

Sterling Business Intelligence

Release Note

Release 9.1



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This edition applies to the 9.1 Version of IBM® Sterling Business Intelligence and to all subsequent releases and modifications until otherwise indicated in new editions.

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New Features

The following new features have been introduced in the IBM® Sterling Business Intelligence, Release 9.1:

- F *Datamart for Quotes and Opportunity Data*
- F *Embedded Analytics*
- F *New IBM Sterling Business Intelligence Reports*
- F *Updates to the Perfect Order Dashboard*
- F *Enhanced Performance*
- F *Updated Documentation*

Datamart for Quotes and Opportunity Data

With this release, you can load data related to quotes and opportunity from the OLTP (Online Transaction Processing) database to the datamart.

The opportunity and quotes datamart can be used to derive metrics such as:

- F Maximum, minimum, and average discount percentage provided on converted quote lines for an item's category.
- F Maximum, minimum, and average discount percentage provided on converted quote lines for an item's category, within the customer's industry.
- F The number of converted quote lines for a sales person, sales team, or region, in specific ranges of the profit margin percentage.
- F The total number of opportunities, the total number of converted opportunities, and the percentage of converted opportunities.
- F The top ten sales persons based on the revenue they generated. The revenue generated by each of the top ten sales persons of the organization.
- F The top ten sales teams based on the revenue they generated. The revenue generated by each of the top ten sales teams of the organization.
- F The top ten sales persons based on the number of successful deals. The number of converted deals for each of the top ten sales persons of the organization.
- F The top ten sales teams based on the number of successful deals. The number of converted deals for each of the top ten sales teams of the organization.

For more details about the datamart for quotes and opportunity data, refer to the *Sterling Business Intelligence: Implementation Guide*.

Embedded Analytics

The Sterling Business Intelligence application provides embedded analytics to incorporate business intelligence right into applications, such as IBM® Sterling Call Center and Store, IBM® Sterling Field Sales, and IBM® Sterling Selling and Fulfillment Foundation. This helps provide intelligence that is more seamless, of a higher quality, and drives business performance in new ways because it is embedded in the applications.

As a part of this release, the following embedded reports have been provided, which are used by the IBM® Sterling Selling and Fulfillment Suite:

- F **Customer Appeasement Report:** This report provides customer information, such as the total revenue generated by the customer in the last year, the total lifetime revenue generated by the customer, and the average value of the customer's order accumulated over the lifetime of the customer. When a customer is not satisfied or has a bad experience with any of the services provided, users of Sterling Call Center and Store can use this report to determine an option to appease the customer.
- F **Quote Adviser Report By Category:** This report provides the maximum, minimum, and average discount percentage provided on previously converted quote lines for the item's category. When creating a quote, this report helps the users of Sterling Call Center and Store, and Sterling Field Sales to arrive at the optimum discount to be given for an item.
- F **Quote Adviser Report By Industry:** This report provides the maximum, minimum, and average discount percentage provided on previously converted quote lines for the item's category, within the customer's industry. When creating a quote, this report helps the users of Sterling Call Center and Store, and Sterling Field Sales to arrive at the optimum discount to be given for an item.
- F **Customer Rating Report:** This report provides details of all the metrics used when calculating a customer's rating. Sterling Business Intelligence computes a rating for the customer based on data such as the customer's past purchase history and credit holds. Based on the rating, Sterling Business Intelligence also determines a grade for the customer. The customer's grade is used by Sterling Selling and Fulfillment Suite for approving quotes, determining an appeasement strategy for the customer, and so forth.

For more details about embedded analytics, refer to the *Sterling Business Intelligence: Implementation Guide*.

New IBM Sterling Business Intelligence Reports

The following new reports have been provided in this release:

- F *Opportunity Pipeline Reports*
- F *Profit Margin Report*

For additional details about the new reports, refer to the *Sterling Business Intelligence: User Guide*.

Opportunity Pipeline Reports

The Opportunity Pipeline reports provide information about the total number of opportunities, the total number of converted opportunities, the percentage of converted opportunities, and the top sales persons, and sales teams by revenue and number of deals. The Opportunity Pipeline reports comprise the following reports:

F Sales Pipeline Report

The Sales Pipeline report provides information about the total number of opportunities, the total number of converted opportunities, and the percentage of converted opportunities.

F Top Sales Persons By Revenue Report

The Top Sales Persons By Revenue report provides information about the top ten sales persons based on the revenue they generated. You can also view the revenue generated by each of the top ten sales persons of the organization.

F Top Sales Teams By Revenue Report

The Top Sales Teams By Revenue report provides information about the top ten sales teams based on the revenue they generated. You can also view the revenue generated by each of the top ten sales teams of the organization.

F Top Sales Persons By Deals Report

Opportunities that are converted into orders are known as deals. The Top Sales Persons By Deals report provides information about the top ten sales persons based on the number of successful deals. You can also view the number of converted deals for each of the top ten sales persons of the organization.

