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CONSULTANCY TRAINING SUPPORT

Oracle Business Intelligence 11g Masterclass

Building Reports, Dashboards, Maps & Scorecards using OBI11g

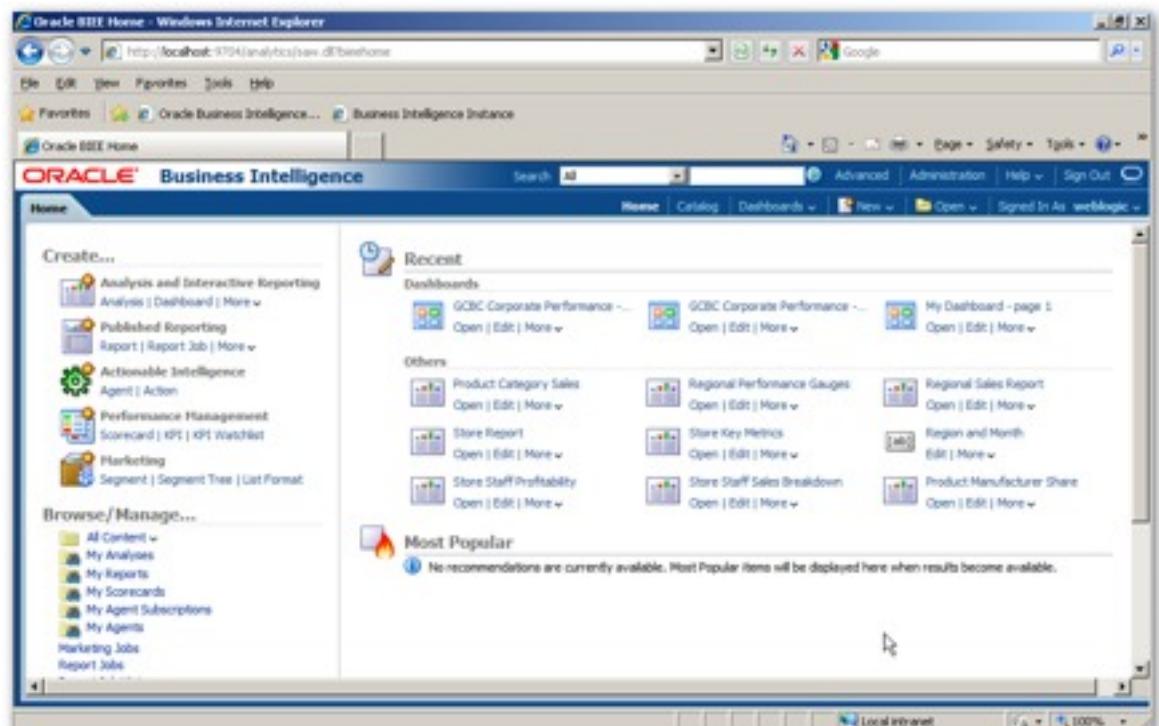
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Agenda

- Review new visualization features in OBIEE 11g
- Look at the updated user interface that combines all the reporting tools
- Review new capabilities in Oracle Answers
- Understand the integration with Oracle MapViewer
- Review the updated dashboard, catalog, search and home page
- See how KPIs are defined
- See how objectives, KPIs and initiatives are formed into scorecards

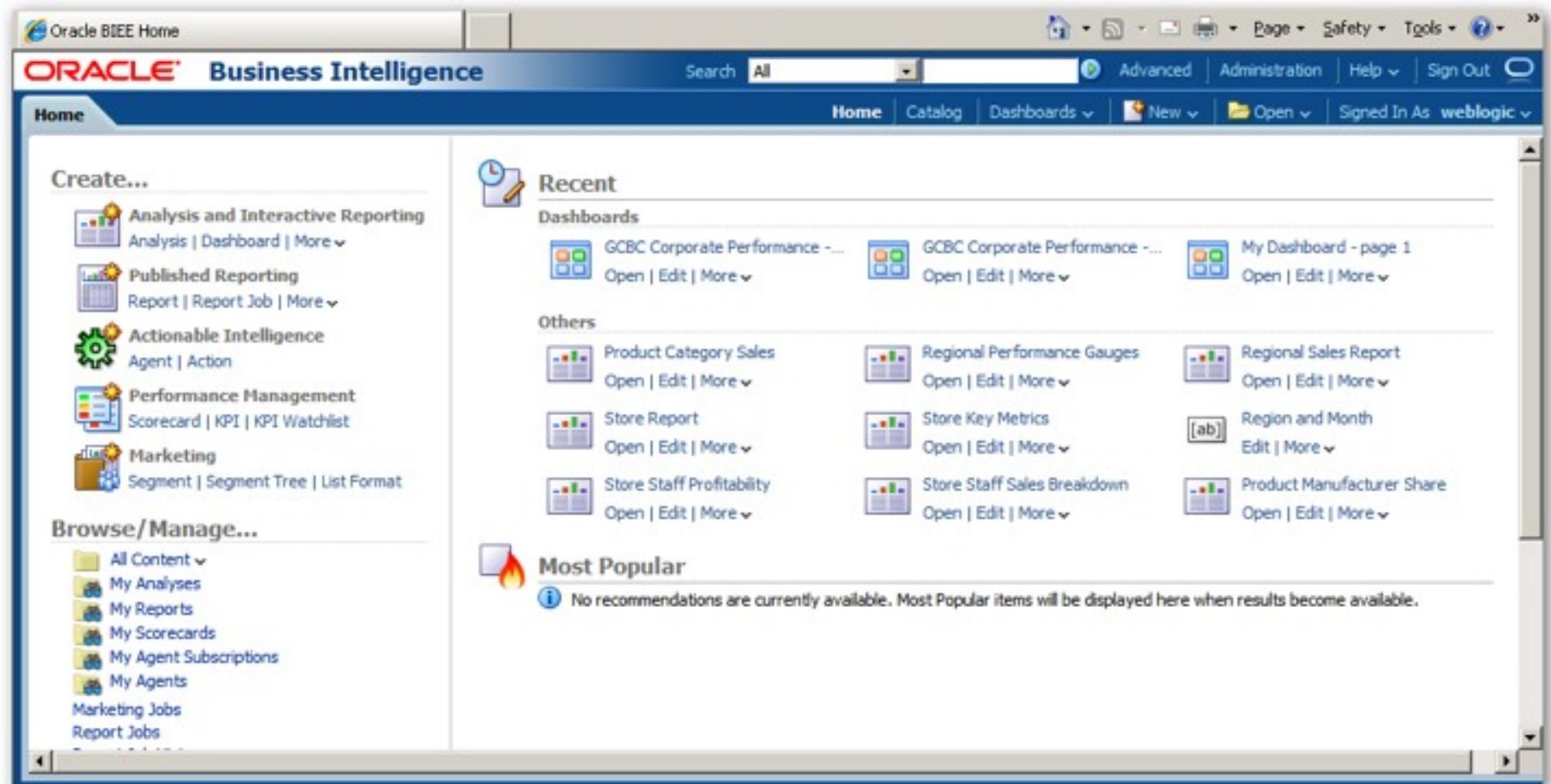
OBIEE 11g Unified Framework

- Single UI for Answers, Dashboards, Delivers, BI Publisher etc
- Common menus, controls, menu buttons
- One-click access to common functions, catalog areas
- Requires IE7+, FF3+



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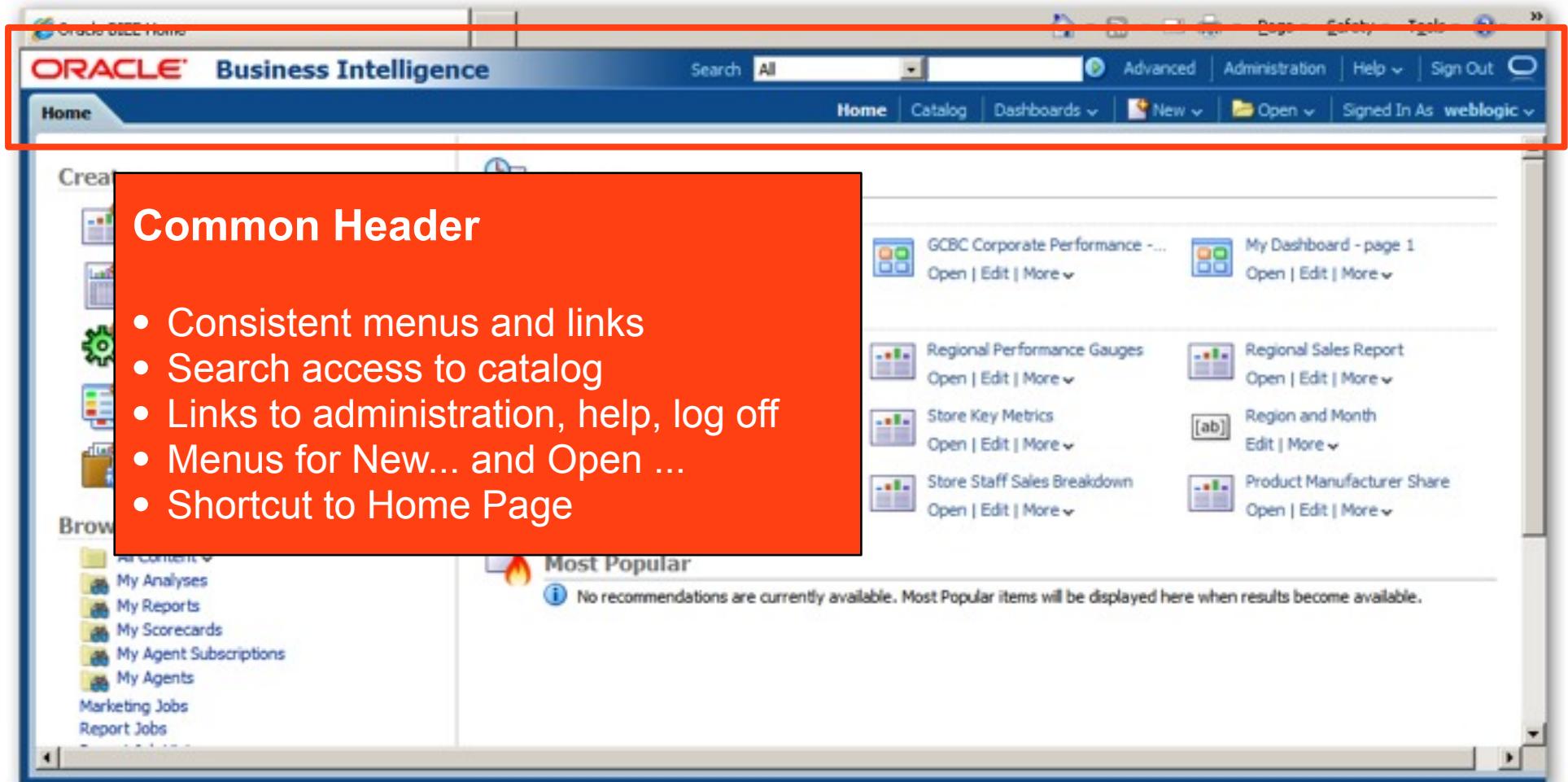
OBIEE 11g Home Page



The screenshot shows the Oracle Business Intelligence 11g Home Page. The top navigation bar includes links for Oracle BI Home, Advanced, Administration, Help, and Sign Out. The main content area is divided into sections:

- Create...**: Options for Analysis and Interactive Reporting, Published Reporting, Actionable Intelligence, Performance Management, and Marketing.
- Browse/Manage...**: Options for All Content, My Analyses, My Reports, My Scorecards, My Agent Subscriptions, My Agents, Marketing Jobs, and Report Jobs.
- Recent Dashboards**: Lists three dashboards: GCBC Corporate Performance - ..., GCBC Corporate Performance - ..., and My Dashboard - page 1.
- Others**: Lists various reports and scorecards: Product Category Sales, Regional Performance Gauges, Store Report, Store Key Metrics, Store Staff Profitability, Store Staff Sales Breakdown, Region and Month, and Product Manufacturer Share.
- Most Popular**: A section stating "No recommendations are currently available. Most Popular items will be displayed here when results become available."

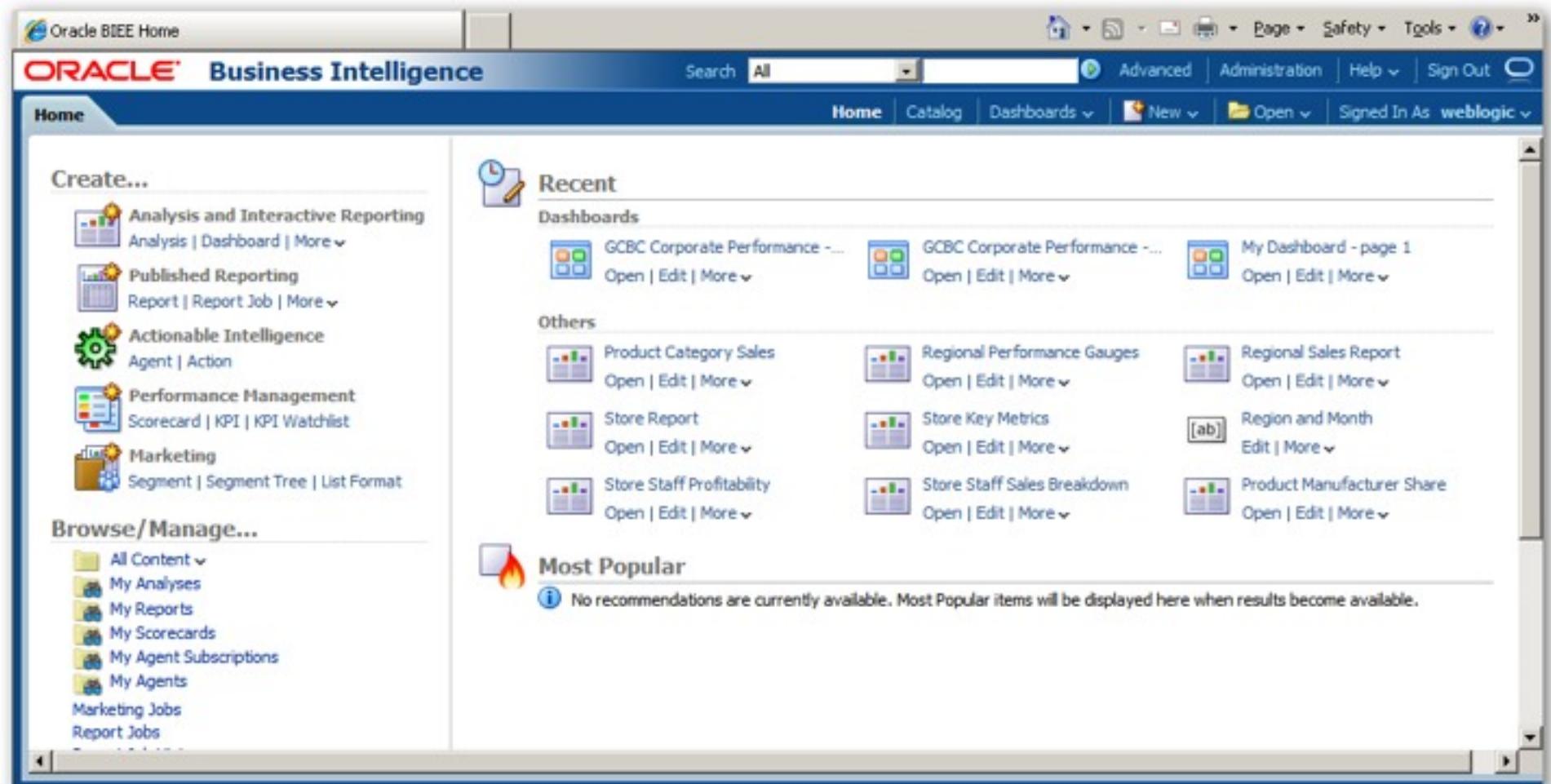
OBIEE 11g Home Page



The screenshot shows the Oracle Business Intelligence (OBIEE) 11g Home Page. A red box highlights the top navigation bar, which includes the Oracle logo, a search bar, and links for Administration, Help, and Sign Out. Below the header, there are two columns of reports. The left column contains links for 'My Content', 'My Analyses', 'My Reports', 'My Scorecards', 'My Agent Subscriptions', and 'My Agents', along with 'Marketing Jobs' and 'Report Jobs'. The right column displays a grid of reports with icons and titles, such as 'GCBC Corporate Performance', 'My Dashboard - page 1', 'Regional Performance Gauges', 'Regional Sales Report', 'Store Key Metrics', 'Region and Month', 'Store Staff Sales Breakdown', and 'Product Manufacturer Share'. A 'Most Popular' section at the bottom indicates 'No recommendations are currently available.'

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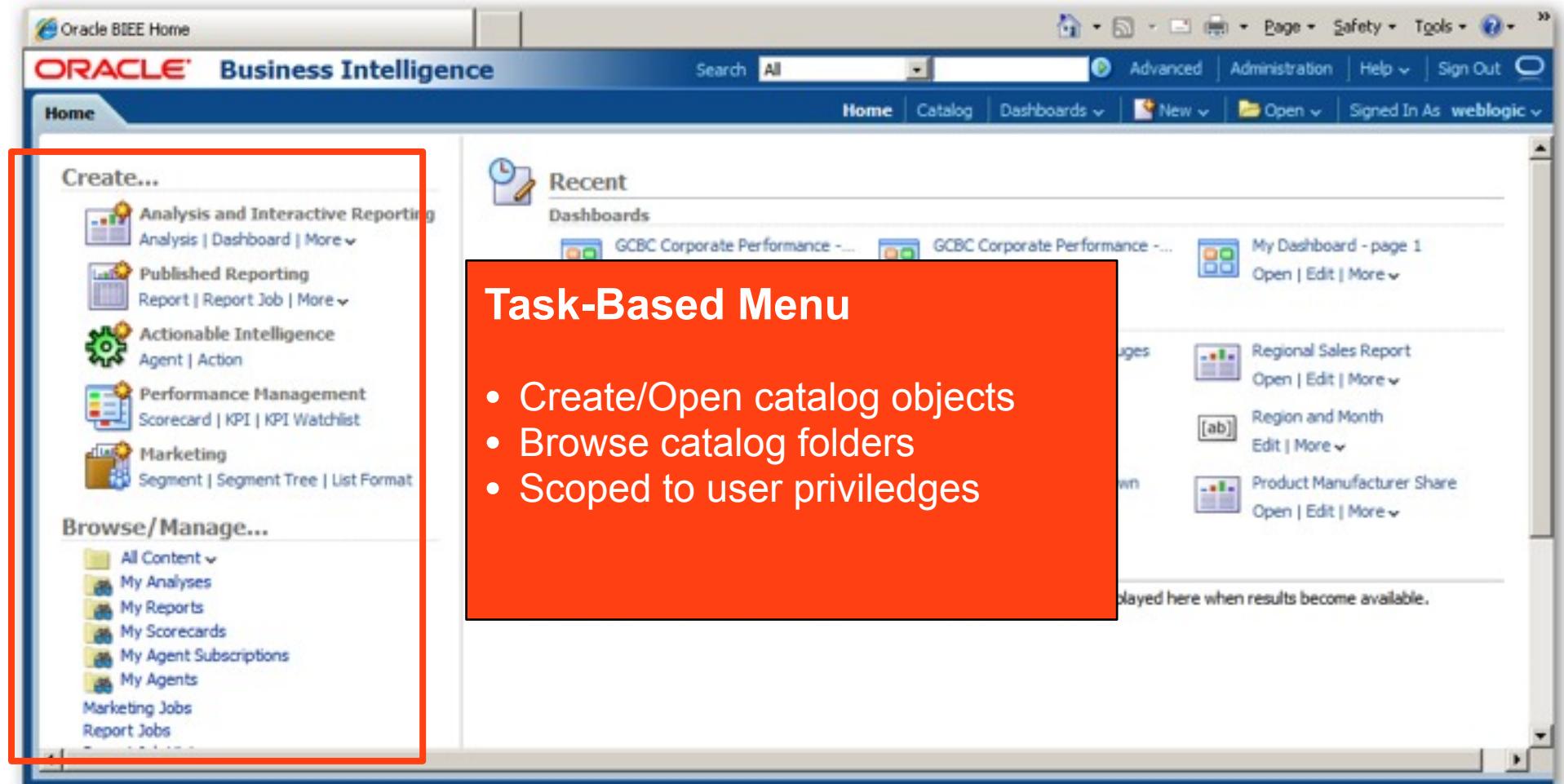
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OBIEE 11g Home Page

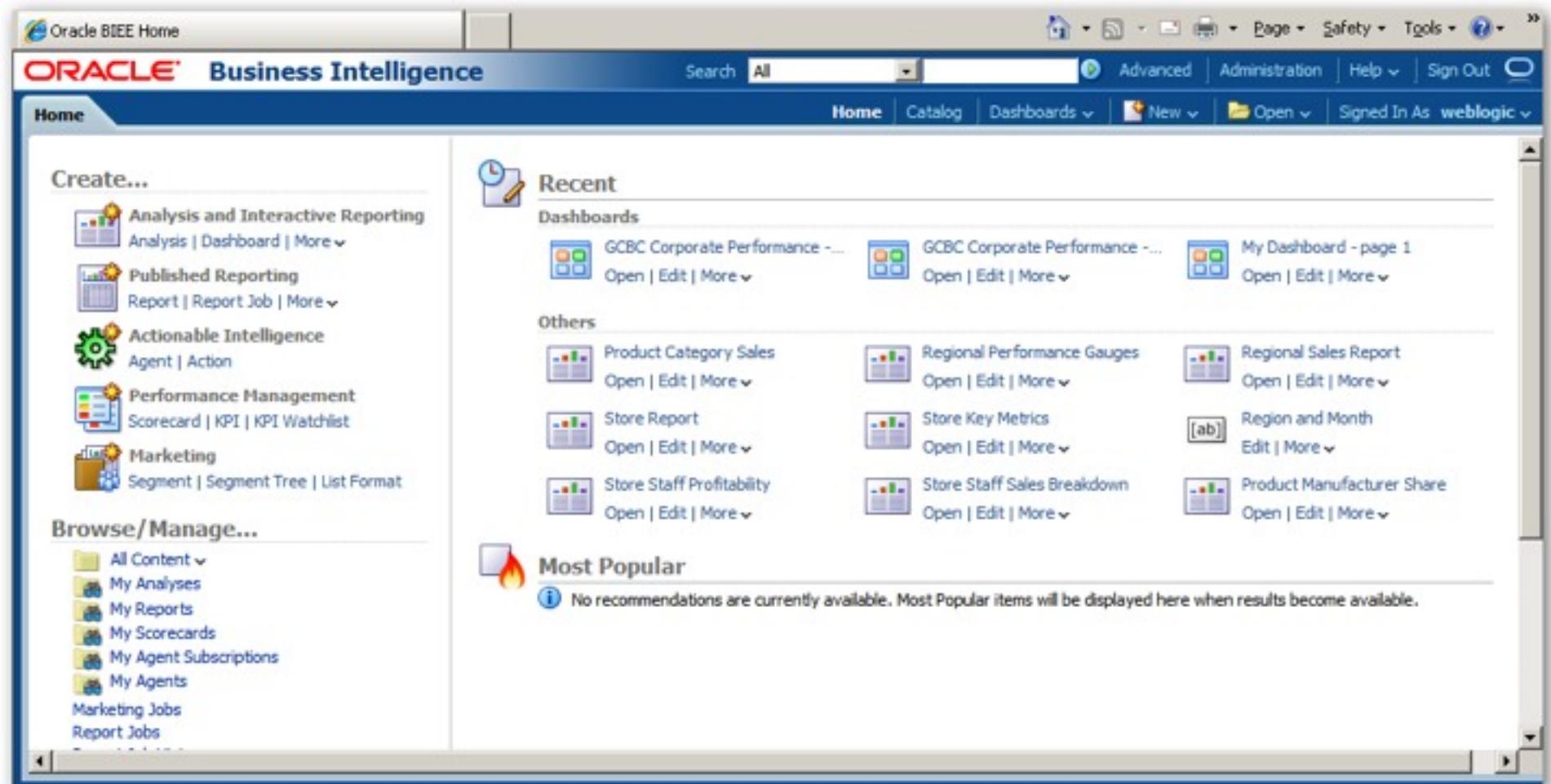


The screenshot shows the Oracle Business Intelligence 11g Home Page. On the left, there is a sidebar with two main sections: "Create..." and "Browse/Manage...". The "Create..." section is highlighted with a red box and contains links for Analysis and Interactive Reporting, Published Reporting, Actionable Intelligence, Performance Management, Marketing, and Segment. The "Browse/Manage..." section also has a red box around it and contains links for All Content, My Analyses, My Reports, My Scorecards, My Agent Subscriptions, My Agents, Marketing Jobs, and Report Jobs. The main content area features a "Task-Based Menu" with the following bullet points:

- Create/Open catalog objects
- Browse catalog folders
- Scoped to user privileges

On the right side, there is a "Recent Dashboards" section with links for GCBC Corporate Performance - ..., My Dashboard - page 1, Regional Sales Report, Region and Month, and Product Manufacturer Share. A message at the bottom right says "Displayed here when results become available."

