Narrative Reporting – Generative AI:

How to Successfully Leverage Generative AI to Boost your Reporting

May, 2025.

How to Successfully Implement Generative AI and Boost Reporting

Generative AI (Gen AI) within Oracle's EPM Narrative Reporting marks a jump in the evolution of financial reporting. By embedding AI-driven logic directly into reporting frameworks, organisations can now move beyond static commentary alone—automatically surfacing key insights, highlighting anomalies, and uncovering trends with speed and precision. This shift transforms reports into intelligent narratives, enabling finance teams to deliver deeper analysis and faster.

Oracle Consulting has demonstrated how GenAI can work in tandem with the Notes feature—empowering users to create layered, context-rich narratives directly within reports. This approach not only enhances transparency and traceability, but also builds a scalable foundation for deeper analytics and continuous improvement.

This white paper explores how Oracle Consulting have successfully implemented GenAI, unlocking a data rich approach by blending artificial intelligence with human insight.

Evolve your Reporting

The aim of this article is to explore the evolving role of Gen AI within Oracle's EPM Narrative Reporting and how it can be seamlessly embedded into reports to elevate the speed, accuracy, and intelligence of financial commentary.

Focusing on how report designers can integrate Gen AI-generated narratives into reporting structures, the article breaks down the key AI-driven features—describing exceptions, identifying causality, and performing comparative analysis—and demonstrates how these can be aligned with real-world EPM use cases.

In addition, this article highlights the powerful synergy between Gen AI and Narrative Reporting's Notes functionality. It showcases how end users can interact with AI-generated content by leveraging Note Templates to add contextual business insight, supporting narratives that go beyond automation and reflect organisational depth.

Ultimately, the goal is to empower reporting teams with practical guidance on using Gen AI and Notes together to build richer, smarter, and more collaborative reports that support informed decision-making across the enterprise.

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Narrative Reporting Generative AI Overview

The image below illustrates how Gen AI functions within a report. In the highlighted area, you can see a variance grid where Gen AI has been triggered to provide commentary on a data cell that exceeds a predefined threshold. This AI-generated text dynamically evaluates the data intersection, identifies relevant anomalies, and articulates them in natural language—removing the need for basic manual analysis and static commentary.

Gen AI logic works in harmony with Conditional Text rules, Analytical Dimensions (*exceptional cases*) and is driven by report PoV and data source context, ensuring that narratives remain accurate, relevant, and up to date with the latest figures.

As we explore in the following sections, GenAI doesn't replace the voice of the finance team—it enhances it. Especially when paired with the Notes feature, users gain the ability to layer in qualitative insight on top of machine-generated outputs, creating a rich and collaborative narrative ecosystem.

NR

Total Segments | November | 2022

Gen AI Narrative Reporting
Income Statement Act vs Plan

Run Date: 25-Apr-25 1:58:52 PM
By Matthew Wesley

	November Actual	November Plan	Generative AI Commentary:
Net Revenue	£ 61,688,419	£ 59,074,861	In November 2022, the actual Net Revenue for North America was £61,688,419. The Net Revenue for North America in the Actual scenario during November 2022 was £61,688,419. This is a decrease of £2,613,558 or (£-4.24)% from the Plan scenario in the same period.
Cost of Sales	£ 39,633,941	£ 37,526,098	In November 2022, the actual Cost of Sales for North America across all segments was £39,633,941. The Cost of Sales for North America in the Actual scenario for November 2022 was £39,633,941, which is a decrease of £2,107,843 or (£5.32)% compared to the Plan scenario.
Gross Profit	£ 22,054,478	£ 21,548,763	In November 2022, the Gross Profit for North America across all segments was USD £22,054,478. The Gross Profit for North America in November 2022 under the 'Plan' scenario was £21,548,763. It decreased to £22,054,478 in the 'Actual' scenario, indicating a decrease of £505,715 or (£2.29)%.
Operating Expenses	£ 16,249,091	£ 15,357,011	In November 2022, the actual Operating Expenses for North America across all segments totalled £16,249,091. The Operating Expenses for North America in November 2022 under the 'Plan' scenario was £15,357,011. It decreased to £16,249,091 in the 'Actual' scenario, indicating a negative change of £892,080 or (£-5.49)%

Image 1 – Example of 'Describe Exception' rule in practice.

The Commonalities & Exceptions with Generative AI Configuration

The following 3 sections will focus on the Commonalities and Exceptions of implementing Generative AI within Narrative Reporting.

Commonality 1 – You Must Always Insert the Conditional Rule into the Back-End.

Notably, each of the 3 Gen AI models requires a similar vein of configuration.

The key differential is the rule applied behind the scenes. The rules determine the interaction with the Oracle LLM. Therefore, ensuring the configuration is correct will allow the system to retrieve the appropriate response.

