFO/CEO level management seek out answers on how the organization is doing and how to improve the organization



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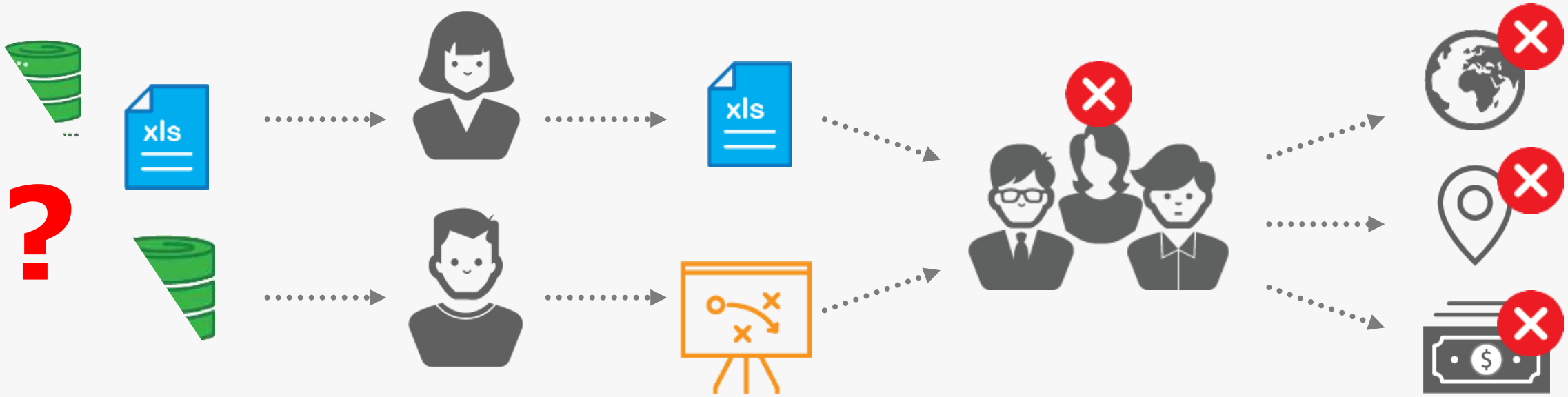

Your data is out there, somewhere!

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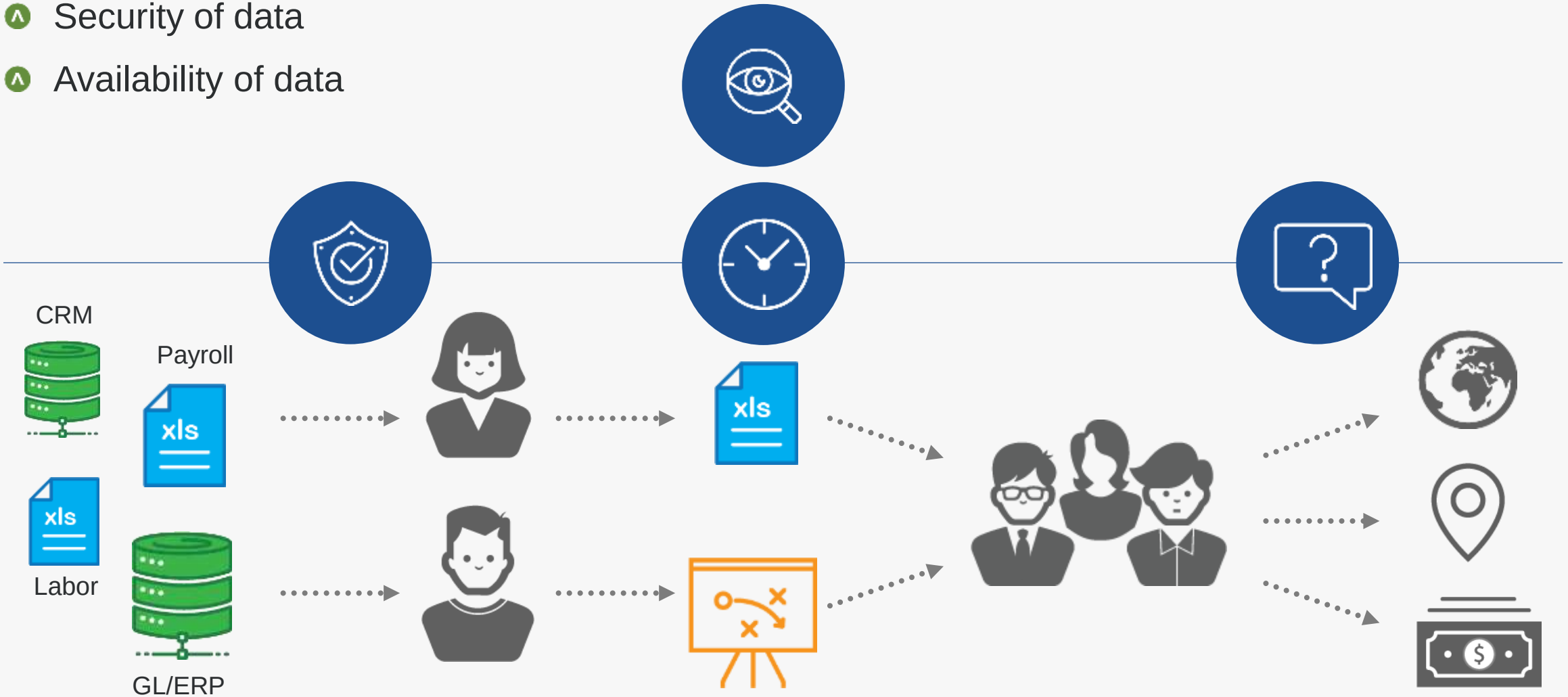
- Timeliness of data
- Security of data
- Availability of data
- Perspective / Point-of-View



