



## Business Analytics & Action Tools

A UNIFIED WEB BASED SOLUTION THAT FUELS IMPROVEMENTS

### Unequaled Flexible Information Access and the Tools Necessary to Act On It

Opti-Insight is a web based system designed to provide flexible business analytics and to provide rapid access to information needed to answer the never ending stream of unanticipated business questions. Visibility to information is only part what Opti-Insight offers. It supplies the Action Tools to capitalize on the new found knowledge. It provides the capabilities to productively manage change and to realize continuous improvements.

The ability to analyze real time and historic business information and to be able to rapidly and cost effectively expand and modify Opti-Insight's analytics capabilities, is the one major advantage over alternative BI products. Its collective features facilitates management's understanding of the business' operating performance, adherence to best practices, and compliance enforcement. Opti-Insight's analytics, data monitoring and alerting, workflow agent, and improvement initiative management features work in conjunction with data from the various disparate systems a firm utilizes. When it is necessary to expand the information boundaries to include the data necessary for compliance or operations improvement it is economically accomplished. The relatively low cost of Opti-Insight is a second major advantage.



### Comprehensive Information Analytics Features

The specific features of Opti-IT's business analytics include:

- Secure Information Distribution
- Personalized Dashboards/Portals
- Simple Lists Supported by Graphs
- Sorting, Finding, Filtering, Exporting and Printing of Data
- Personal and Institution Short Cuts
- Sophisticated Information Presentation
  - Extended Views
  - Cross Tab Views
  - Union Queries
  - Chained Queries
- Flexible, Easily Configurable Drill Downs
- Key Performance Indicators
- Extensive Graphing Options
- Intelligent Document Storage and Retrieval
- Intelligent Web Access for Information Enrichment
- Web-based Distribution of Hard Copy Reports
- Alerts to Flag Issues

### Value Statement

Opti Insight provides the right information to the right people at the right time, improving performance and a business' bottom line!

## After Data is Understood, Then What?

Opti-Insight provides additional functionality designed to help an organization react properly to its business information. Timely actions taken to share findings with others in the organization, to address an outstanding issue with an employee or a group of customers, to communicate directions or information to others, to perform additional discovery or to manage an initiative to drive improved results; are the means to insure a return on business analytics. It is one thing to know you have a problem or opportunity; you earn the return when you take the actions to address or to capitalize on them. Opti-Insight's Action Tools make improved business outcomes more likely.

Many features combine allow the organization to capitalize on the understanding gained through the use of Opti-Insight's analytics. They range from support of simple spontaneous actions through the inclusion of an Improvement Initiative Management module. The capabilities include:

- Configurable alerting and notification
- Document Distribution and Retrieval
- E-mail Integration
- Excel Integration
- Outlook Integration
- Data available for Mail Merge with Word
- Intelligent Notes/Annotations and Retrieval
- Security Controlled On Demand Data Sharing
- Intelligent Web Access for Information Enrichment
- Workflow and Process Agents Triggerable by Data Changes
- Improvement Initiative Management

Beyond these functions, Optima can assist an organization to put new systems in place that build on the clients current application investment but fill identified gaps or rapidly add support for new or changed business processes. The same framework that supports Opti-Insight, combines with Optima's library of modifiable business component building blocks. It insures new capabilities can be delivered quickly while addressing the customers unique needs, often for an order of magnitude less than from other available alternatives.



## Improvements Driven by Initiative Management Features

When opportunities for improvement arise, often initiatives are launched and people are assigned responsibilities in the quest of reaching goals and targets. Pressing day-to-day issues often cause employees to unknowingly defer tasks that make up key elements of such initiatives. Management follow up is difficult and frequently lacking, and planned results become left to chance. The Improvement Initiative module addresses these issues. Tasks associated with improvement initiatives are assigned and automatic notification can be included to either the individual or the manager when the tasks are past due and / or completed. An initiative at a glance view gives team members a comprehensive view of the initiative. Tasks coming due and past due are highlighted for easy identification. Integration with the key performance data or with other information available through Opti-Insight provides feedback on the success of the related initiative. Actions can be adjusted, reinforced, intensified or repeated when appropriate. Opti-Insight's Improvement Initiatives provides an added degree of control over the business and a key contributing factor to its continuing improvement.

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