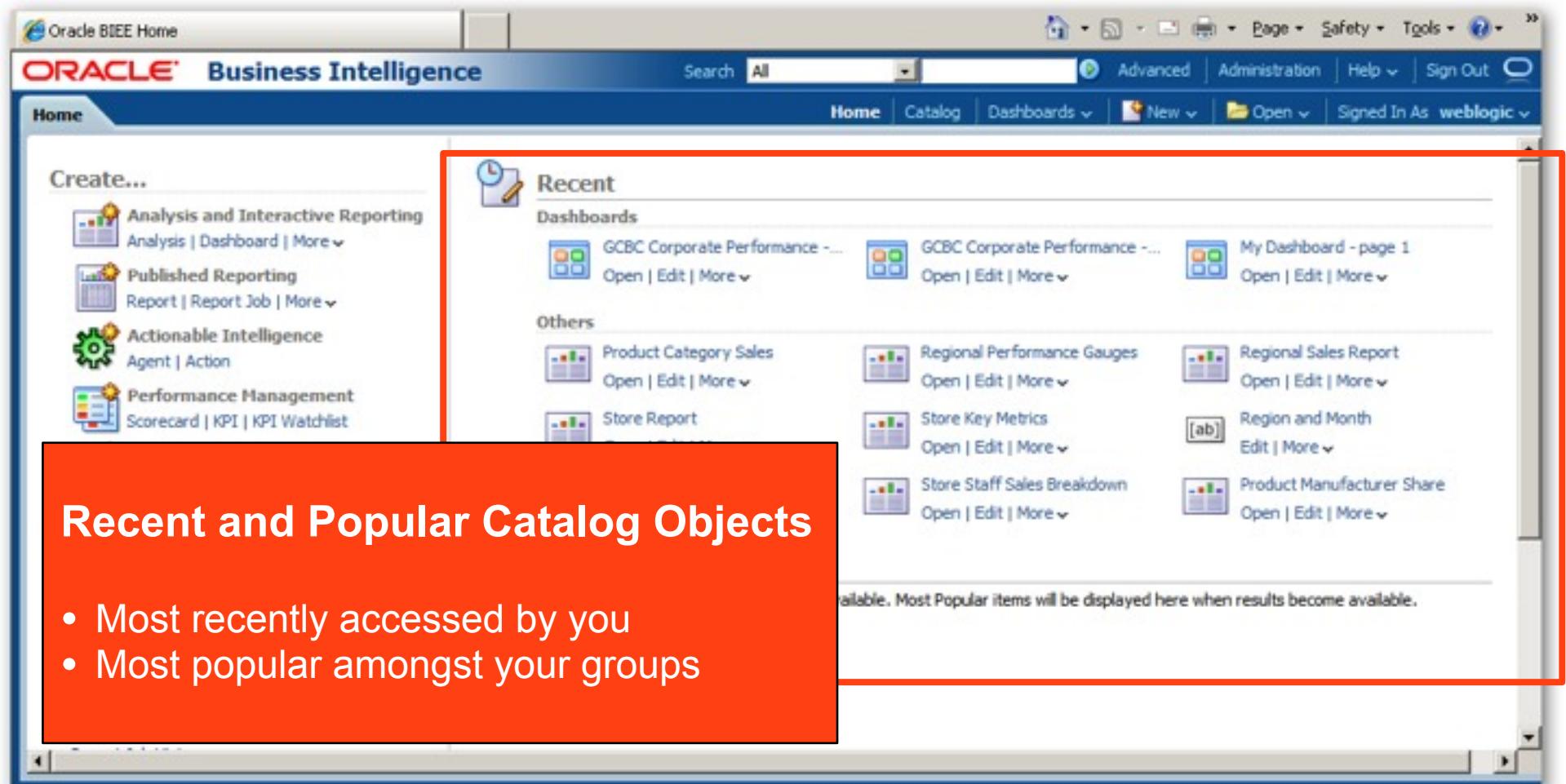
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- Most Popular**: A section stating "No recommendations are currently available. Most Popular items will be displayed here when results become available."

OBIEE 11g Home Page



The screenshot shows the Oracle Business Intelligence 11g Home Page. On the left, there's a sidebar titled "Create..." with options like Analysis and Interactive Reporting, Published Reporting, Actionable Intelligence, and Performance Management. The main area is titled "Recent and Popular Catalog Objects". It has two sections: "Recent Dashboards" and "Others". The "Recent Dashboards" section contains three items: "GCBC Corporate Performance - ..." (with Open, Edit, More options), "My Dashboard - page 1" (with Open, Edit, More options), and "[ab] Region and Month" (with Edit, More options). The "Others" section contains five items: "Product Category Sales" (with Open, Edit, More options), "Regional Performance Gauges" (with Open, Edit, More options), "Store Key Metrics" (with Open, Edit, More options), "Store Staff Sales Breakdown" (with Open, Edit, More options), and "Product Manufacturer Share" (with Open, Edit, More options). A red box highlights the "Recent and Popular Catalog Objects" section.

Recent and Popular Catalog Objects

- Most recently accessed by you
- Most popular amongst your groups

OBIEE 11g Catalog Page

Lab 1 - Standard 10g Analyses - Oracle BI Catalog

ORACLE Business Intelligence

Catalog

User View | Folders | My Folders | Subject Area Contents | Lab 1 - Standard 10g Analyses | My Dashboard | GCBC Corporate Performance | Shared Folders

Type: All

Print > Export > Schedule Add to Briefing Book Delete Copy Rename Create Shortcut Archive Properties Permissions

Dashboard Pro Product Catego Product Manuf Regional Perform

Expand | More Open | Edit | More Open | Edit | More Open | Edit | More

Show More Details

6:01:28 PM | Created By weblogic

6/31/2010 6:14:37 PM | Created By weblogic

6/31/2010 4:41:39 PM | Created By weblogic

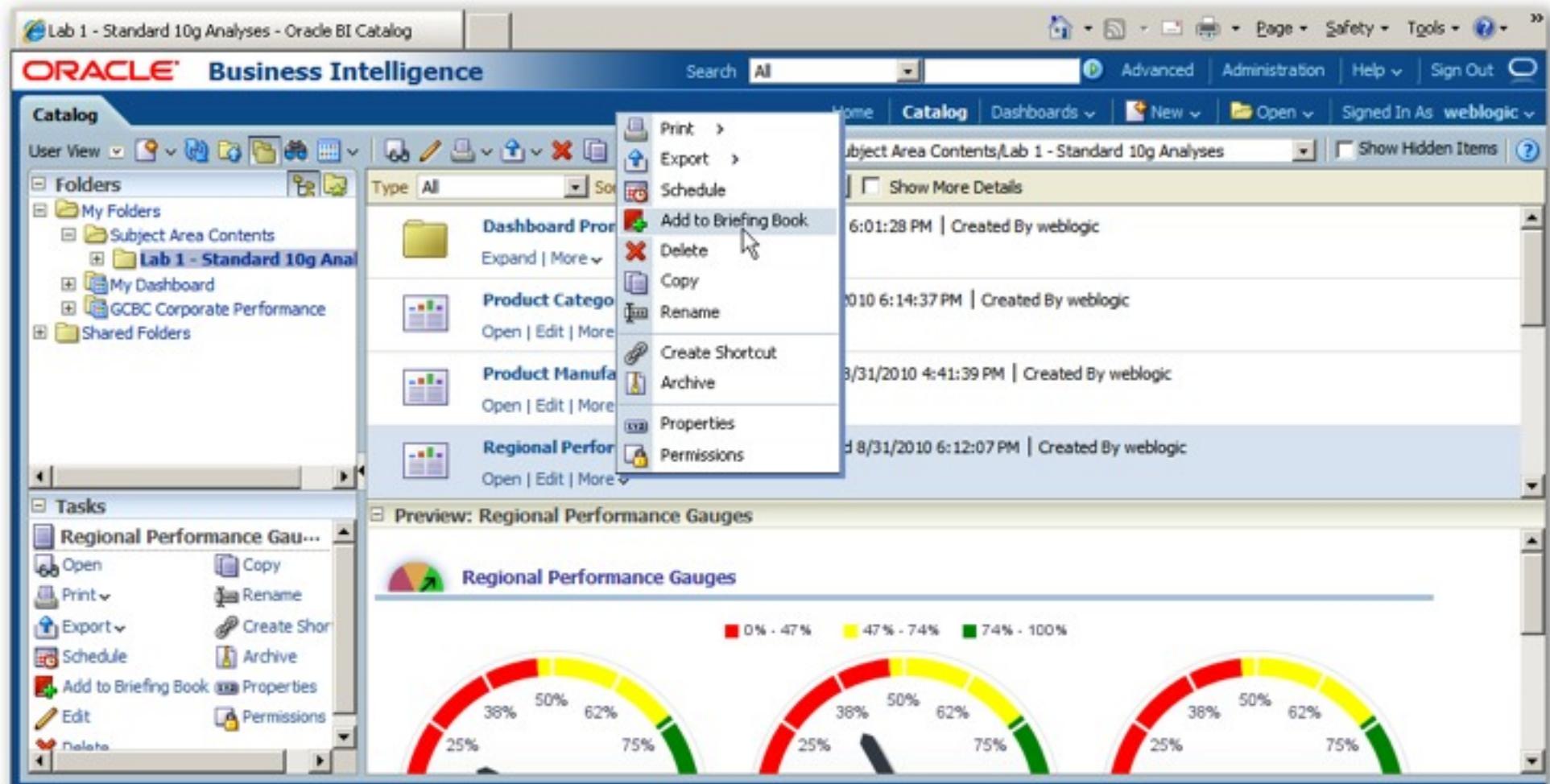
6/31/2010 6:12:07 PM | Created By weblogic

Regional Performance Gauges

Regional Performance Gauges

0% - 47% 47% - 74% 74% - 100%

25% 38% 50% 62% 75% 25% 38% 50% 62% 75% 25% 38% 50% 62% 75%



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OBIEE 11g Catalog Page

The screenshot shows the Oracle Business Intelligence Catalog Page. A red box highlights the 'Catalog' sidebar on the left, which displays a tree view of folders: 'Folders', 'My Folders' (containing 'Subject Area Contents' with 'Lab 1 - Standard 10g Analyses' expanded), 'Shared Folders', and 'My Dashboard', 'GCBC Corporate Performance'. A red callout box points to this sidebar with the text 'Catalog Folder View'. Below the sidebar, the main content area shows a 'Regional Performance Gauges' dashboard with three circular gauges. The gauges have scales from 25% to 75% with segments for 0% - 47%, 47% - 74%, and 74% - 100%. The first gauge has values 38%, 50%, 62%, 75%. The second gauge has values 38%, 50%, 62%, 75%. The third gauge has values 38%, 50%, 62%, 75%.

- My Folders
- Shared Folders
- Nested view of catalog contents

OBIEE 11g Catalog Page

Lab 1 - Standard 10g Analyses - Oracle BI Catalog

ORACLE Business Intelligence

Catalog

User View | Folders | My Folders | Subject Area Contents | Lab 1 - Standard 10g Analyses | My Dashboard | GCBC Corporate Performance | Shared Folders

Search All | Home | Catalog | Dashboards | New | Open | Signed In As weblogic | Advanced | Administration | Help | Sign Out

Print > | Export > | Schedule | Add to Briefing Book | Delete | Copy | Rename | Create Shortcut | Archive | Properties | Permissions

Dashboard Pro | Product Catego | Product Manufa | Regional Perform

Show More Details

6:01:28 PM | Created By weblogic

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Regional Performance Gauges

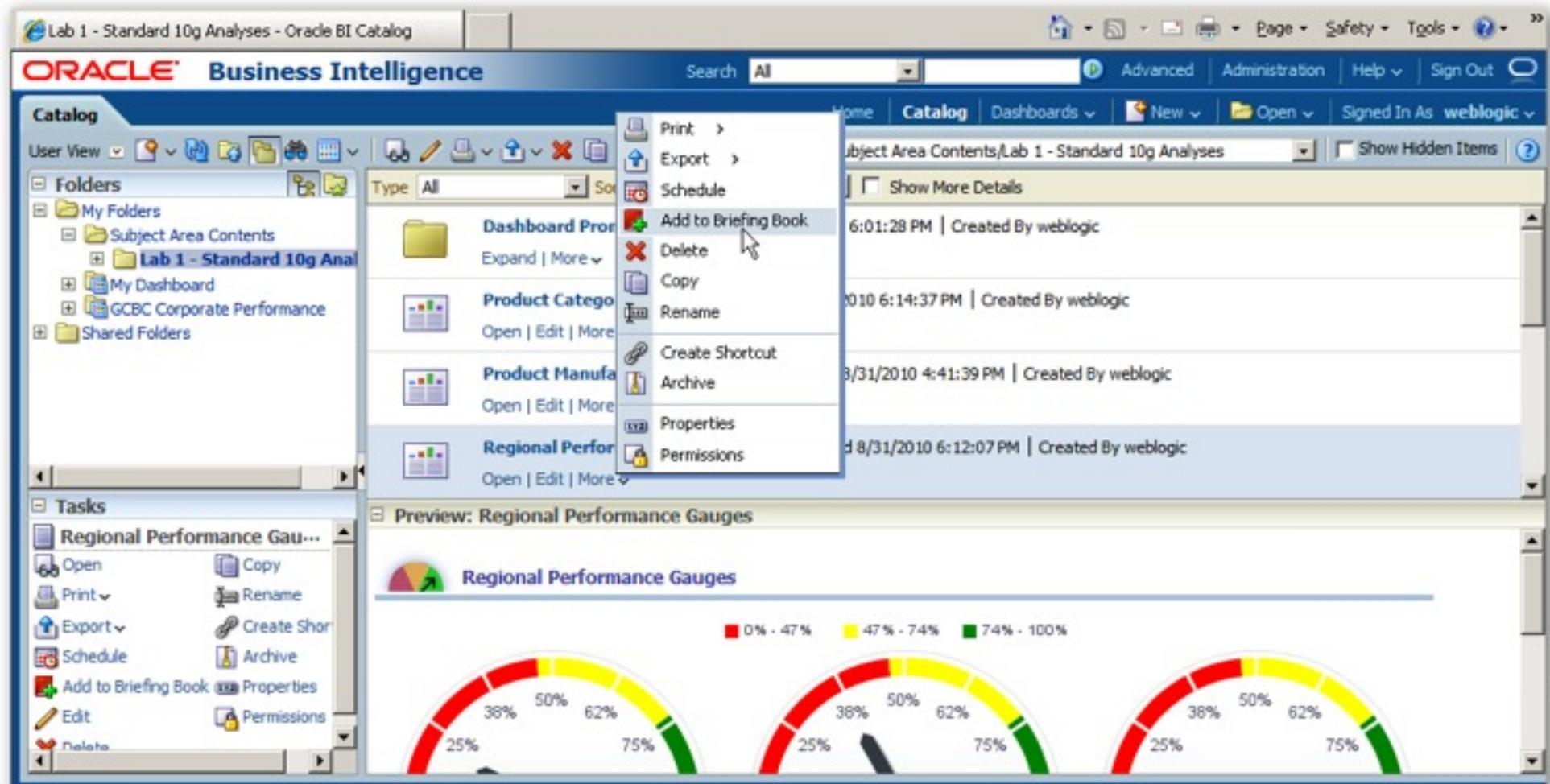
Regional Performance Gauges

0% - 47% | 47% - 74% | 74% - 100%

25% 38% 50% 62% 75%

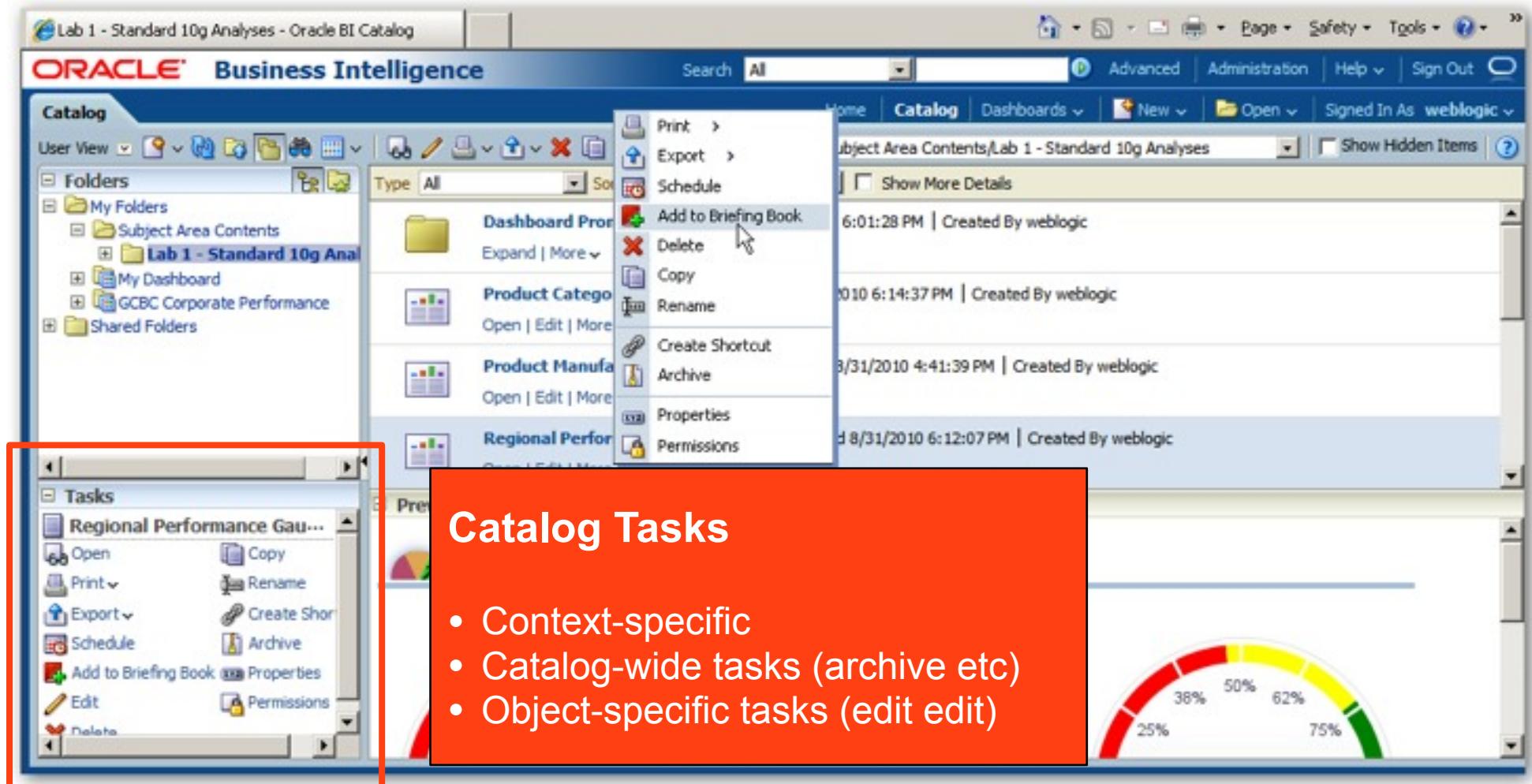
25% 38% 50% 62% 75%

25% 38% 50% 62% 75%



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OBIEE 11g Catalog Page



The screenshot shows the Oracle Business Intelligence Catalog page. A context menu is open over a folder named "Lab 1 - Standard 10g Analyses". The menu includes options like Print, Export, Schedule, Add to Briefing Book (which is highlighted with a cursor), Delete, Copy, Rename, Create Shortcut, Archive, Properties, and Permissions.

