



## Regional Seminar Series Richmond



## Microsoft Alliance and Interoperability

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Director of Product Management  
OSIsoft

September, 22 2009

Empowering Business in Real Time.

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- Discuss what OSI and Microsoft are doing together
- Learn about Dynamic Office Business Applications
- Learn more about Microsoft Business Intelligence and how it compliments your existing efforts
- Answer Questions and Inspire Action

- **Do you have an Operational Business Intelligence architecture?**
  - Do your BI tools provide Operational Intelligence or only Sales and Finance?
  - Do you rely on day-old or week-old data for your Operational decision making?
  - Can you track your production data in real-time anywhere in the life cycle?
    - E.g. Demand to Generation? Transmission to Distribution to Consumption?
  - Are your folks enabled to take immediate action (alerted anywhere, anytime)?
- **Do all of your sites share best practices?**
  - Do you actively minimize start-up times and costs?
  - Do you use a calendar or *predictive measures* to minimize downtime and catch problems before they create emergencies?
- **How much Operational data is being unused because your infrastructure can't store or visualize and report it all?**
  - Can you provide meaningful, enterprise visualization and reporting of your Operational data?
- **If you could generate and receive alerts in real-time, through email or IM or text messages, how much time (and money) could you save?**
  - Environmental limits, outages, equipment faults, etc.

# Alliance History



2009 GLOBAL ISV  
Industry  
**PARTNER OF THE YEAR**  
WINNER



2009 OFFICE BUSINESS APPLICATION  
**PARTNER OF THE YEAR**  
WINNER



**OSIsoft – Microsoft Alliance Partnership 2007**

**OSIsoft – Gold Certified Microsoft  
Partner in 2004**



**PI System – Certified on  
Windows Server 2003**

**OSIsoft released first version of the web offering  
on SharePoint version 1 (Digital Dashboard)**



**OSIsoft #3 company to sign up  
for VBA in 1997**

**OSIsoft ProcessBook #1 manufacturing  
company certified on Windows 95**



**OSIsoft started converting PI Server  
to beta version of NT in 1993**

OSIsoft & Microsoft have forged a strong relationship to drive business value for joint customers, building on existing infrastructure



PI Infrastructure  
PI DataLink Client  
PI DataLink Server  
PI RtWebParts  
Dynamic OBA  
Accelerators



**Microsoft**

SharePoint Server  
Excel Services  
PerformancePoint  
Office 2007  
SQL Server



## Common Areas of Interest

Many of the conversations we have are focused on these topics.

