

Data Agent

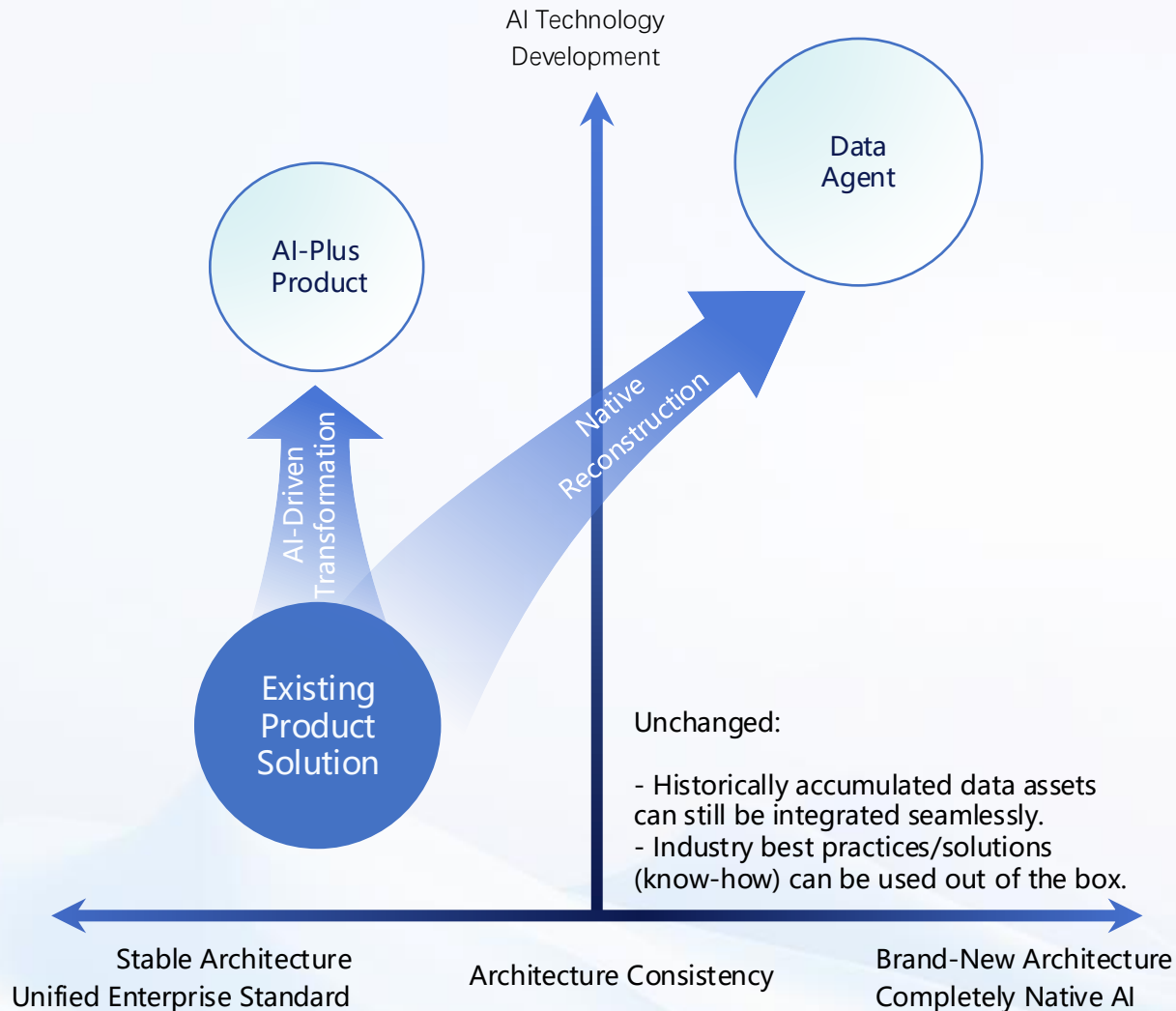
Enterprise Data Agent

Turning “Digital Employees” into Productivity!

