



RANZAL
An Edgewater Technology Company



“BI for the BlackBerry Crowd”

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Ranzal & Associates



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About Ranzal & Associates

- **Founded in 1996, Ranzal has implemented Hyperion solutions for 350+ companies (600+ projects since the acquisition)**
- **Oracle / Hyperion Certified Advantage Partner - Highest Status**
- **Hyperion “Americas Reseller Partner of the Year”**
 - › 1999, 2005 & 2007
- **Certified EPM Consultants & Instructors**
- **Vertical Expertise with High-Profile Clients from Coast to Coast**
 - › East Coast & West Coast Presence
- **Sound Project Methodology Insures Project Success**
 - › Support Business Applications from start to finish
- **One of the Largest Hyperion Practices in the U.S.**
- **“Best Planning & Essbase Practices with Best HFM Practice”**
 - › Hyperion Development utilizes Ranzal for Planning, Essbase and HFM product direction



About Ranzal & Associates

- **Our team has been involved in 500+ successful EPM Implementations**
 - › Financial Consolidation & Management Reporting
 - › Budgeting & Planning
 - › Profitability Management Solutions
 - › Business Intelligence and Data Warehousing
 - › Infrastructure Planning and Performance Tuning
 - › Business Process and Project Management

- **Strong client portfolio across leading Industry Sectors including**
 - › Financial Services
 - › Insurance
 - › Retail / Consumer Packaged Goods
 - › Manufacturing
 - › Pharmaceutical & Hospital
 - › Hospitality / Travel / Entertainment
 - › High Technology / E-business
 - › Energy / Utilities
 - › Distribution
 - › Government
 - › Other

- **Certified consultants and instructors**
 - › Hyperion Essbase, Hyperion Planning, Hyperion Financial Management, Hyperion Enterprise, Hyperion Strategic Finance, Hyperion BI+ (Web Analysis, Financial Reports, Interactive Reporting, Production Reporting), Hyperion Data Relationship Management, Hyperion Financial Data Quality Management, Data Services (including ETL, Warehousing)



What you'll see today

- What you need to know about delivering business intelligence to “Smart Phones”
- Oracle (Hyperion) Demonstration & Tips
- OBIEE Demonstration & Tips



Defining a "smart phone"





Interesting Facts

- The top 5 smart phones in Q4 of 2008 were the BlackBerry Pearl, Palm Centro, BlackBerry Curve, Apple iPhone, and Samsung Instinct
- 73% of cell phone users talk on phone while in traffic
- iPhone and BlackBerry Bold cost roughly \$170 to make
- The first “smart phone” was the IBM Simon produced in 1993 and sold for \$899
- 63% of BlackBerry users admit taking the device into the bathroom



Current Smart Phone Landscape

- Most Popular for business use:
 - BlackBerry (RIM) Devices
 - Nokia Devices
 - Palm Devices
 - Apple iPhone (AT&T only)
- Up & Coming
 - Google G1 (T-Mobile only)
 - Palm Pre
- Declining
 - Motorola & Other Windows Devices



Trends

- Apple increasing market share in business arena, Windows Mobile decreasing
- Applications, especially open source, hailed as future of smart phones
- Virtualization, such as VMWare, for smart phones?
- 3G becoming common place, already discussing “4G”



Keys to BI on a Smart Phone

- Quickly digestible
 - Exceptions and highlights
 - Alerts
 - Features like pivoting and drilling not practical
- “No frills” Reporting
 - Features vary even within brands and/or operating system
 - Design for slow connections
 - Design for lowest common denominator
 - Low to no Interactivity



Keys to BI on a Smart Phone

- Know user's data plan
 - Limited data?
 - Limited text messaging?
- Know user's phone capabilities
 - Screen resolution
 - Operating system
 - Software (i.e. Pocket Excel, Acrobat Reader)
 - Browser and e-mail program



Keys to BI on a Smart Phone

- Security
 - Segment access levels into separate distribution lists
 - Enforce phone security policies
 - Focus on sending alerts or exceptions instead of all data
 - Avoid sending personal data
 - Be prepared for...
 - Lost or stolen phones
 - Employees who leave when using a personal phone



Methods of Delivery

- SMS
- MMS
- Web
- Applications
- E-mail



SMS

- Benefits
 - Delivered quickly
 - Accessible even by “not-so-smart phones”
- Limitations
 - 150 character limitation
 - Text only



MMS

- Benefits
 - Quick, similar to SMS
 - Can handle media
- Limitations
 - Not on all phones, like iPhone (yet)
 - OBIEE doesn't send graphics using MMS



Web browsers on phones

- Benefits
 - Familiar method of finding data
 - Most interactive
- Limitations
 - Limited JavaScript support needed by portals
 - Slow
 - Requires more user effort
- Examples
 - Pocket IE (Windows)
 - Blackberry
 - Safari (iPhone)



Applications

- Benefits
 - Applications can standardize delivery
 - Custom applications have “limitless” possibilities
 - Most phones have SDK
- Limitations
 - Custom applications are proprietary and require more maintenance
 - Availability and functionality varies across phones
 - Oracle BI app available for iPhone but not BlackBerry or Windows Mobile