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So, you usually know where your data is!

- Sometimes you just have a difficult time getting to the data
- Time is money, and technical debt isn't leverage
- Lots of opportunity to get the data into a single place for a holistic view of how the org is doing
  - Opportunity cost should be turned into a business case
- Executives should desire to look across all areas of the business for a 360-degree management dashboard to run the business
  - Dupont framework analytics, anyone

Base Metrics

Measuring your business accurately

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The struggle to measure the organization

- It is very common for businesses to not know how they're performing
- Billion dollar companies cannot answer basic questions:
  - How many units were sold?
  - What is the current headcount?
  - Is there high Employee, AP, AR Turnover?
  - What is the cost of items sold?
  - What is gross profit by branch/BU?
- Why?

The struggle to measure the organization

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- Operational (tactical) reporting does not equate to Analytical (strategic) reporting the company needs to improve
- Individual data silos, spreadsheet databases, quick-fix solutions, or lack of in-house skills prevents accurate data from being accessible to the people who need it the most.
- It may seem like a puzzle figuring out how the pieces (ex: source data) fit together
- In order to get the proper solution, it's okay to ask for help from all areas of the organization or from outside
- Get the CFO, CIO, and Priority Business Unit Leaders to address the problem and seek a solution

Importance of an Enterprise Data Warehouse

And why do you need one that works?

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Slicing the data – Point of View

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- You perspective of the data – how you look at it – can be called a point of view (POV)
- It is also known as dimensionality (how you slice the data) which includes:
  - Hierarchies
  - Point-in-Time reference
  - Snapshots (of data or POV)
  - Historical data
  - Security
- How consistent, secure, timely, and relevant is your data when your reports are shipped around in an Excel spreadsheet?

Slicing the data – Point of View

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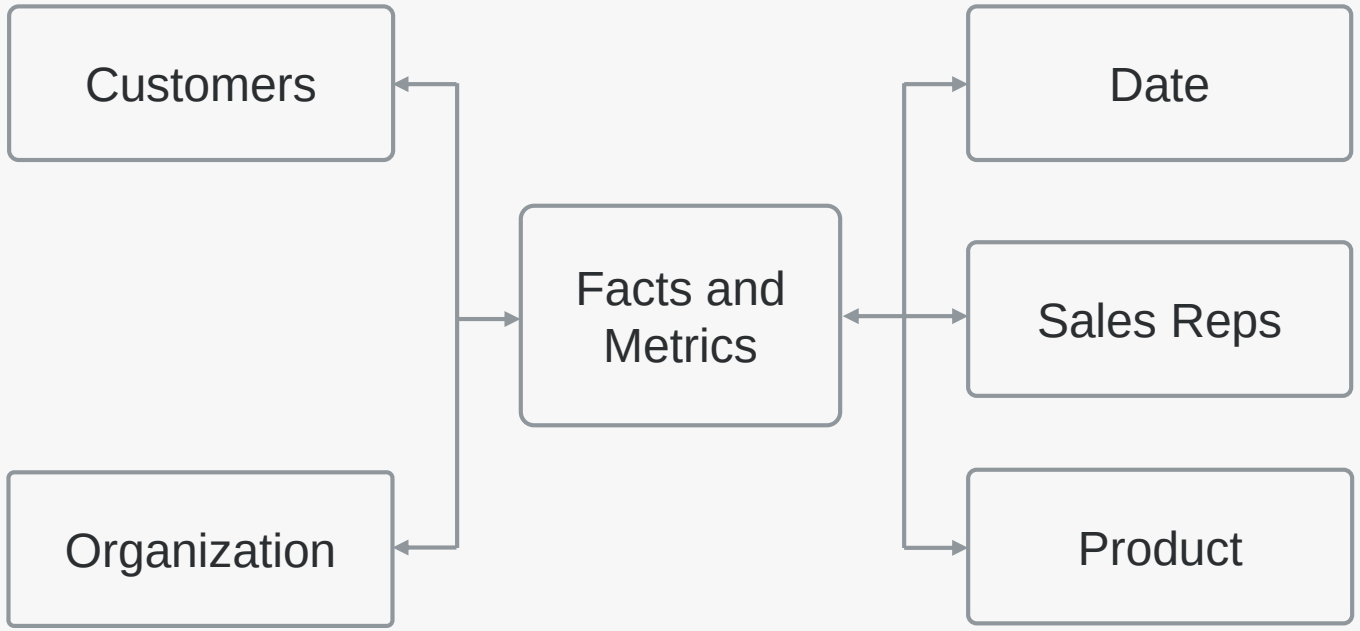
- "Slice the data" your way – add other POVs and data any time (scalability)
  - Point-in-Time reference
  - Snapshots (of data or POV)
  - Historical data
  - Security
  - Hierarchies



