

BI Foundation Suite Implementation with Finance (Essbase), Service (OLTP) Integration

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Insperty is full service HR solutions provider for small, medium and mid-size companies.

Insperty provides a wide range of business performance solutions. Insperty provide premier Workforce Optimization solution as well other offerings like Human Capital Management, Payroll Services, Time and Attendance, Performance Management, Organizational Planning, Recruiting Services, Employment Screening, Financial Services, Expense Management, Retirement Services and Insurance Services.

Our customer relationship management and Business Intelligence applications cater contact center, service center and various other functional areas like Finance, recruiting etc. They provide Insperty Service personnel access to customer profile and related data in a centralized location to more effectively respond customer requests. CRM/BI System is providing customers and work-site employees with relevant, personalized information, thereby improving the customer experience and positively impacting client retention.

Today, customer information, Benefits Information and other relevant information exists in a number of disparate systems. Responding to an inquiry or taking action on a worksite employee or customer is cumbersome, with client service resources having to access information from a variety of locations. Providing access to customer information in one central location is significantly improving the ease of customer service operations, allowing the contact center, service center and other business units to be considerably more efficient and effective. Now we can provide a 360 degree view of information for strategic business decisions. With current CRM/OBIEE System we can provide Enterprise wide reporting solution Service, Finance, Recruiting areas. Also, Insperty CRM/BI solution can provide self-service, ad-hoc reporting solution for power users/end users.

CRM/BI implementation is providing a centralized method for tracking interaction with customers and worksite employees. The application allows Insperty service teams to track activities and service requests for customers and worksite employees, providing Insperty management a better understanding of customer support activity and the ability to represent service levels to clients.

It is also providing support personnel with access to timely, relevant information to provide higher quality customer service. By allowing access to a significant amount of customer information via one system, Insperty see enhanced productivity among sales and service personnel.

Environment

Insperty is currently running Siebel On Premise CRM version IP2014 (PS12) For approximately 1,400 users with core Siebel modules include CRM Base, Call Center, Email Response, and Field Service. Insperty is currently running OBIA 7.9.6.4 and OBIEE 11.1.1.9 (BIFS, Hyperion – Essbase for reporting solutions. We are using Oracle 11g, SQL Server 2008 as our databases.

Current OBIEE solutions are providing complete spectrum for reporting, analysis, modeling and forecasting for major areas like,

- Service
- Finance
- Recruiting

OBIEE Dashboards are integrated within CRM application using Symbolic mechanism.

Case Study OneVoice (CRM/BI Architecture)

OneVoice, Customer Relationship Management System is System of records for Contact Center/Service Center, which has multiple real time/batch integrations to pull data from various other systems shown below,

AIMS – Legacy Customer Centric Application

OBEE/Benefit Studio – Legacy Application to store Benefit data like 401K, HAS/FSA etc.

OEE Priming Application – Legacy Prospect Application

OneVoice – Customer Relationship Management (Siebel CRM), Centralized System of record for Service data

OneForce - Customer Relationship Management (Siebel CRM on Demand), System of record for Sales

Net Suite CRM – CRM with Finance data (ABU Information)

Enwise – Application to display Benefit Information

CRM Desk Top – Application to exchange scheduling /orientation CRM data with Outlook

Service Cloud /Right Now (Chat Co-browse) – Chat/Co-browse solution

BI/Reporting Solution pulls data from CRM system and provides a 360 degree view of information for strategic business decisions.

Insperty Advantages

CRM/BI services provides -

- Improved customer experience and retention
- Provides better quality service
- Efficient Service
- Make service delivery more visible
- Increase sales and service productivity

Essbase-OBIEE Integration Process

Below are the high level steps to implement an integration of multi-dimensional Essbase cubes with OBIEE.

1. Import the Essbase cube into BI Repository.
2. Creating a measure hierarchy – alternate measure dimension instead of default accounts.
 - a. Change the dimension type from Measure dimension to other for Account hierarchy.
 - b. Select scenario hierarchy properties and change the dimension type to 'Other'. Convert measure dimension to flatten measures.
3. Creating the Business Model and Mapping and presentation layers.
4. Create preferred drill path.
5. Create sort order –
 - a. Using EVALUATE function create a sort order.
Example - EVALUATE('Rank(%1.dimension.currentmember,%2.members)' AS INTEGER ,
"localhost"."Demo".""."Basic"."Gen4,Accounts",
"localhost"."Demo".""."Basic"."Gen4,Accounts")
 - b. Associate the sort order column with the columns you want to sort using – Set Order Column option on Business Model column.

BIFS Architecture

OBIEE and Essbase can be integrated in multiple ways.

1. Install Essbase along with OBIEE server which comes as part of Business Intelligence foundation suite (11g). This scenario is ideal when the sole purpose of Essbase is to support reporting out of OBIEE.

2. Another most common way to integrate is the traditional install where OBIEE and Essbase on separate servers. OBIEE and Essbase in this install can support full functionality of Essbase reporting services.

Security Integration works differently for scenario 1 and 2. In integrated platform, Enterprise manager controls security through policies for both applications.

In scenario 2 enterprise manager is out of picture. Either SSO or Shared Essbase Login can be used to implement security.

SSO is chosen in connection pool of OBIEE physical layer and this carries over the security defined in shared services. The prerequisite for this is a common LDAP server for both authentications.

Shared Essbase login bypasses the SSO by connecting to Essbase via a shared login that has access to all cube data. OBIEE repository roles define what security filters get applied to each cube. This concept is very similar to row-level security in OBIEE.

At Insperty, we defined data level filters through an external table. User specific business unit, group and department member values are stored in an external table. Using a set of session variables, the data level security is applied to dashboards. This provides customized prompts and data is filtered as per user data filters.

BIFS Integrated with Essbase -

Pros

- Integrated BIFS solution provides one place security and services administration.
- Enterprise Manager can be used for security configuration.
- OBIEE integrated in workspace EPM.
- Point of Views can be shown on OBIEE Dashboards.
- Smart view integration with Essbase and OBIEE catalog.
- Standardizing on single platform.
- Eliminates Cost Redundancy.
- Improved 360 degree information for strategic decisions.
- Executive Reporting.
- Self Service Reporting.

Cons

- Essbase Server can be run only on Active- Passive Server architecture.
- Complete change of Security administration from Shared Services to Enterprise Manager.
- Workspace EPM has limited functionality in comparison to Stand-alone Essbase.
- To implement Point of View, additional security mechanism is required.
- Essbase administration requires additional learning curve.

Insperty OBIEE Roadmap -

- OBIEE 12c Upgrade.
- Data Visualization improvement.
- One-Premise, Cloud, Hybrid Reporting.
- Focus on Self Service reporting.
- More Predictive, Trend and Statistical Analysis.
- Mobile, Smart device capability.