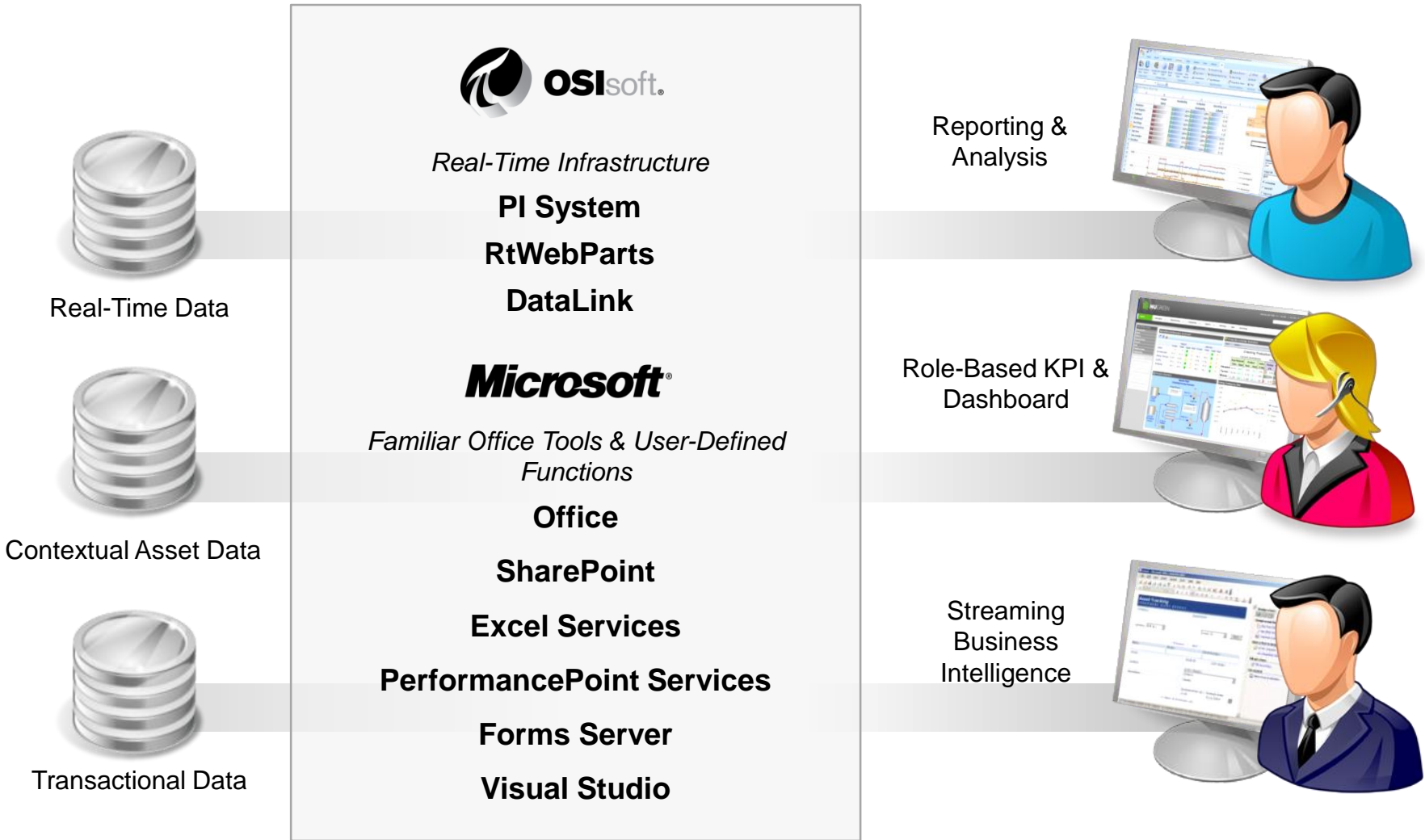
- **Real-Time Performance Management** using role-based visibility
- **Energy Management** from the datacenter to manufacturing operations
- **Continuous Emissions Monitoring** and verifying environmental compliance
- **Microsoft and OSIsoft in the SAP “Perfect Plant”** integrating your ERP systems
- **Continuous Improvement** driven through collaboration and real-time information
- **Condition Based Maintenance**, moving from reactive to proactive
- **Sustainable IT** manage resources for a greener and more profitable future

Executive Eye Opener	Strategy Briefing	Architecture Design Sessions
<ul style="list-style-type: none"> <li>• Business Oriented</li> <li>• At Your Location of Choice</li> <li>• Next: Strategy Briefing OR Architecture Design Session</li> </ul>	<ul style="list-style-type: none"> <li>• Business Oriented</li> <li>• At Local Microsoft Technology Center</li> <li>• Next: Architecture Design Session</li> </ul>	<ul style="list-style-type: none"> <li>• IT Oriented</li> <li>• At Local Microsoft Technology Center</li> <li>• Next: Proof of Concept or Pilot</li> </ul>



# What is an Office Business Application? And what makes them Dynamic?







- Accelerators Available through OSIsoft's Virtual Campus:
  - SharePoint Web Part Pages (RtWebParts)
  - PI DataLink for Excel Services
  - Linking Excel Services to RtWebParts
  - SharePoint Enterprise Search
  - InfoPath Forms Server
  - SharePoint Business Data Catalog
  - Integration with the Business Intelligence Platform
    - Analysis Services and PerformancePoint Services



# Operational Business Intelligence

- It's about Decision Making
  - Every level of management makes decisions - with or without the right data
    - Strategic to Tactical to Operational
    - Personal to Team to Enterprise
  - To have value, BI needs “the **Right Information** at the **Right Time** in the **Right Format**”
  
- Typical BI data = FOSH
  - Financial, Operational, Sales, Human Resources
  - F, S, and H are typically from ERP or other RDB
  - OSIsoft enables the Operational data
    - “OSIsoft is the ‘O’ in FOSH”

# Familiar Environment Drives Adoption

Amplify the impact of your people with the tools you already know



The image displays four overlapping computer monitors, each showing a different business software interface. The top-left monitor shows a financial dashboard with a table of performance metrics. The top-middle monitor shows a 'Project Center' interface with a table of project data. The top-right monitor shows a 'Regional Support Dashboard' with a table of support cases and a bar chart. The bottom monitor shows a 'Support Manager' interface with a table of support cases and a pie chart. The interfaces are designed to be familiar and user-friendly, with clear navigation and data visualization.