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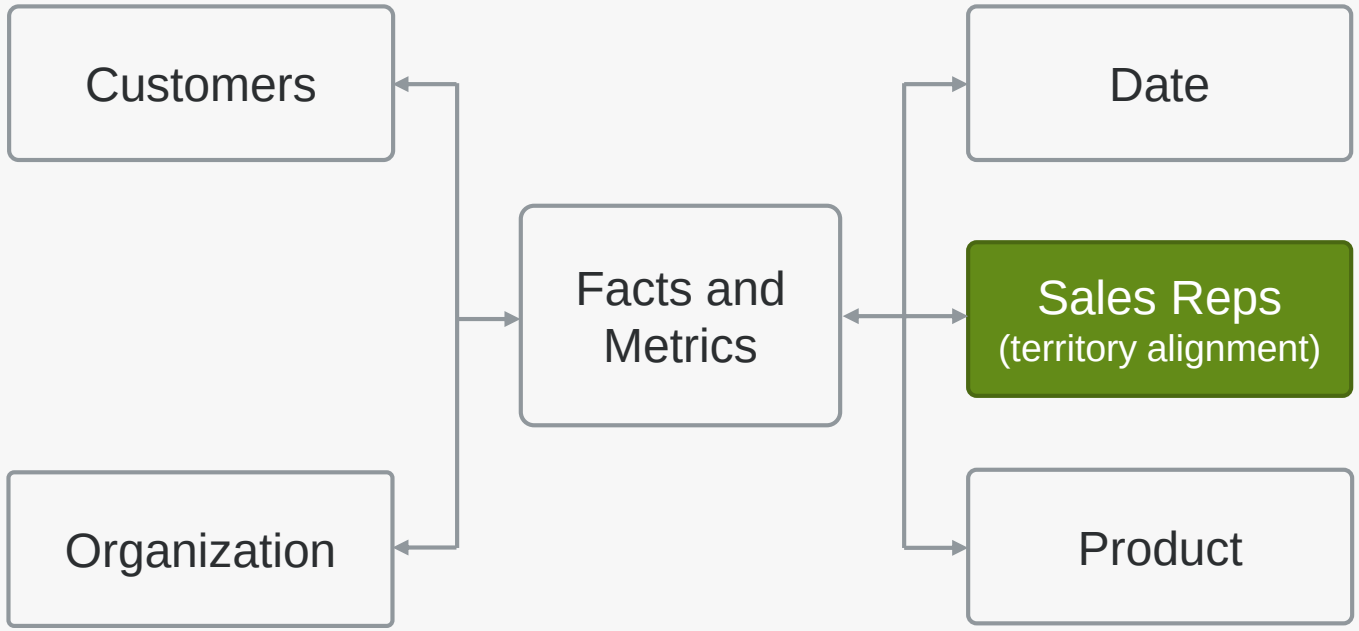