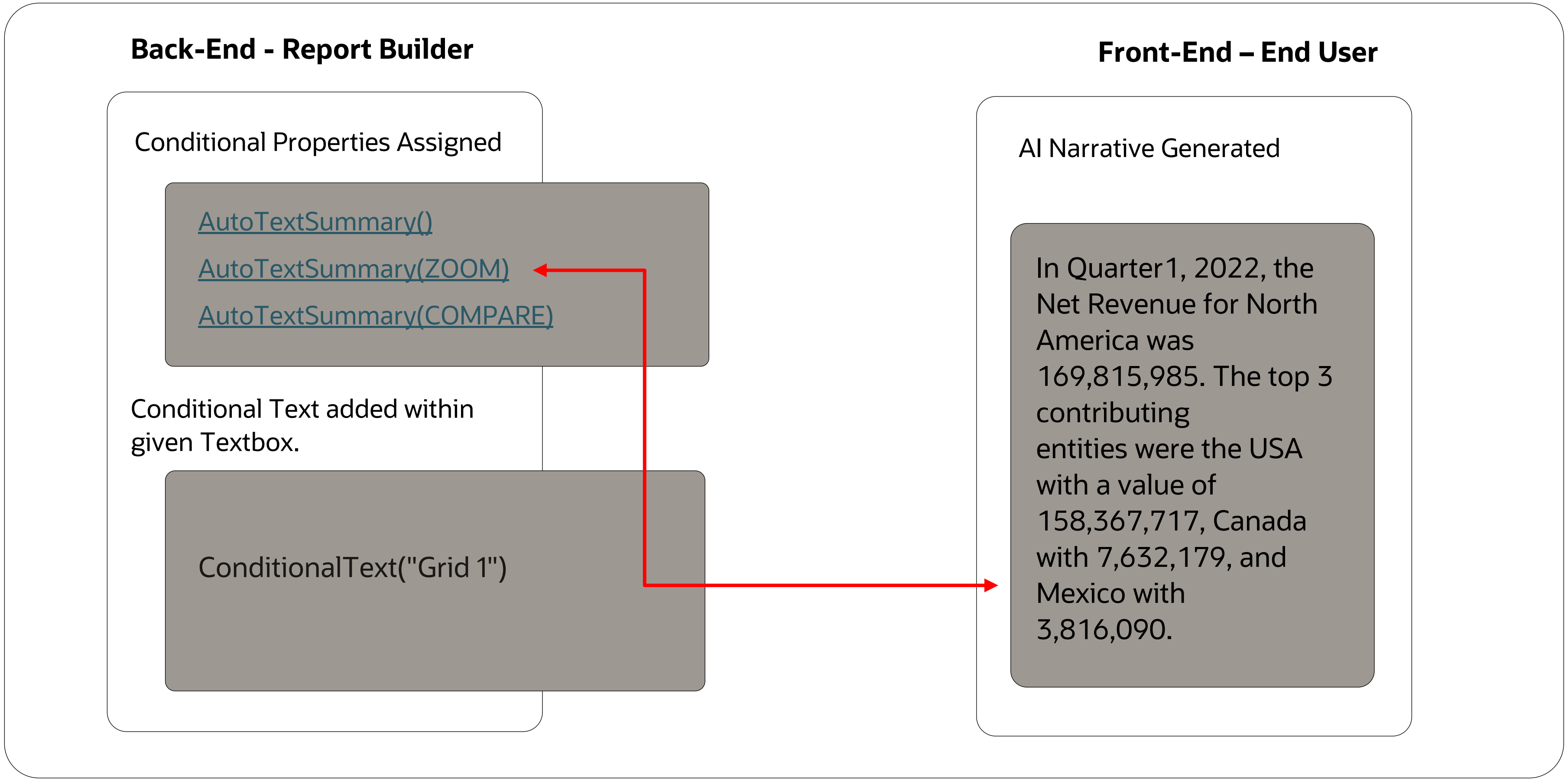
These 3 Gen AI models will be explained in more depth in this whitepaper. You can jump to them by clicking on the hyperlinks within the below table for more information:

	GenAI Models:		
Conditional Text:	**Describe Exceptions**	**Causality for Exceptions**	**Comparative Analysis**
Conditional Text/ Format rule	AutoTextSummary()	AutoTextSummary(ZOOM)	AutoTextSummary(COMPARE)

Commonality 2 – You Must Always insert the Conditional Text in the Front-End

Think of the Back-End conditional property as the source and the Front-End the target. For the system to understand its objective both sections must be set up appropriately.

In the example below, AutoTextSummary(ZOOM) has been applied within the conditional properties, then configured as per the requirement. The Conditional Text has been added as a target and once run the output is generated to the front-end

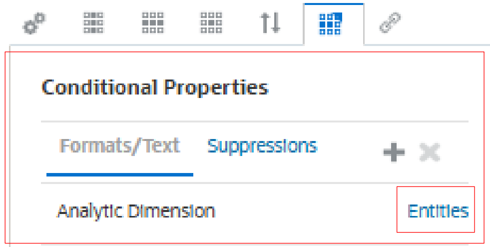


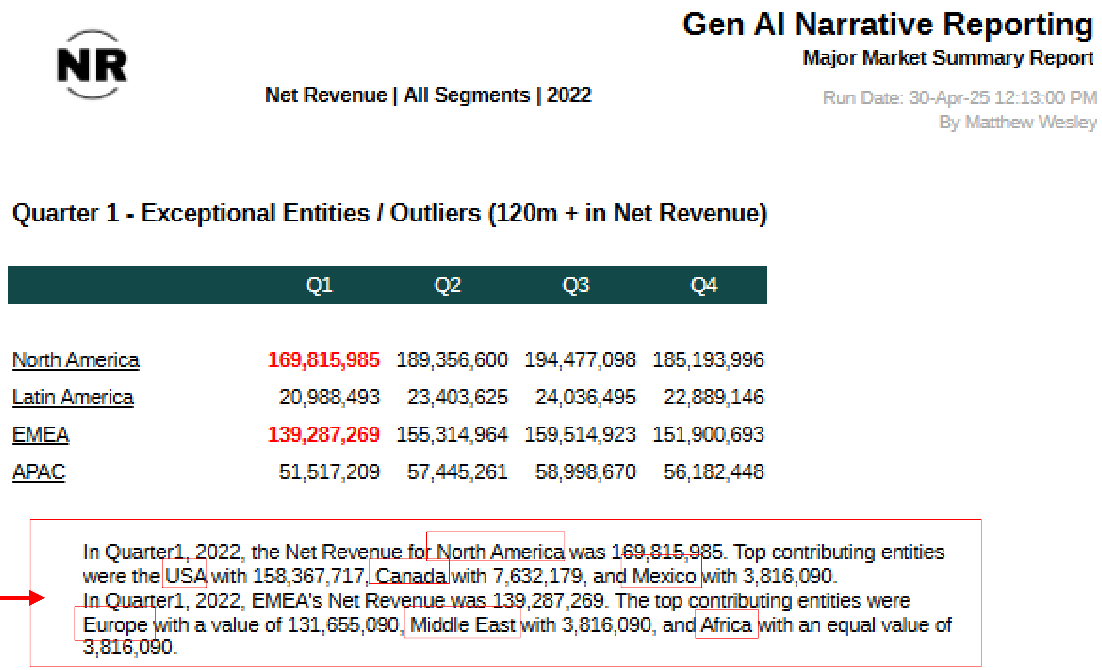
Exception 1 – The Analytic Dimension is Unique to Causality for Exceptions Only

The Analytic Dimension is the Anchor dimension in this use case – the focus of the analysis. This can be adjusted depending on what you wish to focus on.

In the example below, within Conditional Properties the Analytic Dimension selected is the Entity Dimension. This means the conditional properties will focus on that dimension. Therefore, when the Generative AI narrative is produced it will be focusing only on that data intersection.

The condition defined determines if either top or bottom contributors are returned. To return the top contributors use, "greater than" or "greater than equal to". To return the bottom contributors, use "less than" or "less than equal to".