FanRuan Product Marketing Manager



Transformation from AI Plus to AI Native



AI-Native Product | Product Design and Development in the AI-Native Architecture

Based on an AI-native architecture, product capabilities and interaction methods are redesigned. Data, context, tools, and business workflows are organized with agents as the core, supporting an end-to-end closed loop from goal understanding, task disassembly, to analysis execution and result delivery.

AI-Plus Product | AI-Driven Transformation of Original Products

Based on the existing technology stack and AI's LLM capability, AI-driven functions are constructed without disrupting users' original usage paths, improving users' scenario experience.

Core Advantage

Future Ceiling Determined by Underlying Architecture

The natural gap between legacy products and the AI technology stack may easily lead to ceiling existence. The **AI-native architecture** rises with the tide of model and technology iterations.

Full-Workflow AI Solution

In the long run, AI-driven productivity will not rely on stacking a few AI function points, but on a **complete business workflow solution** (for example, a closed loop of data fetch > insight > alert > feedback > approval).

Full-Domain Data/Context Connectivity

The historical data architecture limits AI-powered analysis capabilities. The AI-native architecture is more conducive to the **holistic planning of full-domain data/context systems** for enterprises.

Brand-New Interaction Paradigm Experience

The UI habits of legacy systems still rely on click and selection operations rather than truly **"language/goal-driven" AI interaction experience**, which may easily fragment AI capabilities.

Evolution from ChatBI to Data Agent

Breaking through the limits of traditional conversational data query tools, AI is moving toward the closed-loop execution of vertical business scenarios.



ChatBI (Data Query Tool)

Core Capabilities

Data query in natural language (NL2DSL)

Interaction Characteristics

Mainly single-turn Q&A
After obtaining data, humans still need to make decisions and execute the next actions.

Scenario Value

Mainly fast data query (low barrier)
Upfront configuration and ongoing operations are required, yielding limited ROI.

Only "Q&A" But Unable to "Execute Tasks"



Evolution



Data Agent (Digital Employee) NEW

Core Capabilities

Three-in-one: data + knowledge + related skills (including data query in natural language)

Interaction Characteristics

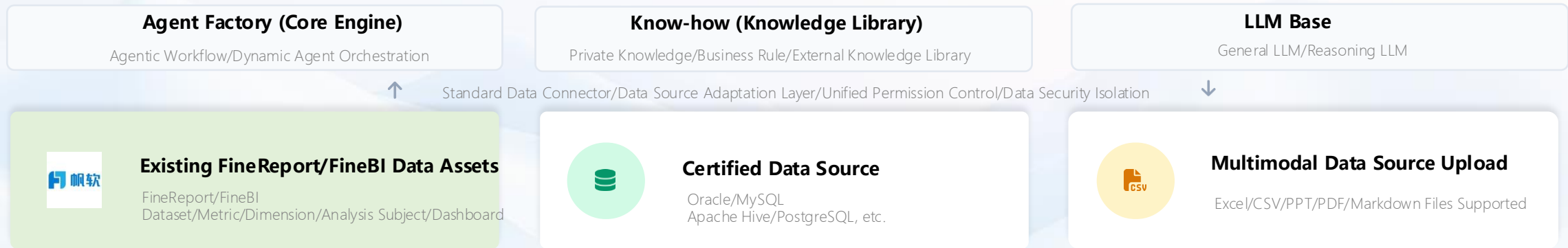
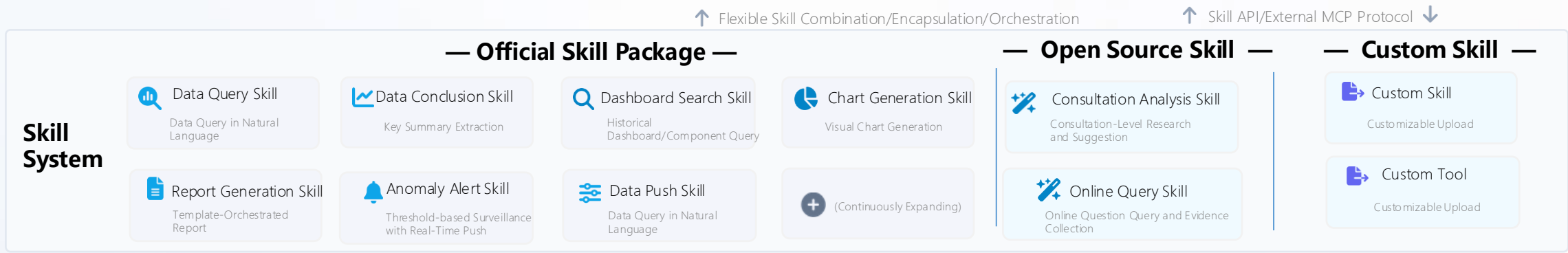
Automated end-to-end execution, user intent understanding, autonomous planning, and related skill invocation to deliver business results