Indicator	Status	Sales Territory	Status	Status
Average Case Age	Green	2	Green	1
Customer Satisfaction	Green	Green	Green	Green
Reseller Satisfaction	Green	Green	Green	Green
Escalation per support rep	Green	Green	Green	Green
Task complete	Green	Green	Green	Green

Support Rep	Days
Amy E. Alberts	0.5
David R. Campbell	21.9
Jillian Carson	59.2
Linda C. Mitchell	61.0
Lynn N. Tsoufas	0.0
Michael G. Blythe	54.7
Pamela O. Anzman-Wolfe	19.6
Ranjit R. Varkey Chudukati	23.7
Shu K. Ito	37.8
Stephen Y. Jiang	5.4



# Technology Integration - RtWebParts for MOSS 2007



**RtWebParts Provides Instant Access to Real-Time and Historical Information Through a SharePoint Portal**



- View All Site Content
- Documents
- News
- Offices
- Departments
- Search
- Help
- Manufacturing
- Engineering
- Support Team
  - Wichita Operations
    - Fred Smith
    - Carol Berger
  - Cracking Technology
    - Deshawn Barr
    - Wilson Adams
  - Production Logistics
    - Carrie Frederickson

### Operations Performance Scorecard

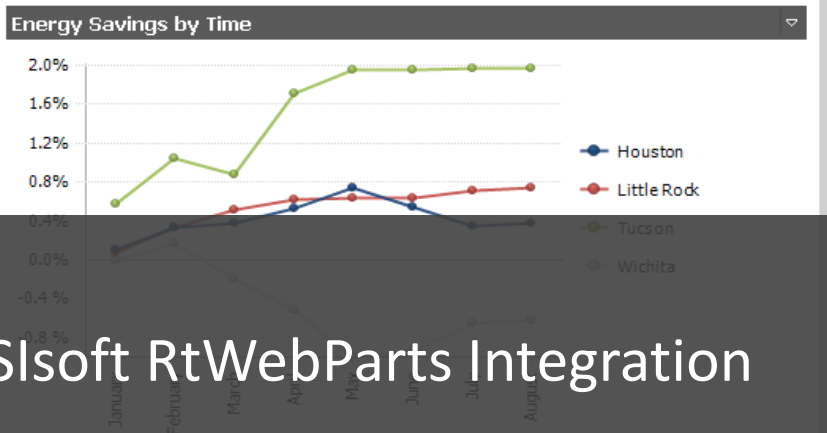
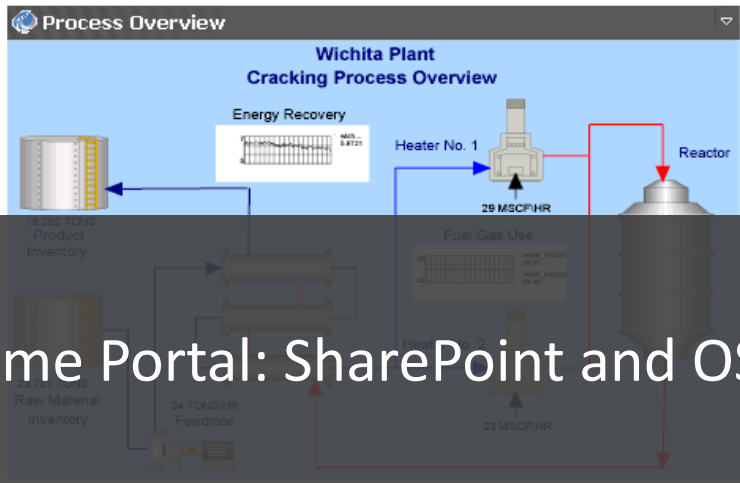
	Houston				Little Rock			
	To Date	Today	Target	Trend	To Date	Today	Target	Trend
Safety	0	0	●	→	0	0	●	→
Environment	97.1	97.0	●	↗	99.0	98.6	●	↗
Energy Savings	0.4%	0.4%	▲	→	0.5%	0.7%	▲	→
Quality	97.6	97.9	●	↗	97.3	97.6	●	↗
Reliability	95.7	96.4	●	→	95.6	96.3	●	→