Gen AI Narrative Reporting
Major Market Summary Report

Net Revenue | All Segments | 2022

Run Date: 30-Apr-25 12:13:00 PM
By Matthew Wesley

Quarter 1 - Exceptional Entities / Outliers (120m + in Net Revenue)

	Q1	Q2	Q3	Q4
North America	169,815,985	189,356,600	194,477,098	185,193,996
Latin America	20,988,493	23,403,625	24,036,495	22,889,146
EMEA	139,287,269	155,314,964	159,514,923	151,900,693
APAC	51,517,209	57,445,261	58,998,670	56,182,448

In Quarter1, 2022, the Net Revenue for North America was 169,815,985. Top contributing entities were the USA with 158,367,717, Canada with 7,632,179, and Mexico with 3,816,090.
In Quarter1, 2022, EMEA's Net Revenue was 139,287,269. The top contributing entities were Europe with a value of 131,655,090, Middle East with 3,816,090, and Africa with an equal value of 3,816,090.

Note *– the entities boxed in red on the right*

are entities within this demo application.

The 3 Use Cases in Practice

1. Describes Exceptions by surfacing anomalies within Reports.

a. What exactly is 'Describing Exceptions'?

Describing exceptions: Describe the cell(s) where a condition is satisfied. For example, a grid cell that satisfies the variance threshold defined by the report designer as a condition.

b. How can it be configured in Practice?

This section will flow through best-practice configuration of the "Describing Exceptions" Gen AI model.

1. Upon opening the Report Designer, the user will need to configure the Conditional Properties to invoke the Generative AI functionality. You can see in the red box the conditional text has been added, this is essentially where the impact of the conditional properties will be seen in text form. Importantly, this is a text box that has been inserted. This can be added below a grid and crucially within a grid, presenting an equivalent of a financial line item (as seen in *image 1, page 4*)

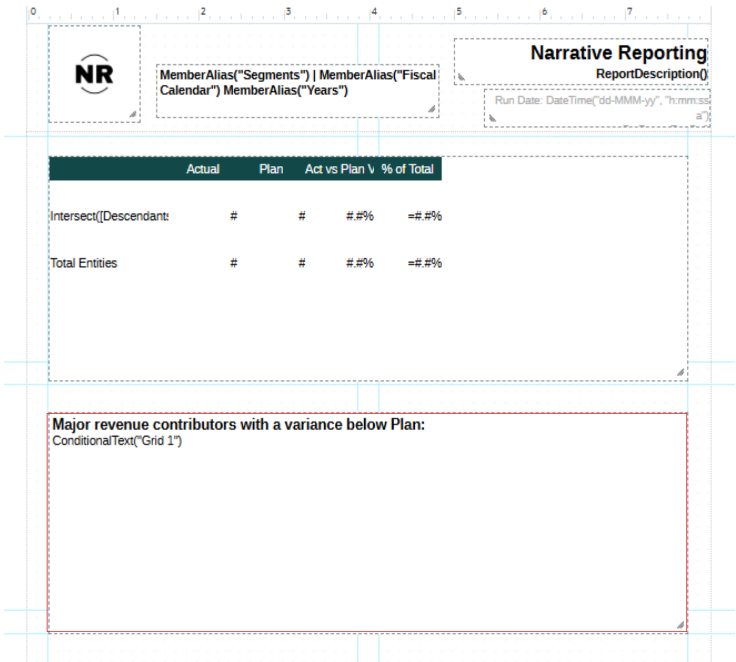


Image 2 – inserting conditional text to populate the narrative GenAI response.

2. To create the Conditional Properties required the user must hit edit on the data grid and navigate behind the scenes to the Conditional Properties section. Crucially, the user must consider how to configure the conditional text:

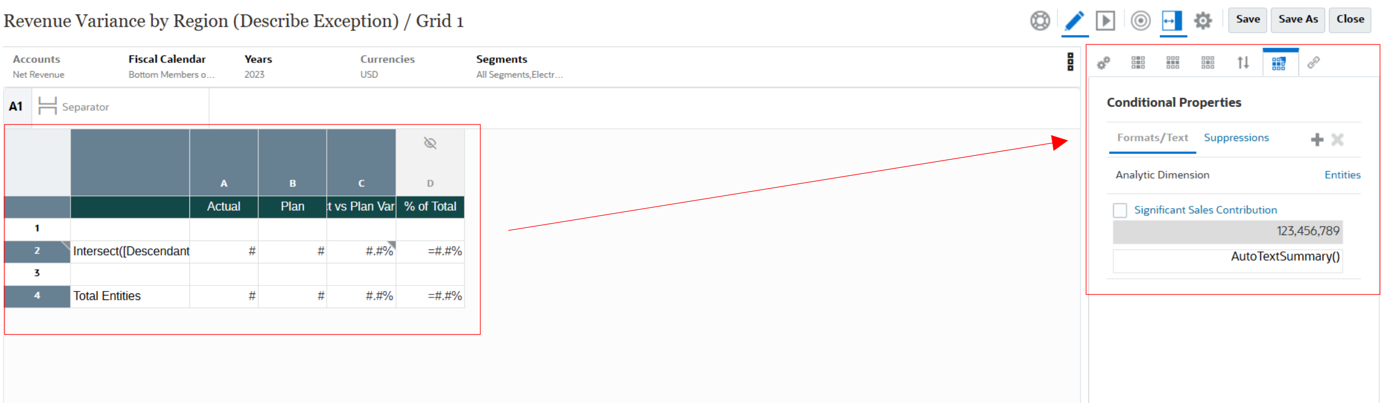


Image 3 – Conditional Properties

a. Creating the Conditional Format/ Text logic

As seen in *image 4* on the following page. Within this section you define the conditions that needs to be met for the conditional formatting to be applied and provide a name. In this example you can see that if Column A is greater than the value of 50,000,000 (Actuals – in relation to the Analytic dimension – Entity) and Column B is greater than the value of 50,000,000 (Plan – in relation to the Analytic dimension – Entity) then the conditional properties are applied.

Note – the conditions applied in this case are a light gray fill as a quick identifier (this can be seen in *image 3* on the right-hand section).

