



Prōject<sup>TM</sup>

integrated business solutions

# Getting the most out of the BI Applications at Arriva

# Introduction

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- What does this presentation cover?
  - Initial situation
  - First steps
  - Long term solution
  - Current situation
  - Working with On Demand
- Who are Prōject?
- Who are Arriva?
- Presenter introduction

# Initial situation

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- Successes
  - BI Apps Financials, Procurement and Spend implemented
  - Custom EAM and Inventory modules
  - Extensive report development in Financials
  - Approx 350 active users
  
- Challenges
  - Growing list of requirements
  - Slow uptake of Financial Analytics
  - Gaps in Procurement Analysis
  - Methodology



# First steps

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- Initial BI Health Check
- 5 Day On-Site engagement to:
  - Review BI Infrastructure
  - Review Business Process for delivery of BI development
  - Review outstanding requirements
- The results of this drove further recommendations



# Health check results

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- Health check results
  - Difficulties reconciling dashboard reports back to EBS
  - Some features not working
  - Processes / methodologies not in place
  - No corporate look and feel guidelines
  - Difficulties around change management
  - Lack of proper documentation

# Long term actions

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- Approach taken
  1. Resolve issues – perform a reconciliation and installation review
  2. Manage – Provide BI project management skills
  3. Develop – Create a framework for the developers to follow
  4. Train – Ensure Arriva employees have suitable skills for their roles
  5. Recruit – Assist with the recruitment of suitable BI skilled personnel
  6. Support – Provide expert support

# Resolve issues - reconciliation

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- Performed to identify possible sources of existing issues
- Limited to Procurement and Spend only
- Data warehouse was reconciled to EBS source
- Over 6 million records reconciled
  
- Issues found:
  - No “Unspecified” record in project dimension hierarchy
  - Fact tables containing NULL foreign keys
  - Circular joins in the RPD
  - W\_EXPENSE\_F empty
  - X\_CUSTOM column populated
  - Data corruption in E-Business Suite



# Resolve issues - installation review

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- 5 Day technical review including:
  - Database setup
  - General server settings
  - OBIEE
  - Weblogic
  - Informatica
  - DAC
  - Source independent configuration
  - EBS specific configuration
  - Procurement and Spend configuration

# Resolve issues - installation review findings

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- Database configuration
  - Indexes and data sharing the same tablespace
  - Incorrectly set init.ora parameters
- Security
  - Policies needed tightening
  - Greater control required
- BI Apps configuration
  - Initialisation blocks needed to be reviewed
  - Informatica variables missing
- Other
  - Software versions needed to be confirmed
  - Additional thought needed around audit rules