### Production Schedule Worksheet

Open Update

#### Cracking Production Schedule

	Current Inventories			Today's Performance		
	Raw Material Tons	Product Days	Sales T/day	Energy 2%	Reliability 95%	Quality 98%
Houston	30,141	35.9	1200	0.5%	95.1%	97.4%
Tucson	30,166	47.1	1000	1.9%	96.0%	97.3%
Wichita	21,300	26.6	750	-0.3%	94.3%	94.3%



Real-Time Portal: SharePoint and OSIsoft RtWebParts Integration





### Operations Performance Scorecard

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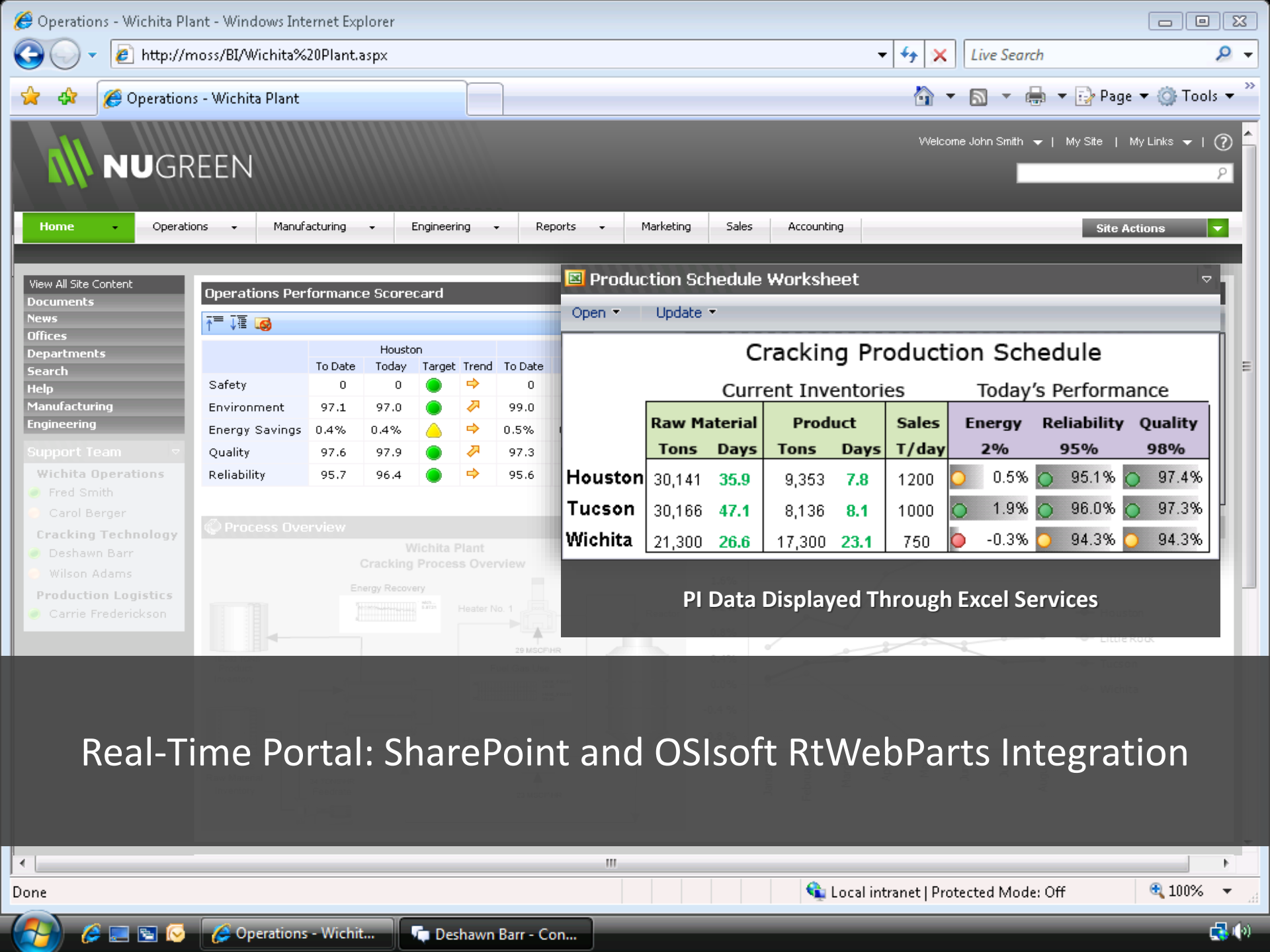
PI Data Integrated into Microsoft PerformancePoint Services

### Cracking Production Schedule

Current Inventories					Today's Performance		
Raw Material	Product	Sales	Energy	Reliability	Quality		
Tons	Days	Tons	Days	T/day	2%	95%	98%
30,141	35.9	9,353	7.8	1200	0.5%	95.1%	97.4%
30,166	47.1	8,136	8.1	1000	1.9%	96.0%	97.3%
21,300	26.6	17,300	23.1	750	-0.3%	94.3%	94.3%



# Real-Time Portal: SharePoint and OSIsoft RtWebParts Integration



Welcome John Smith | My Site | My Links | ?