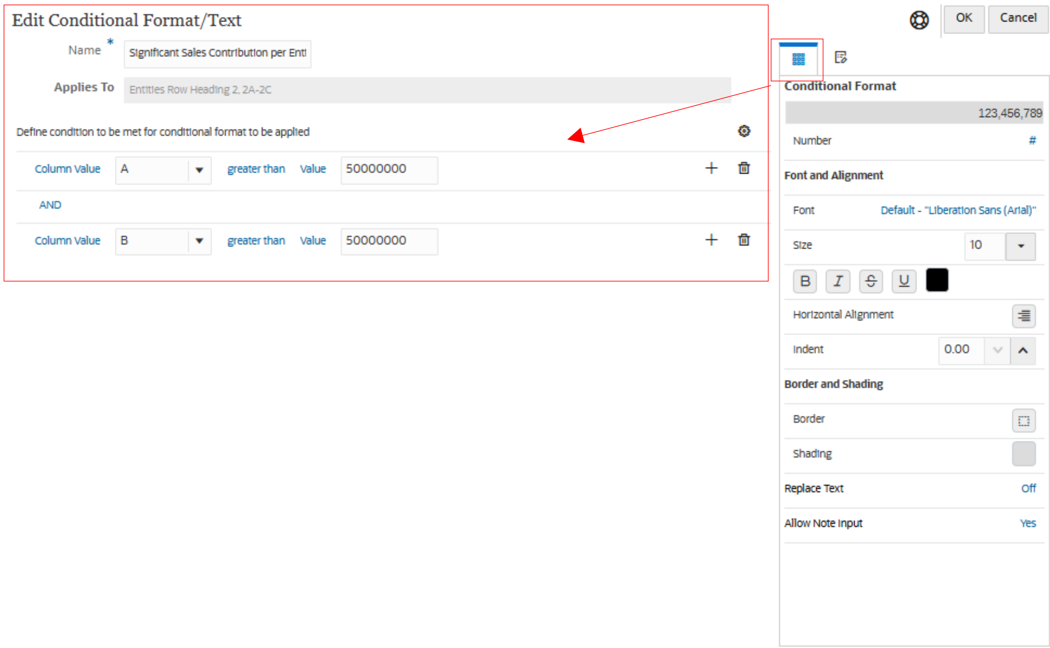


Image 4 – Conditional Property Allocation.

3. As per *Image 5* - once having assigned the Conditional Properties you must similar to step 1 (*image 2*) assign the conditional text by adding in 'AutoTextSummary()' this must be added or the rule will not understand the source of the conditional format.

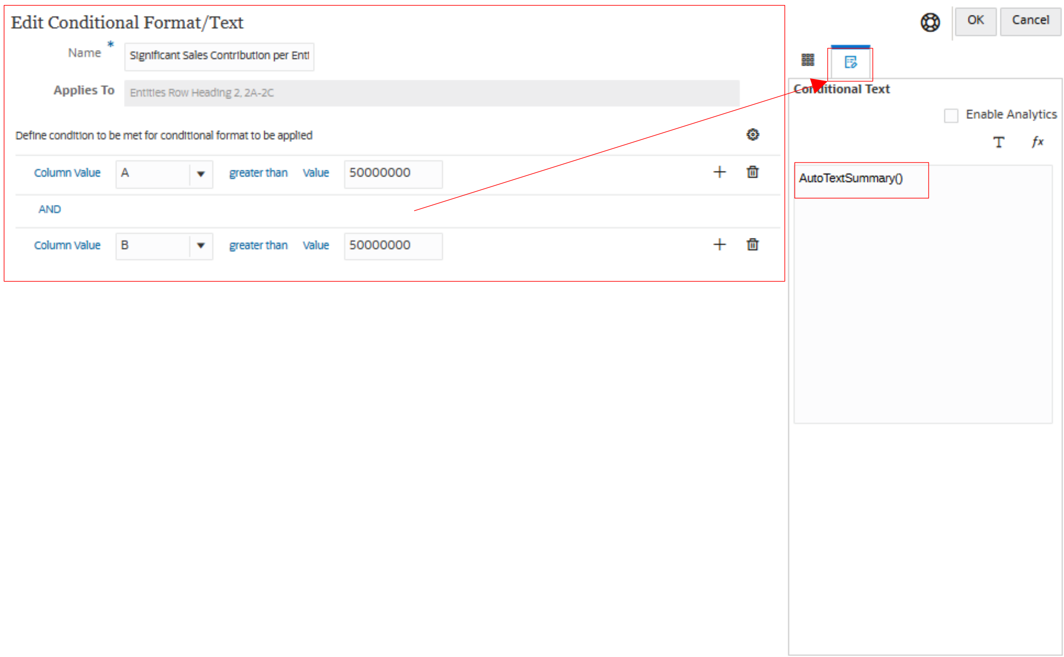


Image 5 – Adding the Conditional Text layer.

<u>Breakdown:</u>

The result is as per *image 6* and *image 7*.

- The exceptional entities within the intersection have been identified and filled in light gray.
- The conditional text is generated – in Example 1 it is within a text box below the grid, and it example 2 – it is within a text column.

As mentioned previously it is possible to create this function in a financial line-item styled format per *image 7*. This can be achieved by creating a text column within the grid and adding the conditional text.

c. 'Describes Exceptions' Practical Examples

'Describe Exceptions' Example 1

NR

All Segments | June 2023

Narrative Reporting

Revenue Variance by Region

Run Date: 29-Apr-25 9:35:29 AM
By Matthew Wesley

	Actual	Plan	Variance %
USA	65,172,091	66,014,146	-1.3%
Canada	3,140,824	3,220,978	-2.5%
Brazil	3,140,824	3,066,455	2.4%
Europe	54,179,208	54,343,071	-0.3%
China	6,281,647	6,150,091	2.1%
Hong Kong	4,711,236	4,668,667	0.9%
Japan	3,140,824	3,078,852	2.0%
Total Entities	157,041,184	157,730,824	(0.4%)

Major revenue contributors with a variance below Plan:
In June 2023, the actual value for the USA was 65,172,091.
In June 2023, the plan value for All Segments in the USA was 66,014,146.
In June 2023, the variance for the USA was -1.3%.
In June 2023, the Actual value for All Segments across Europe was 54,179,208.
In 2023, the plan for June across all segments in Europe was 54,343,071.
In June 2023, the variance for Europe was -0.3% across all segments.

Image 6 – Standard text box insert version with Gen AI commentary.