Scenario Value

Closed-loop data-related tasks across different business scenarios

Value Upgrade: From "Tools" to "Task Completion"

FanRuan Digital Employee Incubation Platform (Dora)



FanRuan Data Agent's Technology Advantages



Enterprise-Level Data Security

Enterprise Data Security

- **Pure-intranet local deployment:** Ensure that data runs entirely within the intranet environment.
- **Group-level user-role permission management:** Data can be controlled at a fine-grained level (row or column level).
- **Multi-level security protection:** Enterprise-level security compliance requirements are met.



Unified Trusted Data Asset Layer

Unified Data Asset Layer

- **Multi-data-source connection and business modeling:** A unified and clear semantic layer is defined.
- **Zero-threshold efficient reuse:** Historical dashboards/reports/metric and dimension sets/other business assets can be reused.
- **Context memory management:** User preferences can be retained. In this case, the more the agent is used, the more intelligent it becomes.



Official Powerful Data Skill Library

Official Data Skill Library

- **Deep domain optimization:** FanRuan's years of data analysis methods are built in, delivering stronger performance for complex questions.
- **FineReport/FineBI atomic capability invocation:** Capabilities such as chart visualization and one-click FVS/dashboard generation can be invoked.
- **Industry scenario reuse:** Real business scenarios are continuously optimized, enriching scenario know-how.



Openness and Integration

Open & Integration

- **Multiple integration forms:** IM system connection, agent invocation (for connecting agents such as OpenClaw), and business system frontend integration are supported.
- **Open ecosystem:** Custom skills can be uploaded, and MCP server services can be connected to adapt to different business scenario requirements.



Comprehensive Coverage of Core Requirements Such As Enterprise Data Security, Asset Management, and Skill Integration

Dora's Highlight Function Modules

An enterprise-level data agent capability base has been built around skills, data, integration, and security.

1 | Skill System



Professional Data Analysis Skill



Data Push Skill



Anomaly Alert Skill



Visual Beautification Skill



Custom Skill



Custom Tool

✓ From standard capabilities to custom extensions, diverse business scenarios are supported.

2 | Data Source/Data Asset



Dashboard



Report



Metric Hub



Database



File Data Source

- ✓ Connected existing FineReport/FineBI data assets
- ✓ Including: dashboard/report/metric hub
- ✓ Connected databases and file data sources

✓ Existing data assets are unlocked to lower integration barriers.

3 | Open Integration



Dora

API



OpenClaw



MCP Service

✓ OpenClaw can be integrated.

✓ MCP services are provided.

✓ Ecosystem collaboration and capability openness are supported.

4 | Data Security



✓ The FineBI platform permission system is inherited.

✓ Zero data security risks exist.

