



Dashboard for Financial Applications: A Partnered Approach



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AGENDA

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- About BOARD International
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- Business Considerations
- Benefits of BOARD
- Why a Partnered Approach
- Comparables
- BOARD Dashboard Demonstration
- Questions / Q&A



MindStream Analytics



MindStream Analytics helps companies identify, implement and manage technology that allows them to effectively analyze and predict key metrics. MindStream Analytics is a consulting and managed services provider that specializes in the implementation and management of financial and analytic applications. For more information, please visit <http://www.mindstreamanalytics.com>.



BOARD International



Founded in 1994 BOARD International is the provider of the industry's only programming-free toolkit for rapid and cost-effective development of Corporate Performance Management and Business Intelligence applications. Headquartered in Lugano, Switzerland, BOARD International has additional offices in Germany, Italy, Spain, Singapore, United States, UK, Australia and India and a worldwide resellers network. For more information about BOARD, visit the website at www.board.com.



Objectives of the Webinar

- Understanding your organization's requirements around a Dashboard
- Discuss the process of creating a sophisticated financial dashboard utilizing a collaborative partner model - Hyperion EPM (HFM) and BOARD's ease of use Dashboard tool-kit
- The ease of use of developing multi-dimension views in BOARD from a Hyperion Application.
- Fast, efficient Drag and Drop technology in BOARD to produce state of the art Dashboard views.
- The ability to refresh the metadata and data from HFM into the BOARD database for a real-time update of your Dashboard.
- The cost and implementation efficiencies of this Partnered Approach.

Key Requirements of a Dashboard

- Data must be useful and actionable by key stakeholders
- Can be refreshed quickly as data changes - Accurate
- Don't over populate Dashboard with various views or KPIs – don't make it cumbersome
- Know your audience – C-Level needs vs. Analyst / Business Unit Manager
- A Dashboard is a key way of helping an user analyze data, not just report it – to facilitate making key decisions and driving forecasts
- Proper combination of snapshots of key metrics vs. drillable “detail” data views
- Ability to “personalize” for the user's needs and preferences

Key Requirements of a Dashboard (cont'd)

- Ability to “alert” viewers to problematic trends or downturns
- Can use spreadsheets for detail – familiarity
- Should be Business User driven – not just to “show” off Technology / must be easy to update for Business User
- Dashboards with ability to print becoming more desired by users – can “pick and choose” what they want

Business Considerations when introducing Dashboards

- Understanding needs between different levels of the organization (Sales, HR, Finance, IT, etc.) – communicating with each other is key to developing a cohesive strategy
- Can spend a lot of money producing sharp Dashboards – a Partnered approach can often be advantageous to one vendor
- Who are your power users – Dashboard tools, as with EPM and BI tools – are becoming more driven toward the business user and away from the difficult code that required more IT development
- Must have a clear, concise Change Management program to make updates as required
- Need to Market across organization – many are not very adaptable to change

Benefits of BOARD

- All in-one Multi-Dimension Analytics tool-kit with streamlined GUI for state of the art Reporting / Dashboard creation
- Open source - can connect to any open Data source through ODBC connection / multi-dimensional through ODBO / MDX
- Installation of BOARD software can be done on one laptop or one server with an easy to install client interface – entire process takes about 30 minutes
- Configuration of Data Sources and development of cubes and capsules can be done in hours and days, dependent on complexity as opposed to weeks
- A single integrated environment to manage data from different core areas such as sales, marketing, finance, HR, logistics, and distribution at a very competitive price

A Partnered Approach with BOARD



- Fast development lifecycle from installation to configuration to development provides great flexibility and lowers TCO
- Can store entire BOARD database on a laptop – can develop anywhere at anytime and reconnect later to refresh data
- Top tier Dashboard graphics and capabilities – such as Cockpits – which are not fully available in Hyperion Web Analysis
- Alternative integrated OLAP tool to Essbase – streamlined maintenance
- Real-time refresh integration with external sources – don't need to data pull into BOARD – can use as Reporting / Dashboard repository only
- Offers a cost effective approach for large number of BI users compared to implementing OBIEE or Essbase



Comparables

| | BOARD Dashboard | Hyperion Web Analysis | OBIEE+ |
|------------------------------------|---|---|---|
| Open Source to Data Sources (ODBC) | Yes – GUI interface can setup sources in minutes | Yes – but requires manual queries to be written to SQL | Yes – but long setup time to Data Sources – especially with Essbase (multi-dimensional) |
| Installation Requirements | Can fit all software and DB on one server – requires small client software for Developers | Requires multi-server environment and Hyperion Workspace – typically up to a week per environment | Heavy integration and configuration time – especially with non relational sources |
| Updates | Periodic – version 7.2 just released | Not part of long-term Oracle strategy – to be integrated with OBIEE | Periodic |