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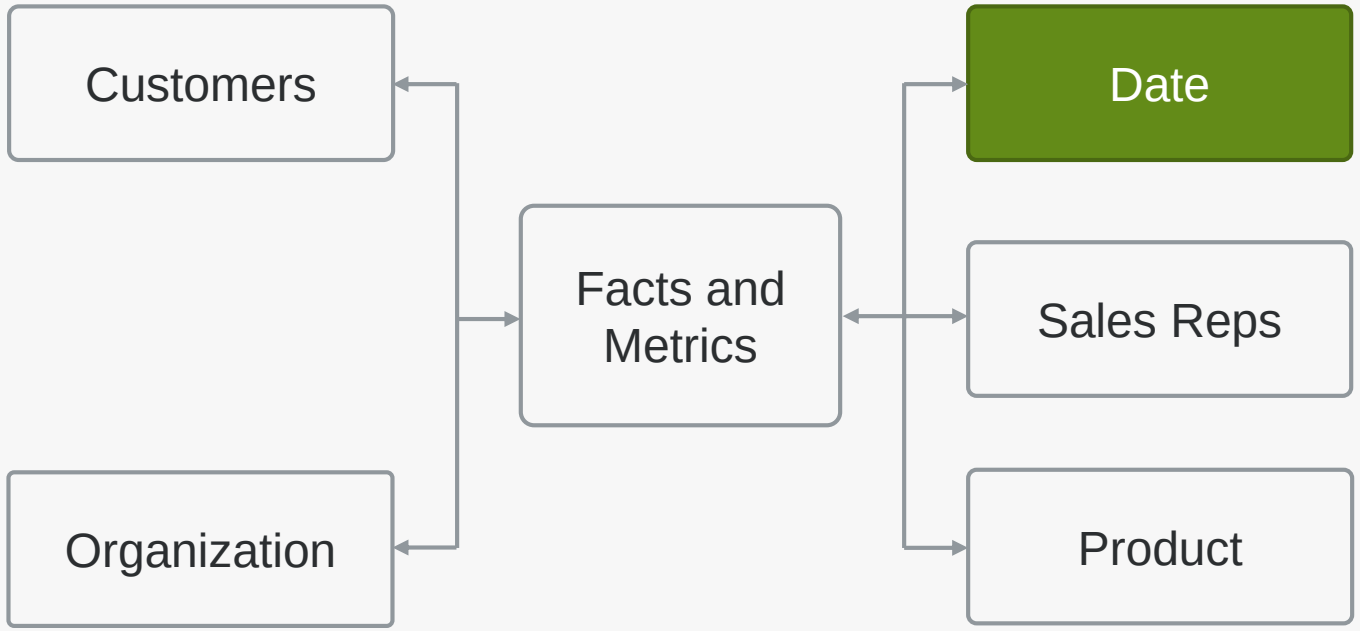

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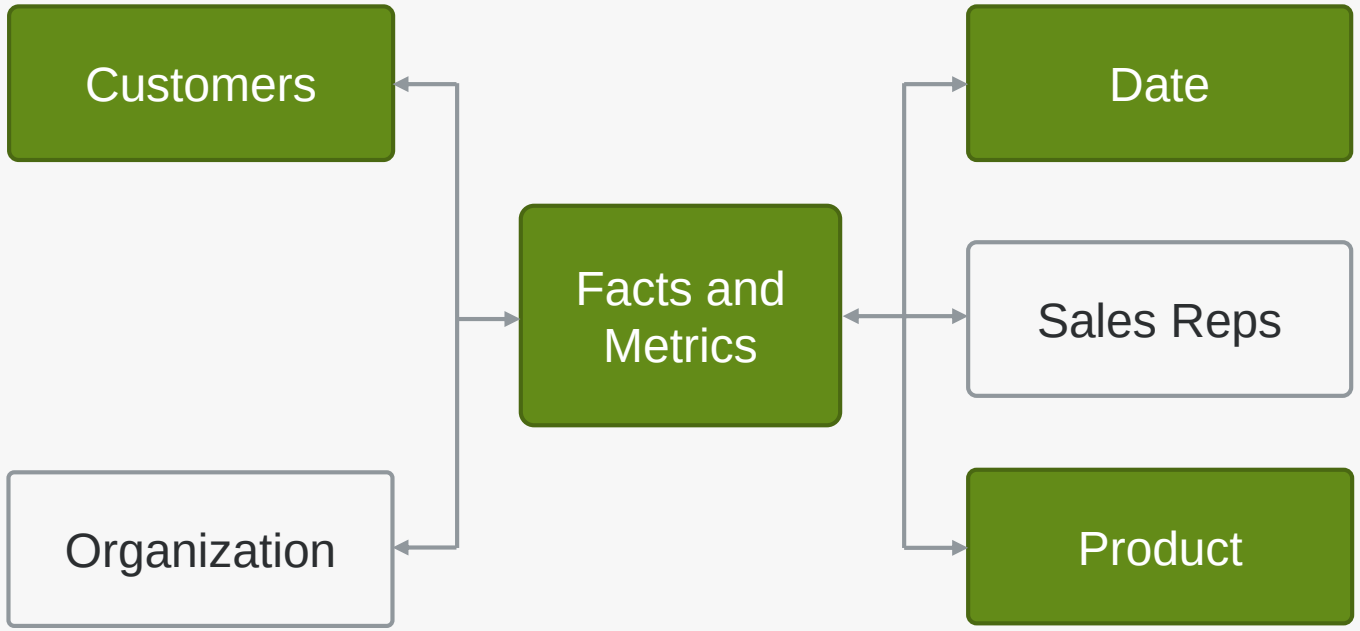
  - **Historical data**
  - Security
  - Hierarchies