A red box highlights the "Tasks" button in the toolbar at the bottom left of the interface. A red callout box contains the following text:

Catalog Tasks

- Context-specific
- Catalog-wide tasks (archive etc)
- Object-specific tasks (edit edit)

OBIEE 11g Catalog Page

Lab 1 - Standard 10g Analyses - Oracle BI Catalog

ORACLE Business Intelligence

Catalog

User View | Folders | My Folders | Subject Area Contents | Lab 1 - Standard 10g Analyses | My Dashboard | GCBC Corporate Performance | Shared Folders

Type: All

Print > Export > Schedule Add to Briefing Book Delete Copy Rename Create Shortcut Archive Properties Permissions

Dashboard Pro Product Catego Product Manuf Regional Perform

Expand | More Open | Edit | More Open | Edit | More Open | Edit | More

Show More Details

6:01:28 PM | Created By weblogic

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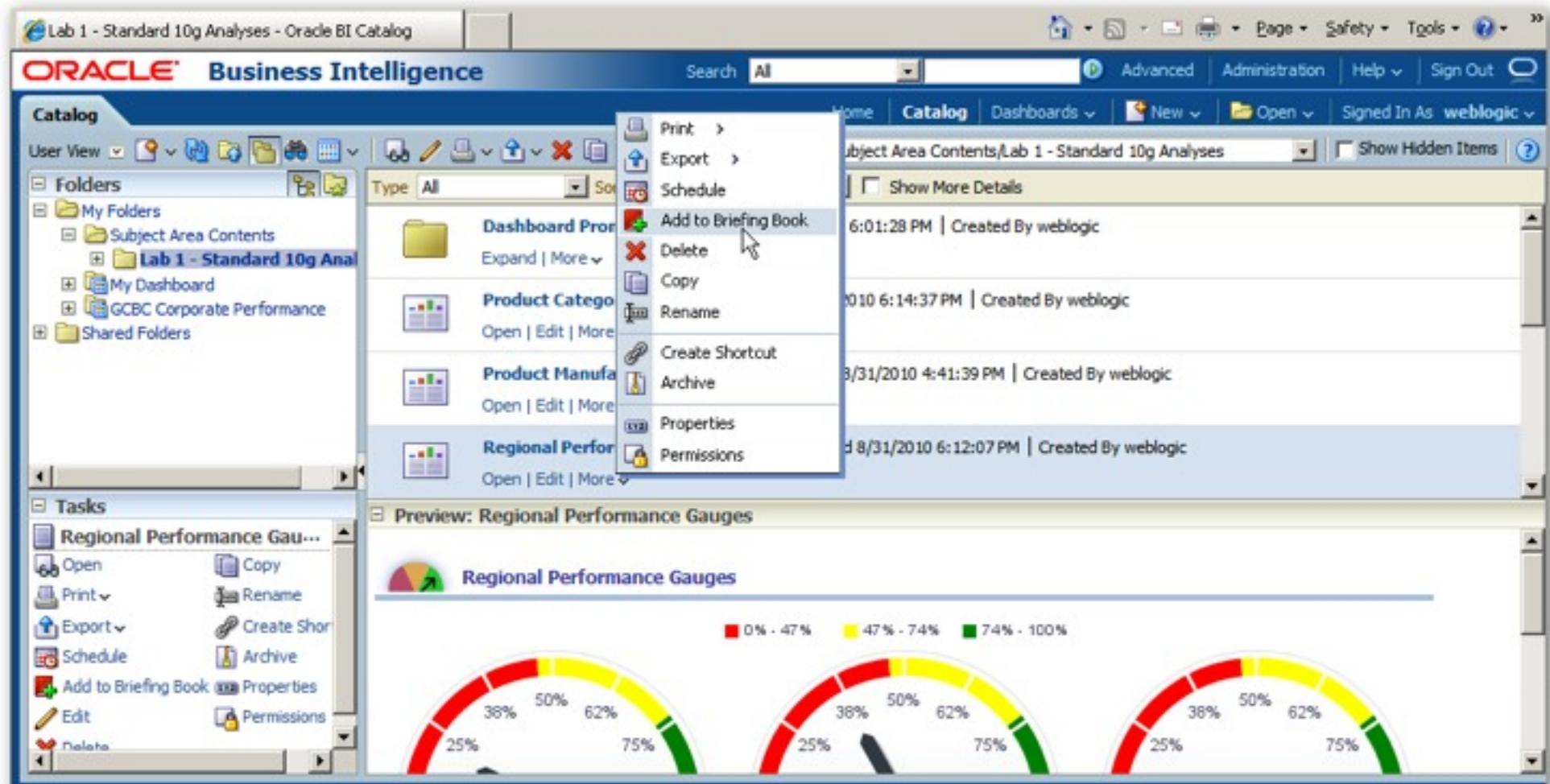
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Regional Performance Gauges

Regional Performance Gauges

0% - 47% 47% - 74% 74% - 100%

25% 38% 50% 62% 75% 25% 38% 50% 62% 75% 25% 38% 50% 62% 75%



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OBIEE 11g Catalog Page

The screenshot shows the Oracle Business Intelligence Catalog page. A red box highlights the 'Object Listing' section on the left, which contains the following text:

Object Listing

- Listing of all objects for selected folder, search etc
- Shortcuts to common actions
- Optional preview of analysis

The main content area displays a list of objects with their creation dates and creators. Below this is a 'Regional Performance Gauges' section with three circular meters.

Lab 1 - Standard 10g Analyses - Oracle BI Catalog

ORACLE Business Intelligence

Catalog

User View

Folders

My Folders

Subject Areas

Dashboard Pro

Print >

Export >

Schedule

Add to Briefing Book

Search All

Home Catalog Dashboards New Open Signed In As weblogic

Object Area Content Lab 1 - Standard 10g Analyses Show Hidden Items

6:01:28 PM | Created By weblogic

10/10 6:14:37 PM | Created By weblogic

3/31/2010 4:41:39 PM | Created By weblogic

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Regional Performance Gauges

0% - 47% 47% - 74% 74% - 100%

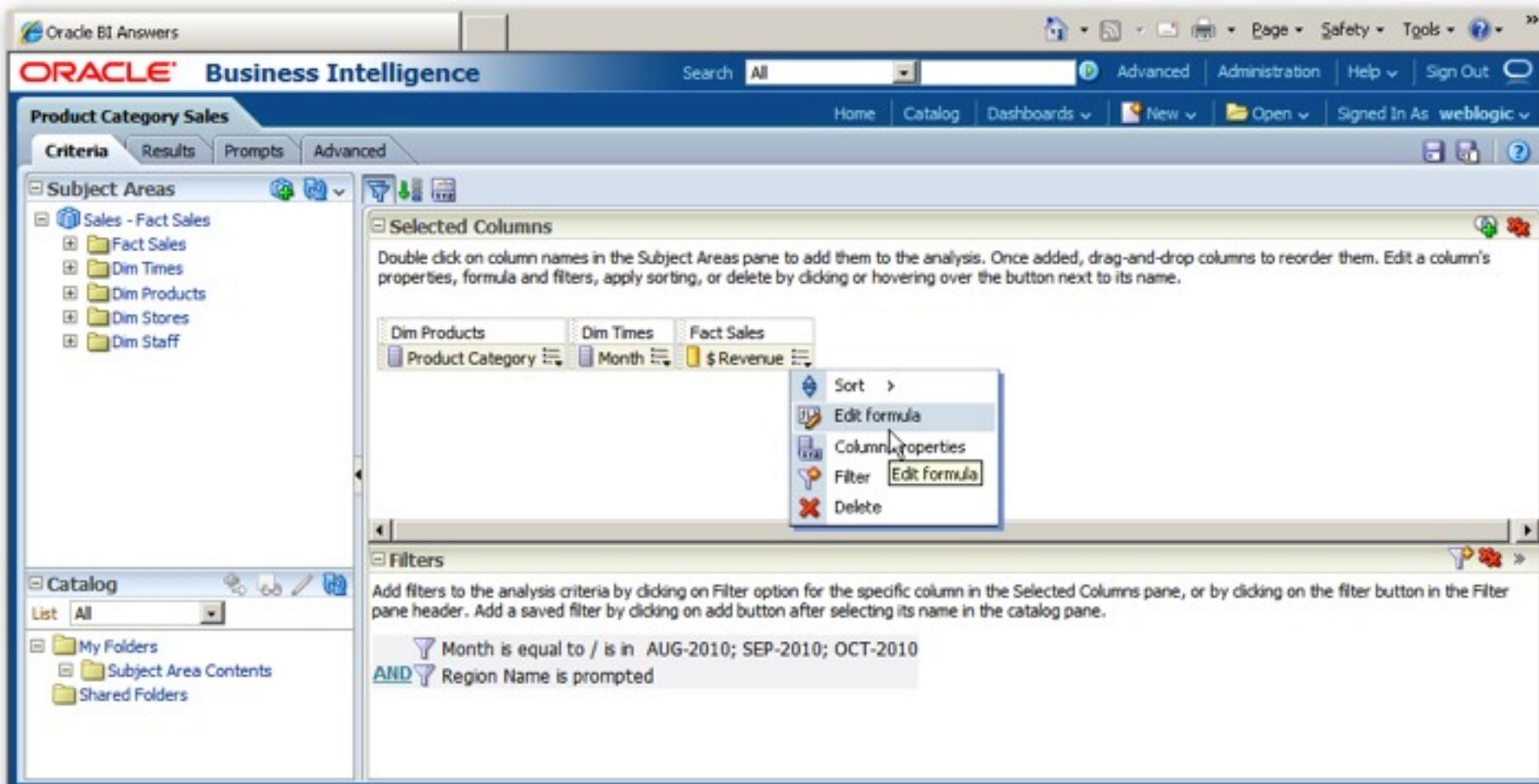
Range	Color
0% - 47%	Red
47% - 74%	Yellow
74% - 100%	Green

25% 38% 50% 62% 75%

25% 38% 50% 62% 75%

25% 38% 50% 62% 75%

OBIEE 11g Answers - Criteria View



The screenshot shows the Oracle Business Intelligence Criteria View interface. The top navigation bar includes links for Oracle BI Answers, Home, Catalog, Dashboards, New, Open, and Signed In As weblogic. The main pane is titled "Product Category Sales". The "Criteria" tab is selected. On the left, the "Subject Areas" pane lists "Sales - Fact Sales" with sub-folders for Fact Sales, Dim Times, Dim Products, Dim Stores, and Dim Staff. The "Catalog" pane shows "My Folders" with "Subject Area Contents" and "Shared Folders". The central "Selected Columns" pane displays three columns: Dim Products (Product Category), Dim Times (Month), and Fact Sales (\$ Revenue). A context menu is open over the Fact Sales column, with options: Sort, Edit formula (highlighted in blue), Column properties, Filter (Edit formula), and Delete. Below the columns, the "Filters" pane contains two filter criteria: "Month is equal to / is in AUG-2010; SEP-2010; OCT-2010" and "Region Name is prompted".

OBIEE 11g Answers - Criteria View

The screenshot shows the Oracle Business Intelligence Criteria View interface. On the left, there is a navigation pane with sections for 'Subject Areas' and 'Catalog'. The 'Subject Areas' section is highlighted with a red box and contains a tree view with nodes like 'Sales - Fact Sales', 'Fact Sales', 'Dim Times', 'Dim Products', 'Dim Stores', and 'Dim Staff'. The 'Catalog' section shows 'My Folders' with 'Subject Area Contents' and 'Shared Folders'. The main area is titled 'Subject Area Folder Listing' and contains a bulleted list of features: 'Listing of one or more subject areas', 'Presentation Tables', 'Attribute columns', 'Hierarchical columns', and 'Measure columns'. Below this list is a 'Filters' section with a note: 'Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.' It also displays two filter conditions: 'Month is equal to / is in AUG-2010; SEP-2010; OCT-2010' and 'Region Name is prompted'.

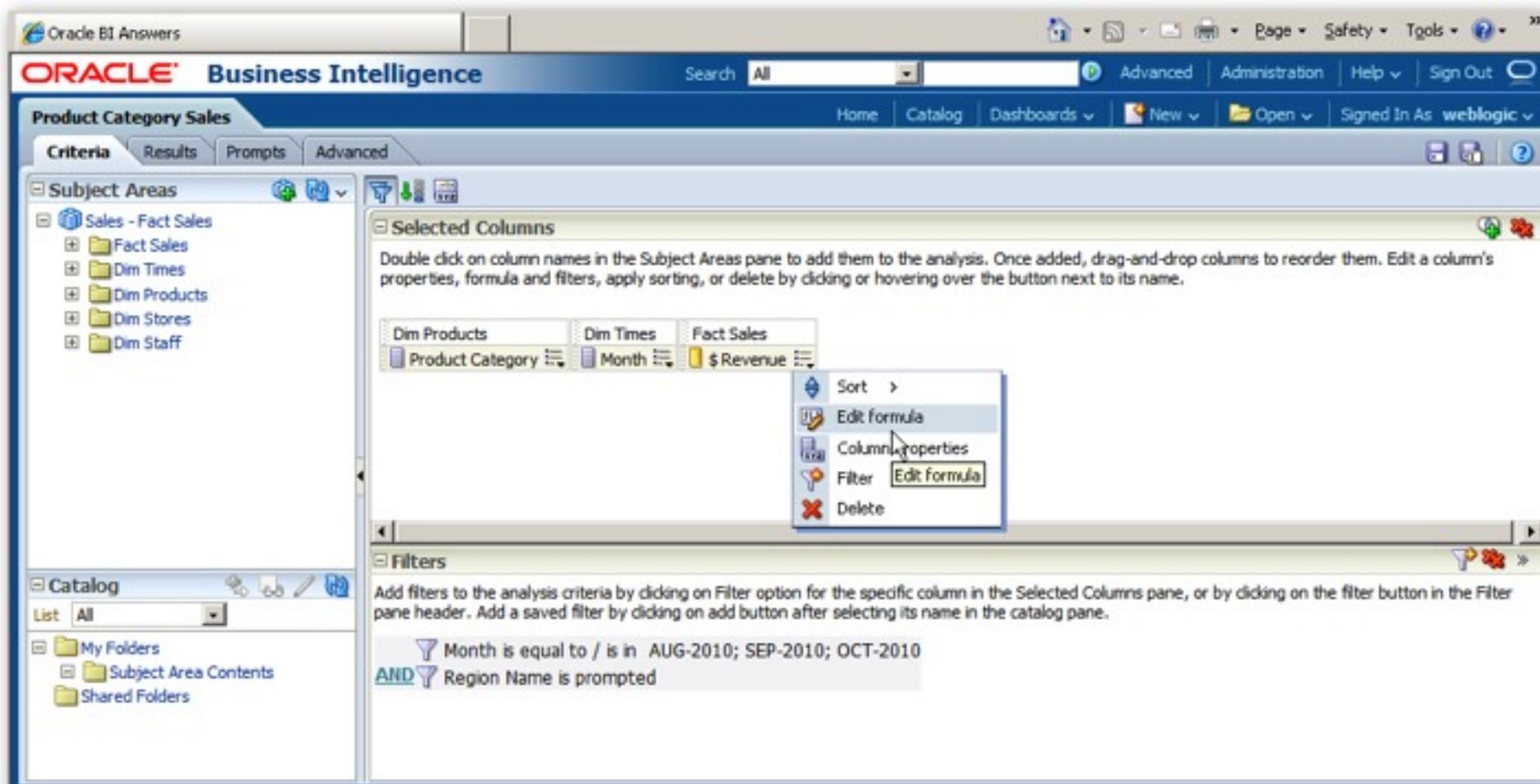
Subject Area Folder Listing

- Listing of one or more subject areas
- Presentation Tables
- Attribute columns
- Hierarchical columns
- Measure columns

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

Month is equal to / is in AUG-2010; SEP-2010; OCT-2010
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OBIEE 11g Answers - Criteria View



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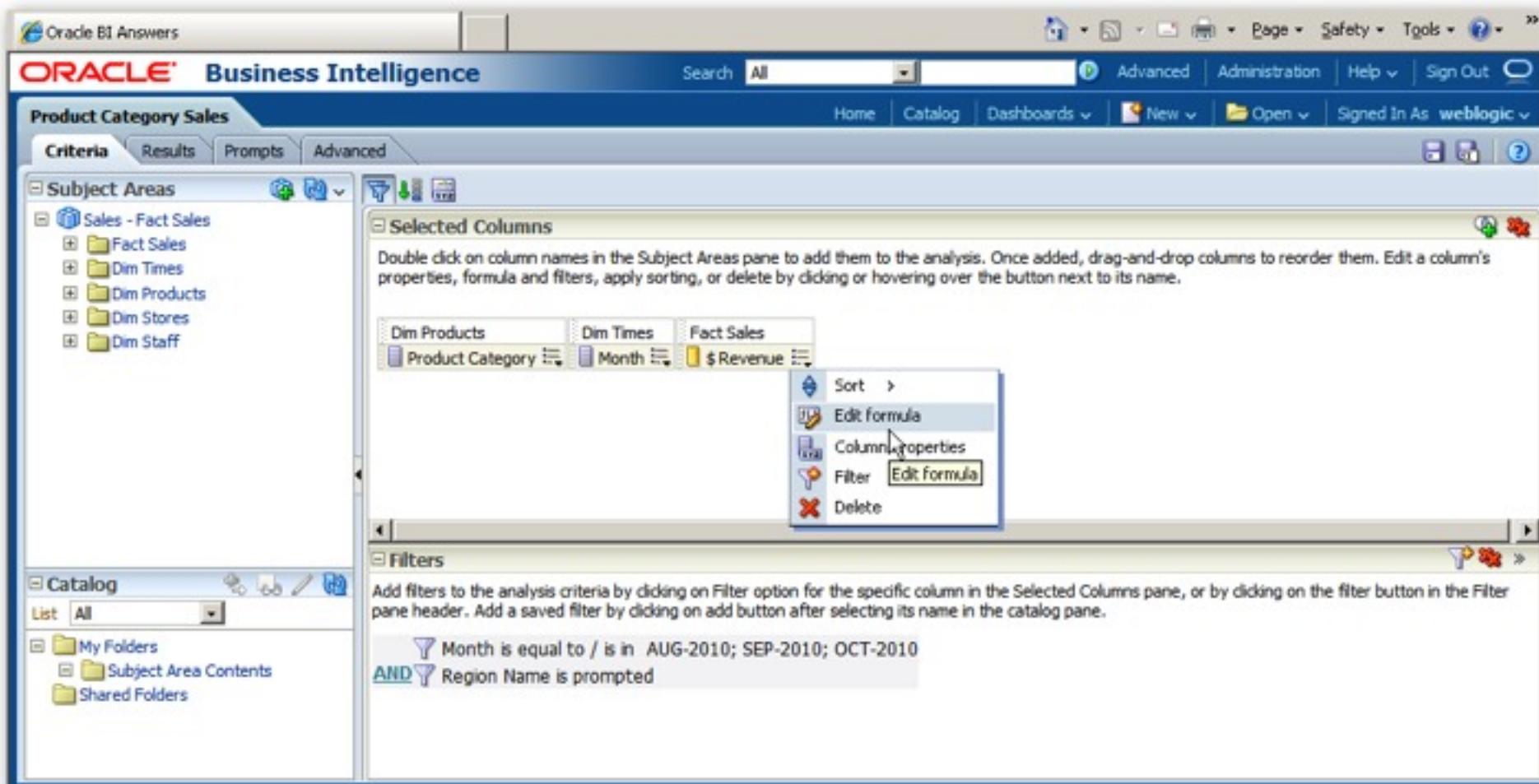
OBIEE 11g Answers - Criteria View

The screenshot shows the Oracle Business Intelligence Criteria View interface. On the left, the 'Subject Areas' pane lists 'Sales - Fact Sales' with sub-folders: Fact Sales, Dim Times, Dim Products, Dim Stores, and Dim Staff. A red box highlights the 'Catalog' pane at the bottom left, which displays a list of folders: 'My Folders' (containing 'Subject Area Contents' and 'Shared Folders'), 'List All', and icons for Add, Edit, and Delete. In the center, the 'Selected Columns' pane shows a grid with columns 'Dim Products', 'Dim Times', and 'Fact Sales'. The 'Fact Sales' column contains rows for 'Product Category', 'Month', and '\$ Revenue'. A context menu is open over the '\$ Revenue' row, with options 'Sort' and 'Edit formula'. The top navigation bar includes links for Home, Catalog, Dashboards, New, Open, and Sign Out.

Catalog Folder Listing

- Same listing as on Catalog Page
- My Folders and Shared Folders

OBIEE 11g Answers - Criteria View

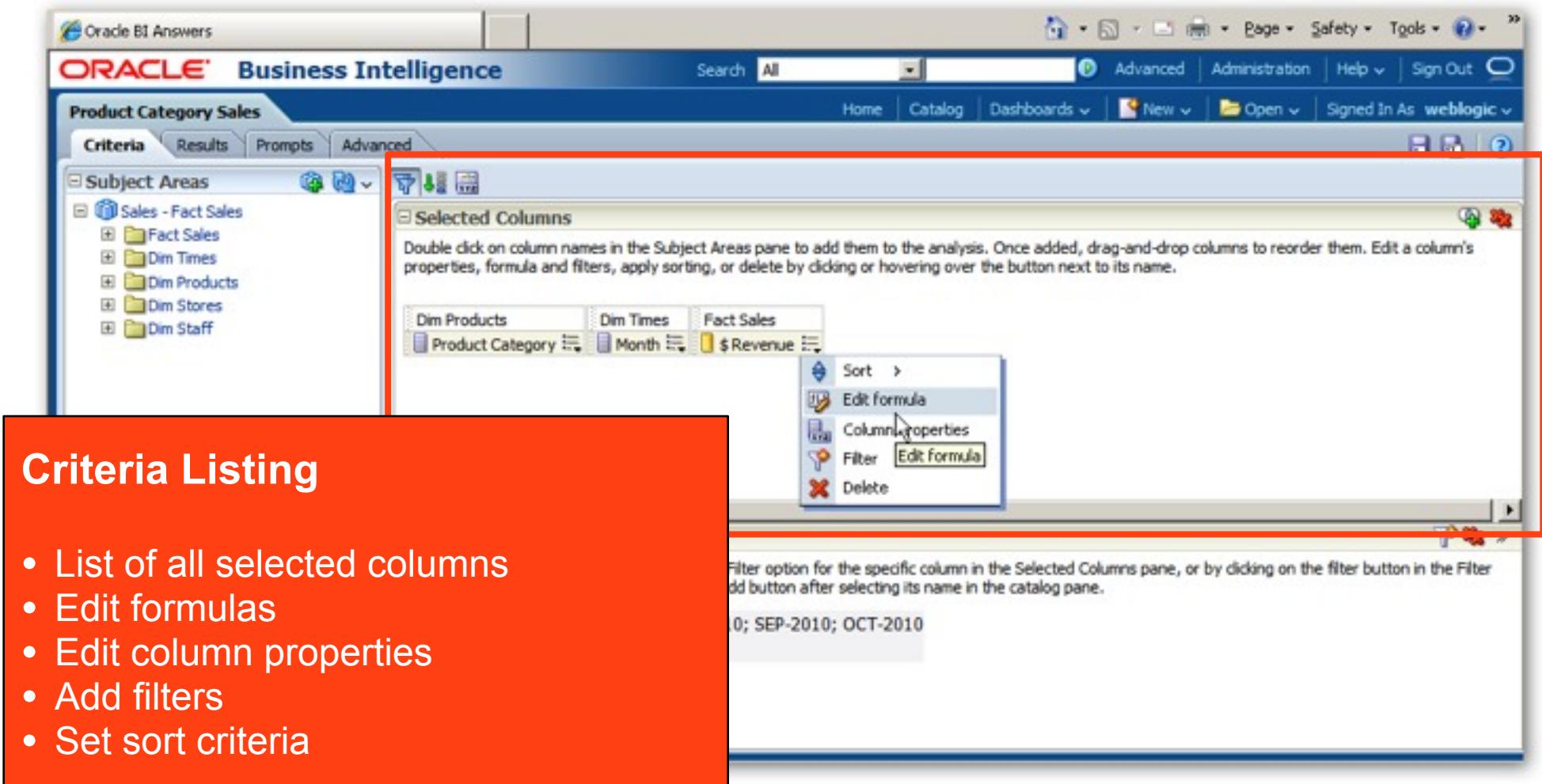


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OBIEE 11g Answers - Criteria View