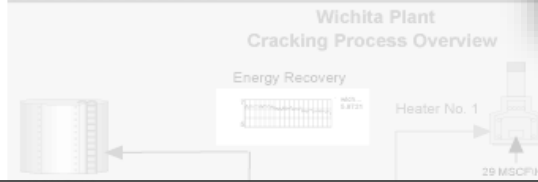
- Home
- Operations
- Manufacturing
- Engineering
- Reports
- Marketing
- Sales
- Accounting
- Site Actions

- View All Site Content
- Documents
- News
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- Departments
- Search
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### Process Overview



### Production Schedule Worksheet

Open | Update

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PI Data Displayed Through Excel Services

Real-Time Portal: SharePoint and OSIsoft RtWebParts Integration



- View All Site Content
- Documents
- News
- Offices
- Departments
- Search
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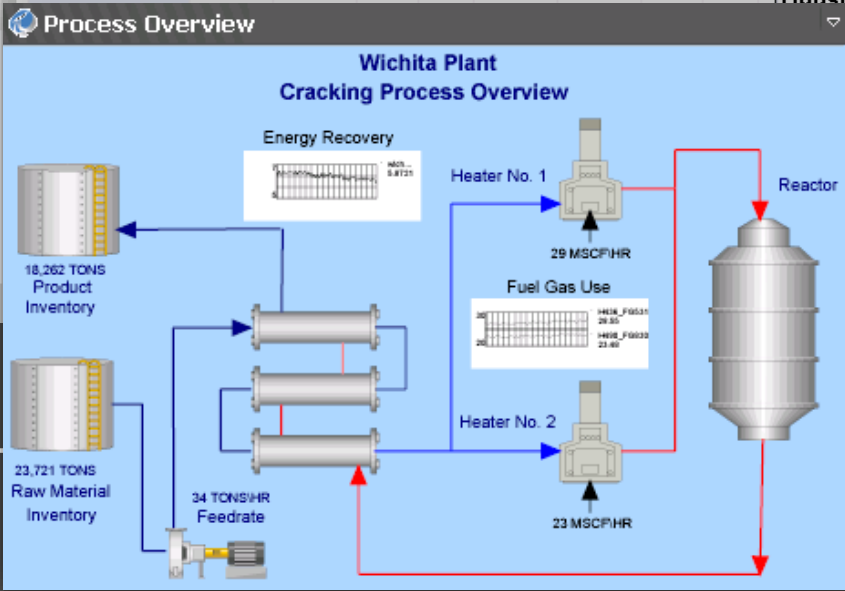
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21,300	26.6	17,300	23.1	750	● -0.3%	● 94.3%	● 94.3%



Real-T

ft RtWebParts Integration

PI Data Visualized through OSIsoft RtWebParts



- View All Site Content
- Documents
- News
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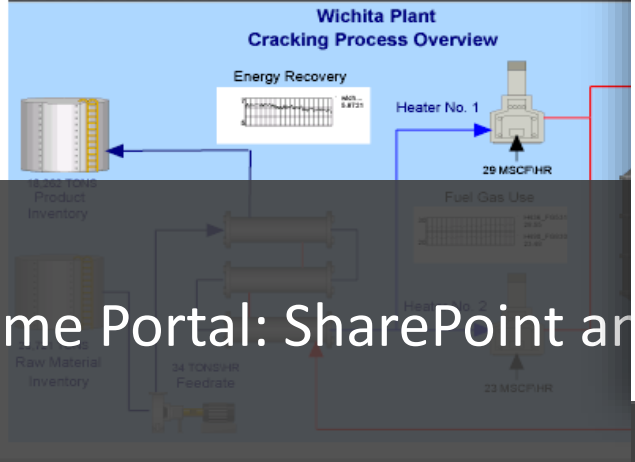
### Production Schedule Worksheet