Comparables

| | BOARD Dashboard | Hyperion Web Analysis | OBIEE+ |
|---------------------------|---|--|---|
| Integrated with OLAP (BI) | Yes – toolkit is automatically integrated – can also pull data from Essbase | Need to purchase Essbase separately - but integrated through Workspace – can write-back to BSO model | Integrated with Essbase – but schema changes can be inflexible |
| Functionality | Very efficient Interactive Dashboard | Has charts, graphs, alerts, spreadsheet – does not offer Cockpit features (i.e. – Gauges) | Very efficient Interactive Dashboard – but less efficient with Financial Reporting formatting |
| “Drill” features | Can drill down into detail or back up to summarized level | Can drill down into detail or back up to summarized level | Can only drill down at this point |

Comparables

| | BOARD Dashboard | Hyperion Web Analysis | OBIEE+ |
|------------------------------|--|--|---|
| Integration with Sharepoint | Not available yet, but coming Q3 2010 | Oracle Took-kit available – challenging configuration | Oracle Took-kit available – challenging configuration |
| Implementation of Dashboards | Useable views can be built in minutes to hours | Drag and Drop technology - but refining views can take significant time | Prepackaged Dashboards available, custom ones require a lot of development time |
| Cost | Starts about \$2K per user but drops to about \$500 per user as users exceed 250 | Included with System 11 EPM tool (HFM, Essbase, Planning) - can be \$2-3K per user | \$2K per user – additional for Essbase |

BOARD Demonstration

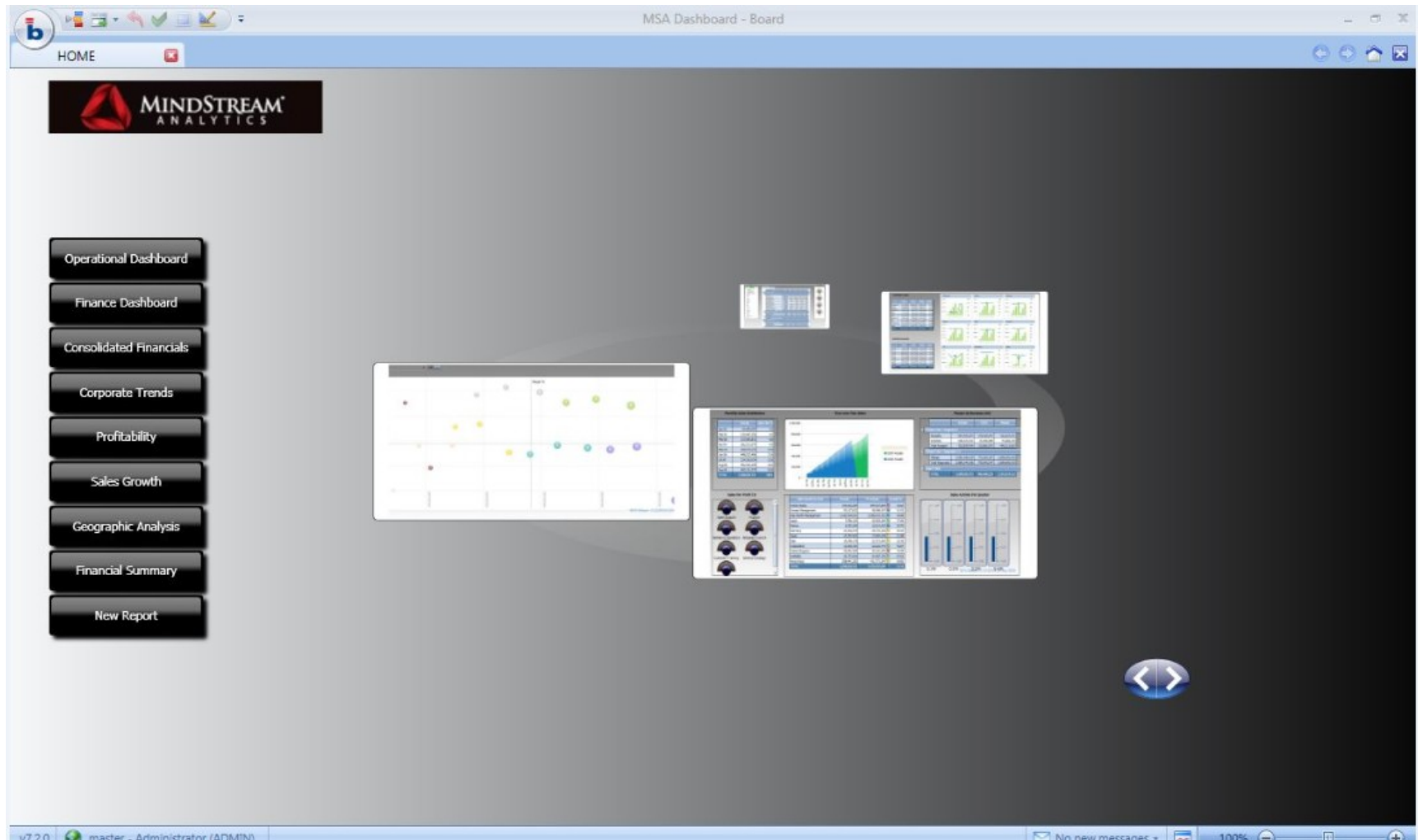
Questions:

What is your organization's largest roadblock to building a Financial Dashboard?

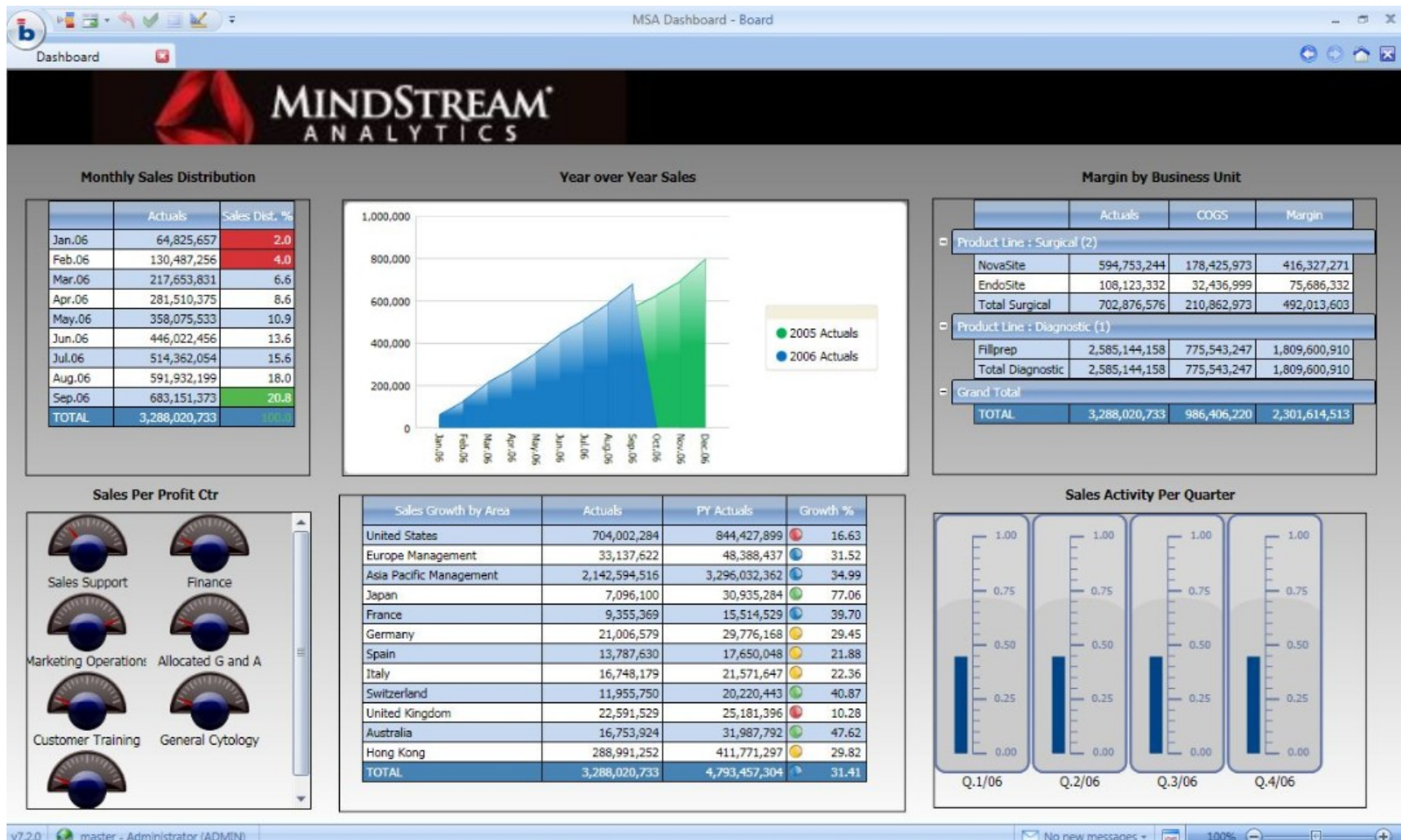
What features are you looking for in a Dashboard – your users?