Describe Exceptions' Example 2

All Segments | June 2023

Narrative Reporting
Revenue Variance by Region

Run Date: 29-Apr-25 9:39:41 AM
By Matthew Wesley

	Actual	Plan	Variance %	GenAI Commentary:
USA	65,172,091	66,014,146	-1.3%	In 2023, June's actual value for the USA was 65,172,091. In 2023, the plan for June across all segments in the USA was 66,014,146. In June 2023, the Variance % across all segments for USA was -1.3%.
Canada	3,140,824	3,220,978	-2.5%	
Brazil	3,140,824	3,066,455	2.4%	
Europe	54,179,208	54,343,071	-0.3%	In June 2023, the Actual value for All Segments across Europe was 54,179,208. In 2023, the plan value for all segments across Europe was 54,343,071 in the month of June. In June 2023, the Variance % across all segments in Europe was -0.3%.
China	6,281,647	6,150,091	2.1%	
Hong Kong	4,711,236	4,668,667	0.9%	
Japan	3,140,824	3,078,852	2.0%	
Total Entities	157,041,184	157,730,824	(0.4%)	

Image 7 – financial line item insert version with Gen AI commentary.

2. Describe Causality by identifying the top contributing drivers.

a. What exactly is 'Describing the Causality for Exceptions'?

Describe the causality for exceptions: Examine one of the relevant cell dimensions where the condition was satisfied and describe the top or bottom contributors to it.

b. How can it be configured in Practice?

This section will take you through a step-by-step on how to configure the 'Causality for Exceptions' Gen AI model for Reporting.

1. Firstly, build up the grid you wish to analyse. Upon completion, go to the conditional properties tab within the Report Builder. Then choose the 'Analytical Dimension' you wish to act as your anchor for the Gen AI narrative creation. Once configured, you will then need to configure the conditional properties for this given Gen AI model.

   In this specific case of Describe the causality for exceptions, where the service needs to internally zoom in on a dimension to retrieve relevant data values, in the Conditional Properties tab, select an Analytic Dimension, which is typically the row dimension in the grid.

   Note:

   - The Analytic Dimension property is only used for GenAI narrative generation for the **Causality for exceptions** use case**; it is not** used elsewhere for any other use cases or functionality (*image 8*).

   - The condition defined determines if either top or bottom contributors are returned. To return the top contributors use, "greater than" or "greater than equal to". To return the bottom contributors, use "less than" or "less than equal to"

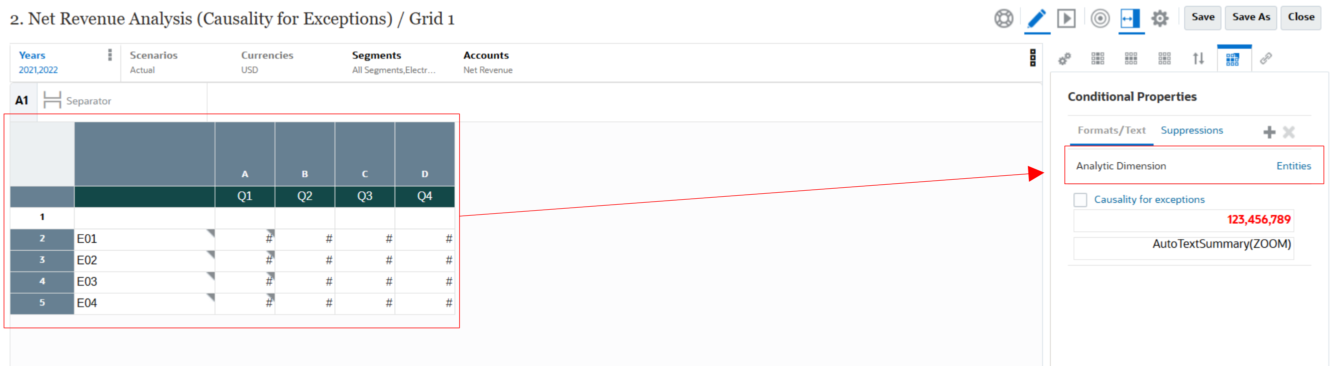


Image 8 – configuring the Analytical Dimension.

2. As you can see below in *image 9*, a decision has been made to make the current cell value **greater than** 120m to trigger the Gen AI response. Upon the condition being met the text will change to a bold red as per the breakdown on the right-hand column section.

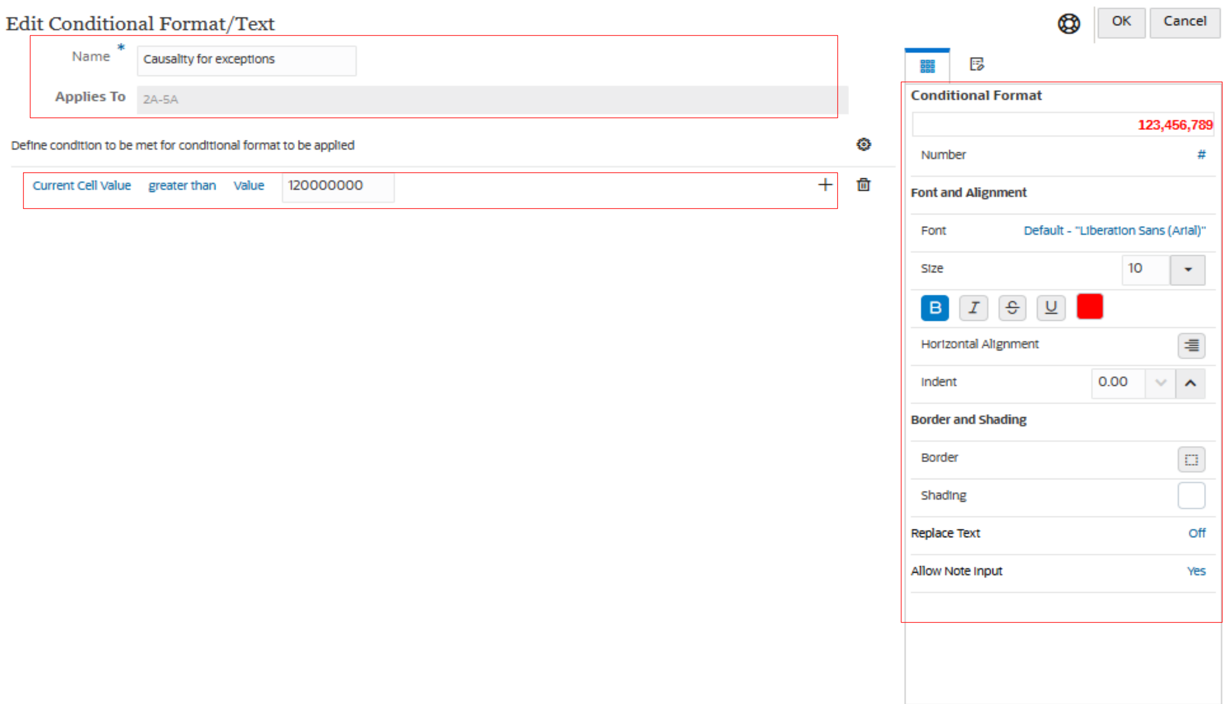


Image 9 – configuring the 'Causality for Exceptions'.