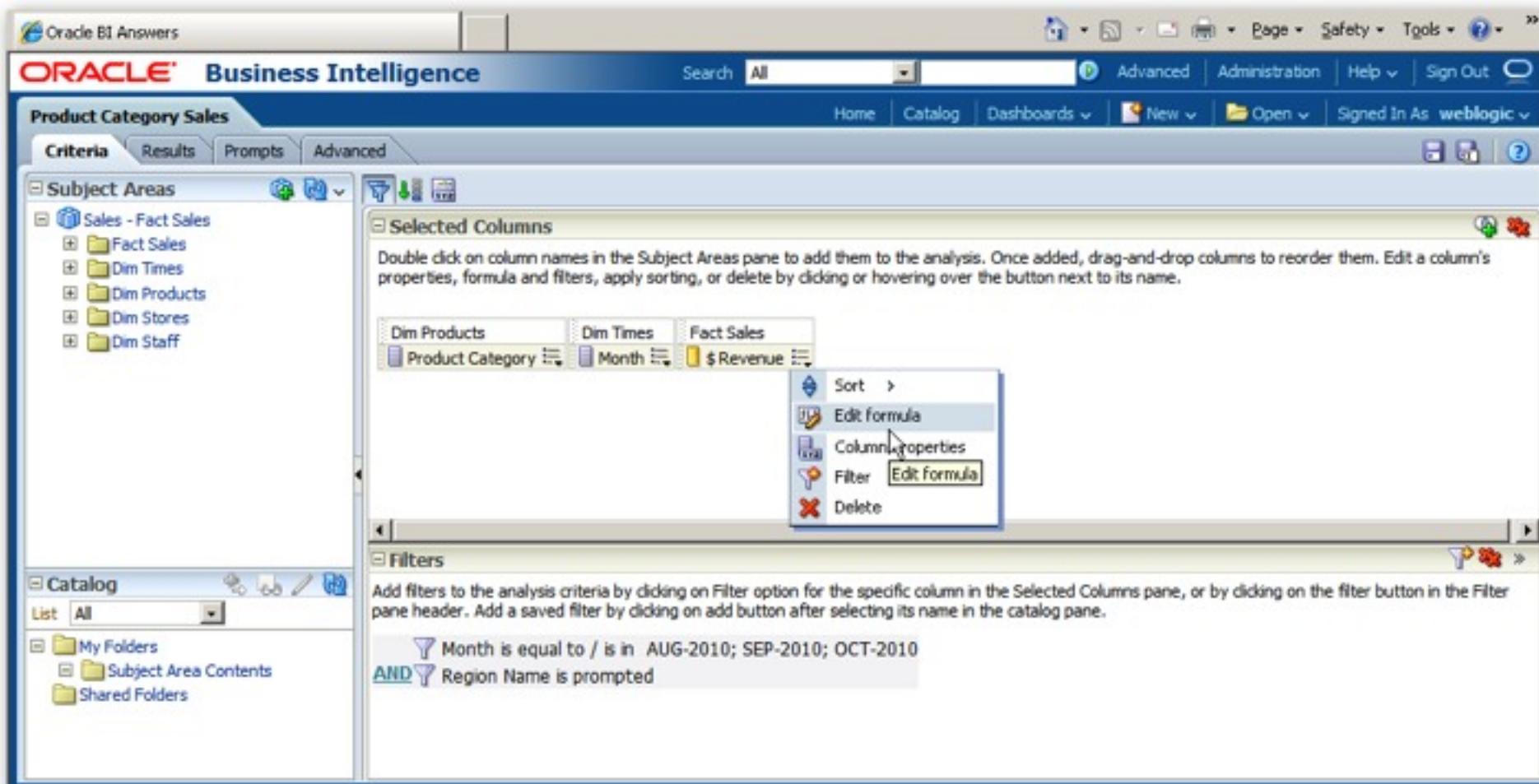
Criteria Listing

- List of all selected columns
- Edit formulas
- Edit column properties
- Add filters
- Set sort criteria



The screenshot shows the Oracle Business Intelligence Criteria View interface. On the left, there's a tree view of 'Subject Areas' under 'Sales - Fact Sales', including Fact Sales, Dim Times, Dim Products, Dim Stores, and Dim Staff. The main area is titled 'Selected Columns' with the instruction: 'Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.' Below this, three columns are listed: Dim Products, Dim Times, and Fact Sales. Each column has a dropdown arrow icon. A context menu is open over the 'Fact Sales' column, showing options: Sort, Edit formula (which is highlighted with a blue border), Column Properties, Filter (with 'Edit formula' also visible), and Delete. At the bottom of the 'Selected Columns' pane, there's a note: 'Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter add button after selecting its name in the catalog pane.' Below the menu, there's a date range: '0; SEP-2010; OCT-2010'.

OBIEE 11g Answers - Criteria View

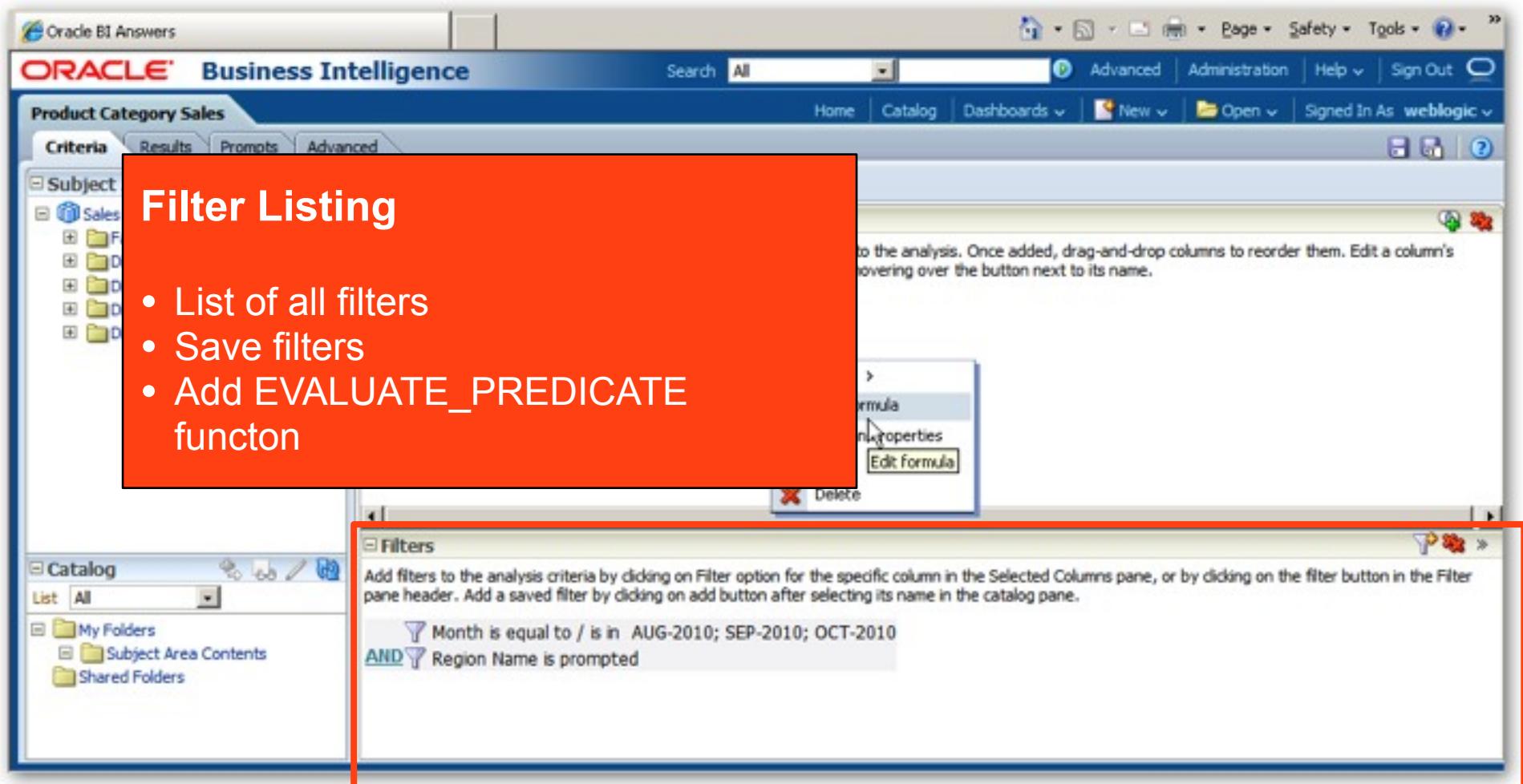


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OBIEE 11g Answers - Criteria View

Filter Listing

- List of all filters
- Save filters
- Add EVALUATE_PREDICATE function

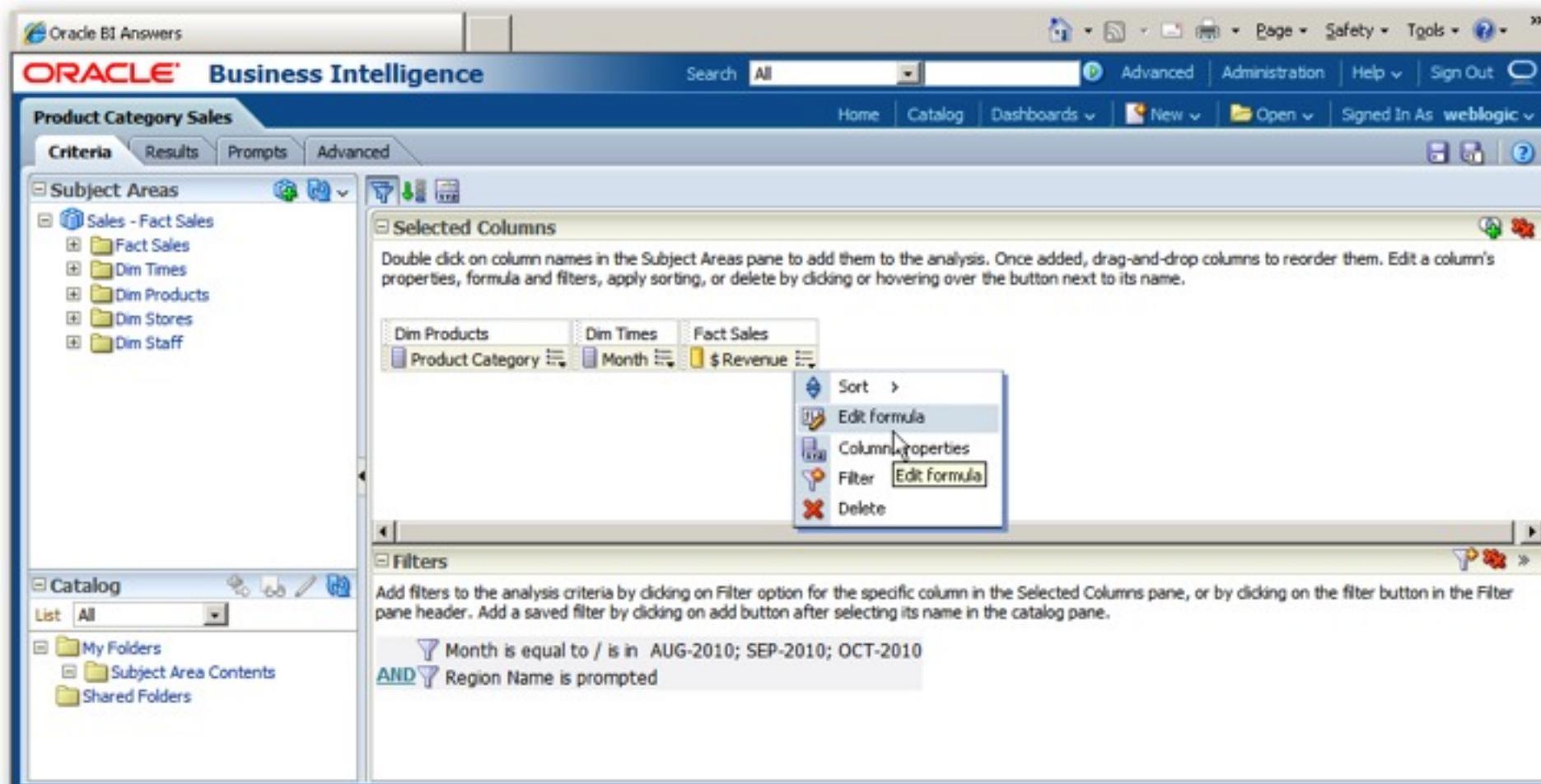


The screenshot shows the Oracle BI Answers interface. The top navigation bar includes 'Oracle BI Answers', 'Search All', 'Advanced', 'Administration', 'Help', and 'Sign Out'. Below the navigation is a toolbar with icons for Home, Catalog, Dashboards, New, Open, and Signed In As weblogic. The main area has tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. On the left, there's a 'Subject' tree with 'Sales' selected, showing sub-folders F, D, D, D, and D. The right side features a 'Selected Columns' pane with a tooltip about dragging columns to reorder them. At the bottom right, a 'Filters' pane is shown with the following content:

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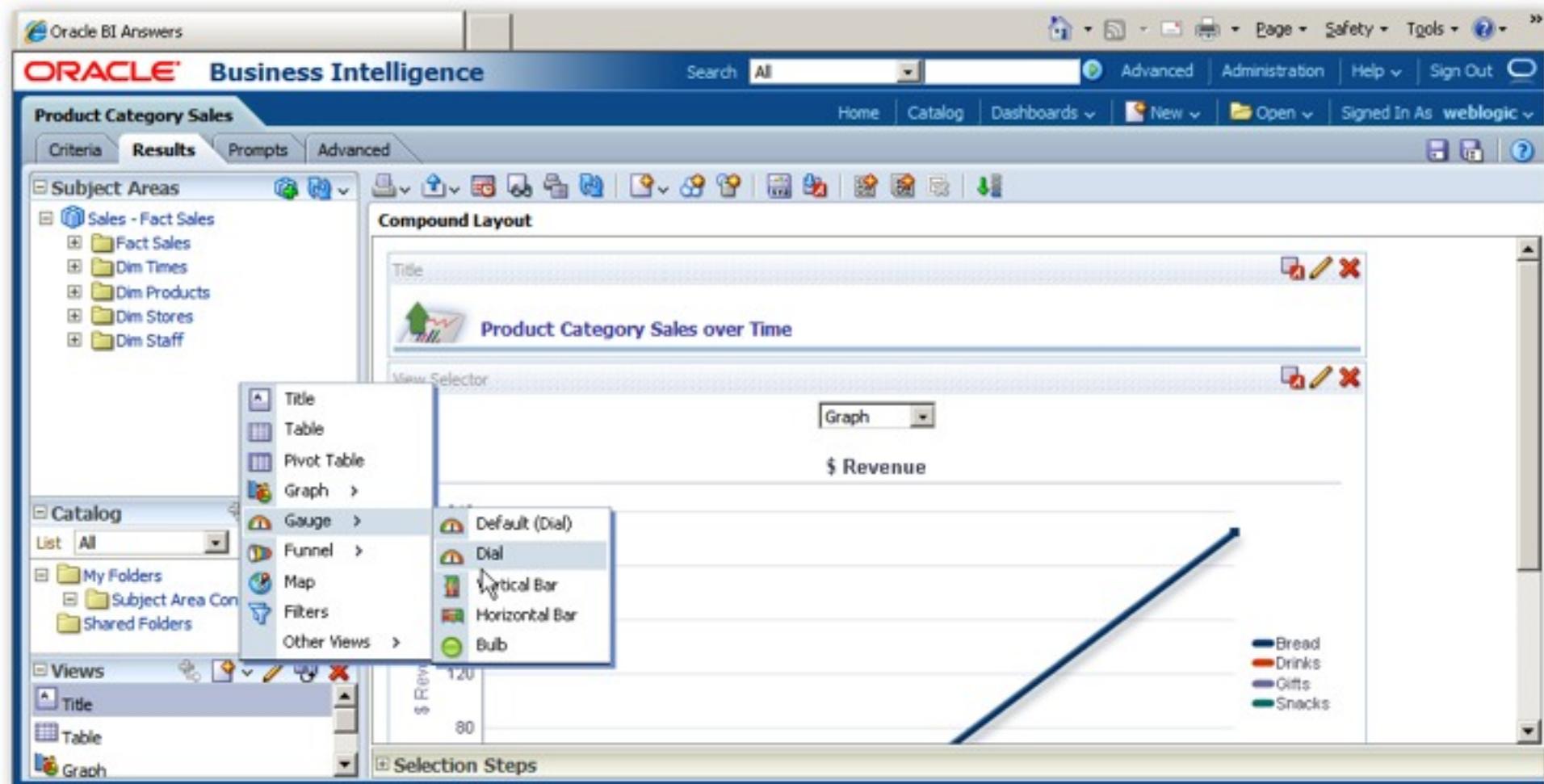
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OBIEE 11g Answers - Criteria View



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OBIEE 11g Answers - Results View



OBIEE 11g Answers - Results View

Oracle BI Answers

ORACLE Business Intelligence

Product Category Sales

Criteria Results Prompts Advanced

Subject Areas

- Sales - Fact Sales
 - Fact Sales
 - Dim Times
 - Dim Products
 - Dim Stores
 - Dim Staff

Catalog

List All

My Folders

- Subject Area Con
- Shared Folders

Views

- Title
- Table
- Pivot Table
- Graph >
- Gauge >
- Funnel >
- Map
- Filters
- Other Views >

View Selector

Compound Layout

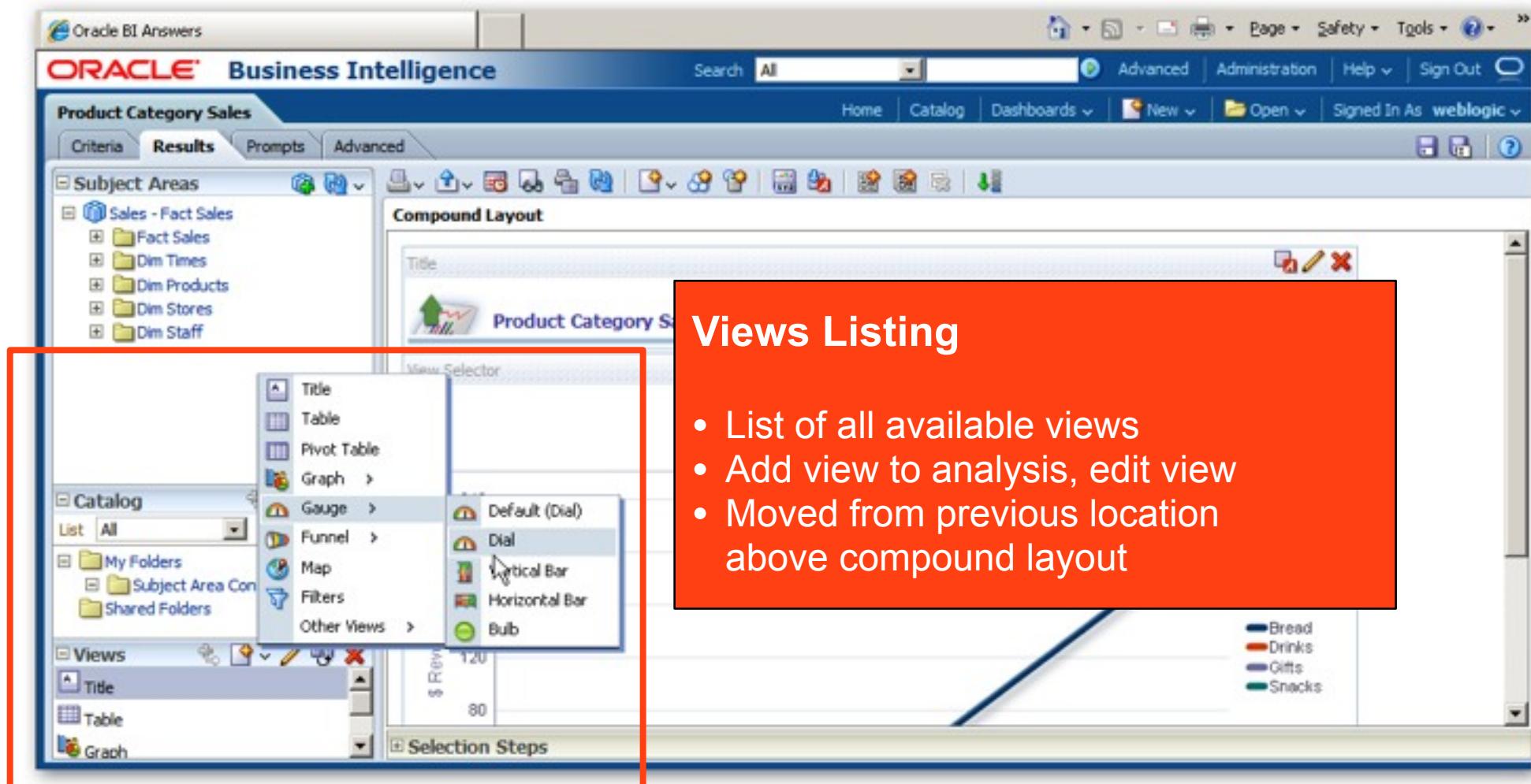
Title

Product Category Sales

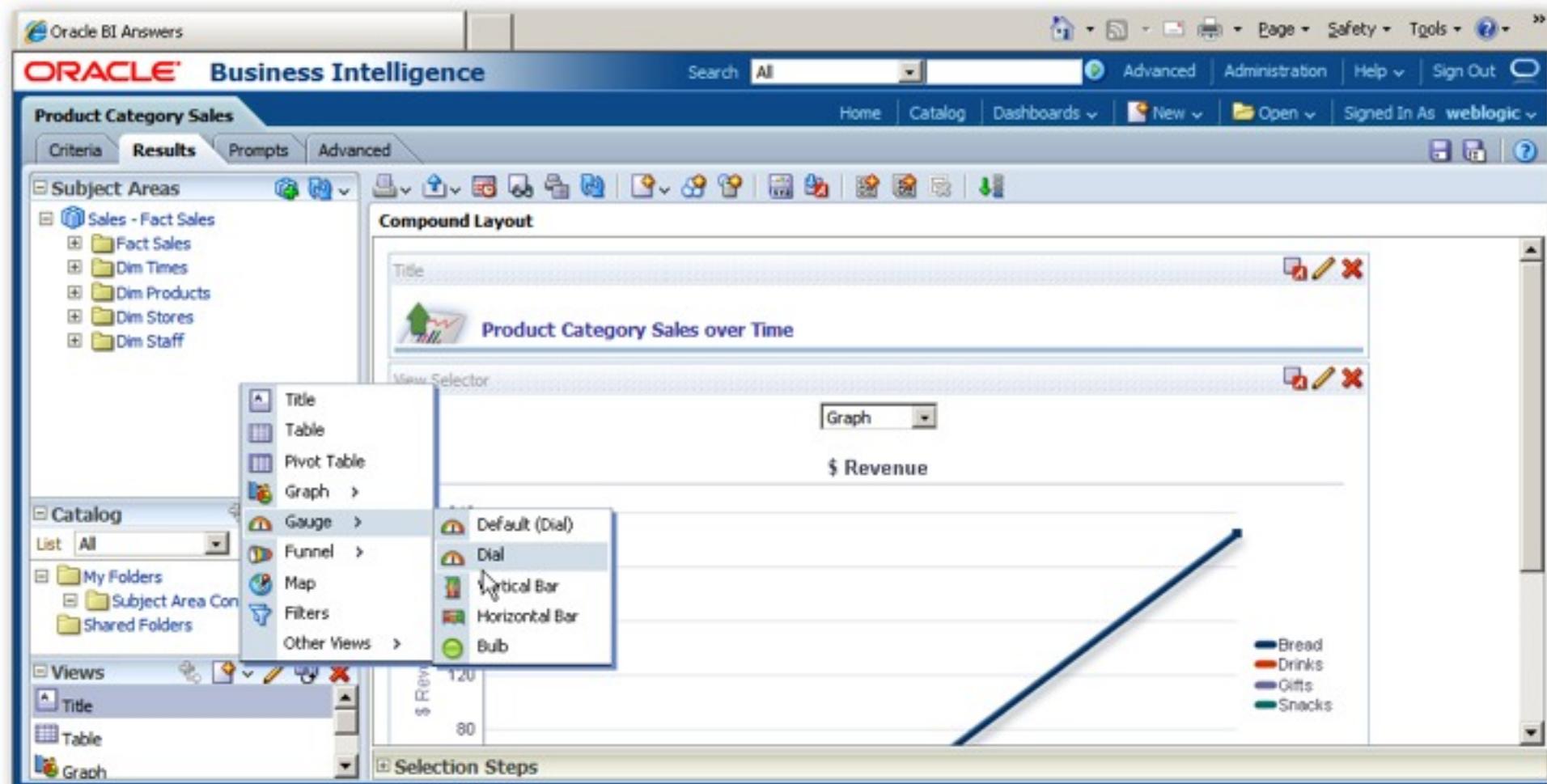
Views Listing

- List of all available views
- Add view to analysis, edit view
- Moved from previous location above compound layout

