FINANCIAL SERVICES COMPANY IMPLEMENTS ORACLE FUSION DATA INTELLIGENCE

IMPROVES CROSS-FUNCTIONAL REPORTING AND ANALYSIS WITH ADVANCED ANALYTICS FOR ORACLE CLOUD APPLICATIONS

CUSTOMER PROFILE

HQ
New York, NY

INDUSTRY
Financial Services

EMPLOYEES
1000

ITC SERVICES
• Analytics

APPLICATIONS & TECHNOLOGIES
• Oracle Fusion Data Intelligence
• Oracle ERP Cloud

INTRODUCTION

The client is a privately owned wealth management company providing services from estate planning to insurance advisory through comprehensive investment management, wealth planning, and family office services.

CHALLENGES

The client moved from Oracle E-Business Suite (EBS) to Oracle Cloud Applications and initially used Oracle Transactional Business Intelligence (OTBI) for reporting. However, modifying OTBI reports for cross-functional analysis was challenging, so they chose Oracle Fusion Data Intelligence for a more robust analytics solution.

SOLUTION

After implementing Oracle Fusion Data Intelligence (FDI) out-of-the-box, the client wanted to ensure their Oracle ERP Cloud data was accessible within Oracle FDI. Before starting the customizations, business users validated the out-of-the-box content to prevent future issues. We helped their team in building new data visualizations, creating new datasets, and conducted training sessions. Once the users were prepared, we proceeded with the customizations and provided Hypercare support. The project required close coordination with Oracle support since it was a fully Oracle-managed platform, and a deep understanding of Oracle Cloud Applications.

RESULTS

• Ability to quickly create a data warehouse within weeks for faster time-to-value

• Ability to add more data sources, allowing seamless growth as the business expands

• Enhanced cross-functional reporting provides deep insights across departments

• Custom data visualizations significantly enhance data analysis for better decision-making

• Okta integration with Single Sign-On (SSO) offers robust security and easy access management

• Built-in AI/ML capabilities support advanced analytics and predictive modeling

ITC ADVANTAGE

• **Our expertise in Oracle Cloud Applications ensures seamless integration and customization of Oracle FDI, tailored to your business needs.**

• **We provide end-to-end support, from training sessions to coordinating with Oracle support, ensuring a smooth implementation without any business disruption.**