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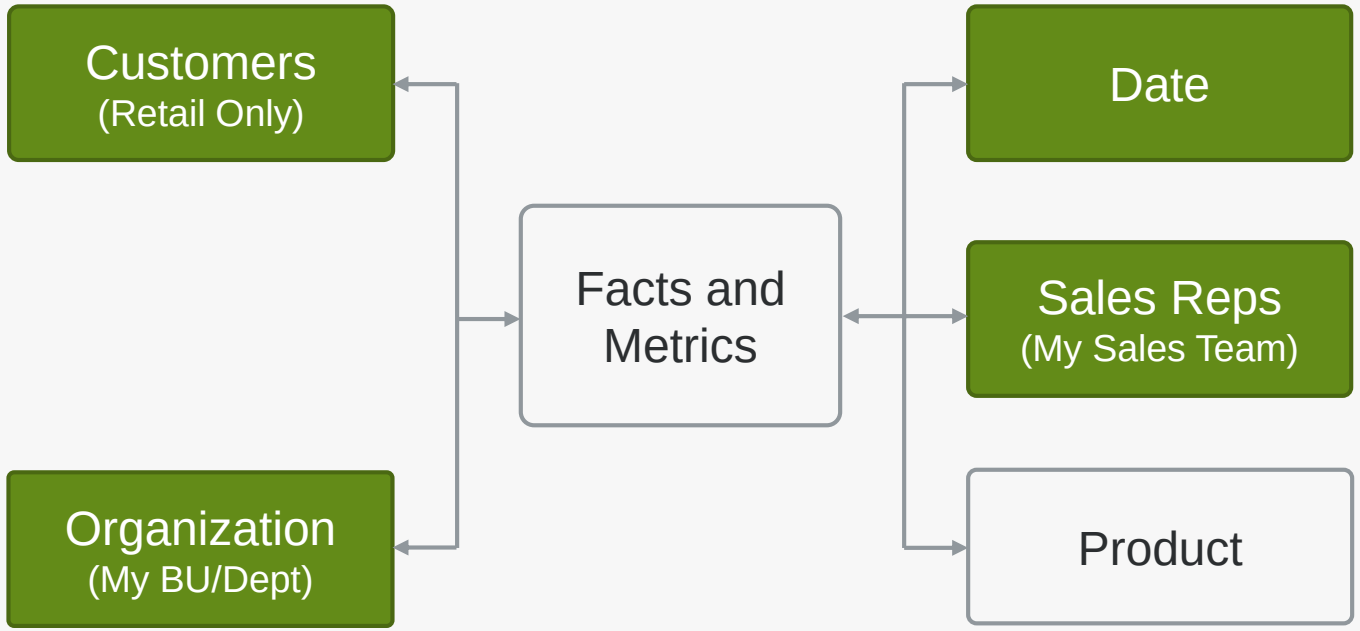

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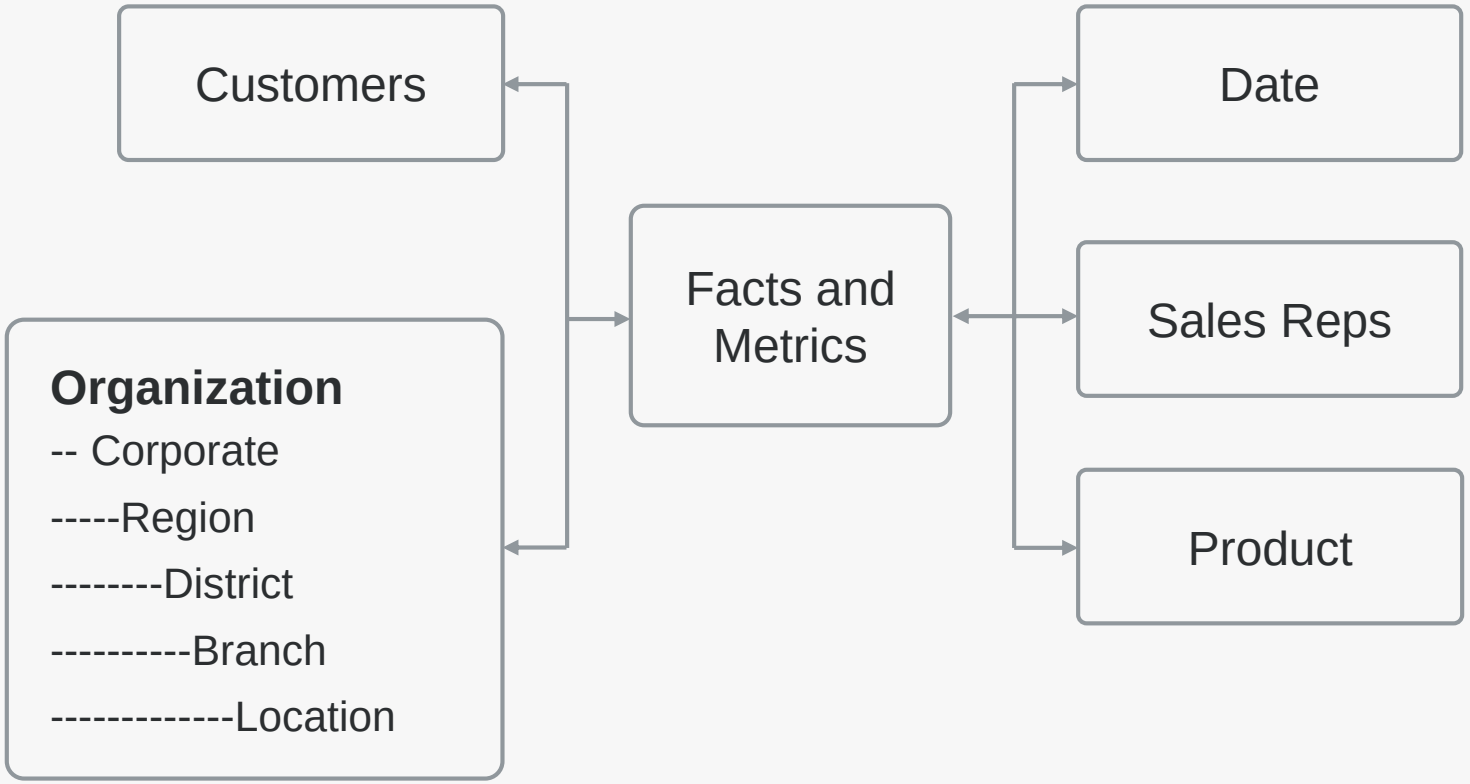