Bread
Drinks
Gifts
Snacks

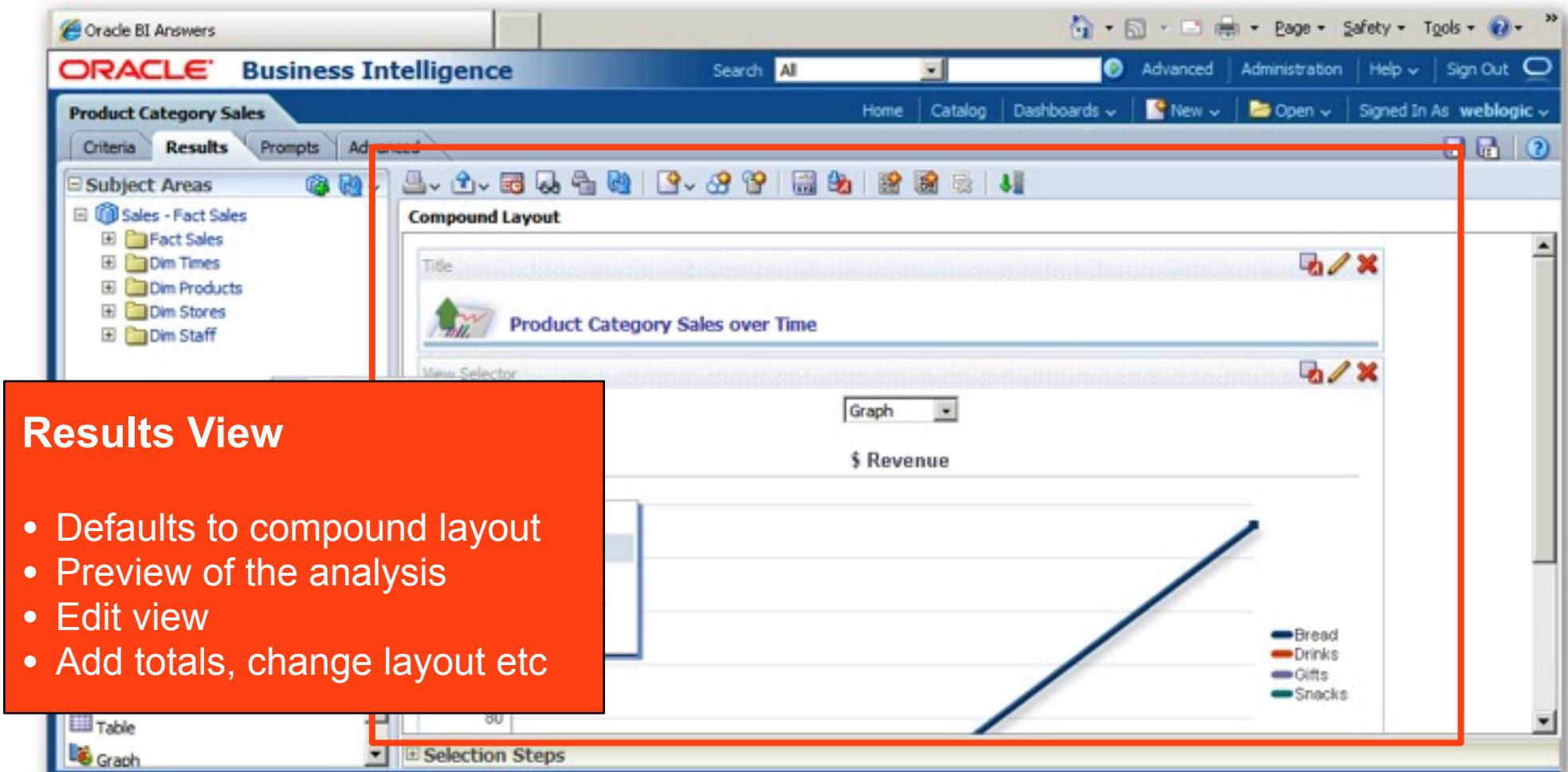


OBIEE 11g Answers - Results View



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OBIEE 11g Answers - Results View

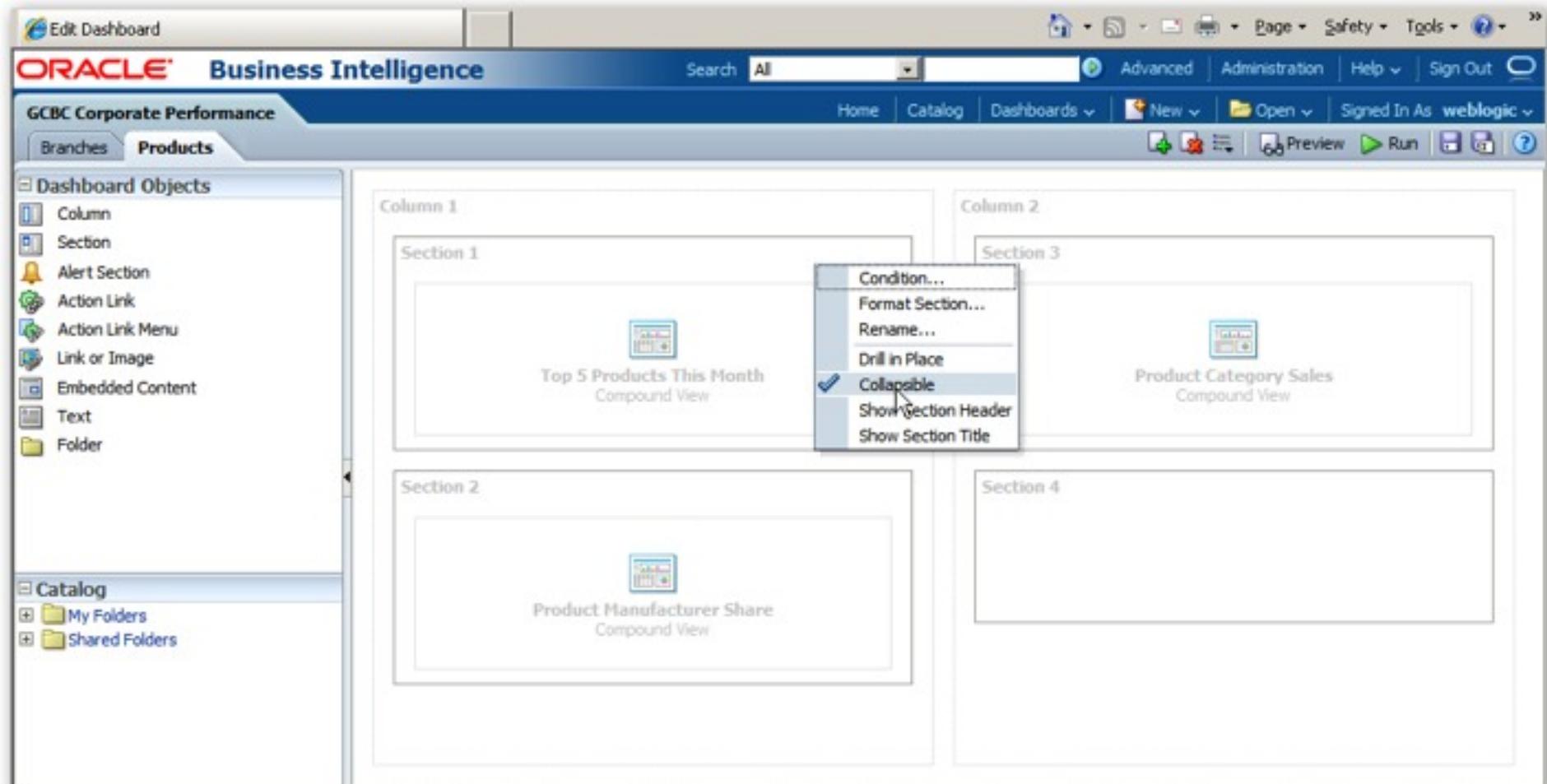


The screenshot shows the Oracle Business Intelligence Results View interface. On the left, there's a navigation pane with 'Subject Areas' expanded, showing 'Sales - Fact Sales' with sub-folders like 'Fact Sales', 'Dim Times', 'Dim Products', etc. Below this is a large orange box containing the heading 'Results View' and a bulleted list of features. To the right is the main workspace, which displays a 'Compound Layout' titled 'Product Category Sales over Time'. This layout includes a 'View Selector' at the top, a 'Graph' dropdown set to 'Graph', and a Y-axis labeled '\$ Revenue'. A single blue line graph shows revenue over time for four categories: Bread, Drinks, Gifts, and Snacks. The legend indicates: Bread (blue), Drinks (orange), Gifts (purple), and Snacks (green). At the bottom of the workspace, there are tabs for 'Table' and 'Graph', and a 'Selection Steps' section.

Results View

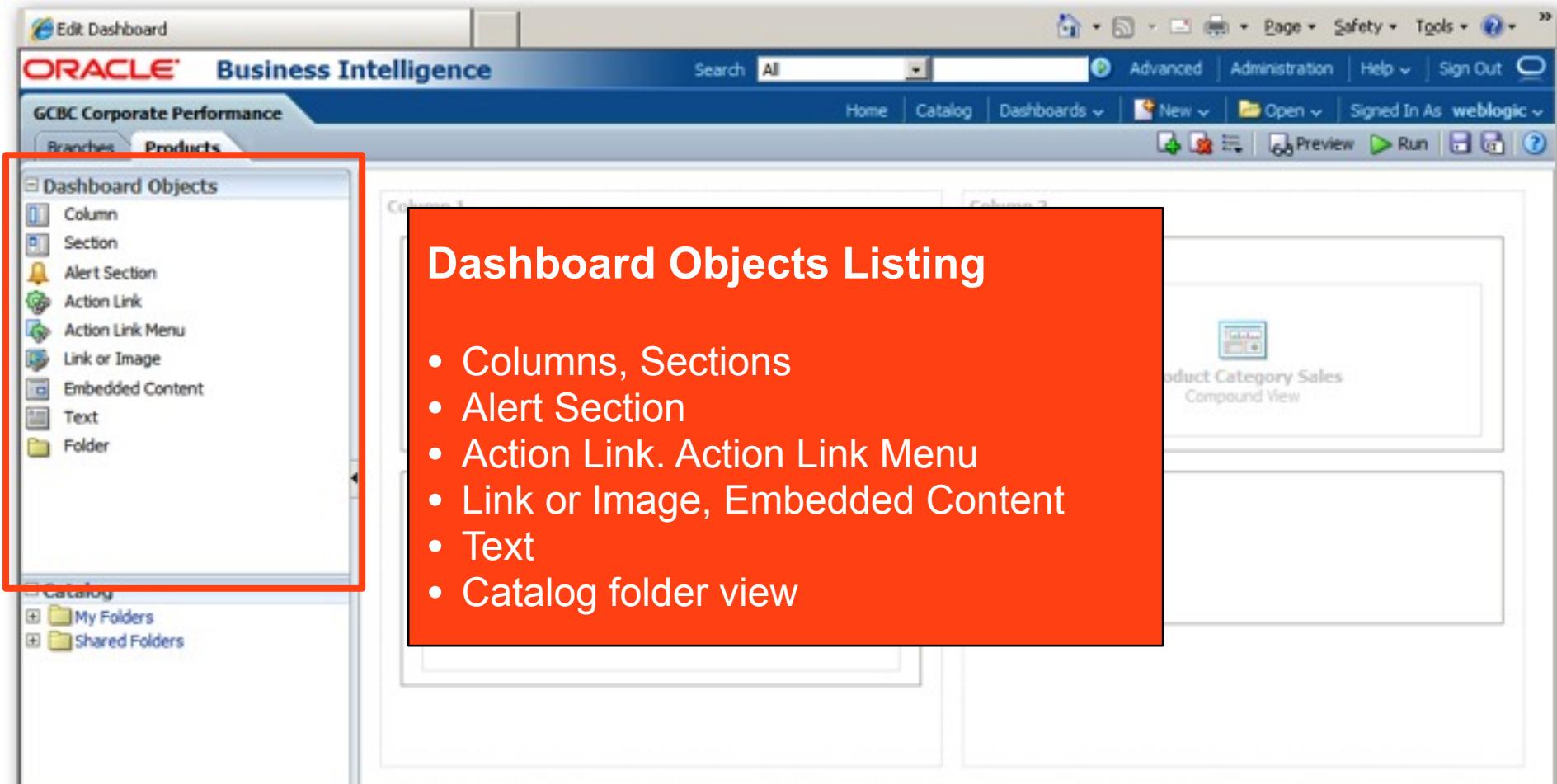
- Defaults to compound layout
- Preview of the analysis
- Edit view
- Add totals, change layout etc

OBIEE 11g Dashboard Editor



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OBIEE 11g Dashboard Editor

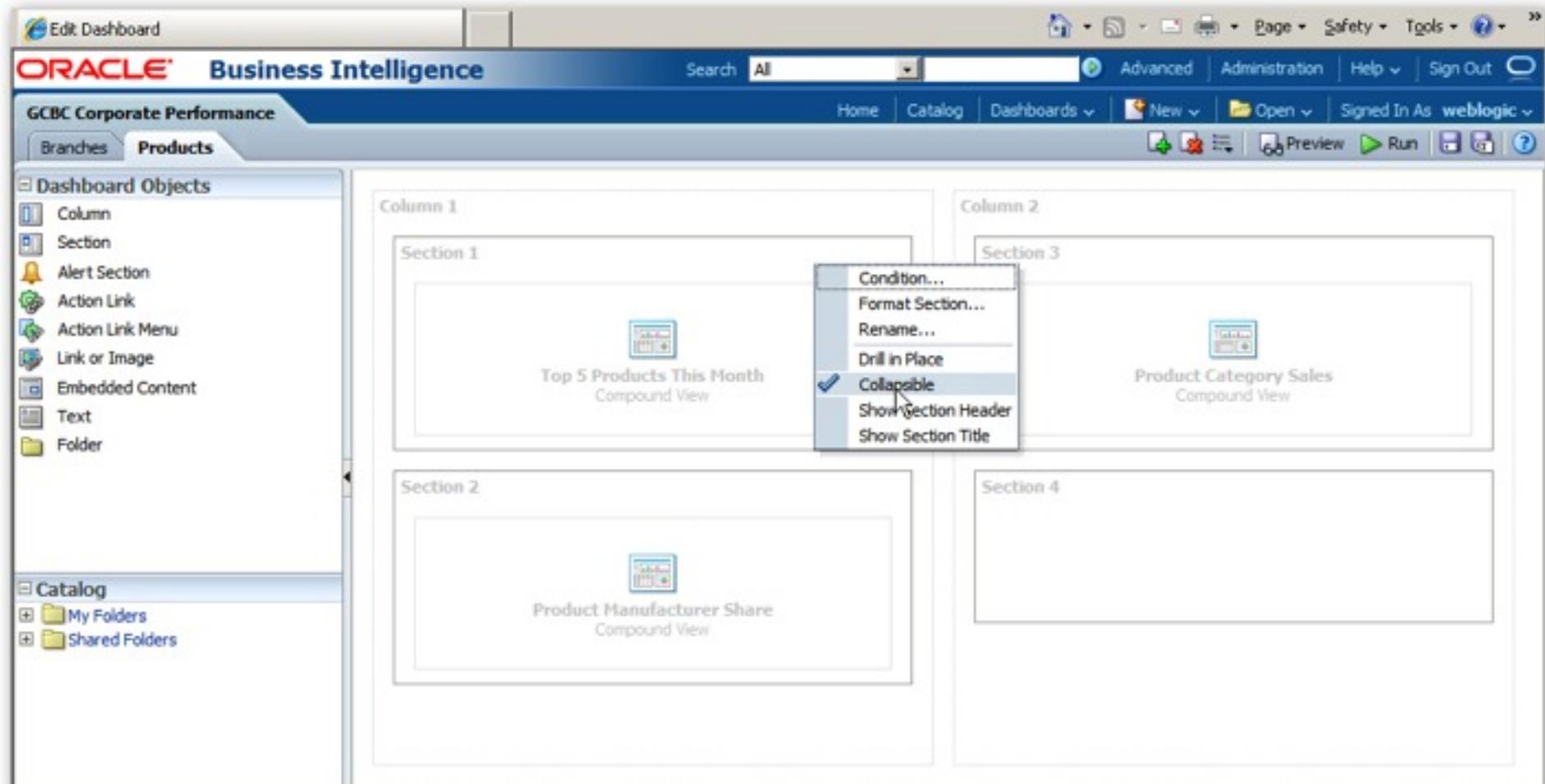


The screenshot shows the Oracle Business Intelligence (OBIEE) 11g Dashboard Editor. The interface has a blue header bar with the 'ORACLE Business Intelligence' logo and a search bar. Below the header is a navigation bar with links like Home, Catalog, Dashboards, New, Open, and Sign Out. The main area is divided into two columns: Column 1 and Column 2. Column 1 contains a sidebar titled 'Edit Dashboard' with sections for 'Dashboard Objects' (highlighted with a red box) and 'Catalog'. Under 'Catalog', there are 'My Folders' and 'Shared Folders'. Column 2 displays a 'Dashboard Objects Listing' box with a bulleted list of object types. A preview window on the right shows a 'Product Category Sales Compound View'.