✓ Enterprise-level permission governance is maintained to ensure secure implementation.



Management Value



Quick Reuse of Existing Data Assets



Flexible Extension of Agent Capability Boundaries



Business Implementation under Security Premises

Digital Employee Teams in Four Core Scenarios

Full-chain closed loop of data analysis, reports, alerts, and pushes across different enterprise data consumption scenarios



Data Analyst

Good At

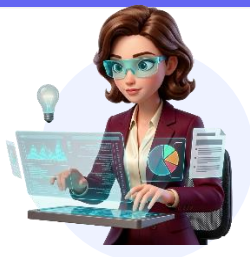
Quickly retrieve data based on specific business questions, and provide preliminary attribution analysis or analysis conclusions according to the questions. Conversational analysis is supported.

Recommended Scenarios

Data Query by Frontline Sales Personnel

Business Theme Analysis

Store Performance Attribution Analysis



Report Researcher

Good At

Based on data and business knowledge, write reports, distill insights and textual summaries, and present data analysis conclusions with intuitive charts.

Recommended Scenarios

Monthly Operation Report

Finance and Tax Risk Report

Monthly Department Work Report



Daily Report Push Secretary

Good At

Regularly query dashboards and metrics every day, generate data summaries and business recommendations, and automatically sync them to IM tools such as DingTalk, WeCom, and Lark.

Recommended Scenarios

Morning Department Meeting

Executive Morning Meeting

Data Transparency Briefing Meeting



Risk Alert Officer

Good At

Extremely sensitive to data fluctuations, identify anomalies and push alerts in real time 24/7, automatically uncover causes, and push business recommendations.

Recommended Scenarios

Yield Rate Surveillance

Customer Service Response Time

Inventory Turnover Anomaly Detection



Data Analyst

Enterprise's "data operation officer": an agile analyst for quick data query and fast attribution analysis



Recommended Application Scenarios

Resolving the scenario pain points of high barriers to data retrieval, delayed access, and difficulty data analysis due to data factors and lack of clear analysis ideas



Data Query by Frontline Sales Personnel

While traveling on business, sales personnel can ask questions anytime via mobile terminals to check customer visit information/personal performance/supplier fulfillment and obtain data results in time.



Market Potential Analysis

Based on external and internal data, input fixed analysis ideas into the LLM, and quickly ask further questions by dimension to identify target regions with "high potential and low market share".



Store Performance Analysis

Obtain store performance metrics and drill down data by dimension, such as people, products, and places, to precisely identify causes and provide business operation recommendations.



Core Capabilities

 Search existing dashboard data for related reports.

 Accumulate analysis ideas and conduct targeted analysis according to the ideas.

 Quickly query data results by chats.



Preset Skills

Dashboard Search

Data Query

Conclusion Generation



Actual Case

Identifying potential opportunities in a certain industry, a B2B market business operator asked "What is the national market potential trend for this industry in 2025?" for automatic data query. Based on business rules, the system performed quick analysis and finally found the top 3 provinces by opportunity potential along with related data.



This improved analysis efficiency by 3 times and quickly uncovered opportunities for in-time decision-making.

Report Researcher

Enterprise's "master copywriter": a report expert in structured expression and data chart presentation

Recommended Application Scenarios

Resolving the scenario pain points of time-consuming report writing, manual transcription errors, and cumbersome chart creation



Monthly Operation Report

Automatically extract business data, generate monthly operation analysis reports based on a standard framework, and create charts to ensure data caliber consistency and free up business personnel's time.



Daily Profit and Loss Report of Risk Control

Automatically capture the latest profit and loss data from dashboards every day and generate daily profit and loss reports for headquarters and each product line according to a standardized daily report paradigm.



Finance and Tax Report

Based on the latest tax policies and internal control model capabilities, submit financial data using standard templates and generate a tax compliance inspection report to avoid tax risks.