Open Update

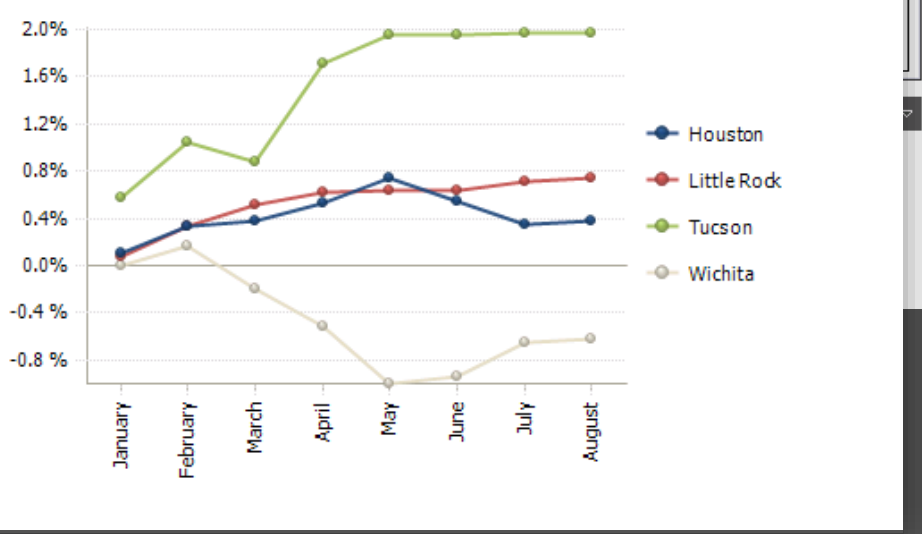
#### Cracking Production Schedule

Current Inventories			Today's Performance		
Raw Material	Product	Sales	Energy	Reliability	Quality
Tons	Days	T/d	2%	95%	98%

### Process Overview



### Energy Savings by Time



# Real-Time Portal: SharePoint and

## PI Data Integrated into Microsoft PerformancePoint Services



Support Team

- Wichita Operations**
  - Fred Smith
  - Carol Berger
- Cracking Technology**
  - Deshawn Barr
  - Wilson Adams
- Production Logistics**
  - Carrie Frederickson

Deshawn Barr - Conversation

Steve Jones  
Deshawn Barr

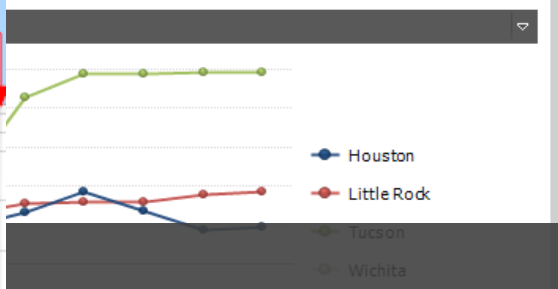
Steve Jones:  
Deshawn...

Deshawn Barr:  
Hey Steve what's up?