Dashboard Objects Listing

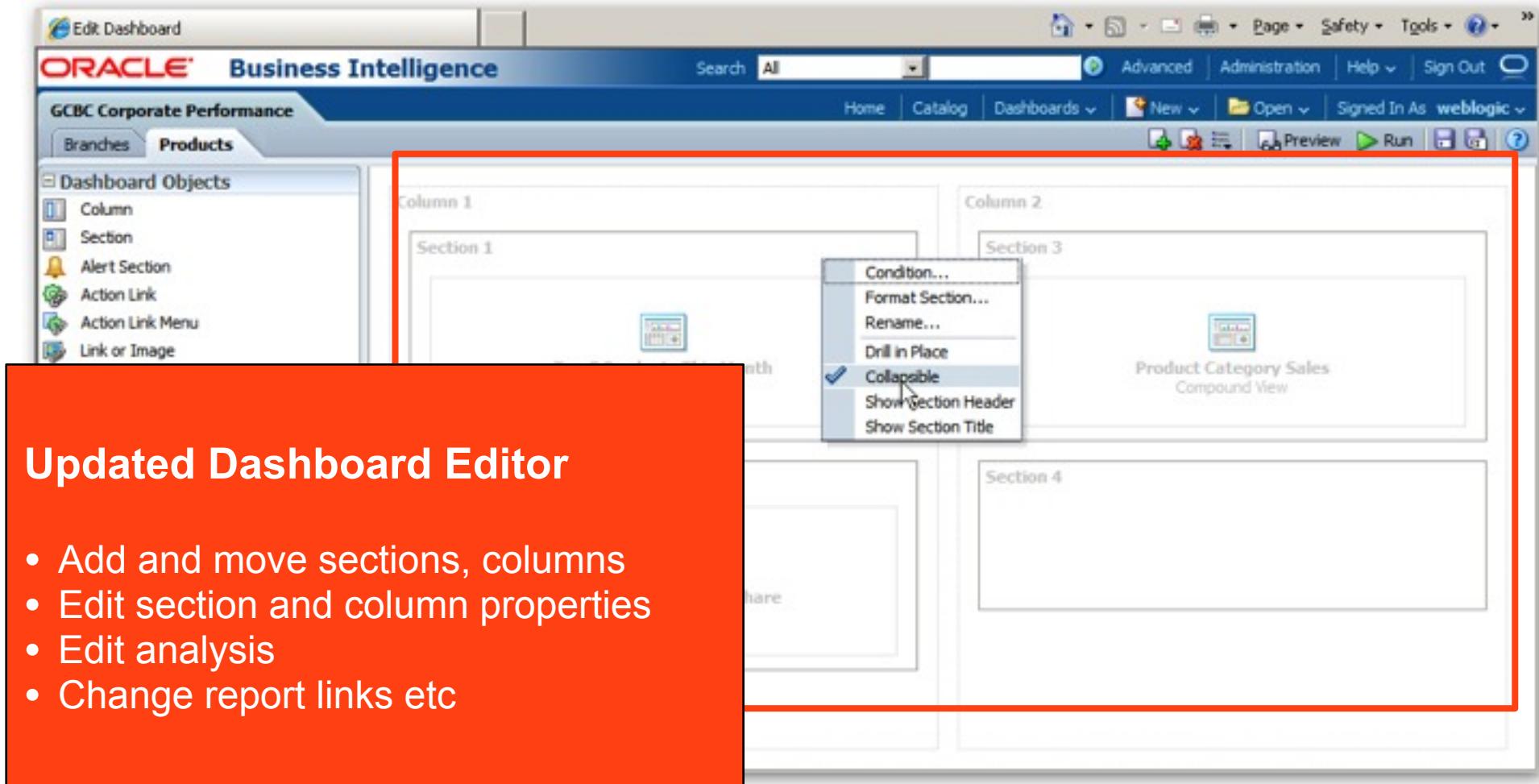
- Columns, Sections
- Alert Section
- Action Link, Action Link Menu
- Link or Image, Embedded Content
- Text
- Catalog folder view

OBIEE 11g Dashboard Editor



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OBIEE 11g Dashboard Editor

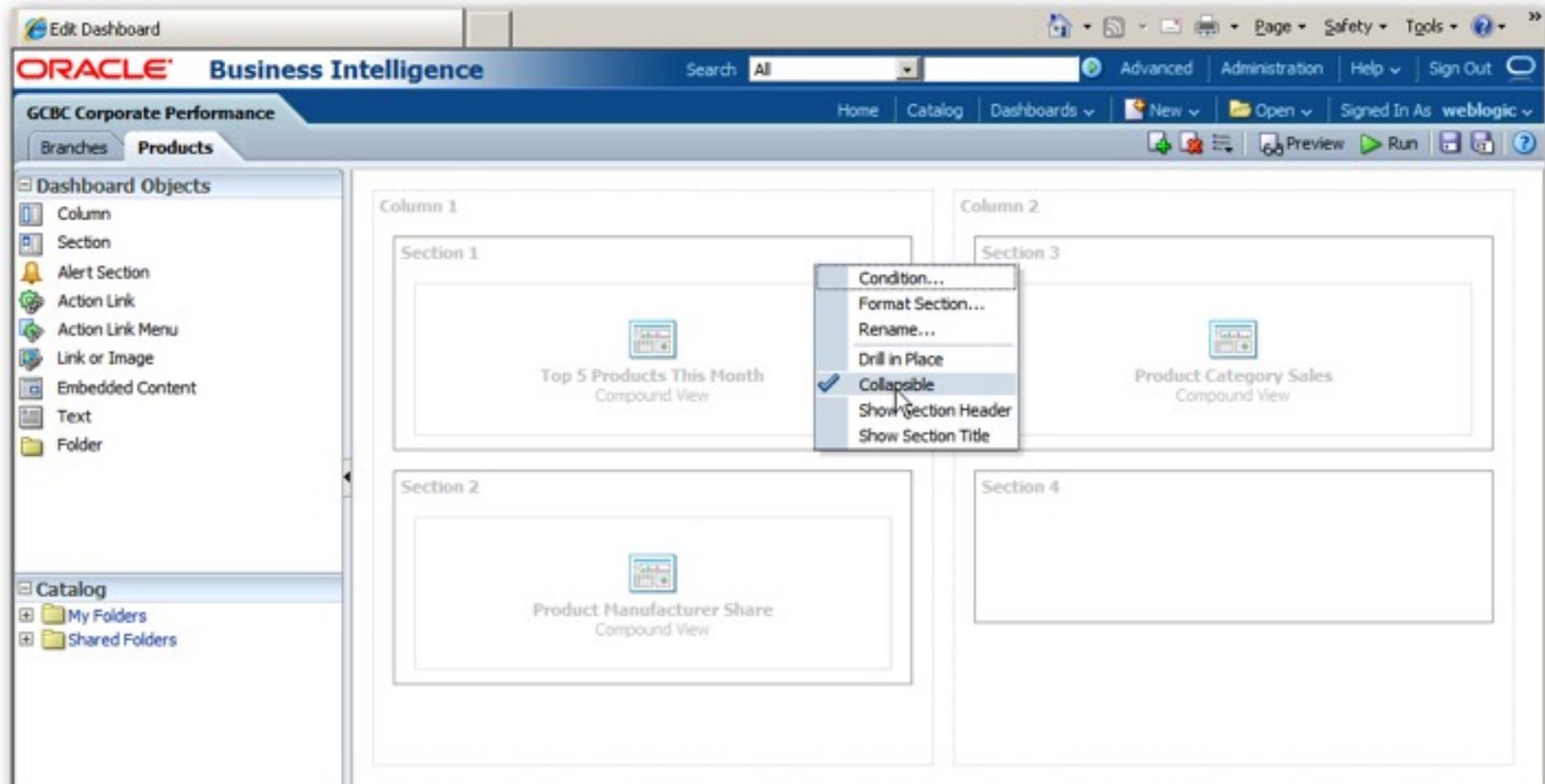


The screenshot shows the Oracle Business Intelligence dashboard editor interface. A red box highlights a context menu that has appeared over a section header. The menu items are: Condition..., Format Section..., Rename..., Drill in Place, Collapsible (which is checked), Show Section Header, and Show Section Title. The dashboard itself contains several sections and columns, with one section labeled 'Product Category Sales Compound View'.

Updated Dashboard Editor

- Add and move sections, columns
- Edit section and column properties
- Edit analysis
- Change report links etc

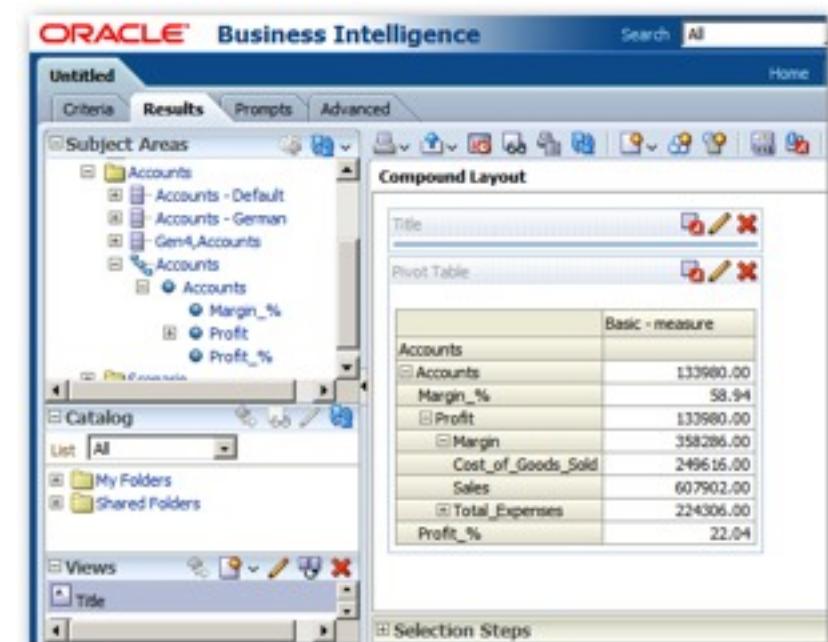
OBIEE 11g Dashboard Editor



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New Answers and Dashboards Features in OBIEE 11g

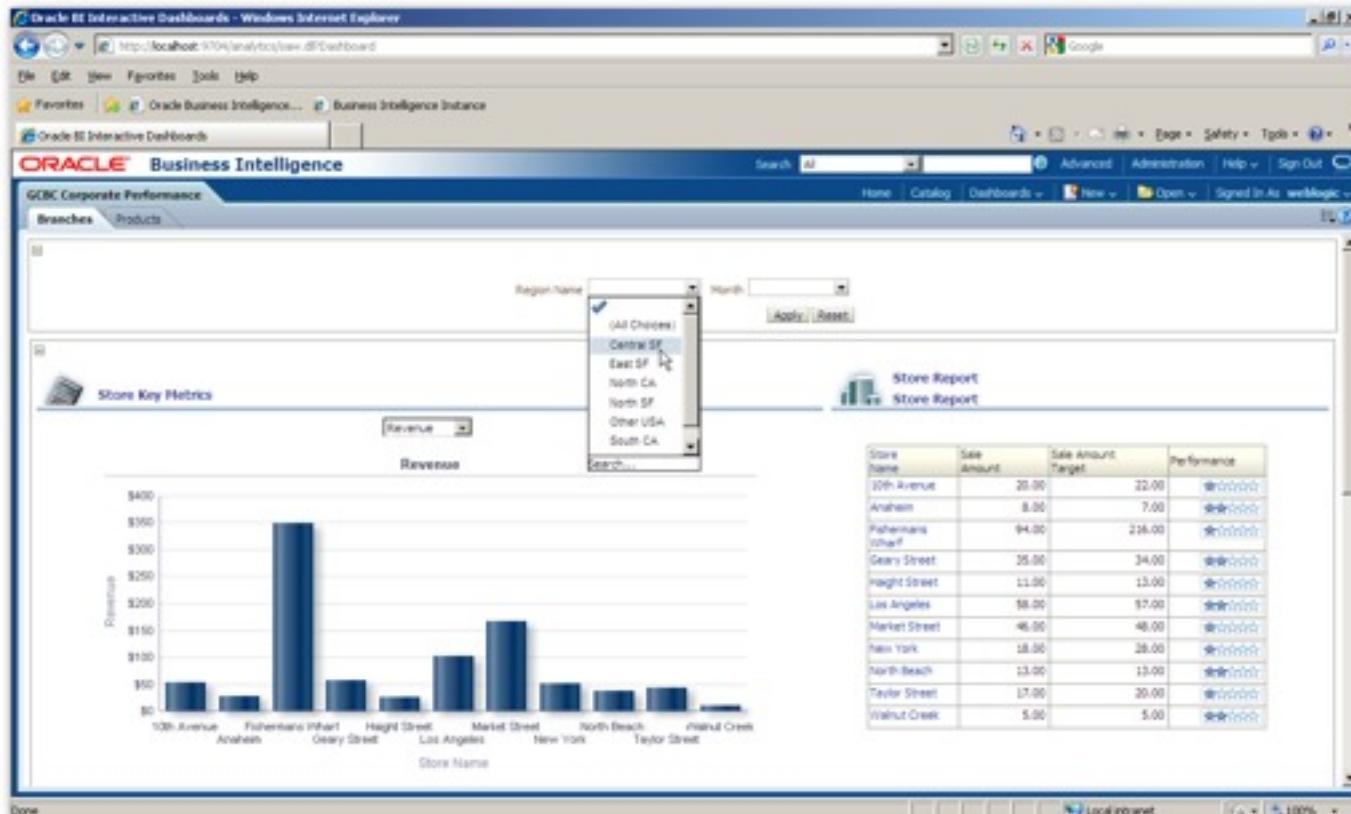
- Improved support for OLAP-style reporting
 - Hierarchical columns
 - Support for ragged and skip-level hierarchies
 - Dynamic re-arrangement of pivot tables in the dashboard
- Dynamic grouping and custom aggregates
- New visualizations and dashboard controls
- Updated graphing engine (ADF DVT)
- New gauge types and graphics



The screenshot shows the Oracle Business Intelligence interface. On the left, there are three panels: 'Subject Areas' (listing Accounts, Catalog, and Views), 'Criteria' (with tabs for Results, Prompts, Advanced), and 'Prompts'. The main area is titled 'Compound Layout' with sections for 'Title' and 'Pivot Table'. The 'Pivot Table' section displays the following data:

	Basic - measure
Accounts	133980.00
Margin %	58.94
Profit	133980.00
Margin	358286.00
Cost_of_Goods_Sold	249616.00
Sales	607902.00
Total_Expenses	224306.00
Profit %	22.04

Backward Compatibility with OBIEE 10g Dashboards



The screenshot shows a Microsoft Internet Explorer browser window displaying an Oracle Business Intelligence dashboard. The dashboard has a blue header with the text "ORACLE Business Intelligence". Below the header, there are tabs for "Branches" and "Products". A search bar and a menu bar with links like "Home", "Catalog", "Dashboards", "New", "Open", and "Signed In As: webMagic" are visible.

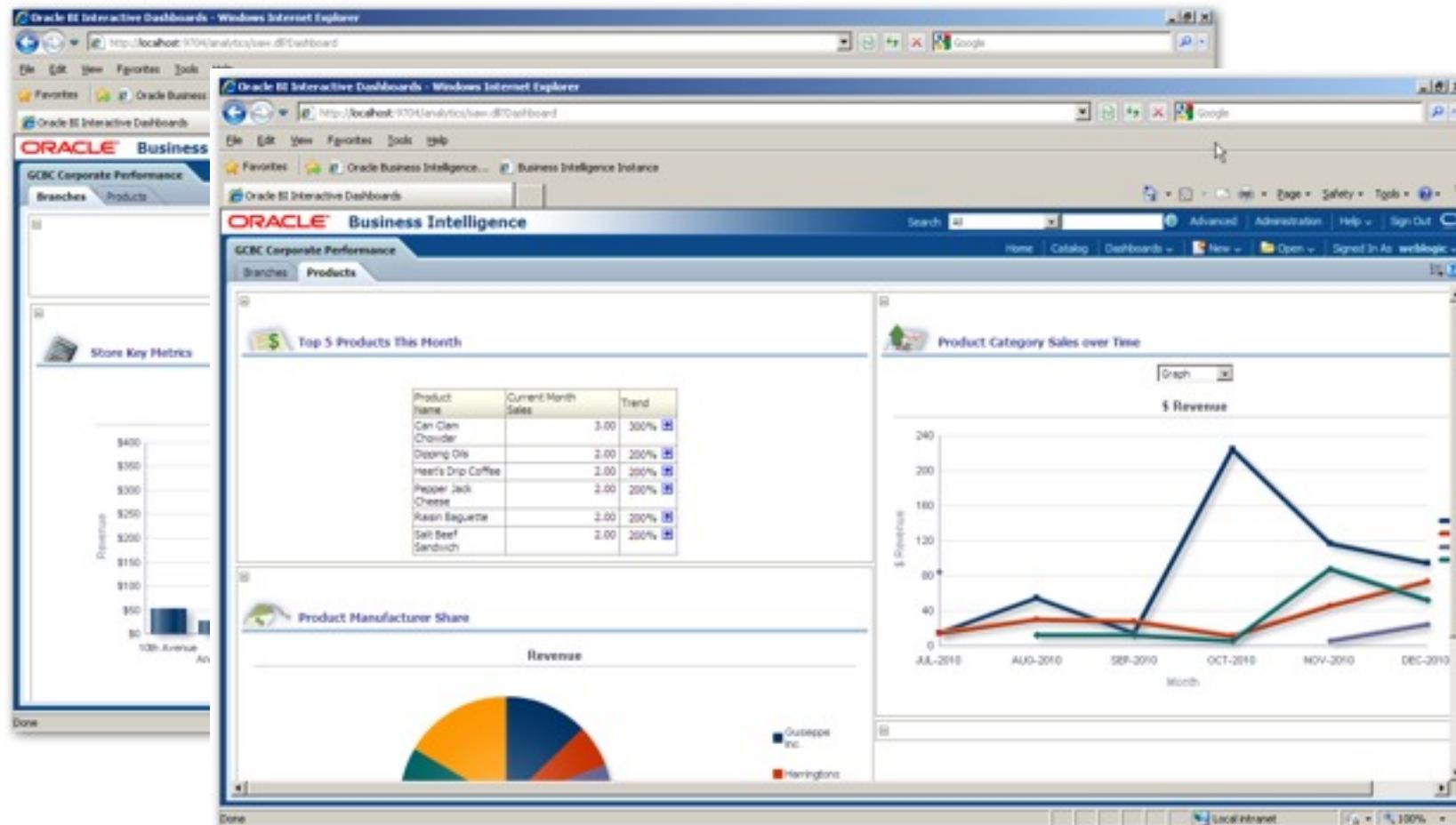
The main content area contains two reports:

- Store Key Metrics:** A bar chart titled "Revenue" showing revenue for various stores. The Y-axis ranges from \$0 to \$400. The X-axis lists stores: 10th Avenue, Anaheim, Foothill Wharf, Geary Street, Height Street, Los Angeles, Market Street, New York, North Beach, Taylor Street, and Walnut Creek. The chart shows significant variation in revenue across these locations.
- Store Report:** A grid report titled "Store Report" showing store names, sale amounts, sale amount targets, and performance ratings. The data is as follows:

Store Name	Sale Amount	Sale Amount Target	Performance
10th Avenue	20.00	22.00	★★★★★
Anaheim	8.00	7.00	★★★★★
Foothill Wharf	94.00	216.00	★★★★★
Geary Street	26.00	34.00	★★★★★
Height Street	11.00	13.00	★★★★★
Los Angeles	58.00	57.00	★★★★★
Market Street	46.00	48.00	★★★★★
New York	18.00	28.00	★★★★★
North Beach	13.00	13.00	★★★★★
Taylor Street	17.00	20.00	★★★★★
Walnut Creek	5.00	5.00	★★★★★

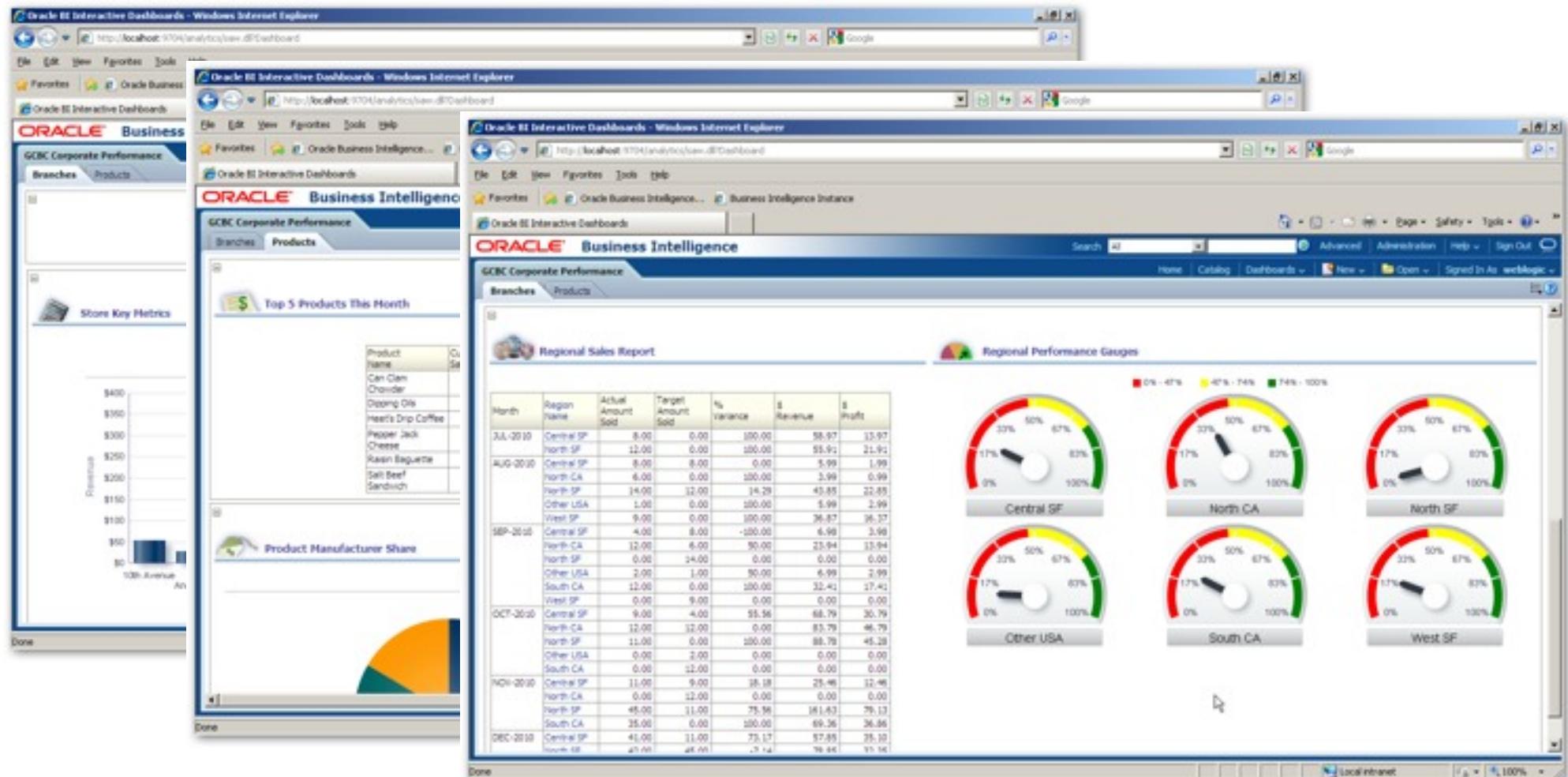
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Backward Compatibility with OBIEE 10g Dashboards



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Backward Compatibility with OBIEE 10g Dashboards



The image displays three separate browser windows, each showing a different Oracle Business Intelligence dashboard. All three windows have the same URL: <http://localhost:1704/analytics/saw BI Dashboard>.

- Left Window:** Shows a "GCBC Corporate Performance" dashboard with tabs for "Branches" and "Products". It includes a chart titled "Store Key Metrics" with a Y-axis from \$400 to \$4000 and an X-axis showing months. Below it is a table titled "Top 5 Products This Month" with columns: Product Name, Q1 Sales, Q2 Sales, and Q3 Sales.
- Middle Window:** Shows a "Regional Sales Report" dashboard. It features a table with columns: Month, Region Name, Actual Amount Sold, Target Amount Sold, % Variance, \$ Revenue, and \$ Profit. The table spans from JUL-2010 to DEC-2010 across various regions like Central SF, North CA, etc. To the right is a section titled "Regional Performance Gauges" with six circular performance indicators for different regions, each with a color scale from red (0% - 47%) to green (74% - 100%).
- Right Window:** Shows a similar "Regional Sales Report" dashboard with the same table structure and regional performance gauges as the middle window.