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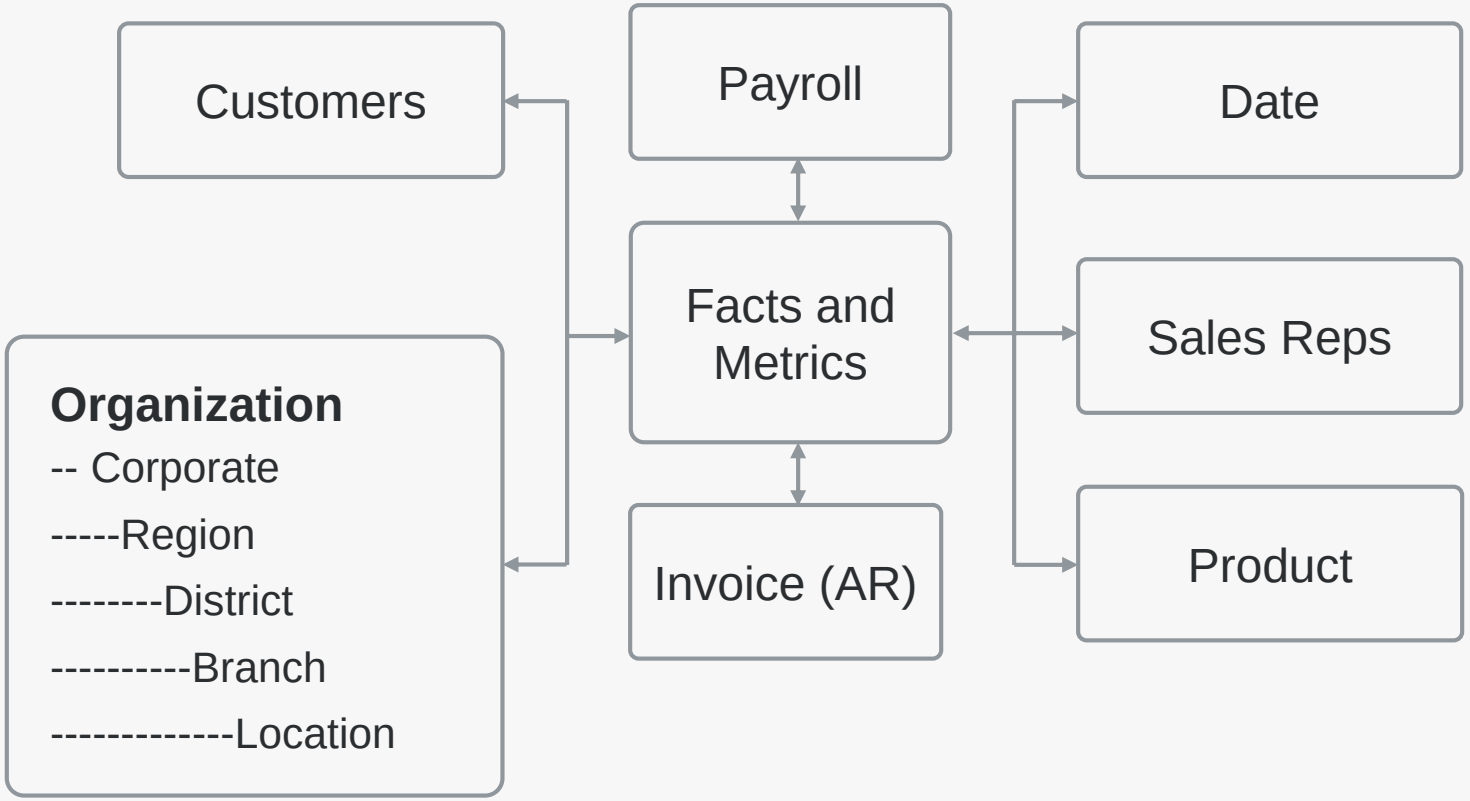
- Expand by Subject Area