3. **Note** – as mentioned in the Commonalities section – the back end via the Conditional Text tab must always have the appropriate syntax which aligns to the Gen AI model of choice. Glancing at *image 10*, you can identify the correct configuration for the 'Causality for Exceptions' approach - you can check the table here to confirm.

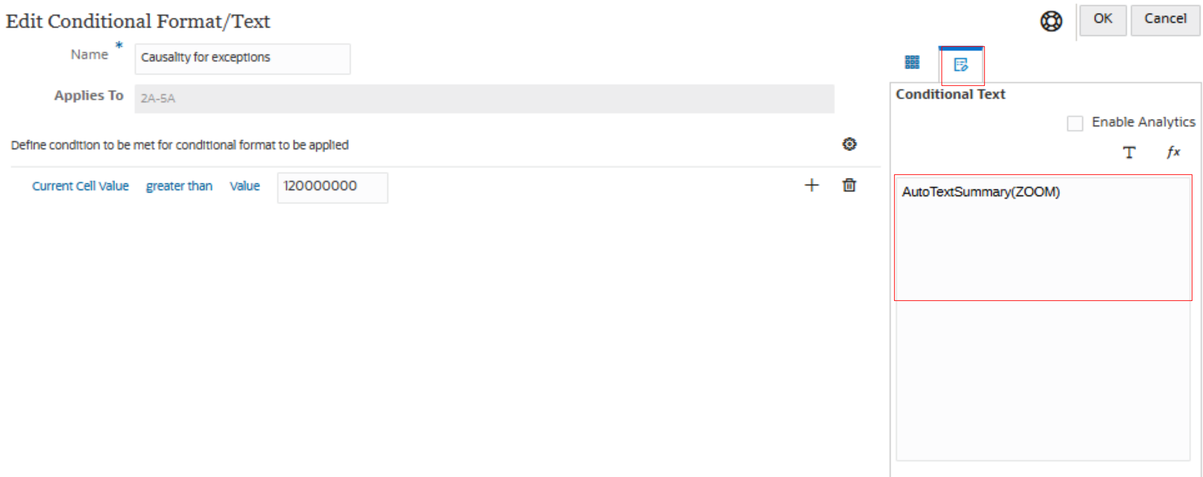


Image 10 – applying the conditional text to the back-end.

4. Once configured the condition must now be applied. This can be done easily by highlighting the cells you wish to focus on and by hitting the tick icon in the top-left section of the conditional property box – check *image 11* below:

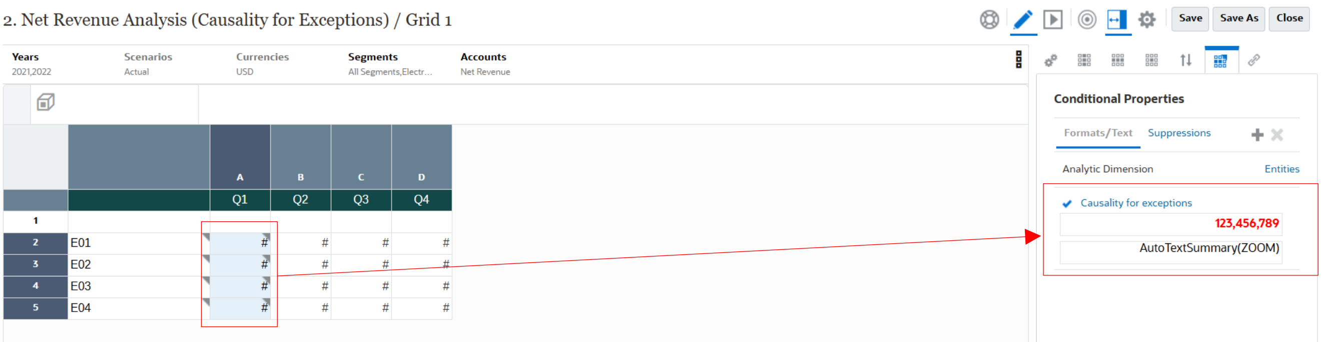


Image 11 – ticking the 'Causality for Exceptions' box to facilitate the condition.

5. The user must then hit the preview icon and the following as per *image 12 (next page)* will display.

c. ‘Describing the causality for exceptions’ Practical Example

Breakdown:

- Cell greater than 120m is highlighted in red and **bold.** In this case, the North American and EMEA entity parents have been highlighted.
- The 3 top contributors within that structure are identified within the text automatically – check the text box below in *image 12*.

Gen AI Narrative Reporting

Major Market Summary Report

Net Revenue | All Segments | 2021

Run Date: 01-May-25 9:13:08 AM
By Matthew Wesley

Quarter 1 - Exceptional Entities / Outliers (120m + in Net Revenue)

	Q1	Q2	Q3	Q4
North America	**160,150,418**	178,225,775	183,347,657	174,592,709
Latin America	19,793,872	22,027,905	22,660,946	21,578,874
EMEA	**131,359,332**	146,185,186	150,386,281	143,205,256
APAC	45,858,952	52,964,174	55,622,323	48,422,266

In Quarter1, 2021, Net Revenue for North America across all segments amounted to 160,150,418. The top 3 contributing entities were the USA with a value of 149,353,761, Canada with 7,197,772, and Mexico with 3,598,886.
In the first quarter of 2021, EMEA's Net Revenue was 1,313,592. The top three contributing entities were Europe with 1,241,615, the Middle East with 359,886, and Africa with an equal amount of 359,886.

Image 12 – ‘Causality for Exceptions’ Gen AI narrative populated.

3. Comparative Analysis

a. What exactly is 'Comparative Analysis'?

Performing a comparative analysis: If the grid has prior time periods in the columns, describe the cell value in comparison to the prior period.

b. How can it be configured in Practice?

1. Create the Report breakdown desired and add the text box and 'ConditionalText()' syntax as per the commonalities section. In the example below - *image 13* - the Generative AI Commentary section has been added as a text box within a grid instead of a standalone text box – this acts as a financial line item.

   Note – the grid has been created with Accounts in the rows and the Actual and Plan Scenarios and Periods (*required in this use case*) in the Columns. The desire is that the Gen AI model reads the account and compares the Actual Vs. Plan and provides and commentary.