# Manage - project management

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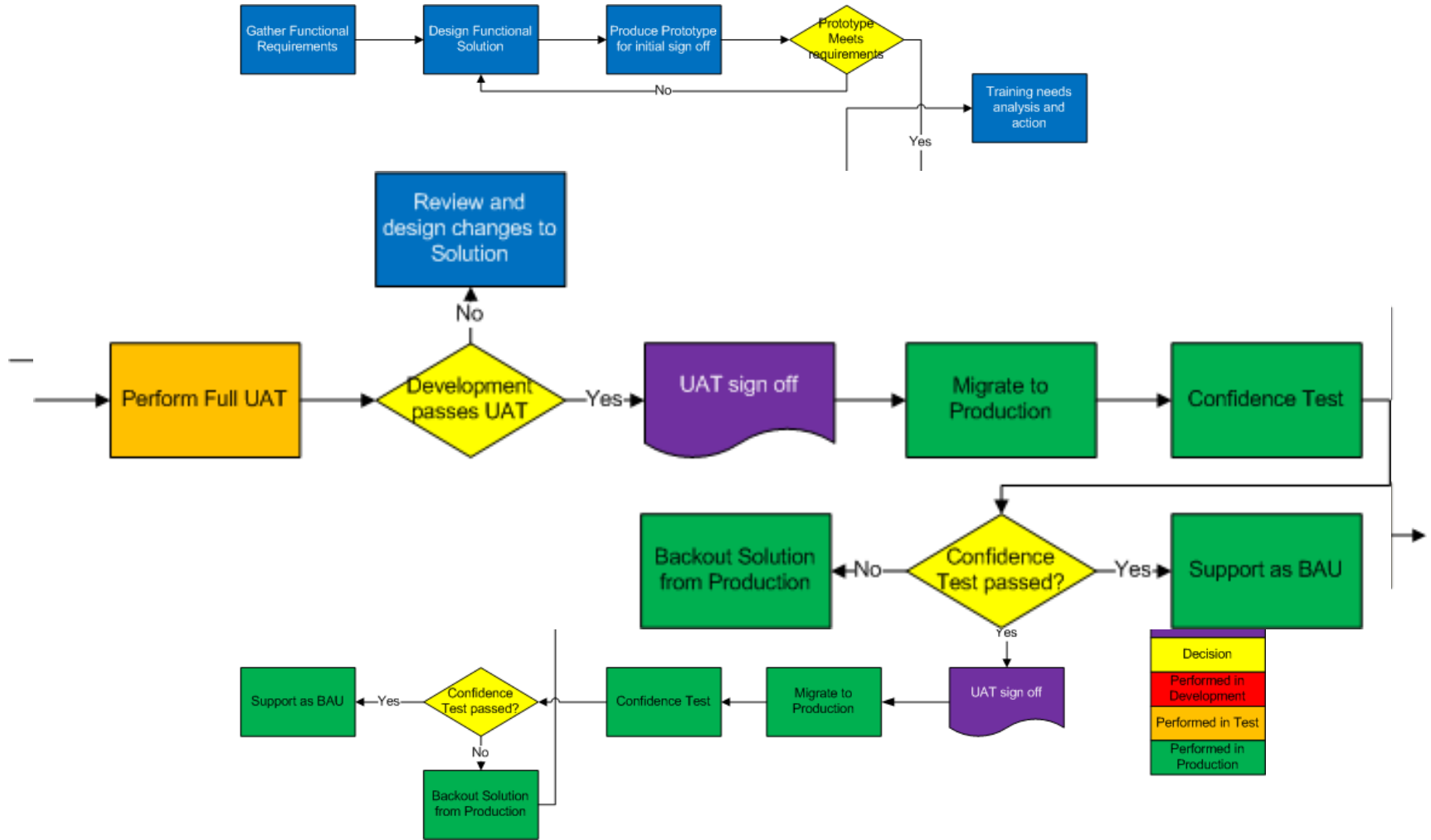
- As the main BI project manager was moving on it was essential to fill this gap
- Prōject supplied a resource with the following skills:
  - Proven BI project manager
  - Accredited Project Management
  - Answers, Dashboards and Delivers trained
  - Business Analyst, including requirements gathering

# Develop - BI Development Framework

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- Required to add processes and best practice to the BI development team
- Consists of a series of documents:
  - Framework Overview
  - Requirement Gathering Guidelines
  - Implementation Guidelines
  - Migration Guide
  - Corporate Look and Feel
  - User Acceptance Testing Guide

# Develop - Framework Overview - Design



# Develop - Supporting Documents

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- Requirements Gathering Guidelines
  - Described existing methods
  - Recommendations for new processes to follow using existing technology (support system)
- Implementation Guidelines
  - Guide for technical and functional BI Apps developers
  - Details best practice
  - Covers data warehouse, Informatica, DAC, OBIEE repository
- Migration Guide
  - Details on how to move development work from one environment to another e.g. Development to test to production
  - Covers all parts of the technology stack required for BI

# Develop - Supporting Documents

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- Corporate Look and Feel
  - Details what aspects should be considered when creating a look and feel
  - Includes information on visualisation
  - Does not dictate what the look and feel should be
- User Acceptance Testing Guide
  - Details of best practice to be adopted during UAT phase of the development process

# Train – suitable skills

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- A training needs analysis was recommended to identify specific training
- Training supplied:
  - Answers, Dashboards and Delivers
  - One to one specific training



# Current situation

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- Improvements
  - Improve the team structure
    - Employ full time reporting lead
    - Up-skilling of the virtual team
    - Hired full time BI Developer
  - Emphasising the new processes
    - Involving and empowering team
    - Pilot phases
    - Thorough UAT
- Still to do
  - Financials and Engineering reconciliation
  - Housekeeping

# Working with third parties

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- From our work at Arriva, Prōject recommend that the following core areas are addressed when working with third parties
  - Planning
  - Communication
  - Co-ordination
  - Relationships
  - Documentation

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