Worksheet

Tracking Production Schedule

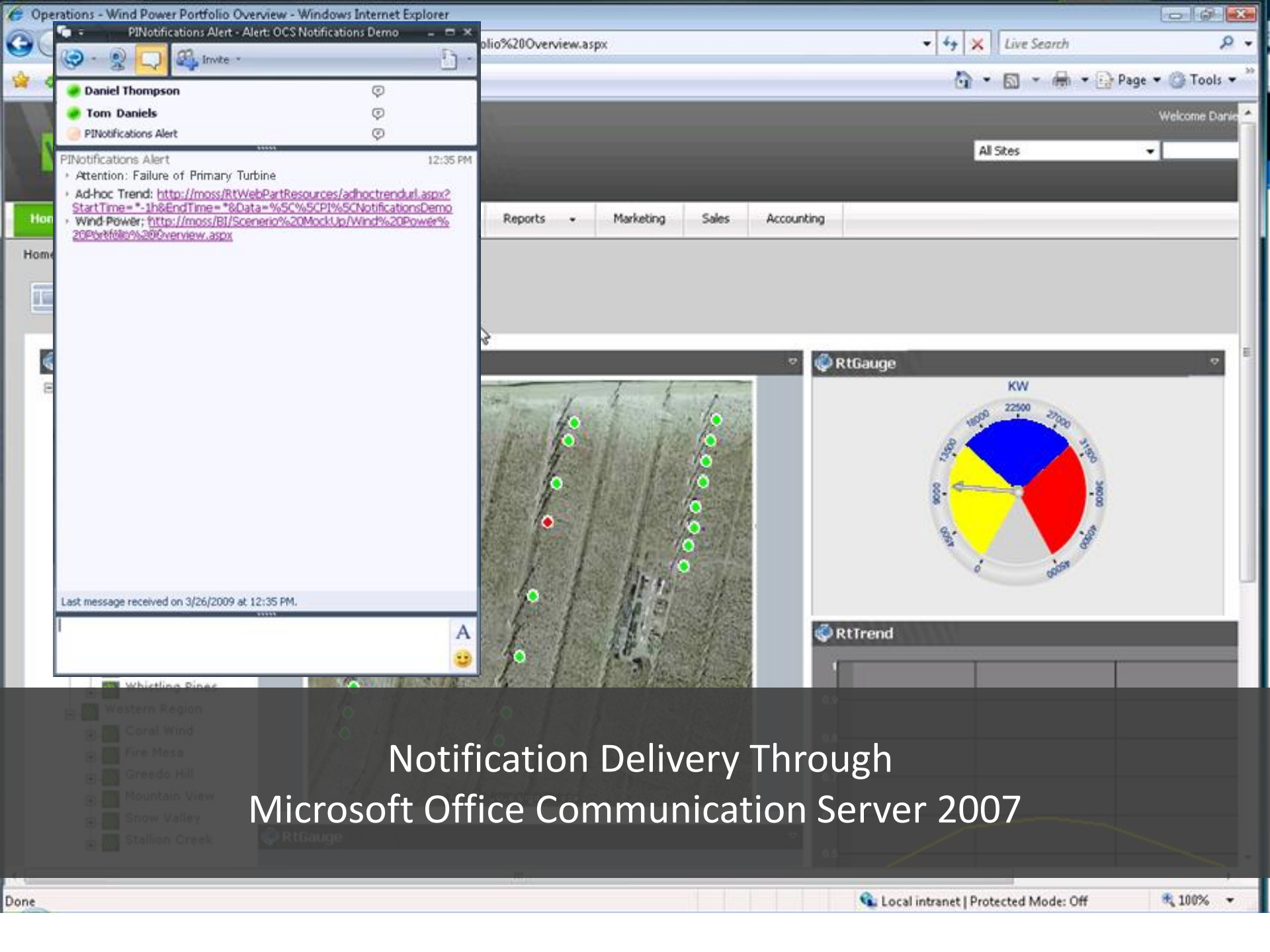
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OSIsoft RtWebPart

Office Communication

Server 2007



## Notification Delivery Through Microsoft Office Communication Server 2007





# Looking Forward

- Wave 14 coming out early 2010
  - Office, Exchange, SQL, Access, Outlook, OCS
- Office
  - SharePoint 2010 (online and offline)
  - Web versions of Word, Excel, PowerPoint, OneNote
  - Simultaneous editing
  - Mobile Client
- Three Screens and a Cloud
  - Mobile, PC, TV

<http://www.microsoft.com/office/2010>

- Realization of “BI for the Masses”
- Code Named “Gemini”
  - Analysis Services based plug-in to Excel 14
  - Quickly handles massive amounts of data
  - In memory data store, column based processing
  - Individual BI: Load - Massage - Present
  - Relate tabs via common fields for “cube-like” query and analysis
  - DAX - Data Analysis Expressions (Excel-like formulas)
  - Store into SharePoint to Share

- **Dynamic OBAs**
  - **Combining PI's real-time and historical data with the familiar MS Office tools**
- **Get ready for Self-Service BI**
  - **Wave 14 coming in 2010**
  - **Gemini** (Analysis Services + Excel + Add-in)
- **Key Questions to Take Away:**
  - **Do you have an Operational Business Intelligence architecture?**
  - **How do you Collaborate? Do all of your sites share best practices?**
  - **How much Operational data is being unused because your infrastructure can't store or visualize and report it all?**
  - **How much time (and money) could you save if you could generate and receive alerts in real-time?**
- **Leverage OSIsoft and Microsoft for a joint Innovation Engagement**

- Get Rolling on your SharePoint initiative
- Innovate with your own Dynamic OBA's
- Get ready now for Wave 14
- Contact your Microsoft or OSIsoft representative to help unlock your data



Thank you

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