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Hierarchical Columns

- OBIEE 11gR1 now supports concept of “hierarchical columns”
 - ▶ In-column drilling up and down a hierarchy
 - ▶ Similar concept to Discoverer and other OLAP tools
 - ▶ Regular columns still supported, now renamed “attribute columns”
- Supports level-based and ragged (parent-child) hierarchies
- Flexible totalling and ability to determine leaf-levels, ancestors, parents etc
- Works with both relational and OLAP (Essbase, Oracle OLAP etc) data sources

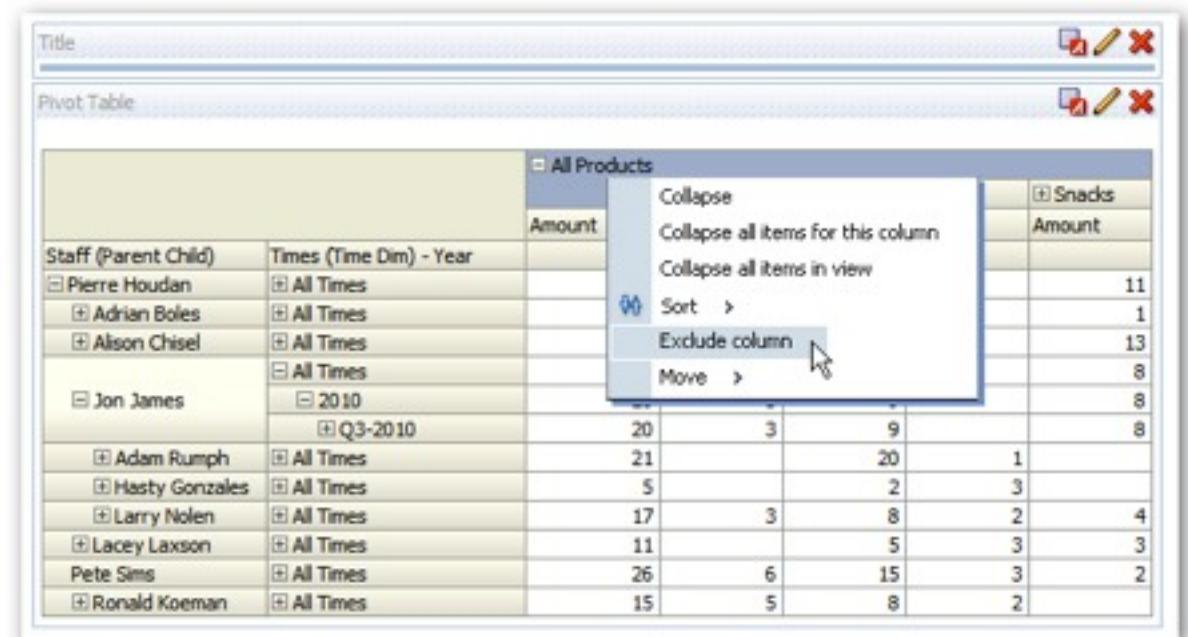
Pivot Table

	Amount
Staff (Parent Child)	
Pierre Houdan	53
Adrian Boles	8
Alison Chisel	37
Cassandra Barry	11
Russell Durkee	5
Jon James	20
Lacey Laxson	11
Doris Lines	10
Malcom Doig	40
Vernice Kennebeck	19
Pete Sims	26
Ronald Koeman	15

Hierarchical Columns and OLAP Reporting

- Hierarchical columns can be used in pivot tables
 - Can be nested within each other
 - Can be dynamically re-arranged in the dashboard
 - Can be used alongside regular attribute and measure columns

Pivot Table



The screenshot shows a Pivot Table interface with a context menu open over a column header. The menu options include:

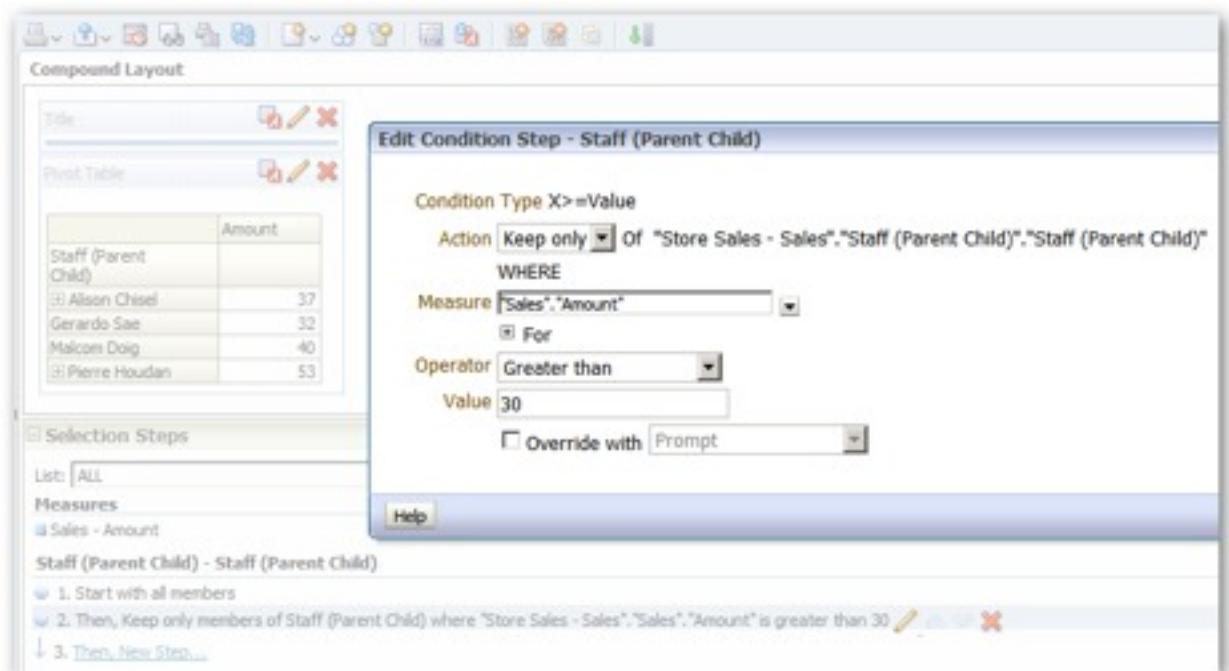
- All Products
- Amount
- Collapse
- Collapse all items for this column
- Collapse all items in view
- Sort >
- Exclude column** (highlighted with a cursor)
- Move >

The Pivot Table data is as follows:

		All Products	Snacks
		Amount	Amount
Staff (Parent Child)	Times (Time Dim) - Year	□ All Products	□ Snacks
Pierre Houdan	□ All Times	11	
Adrian Boles	□ All Times	1	
Alison Chisel	□ All Times	13	
Jon James	□ 2010	8	
	□ Q3-2010	8	
Adam Rumph	□ All Times	1	
Hasty Gonzales	□ All Times	3	
Larry Nolen	□ All Times	4	
Lacey Laxson	□ All Times	3	
Pete Sims	□ All Times	2	
Ronald Koeman	□ All Times	3	

Hierarchical Columns and Selection Steps (Filtering)

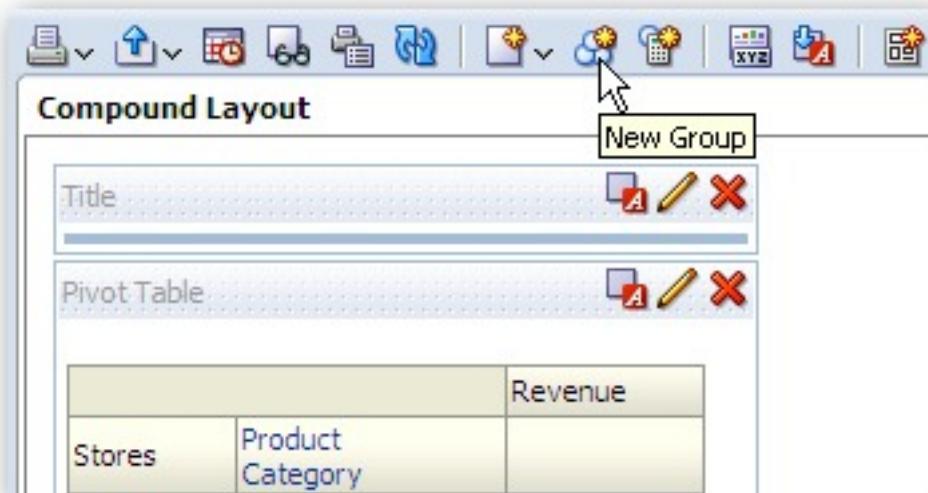
- Incremental (status-aware) filter steps can be defined for hierarchical columns
- Add, remove, keep dimension members
- Reference members by their position in the hierarchy
- Add member conditions referencing measures
- Combine with regular filters on attribute columns



The screenshot shows the SAP BusinessObjects Web Intelligence environment. On the left, there's a 'Compound Layout' window containing a 'PivotTable' section. The PivotTable displays data for 'Staff (Parent Child)' with an 'Amount' column, showing rows for Alison Chisel (37), Gerardo Sae (32), Malcolm Doig (40), and Pierre Houdan (53). Below the PivotTable is a 'Selection Steps' section. The 'Edit Condition Step - Staff (Parent Child)' dialog is open on the right, showing a condition type of 'X >= Value'. The 'Action' dropdown is set to 'Keep only' for the measure 'Sales'. The 'Measure' dropdown is set to 'Sales'. The 'Operator' dropdown is set to 'Greater than' and the 'Value' input field is set to '30'. A checkbox for 'Override with Prompt' is unchecked. At the bottom of the dialog, there are 'Help' and 'OK' buttons.

Hierarchy Groups

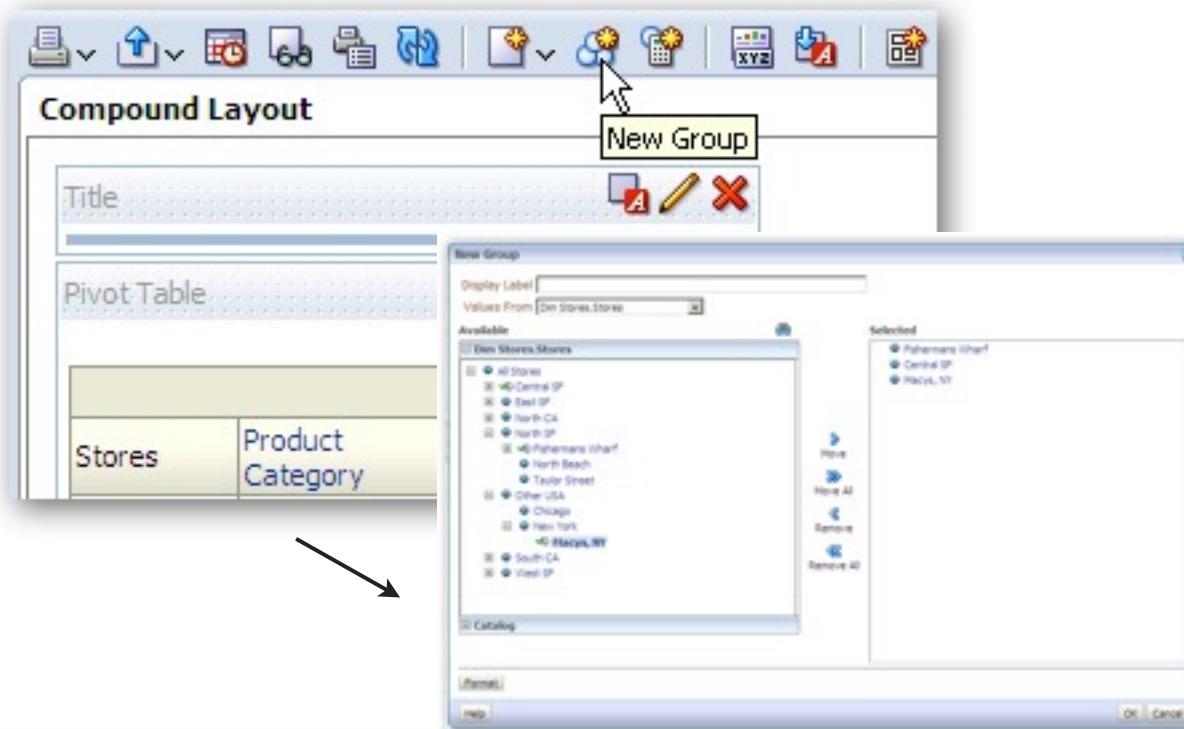
- Groups can be created in Answers 11g for custom aggregations
- Preserves hierarchy within group, can drill-down from selected members
- Existing calculated member feature still available



The screenshot shows the Oracle BI Answers Compound Layout interface. At the top, there's a toolbar with various icons. Below it, the title 'Compound Layout' is displayed. A 'New Group' button is highlighted with a mouse cursor. Below this, there are two sections: 'Title' and 'Pivot Table'. The 'Title' section contains a text input field and some icons. The 'Pivot Table' section contains a table structure with columns for 'Stores' and 'Product Category', and a row for 'Revenue'. The table has a light beige background with blue text for column headers.

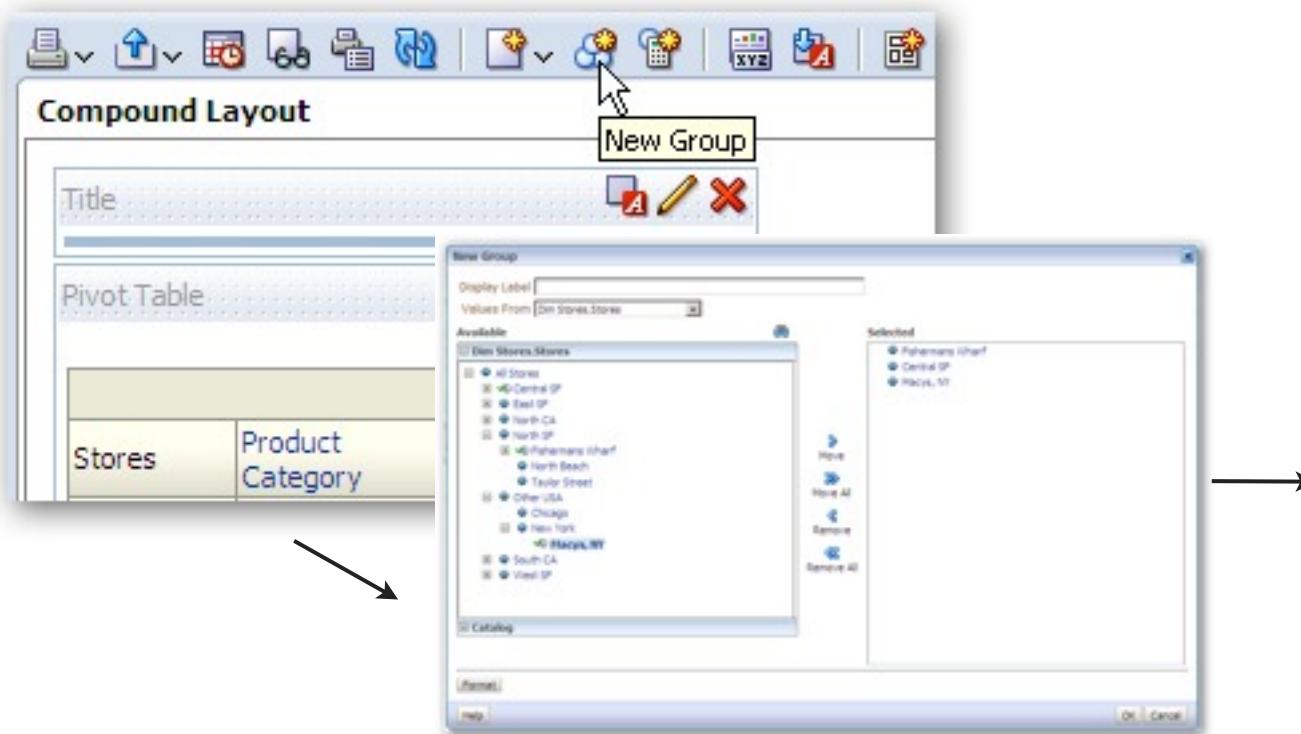
Hierarchy Groups

- Groups can be created in Answers 11g for custom aggregations
- Preserves hierarchy within group, can drill-down from selected members
- Existing calculated member feature still available



Hierarchy Groups

- Groups can be created in Answers 11g for custom aggregations
- Preserves hierarchy within group, can drill-down from selected members
- Existing calculated member feature still available



The screenshot shows the Oracle BI Answers interface with a 'Compound Layout' window. A 'New Group' dialog box is open, allowing users to define a new hierarchy group. The 'Available' section lists various store locations like 'All Stores', 'Central SF', 'Bread', etc., while the 'Selected' section contains 'Fishermans Wharf', 'Central SF', and 'Macy's, NY'. An arrow points from the 'Selected' section towards the resulting report.

Stores	Product Category	Revenue
All Stores	Bread	6246.00
	Drinks	1821.69
	Gifts	923.44
	Snacks	2037.36
Test Stores and Areas	Bread	304.15
	Drinks	76.27
	Gifts	113.95
	Snacks	90.88
Central SF	Bread	94.70
	Drinks	28.42
	Gifts	58.97
	Snacks	41.95
SFO	Bread	79.80
	Drinks	20.94
	Gifts	209.45
	Snacks	47.85
Fishermans Wharf	Bread	54.98
	Drinks	35.95
	Gifts	14.95
	Snacks	2.99
Macy's, SF	Bread	6.48
	Drinks	15.98
	Gifts	12.98
Nordstroms, SF	Snacks	
Macy's, NY	Snacks	



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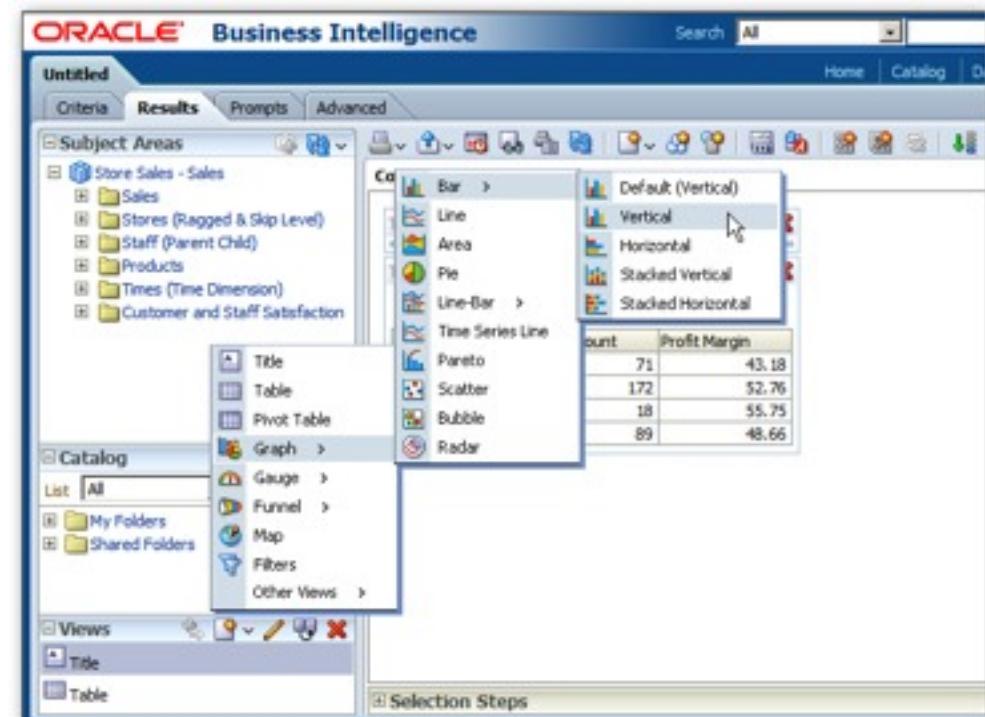
Demonstration

Hierarchical Columns

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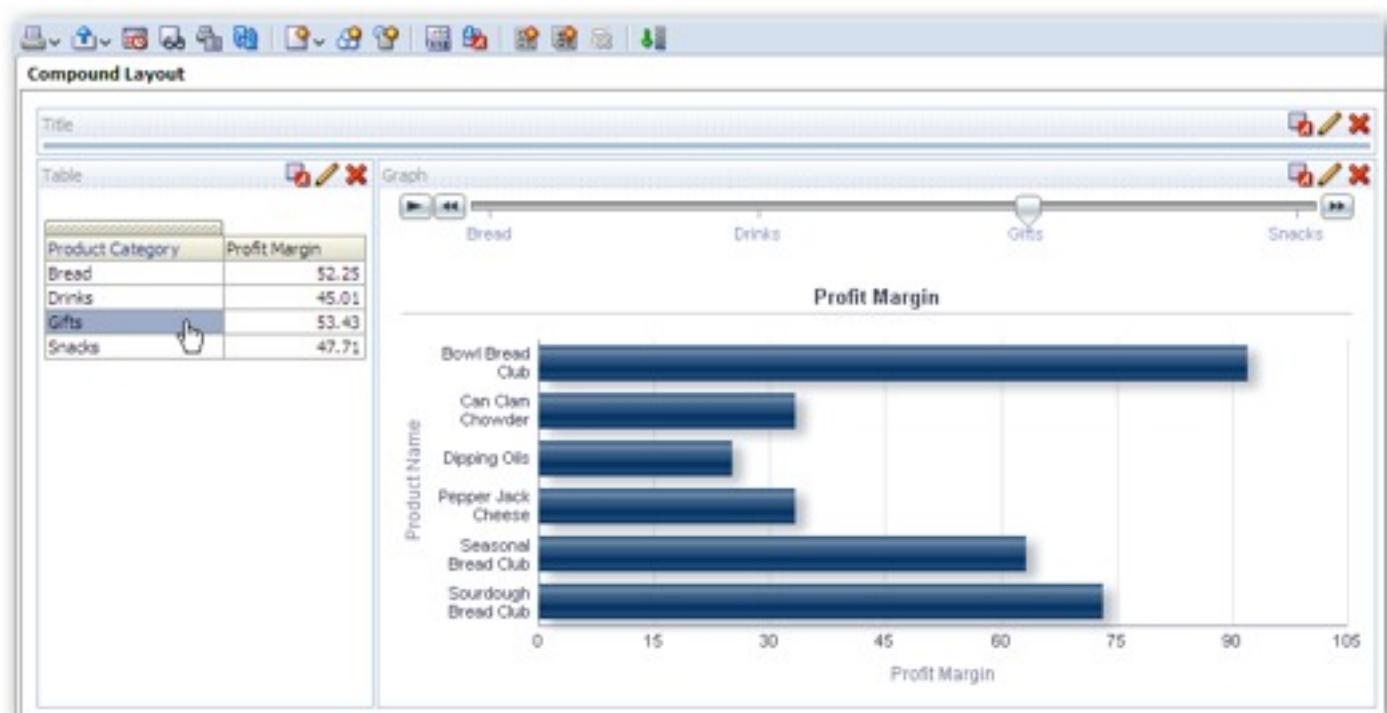
New Graphing Engine, Controls and Layout Editor

- Graphing engine in OBIEE 11gR1 has been moved to ADF DVT
- Easy access to graph types from main Results tab
- New layout controls to determine X, Y axis, measures graphed etc
- Ability to define time-based animations, and opening animations
- Graph Prompts
- Chart zoom