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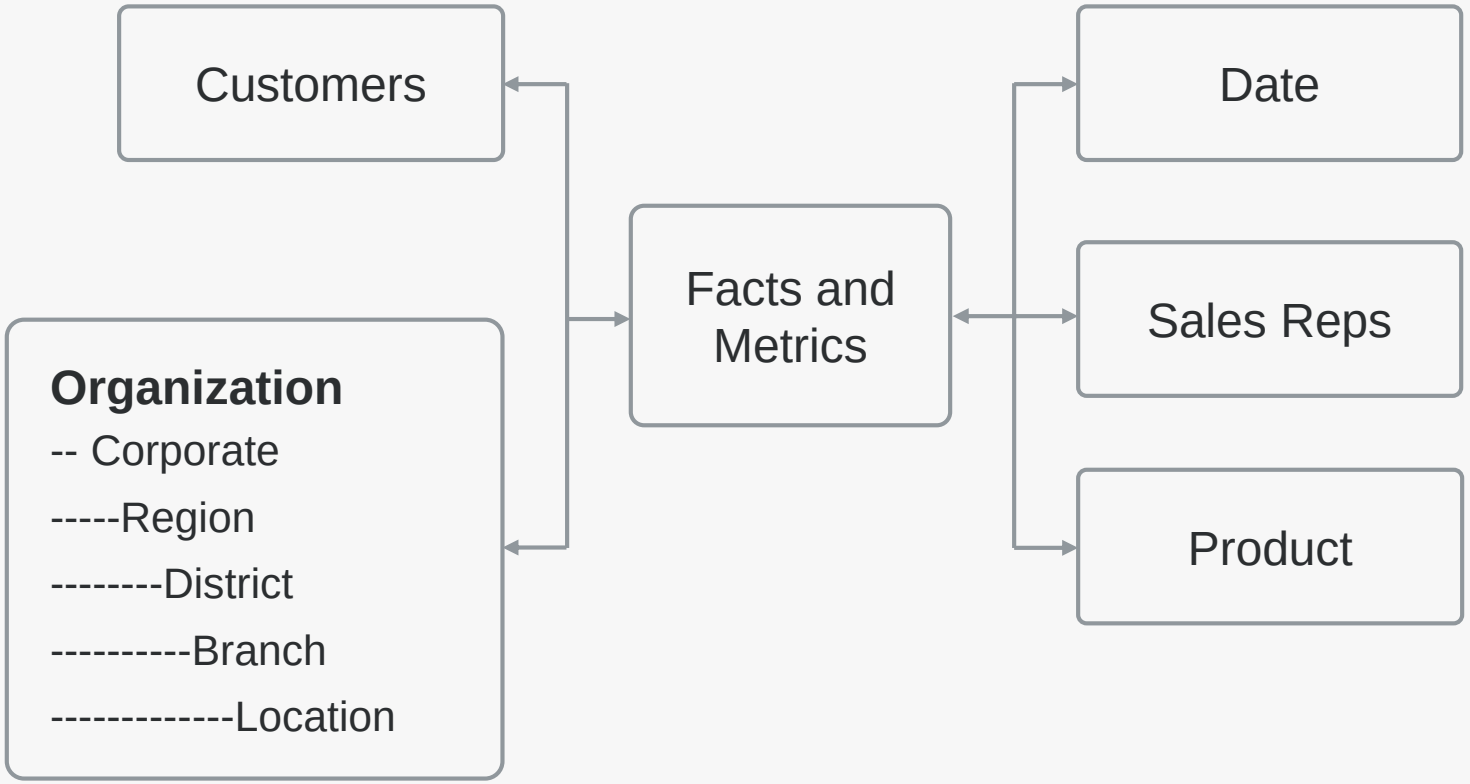

Drilling Down into Data from Summary

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- Management by exception – instead of searching through data for issues
- Drill into lower detail – account to sub-ledger detail transactions

Northwest Region	Period 1			2017	2016
Current Assets					
	Cash				
		10100 - Checking		46,969	35,879
		10300 - Savings		17,910	16,345