What are your source systems – are they integrated?

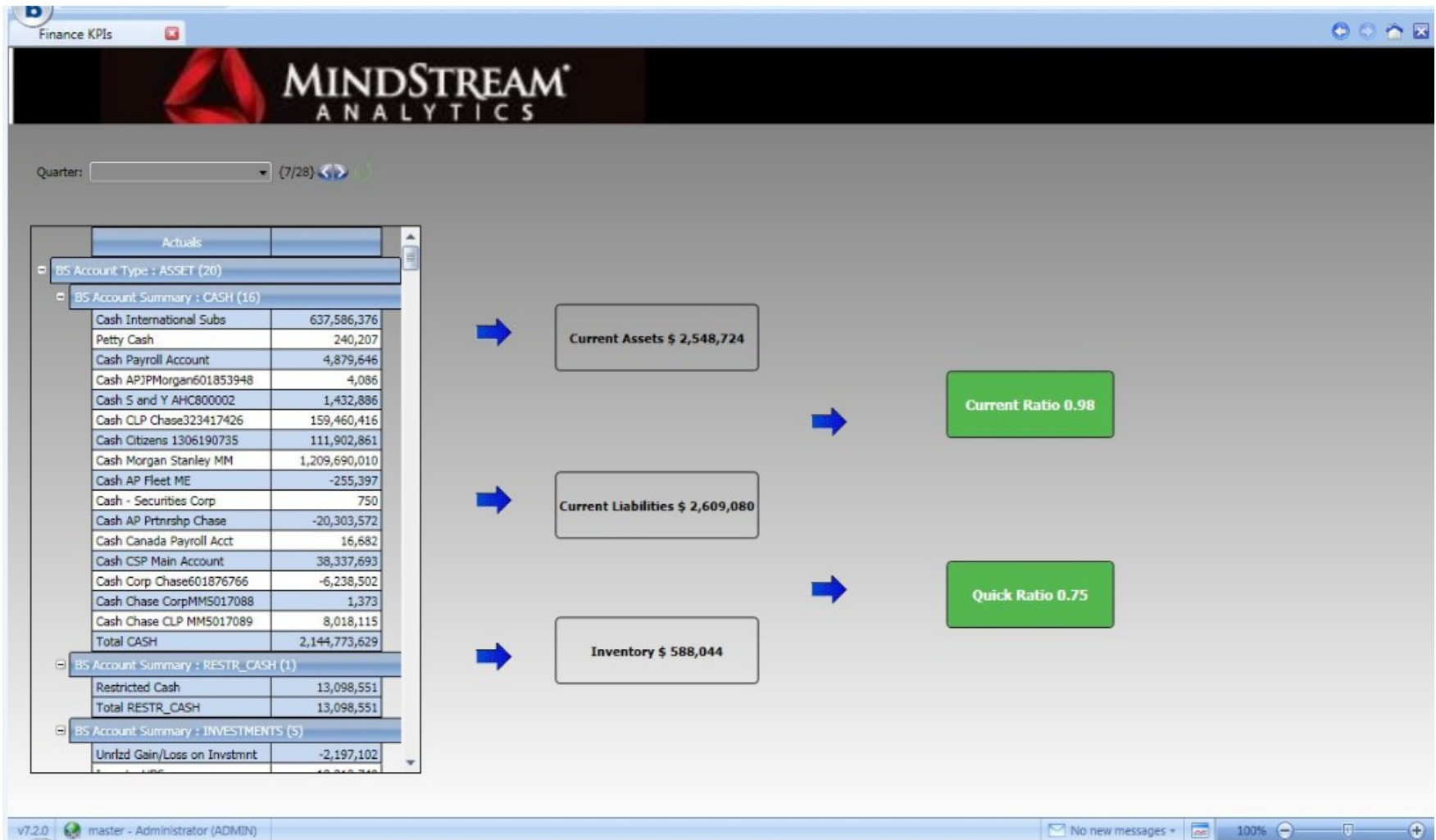
BOARD Dashboard Home Page



Operations Dashboard



Finance KPI's



Profitability



Sales Growth



Bubble Chart



Thank You!

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