F Top Sales Teams By Deals Report

The Top Sales Teams By Deals report provides information about the top ten sales teams based on the number of successful deals. You can also view the number of converted deals for each of the top ten sales teams of the organization.

Profit Margin Report

The Profit Margin report provides information about the number of quote lines converted in specific ranges of the profit margin percentage.

Updates to the Perfect Order Dashboard

As a part of this release, the Percentage Opportunity Conversion metric has been added to the existing Perfect Order Dashboard.

For more details about the updates to the dashboard, refer to the *Sterling Business Intelligence: User Guide*.

Enhanced Performance

With this release of Sterling Business Intelligence, the performance of dashboards and reports have been enhanced by using indices and aggregate fact tables. Aggregate fact tables store pre-summarized data to reduce the report execution time. You can also enhance the performance of custom dashboards and reports by creating new aggregate tables as per your requirement.

For more details about enhancing the performance of the dashboards and reports, refer to the *Sterling Business Intelligence: Implementation Guide*.

Updated Documentation

To access the updated documents in the Sterling Business Intelligence documentation set, refer to the Sterling Business Intelligence Documentation Online Library at:

<http://help.sterlingcommerce.com/SFSF91/index.jsp>

Known Issues

You may encounter the following known issues when using Sterling Business Intelligence, Release 9.1. Some of the defects listed in this topic will be addressed in future maintenance pack releases. To determine if a defect has been addressed in a maintenance pack, review the Hot Fix Release Notes that accompany the maintenance pack.

IBM Sterling Business Intelligence Issues

228817: "java.lang.reflect.InvocationTargetException" is displayed when generating a report.

Solution/Workaround: Ensure that ETLs have been executed and the datamart contains data.

202686: Do not run the Order Release Status Purge agent before seeding the Data Mart, as some orders may not make it to the Data Mart and a few metrics could be calculated incorrectly.

Solution/Workaround: Run the ETLs prior to running the Sterling Selling and Fulfillment Foundation Order Release Status Purge, to avoid incorrect calculations in some metrics.

242938: During incremental source to staging data load, ETL scripts slow down on a high-transactional load.

Solution/Workaround: ETLs are often able to catch up when system load is diminished. You may also stop the ETLs and run ETL scripts when the load on the system is lower.

Cognos-Dependent Issues

The known issues that are dependent on Cognos and the solutions or workarounds, if any, are listed here. Enhancement requests have been logged with Cognos regarding these issues. These issues will be resolved when Cognos incorporates the enhancement requests.

188724: If the number of categories in a pie chart exceeds four, the legend is not displayed completely (Cognos Defect Number: 622354).

Solution/Workaround: Details of the Category can be obtained from Tool tip.

234686: ETL scripts can fail when executing long running jobs using IBM Cognos Adaptive Warehouse Runtime on Linux. The errors "Cannot open (read) file" and "An error occurred exporting Catalog '(null)'" are logged.

Solution/Workaround: Add the following content in the
<AAF_Install_DIR>\ap\configuration\aaf.ini file:

```
<Section Name="DebugInfo"> <PackagePersistence>true</PackagePersistence>
</Section>.
```

191752: Dates are not localized properly because IBM Cognos Adaptive Warehouse does not support localization of Calender Member captions. (Cognos Defect Number: APAR 7150 082 000)

Solution/Workaround: None.

220220: Report style setup is not working in Mozilla Firefox. Reports and fonts are not getting displayed properly.(Cognos Defect Number: SR 37379 082 000)

Solution/Workaround: The “.css” file entries which is provided with the Sterling Business Intelligence should be placed at the beginning of file.

236070: SO Daily Summary flow taking up large amounts of memory.(Cognos Defect Number: APAR 15338,082,000)

Solution/Workaround: Manually add the following into the cogdmor.ini file to force the cast to be pushed to the database. The entries go into the [Operator Cast] section and the old entries can be commented using “;” at the beginning of the line:

```
[Operator Cast]
QD=VC, VC:DT, DT:NU, NU:DM, DM
;QD=VC, VC:DT, DT
```

The entries are translated as follows:

QD = Quad and Int65

NU = Number

DM = Decimal

221566: Running ETL Fails on Linux for the first time after importing the project. The errors “(delivery element '<element name>') does not exist in the destination table“ and “The delivery '< name>' failed“ are logged.(Cognos Defect Number: SR# 38306 082 000)

Solution/Workaround: Run ETL again.

218622: Memory allocation error occurs when CDC_Table ETL job is executed on Linux. The error “glibc detected *** rundsnode: free(): invalid pointer: “ occurs. (Cognos Defect Number: APAR 14037,999,000)

Solution/Workaround: Set an environment variable MALLOC_CHECK=0.

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