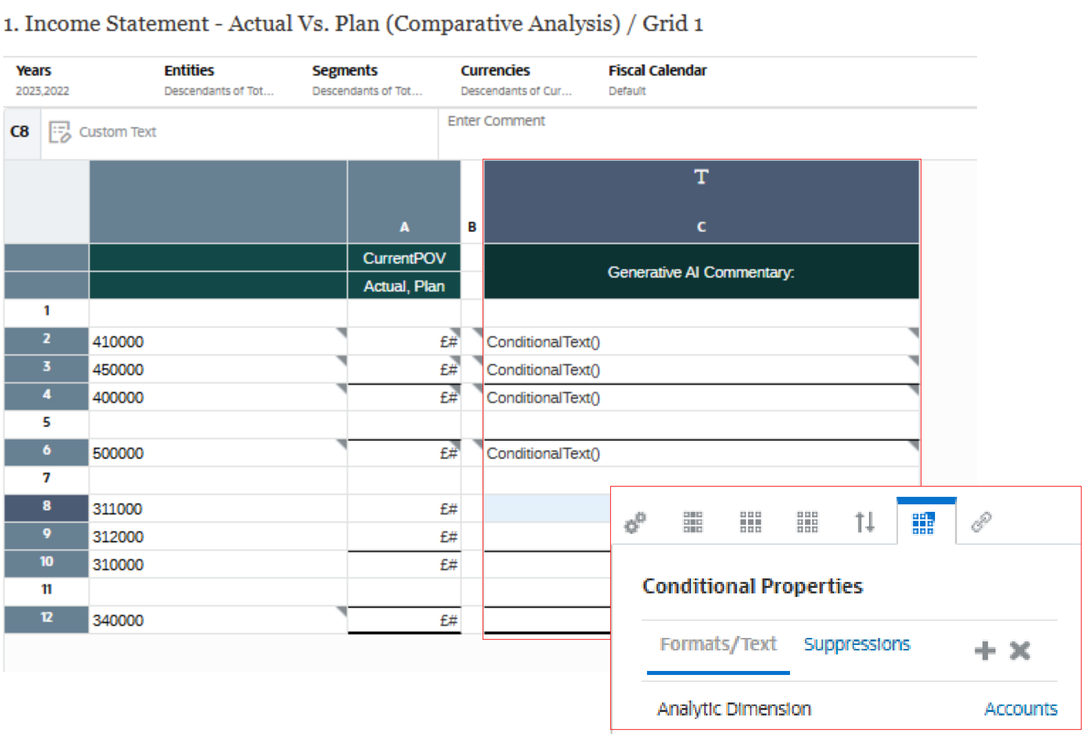
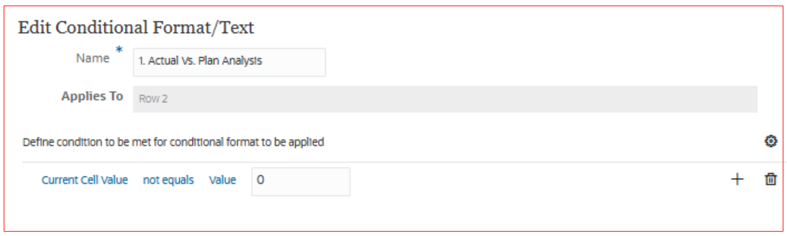


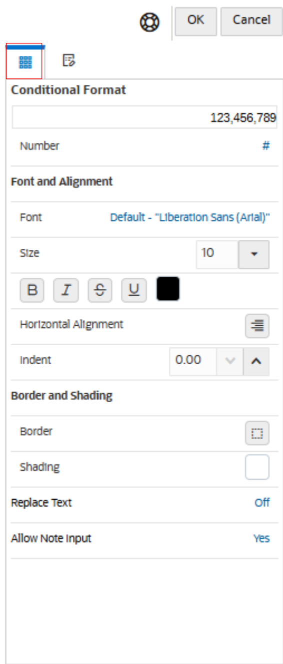
Image 13 – Comparative Analysis Grid Configuration.

2. The Conditional Format/ Text then needs to be applied – in the example below (*image 14*) a name for the Condition has been applied, and the definition to be met for the condition to be applied has been identified in the form of ‘current cell value’ not equaling the value of 0.

   This ensures that if the data in my grid does not equal exactly 0 then this calculation will be present in all the cells selected.

   Note – In the bottom left section of image 14, you will identify the Conditional text applied. This is as per the commonalities section instruction.





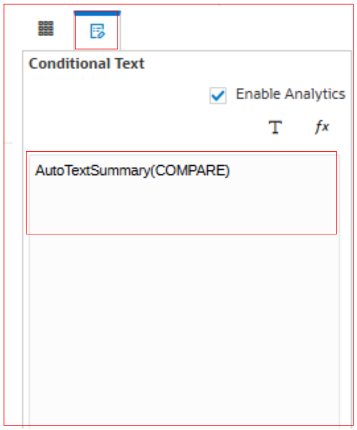


Image 14 – Comparative Analysis back-end configuration.

3. Once all is configured hit the preview icon and the report will appear with the Gen AI Narrative assigned as per *image 15* on the following page.

Breakdown:

- The configuration is reading the given accounts in the rows against the scenarios in the columns – making a comparison between June 2023 Actual Vs. Plan and providing a basic understanding of what is happening through that comparative lens.

c. ‘Describing the causality for exceptions’ Practical Example

NR

All Segments | June | 2023

Gen AI Narrative Reporting

Income Statement Act vs Plan

Run Date: 02-May-25 11:08:53 AM
By Matthew Wesley

	June Actual	June Plan	Generative AI Commentary:
Net Revenue	£ 69,883,327	£ 70,782,846	In June 2023, the actual Net Revenue for North America was £69,883,327. The Net Revenue for North America in the Actual scenario for June 2023 was £69,883,327, which is a £899,519 or 1.29% decrease from the Plan scenario.
Cost of Sales	£ 47,337,845	£ 47,594,038	In June 2023, the actual Cost of Sales for North America across all segments was £47,337,845. The Cost of Sales for North America in the Actual scenario for June 2023 was £47,337,845, which is a decrease of £256,193 or 0.54% from the planned £47,594,038.
Gross Profit	£ 22,545,482	£ 23,188,808	In June 2023, the Gross Profit for North America across all segments was £22,545,482. The Gross Profit for North America in the Actual scenario for June 2023 was £22,545,482, which is lower by £2.85% compared to the Plan scenario's £23,188,808.
Operating Expenses	£ 18,807,332	£ 18,857,337	In June 2023, the actual Operating Expenses for North America were £18,807,332. The Operating Expenses for North America in the Actual scenario for June 2023 was £18,807,332, showing an increase of £50,005 or 0.27% compared to the Plan scenario.
Pretax Income From Operations	£ 3,738,149	£ 4,331,471	
Other Exp (Inc)	£ -833,933)	£ -835,119)	
Total Pretax Income	£ 2,904,217	£ 3,496,352	
Net Income	£ 1,891,979	£ 2,481,607	

Image 15 – Comparative Analysis example – Actual Vs. Plan for June 2023.