Core Capabilities



Generate report content according to structured and fixed framework templates.



Generate content analysis and key metric interpretation based on knowledge libraries.



Secondly edit reports and convert them into PPT/PDF/Word reports.



Preset Skills

Data Query

Intelligent Report

PPT Conversion



Actual Case

Before the group's business analysis meeting at the end of each month, **AI completed over 80% of the monthly business report according to a template**. Then the business manager reviewed, refined, and confirmed the report, after which the report was automatically sent to leadership and archived.



The report production cycle was shortened from 7 days to 2 days, eliminating 100% of low-level manual transcription errors.



Daily Report Push Secretary

Enterprise's "morning secretary": a thoughtful assistant who delivers a "data breakfast" on time



Recommended Application Scenarios

Resolving the scenario pain points of delayed data, reliance on people to query data, and untimely information delivery



Business Department's Morning Meeting

Automatically send the latest business data summary before the morning meeting, saving the time of manual report compiling and allowing the team to focus on problem analysis and strategy development.



Executive Morning Meeting

Push yesterday's operational overview and abnormal fluctuations to senior executives on time every morning for quick review during commuting or morning tea, enabling faster decision-making.



Routine Transparency Briefing Meeting

Regularly announce team performance rankings within the group for transparent data display, creating a healthy competitive atmosphere and stimulating team sprint momentum.



Core Capabilities



Intelligently connect to FineBI or other data sources and accurately extract key operation metrics.



Customize daily push content, including metrics, charts, and recommendations.



Create scheduled tasks to sync and push daily reports to DingTalk/WeCom/Lark with just one click.



Preset Skills

Data Query

Visual Chart

Conclusion
Generation



Actual Case

Every morning at 8:00, the regional heads automatically received a daily performance report on their phone. **Key regional operation metrics, charts, and AI recommendation summaries** were visible at a glance. They could identify underperforming teams and push execution, no longer spending over 1 hour every day in organizing summary meetings.



This saved over 1 hour per day for regional heads and sales team leaders.

Risk Alert Officer

Enterprise's "24/7 inspector": a risk-control guard who is highly sensitive to data fluctuations

Recommended Application Scenarios

Identifying abnormal data fluctuations for "in-process intervention" rather than "post-event review"



Customer Service Response Time

Supervise service queue waiting time and handling duration in real time and push alerts immediately when a sharp increase is detected to prevent concentrated customer complaints and ensure good service experience.



Yield Rate Surveillance

Return yield rate data per product line in real time, and automatically trigger alerts when the rate drops below the set threshold or continues to decline, so that the line can be stopped for inspection in time for less scrap loss.



Inventory Turnover Anomaly

Automatically identify slow-moving inventory and categories with abnormal turnover rates, and push alerts of overstock risks to assist in procurement and promotion decision-making and optimize cash flows.

Core Capabilities



Supervise data in real time based on metric thresholds and fluctuation dynamic rules.



Provide preliminary data attribution analysis of abnormal changes and corresponding recommendations.



Instantly push alerts to IM systems and proactively initiate to-do task notifications.



Preset Skills

Data Alert

Attribution Analysis

Data Query

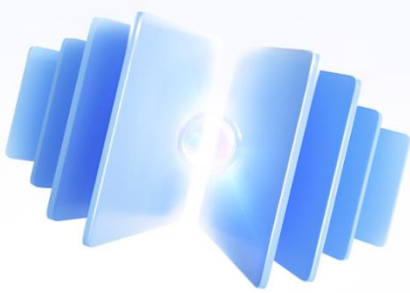


Actual Case

During a major e-commerce promotion, this agent found a sharp rise in the average customer service response time with open tickets about to exceed the threshold 100, located a certain region with a surge in metrics, and immediately notified the regional manager to take measures in time.



This avoided large-scale customer complaints and reputation decline, indirectly preventing 10%+ sales amount loss.

Thank  You