Date	Docum#	Description	Allocation	Debit	Credit
1/3/2017		AMA Mfg.	11000 – AR	11,256.00	
1/10/2017			12000 – UF	22,334.00	
1/15/2017		Start and Shield Ins.	20000-AP		8,0050.00
1/17/2017		Truck Auto Leasing	20000-AP		5,3989.00

Data Confidence

Certifiable data with integrity and availability

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Enterprise Data Warehouse - Example

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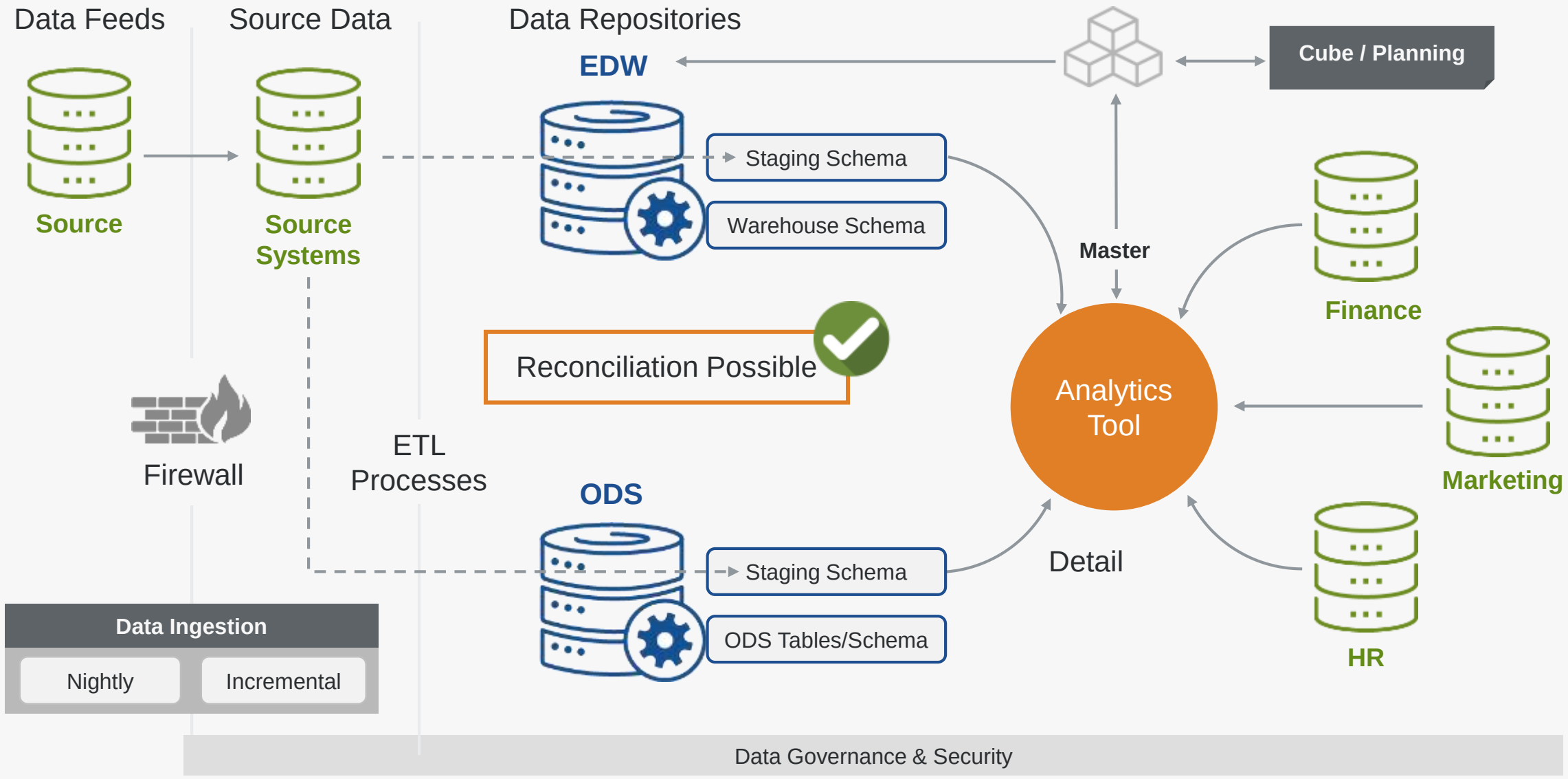

BI/DW Tool Selection Process

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- This would be a professional services arrangement
- Engagement Activities:
  - An …
- Deliverables
  - Pros-

Getting Started

Consider opportunity cost of not incorporating an EDW

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Getting Started with Better Data & Reporting

- BI Tool Selection
- ETL Tool Selection
- DW/Business Analytics Roadmap Strategy Plan
- Business Case Development for an EDW
- Enterprise Data Warehouse design and development implementation
- Health-check of Existing Data & Reporting Systems

Q&A

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Thank you