E-mail

- Benefits
 - Any smart phone has e-mail functionality
 - Less limitations on amount of content (like SMS)
 - Can easily be forwarded (*good or bad thing?*)
 - Can deliver attachments such as spreadsheets
- Limitations
 - Implementation and features vary widely



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Oracle EPM (Hyperion) Demonstration

- Features & Capabilities
- Examples
- Version 11 “Fusion”



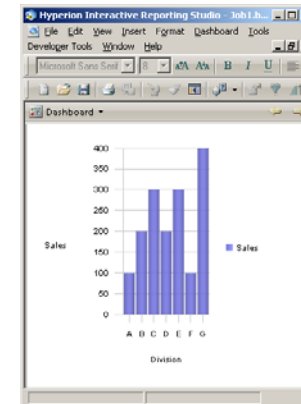
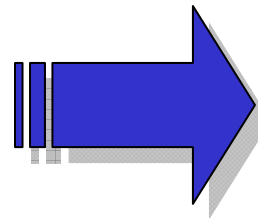
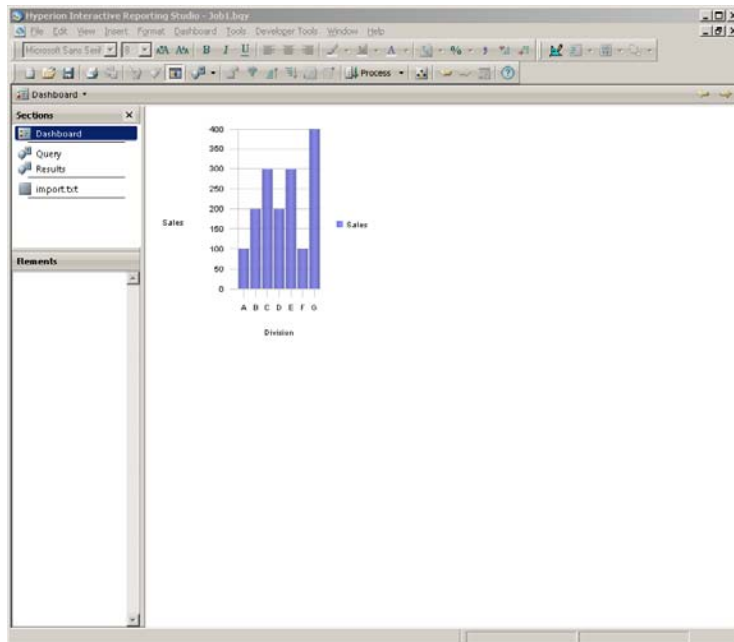
Oracle EPM (Hyperion) Tips

- Hyperion job outputs are not capable of HTML e-mail, must use attachments (only one per e-mail)
- JPEG output of “Dashboard” section is most reliable for e-mail, and usually smallest data size, even for chart sections



Oracle EPM (Hyperion) Tips

- If sending a dashboard section, close all tool bars and resize the IR studio before saving the document





Oracle BI Demonstration

- Features & Capabilities
- Examples
- Version 10.1.3.4



Oracle BI Tips

- When scheduling make sure to uncheck Interactive Dashboard from the Delivery options
- Consider creating a user with a delivery profile specifically for mobile content



Oracle BI Tips

- Force the size of graphs



General

Title

Custom Title

Data Labels

Show data labels

Override Default Data Format

Treat Numbers As

Negative Format

Decimal Places

Use 1000's Separator

Size

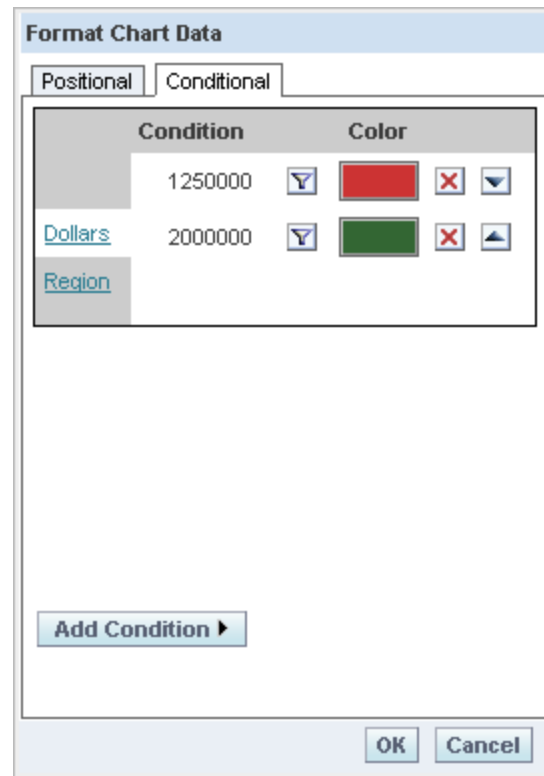
Width

Height



Oracle BI Tips

- Use conditional formatting





General Tips

- Bar graphs may be easier to read horizontally orientated
- Make use of phone and email information; most smart phones can direct dial/email from phone text
- If possible use a distribution lists per device type and per access level



General Tips

- Most phone providers have E-mail to SMS and/or MMS capability
- Organize jobs by creating folders and naming jobs by device, screen resolution or audience

Examples:

- DistrictSales_320x240
- HourlySales_BlackBerryCurve
- OnTimeDeliveries_ExecDashboard



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