Combining Notes & GenAI to drive Basic & Comprehensive Analysis

Oracle's Narrative Reporting offers the opportunity to align machine-generated insight with human context. By combining GenAI features with the Notes functionality, organisations can create intelligent narratives that support both foundational understanding and in-depth financial storytelling.

The Approach

GenAI automates the generation of commentary in response to data conditions—identifying exceptions, explaining causality, and performing comparative analysis. These outputs are dynamically generated based on Point of View (PoV), leveraging Conditional Text logic and Analytical Dimensions (*when using causality for exceptions only*). When layered with Notes—structured, PoV-linked commentary from business users—the result is a dual narrative: AI-generated analysis plus user-driven interpretation.

An example of this can be found on the following page.

Real-World Scenario

A ‘Causality for Exceptions’ focused report – *image 16* - highlights exceptional Net Revenue results for a handful of companies:

- **Gen AI Commentary:**

  “In Quarter1, 2021, Net Revenue for North America across all segments amounted to 160,150,418.
  The top three contributing entities were the USA with a value of 149,353,761, Canada with 7,197,772, and Mexico with 3,598,886”

Gen AI Narrative Reporting
Major Market Summary Report

Net Revenue | All Segments | 2021

Run Date: 02-May-25 11:23:24 AM
By Matthew Wesley

Quarter 1 - Exceptional Entities / Outliers (120m + in Net Revenue)

	Q1	Q2	Q3	Q4	Note Commentary
North America	**160,150,418**	178,225,775	183,347,657	174,592,709	The strong Q1 2021 performance in North America, led predominantly by the USA, reflects the success of our targeted investment in digital sales infrastructure and localized marketing strategies. The U.S. market benefitted from accelerated eCommerce adoption and stimulus-driven consumer demand, reinforcing its role as our primary revenue driver. Canada's steady contribution highlights market stability, while Mexico's growth, though modest, signals early returns from our regional expansion efforts. This geographic performance supports continued prioritization of the U.S. for core revenue generation while justifying increased strategic focus on scaling operations in Mexico to diversify regional revenue streams.
Latin America	19,793,872	22,027,905	22,660,946	21,578,874	
EMEA	**131,359,332**	146,185,186	150,386,281	143,205,256	EMEA’s Q1 2021 net revenue performance was primarily driven by Europe, contributing over 94% of the region’s total. This reflects our established presence, brand recognition, and optimized supply chain operations across key European markets. The identical contributions from the Middle East and Africa—though relatively small—demonstrate the initial success of our market entry and partnership strategies in these regions. These results support a two-tiered regional approach: consolidating our stronghold in Europe through product innovation and operational efficiency, while pursuing scalable growth opportunities in the Middle East and Africa through targeted investment and localization efforts.
APAC	45,858,952	52,964,174	55,622,323	48,422,266	

Gen AI Commentary:

In Quarter1, 2021, Net Revenue for North America across all segments amounted to 160,150,418. The top 3 contributing entities were the USA with a value of 149,353,761, Canada with 7,197,772, and Mexico with 3,598,886.
In the first quarter of 2021, EMEA's Net Revenue was 1,313,592. The top three contributing entities were Europe with 1,241,615, the Middle East with 359,886, and Africa with an equal amount of 359,886.

Image 16 – Combining Gen AI with Notes

- **The FP&A team adds their own Note commentary to justify the AI response:**

  "The strong Q1 2021 performance in North America, led predominantly by the USA, reflects the success of our targeted investment in digital sales infrastructure and localized marketing strategies. The U.S. market benefitted from accelerated eCommerce adoption and stimulus-driven consumer demand, reinforcing its role as our primary revenue driver. Canada's steady contribution highlights market stability, while Mexico's growth, though modest, signals early returns from our regional expansion efforts. This geographic performance supports continued prioritization of the U.S. for core revenue generation while justifying increased strategic focus on scaling operations in Mexico to diversify regional revenue streams".

This combination not only answers what happened but begins to address why, and even what might happen next – The Gen AI provides the basics, and the human adds the layering.

How does this Combined Approach Provide Extra Value?

Benefit	How?
Enhanced Insight	Augments AI-generated data points with business-specific insight, improving contextual understanding.
Collaboration Across Teams	Notes facilitate cross-functional commentary, bringing together input from relevant teams across the business.
Data Richness	Creates a layered data narrative that evolves over time—ideal for audit, governance, and knowledge transfer.
Efficiency Gains	Reduces manual effort spent producing baseline analysis, enabling teams to focus on high-value strategic commentary.
Traceability	Each Note is version-controlled and PoV-specific, supporting governance and data lineage across reporting cycles.

Best Practice Summary

- Pair GenAI with Notes for high-impact data intersections.
- Use Notes to surface leading indicators and future risk considerations.
- Treat narrative content as part of the data asset—not a by-product.
- Leverage Notes to build a living knowledge repository within reports.

The synergy between Gen AI and Notes embodies Oracle's vision for Smart Narrative Reporting—where technology and human expertise combine to deliver faster, richer, and more actionable financial intelligence.

Conclusion

Oracle Narrative Reporting Gen AI, when paired with the Notes functionality, represents a step-change in how organisations can generate, understand, and act on financial insights. This white paper has demonstrated how Gen AI automates foundational commentary—describing exceptions, identifying causality, and enabling comparative analysis—while Notes enrich these narratives with contextual, human-driven insight. Together, they deliver a more intelligent, transparent, and collaborative reporting process. By embedding this combined approach into everyday reporting practices, businesses not only enhance the speed and accuracy of their analysis but also lay the groundwork for greater emphasis on data-informed decision-making.

Note: *The data used in this document is based on a hypothetical entity/s and is intended solely for illustrative purposes. It does not reflect any real organisation or customer.*