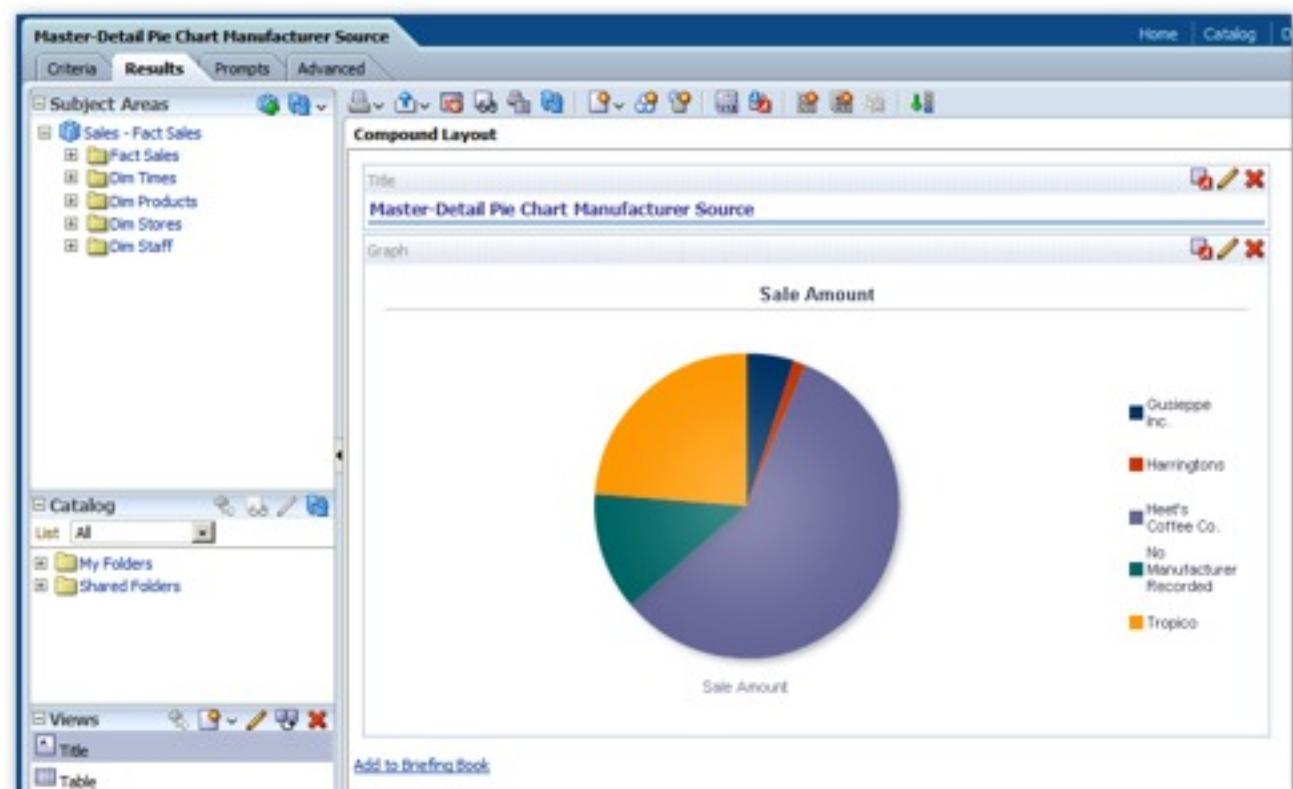
Master-Detail Linking

- Columns can be enabled for Master-Detail Linking
- Selecting a column causes master-detail messages to be sent to other views
- Provides a Qlikview-like experience for users



Master-Detail Linking Step 1 : Select Source Analysis

- Any analysis can be used
- Can use attribute or hierarchical columns



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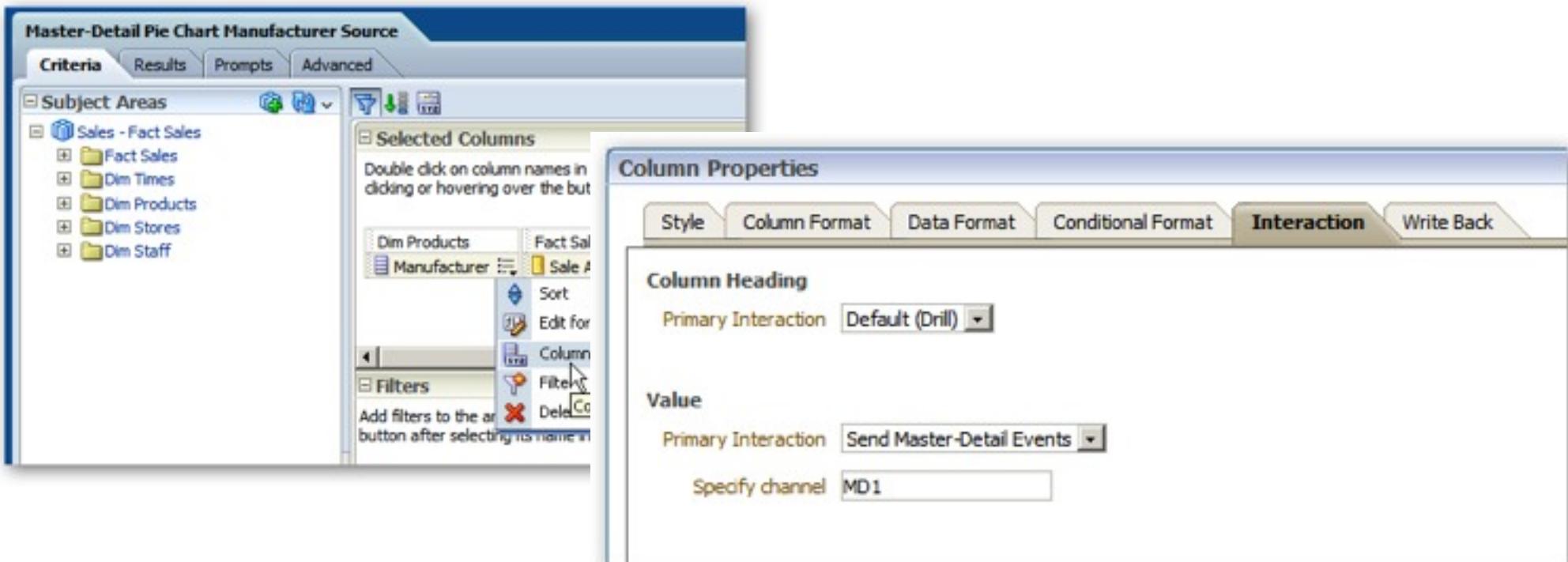
Master-Detail Linking Step 2 : Set Source M-D Channel

- Edit column properties for the column that will provide the filtering
- Set Send Master-Detail Events as the Primary Interaction
- Specify Channel (arbitrary value, used to distinguish trigger events)



Master-Detail Linking Step 2 : Set Source M-D Channel

- Edit column properties for the column that will provide the filtering
- Set Send Master-Detail Events as the Primary Interaction
- Specify Channel (arbitrary value, used to distinguish trigger events)



The screenshot shows the 'Master-Detail Pie Chart Manufacturer Source' application window. On the left, the 'Subject Areas' tree view includes 'Sales - Fact Sales' (selected), 'Fact Sales', 'Dim Times', 'Dim Products', 'Dim Stores', and 'Dim Staff'. In the center, the 'Selected Columns' pane lists 'Dim Products' and 'Fact Sales' under 'Manufacture'. A context menu is open over 'Fact Sales' with options: Sort, Edit for, Column, Filter, Delete, and Copy. The 'Column Properties' dialog is open on the right, showing the 'Interaction' tab selected. Under 'Column Heading', 'Primary Interaction' is set to 'Default (Drill)'. Under 'Value', 'Primary Interaction' is set to 'Send Master-Detail Events' and 'Specify channel' is set to 'MD1'.

Master-Detail Linking Step 3 : Select Target Analysis

- Again, any analysis will work
- Column to be filtered against needs to be in the criteria

Title Edit

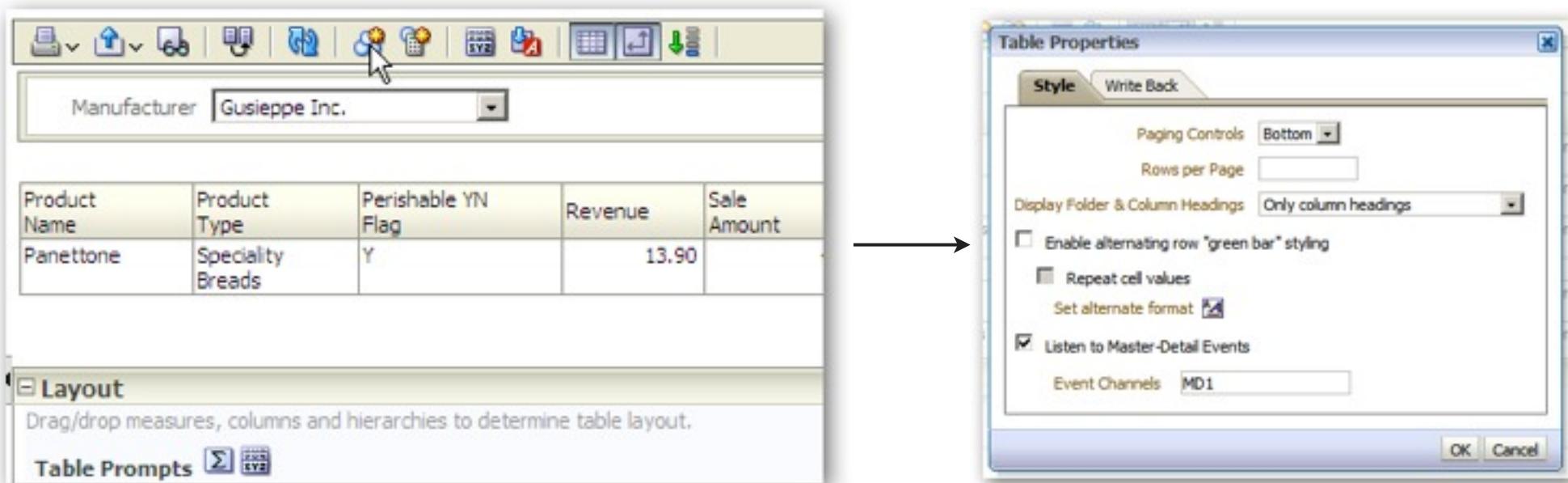
Master-Detail Table View Target

Table Edit

Product Name	Product Type	Perishable YN Flag	Revenue	Sale Amount	Cost	Manufacturer
Banner Assortment	Bread Assortments	Y	29.95	2.00	20.00	No Manufacturer Recorded
Bowl Bread Club	Bread Clubs	Y	49.98	2.00	46.00	No Manufacturer Recorded
Bread Bowls	Rounds & Loaves	Y	59.90	3.00	34.00	No Manufacturer Recorded
Breakfast Muffin	Sandwiches	Y	6.99	1.00	3.00	Harringtons
Can Clam Chowder	Gifts & Baskets	N	11.98	6.00	4.00	No Manufacturer Recorded
Challah Bread	Speciality Breads	Y	25.90	3.00	16.00	No Manufacturer Recorded
Clam Chowder	Soup	Y	89.90	55.00	40.00	No Manufacturer Recorded
Cobb Salad Sandwich	Sandwiches	Y	11.98	12.00	8.00	No Manufacturer Recorded
Dipping Oils	Gifts & Baskets	N	3.99	2.00	1.00	No Manufacturer Recorded

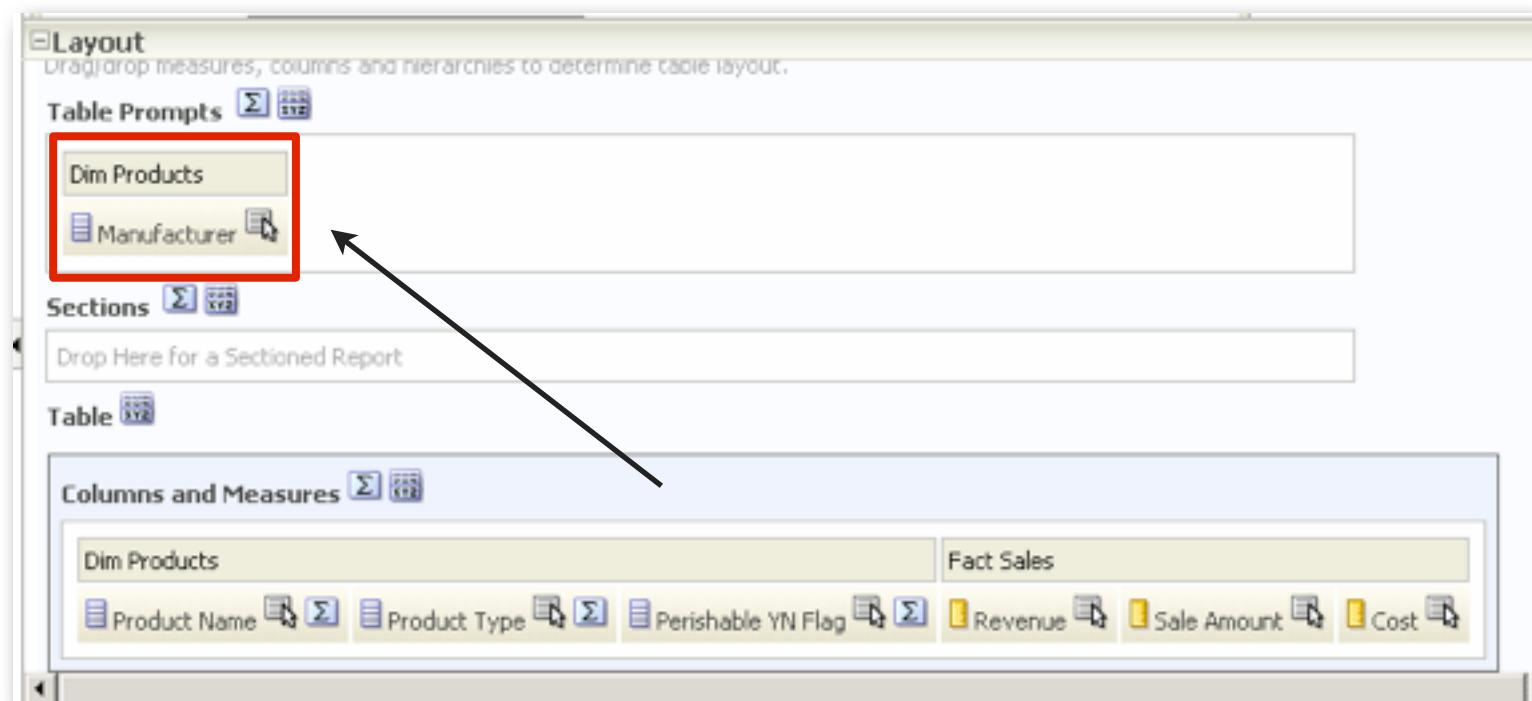
Master-Detail Linking Step 4 : Enable Listen for M-D Events

- Move the filter column into the Table Prompts area
- Edit the Table View Properties to listen for M-D events on this channel
- Select the same channel that was used on the M-D analysis



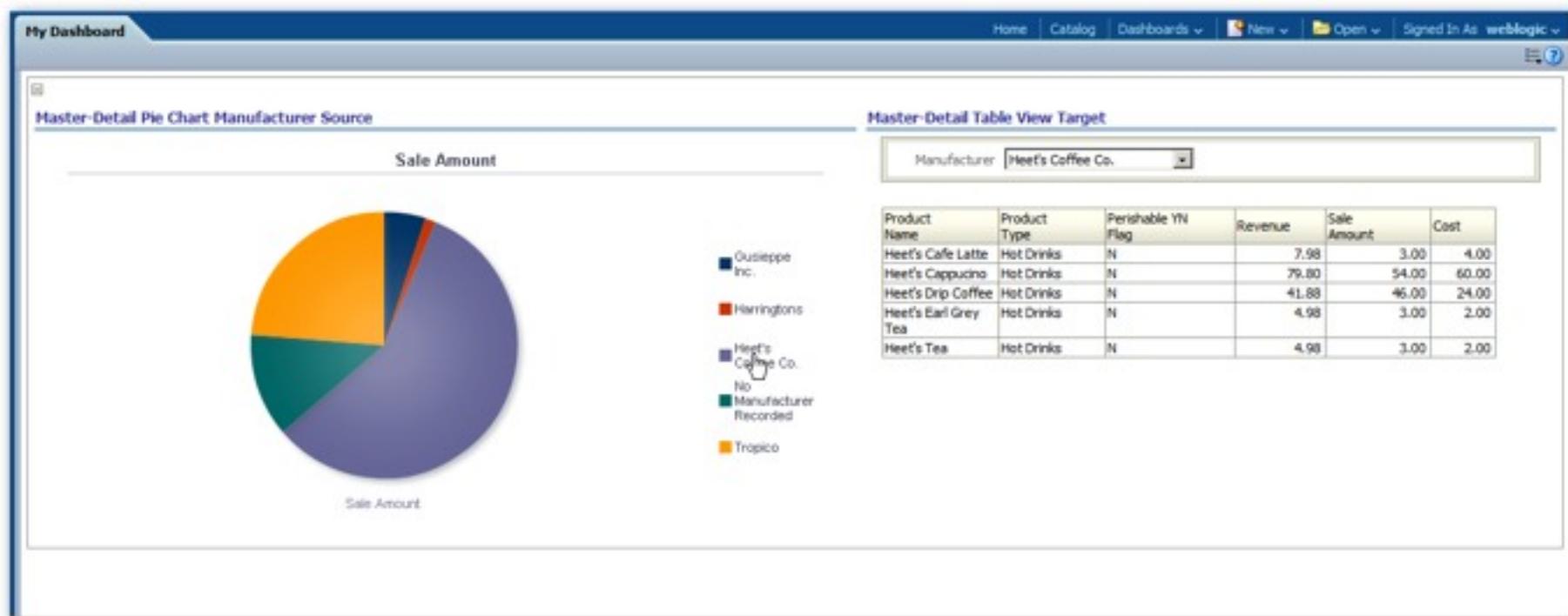
Master-Detail Linking Step 5 : Move Filter Column to Page Area

- To enable tables etc to respond to M-D event, move the column to the Table Prompts area



Master-Detail Linking Step 6 : Include Both on Dashboard

- Include both analyses on a dashboard
- Clicking on the master analysis triggers filtering on the target one
 - ▶ Graphs require you to click on the labels



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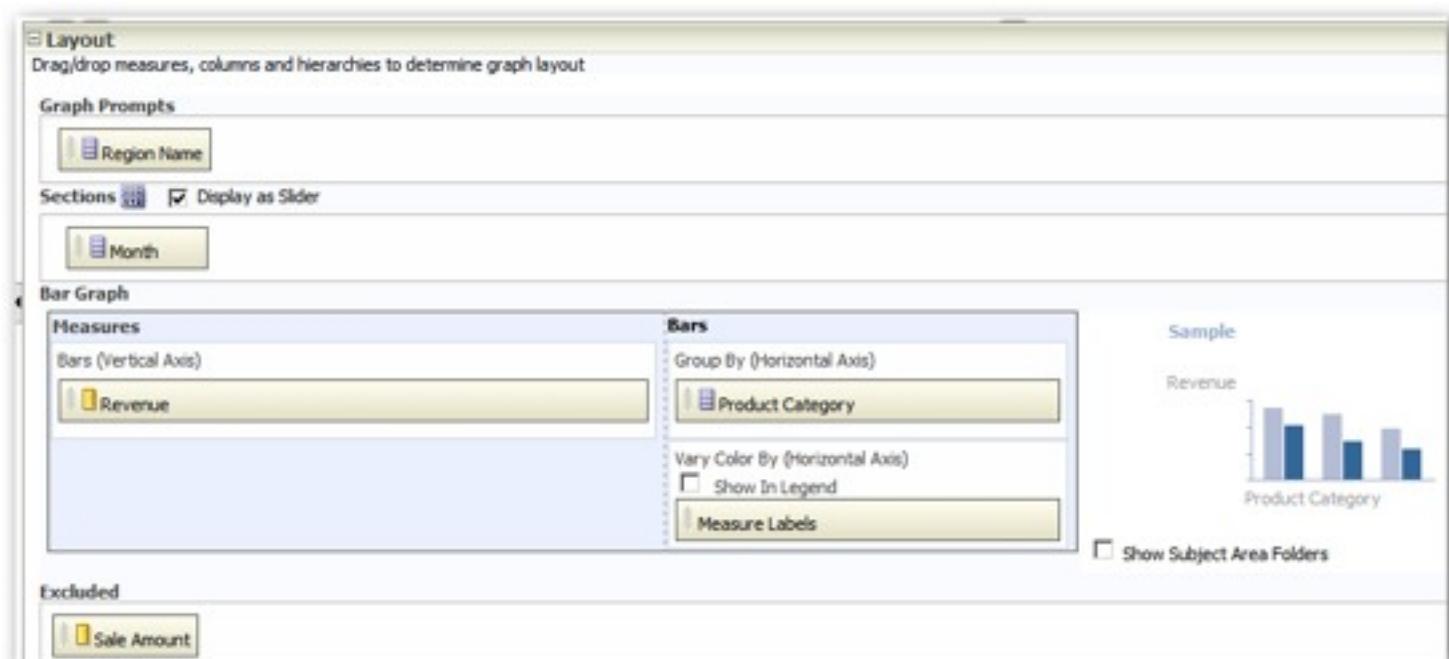
Demonstration

Master-Detail Linking

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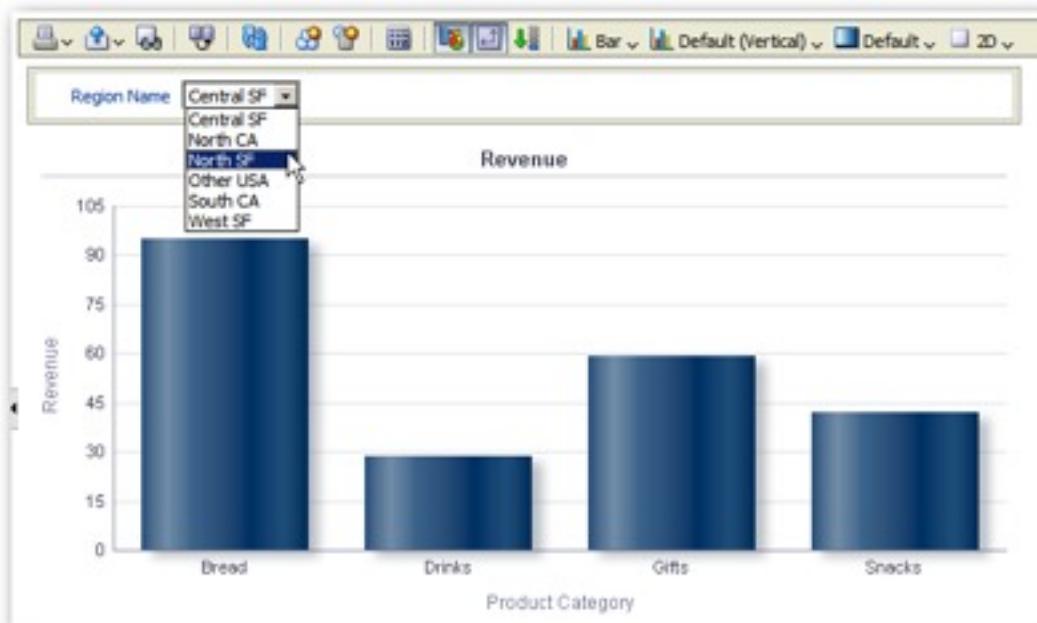
New Graph Layout Dialog

- Common dialog used in most views
- Include and exclude columns from the view
- Select column(s) as prompts (drop-down lists)
- Select column as section slider



Graph Prompts and Section Sliders

- Column(s) can be designated as prompts (drop-downs)
- Section sliders can be used to animate graph over timescale



Graph Prompts and Section Sliders

- Column(s) can be designated as prompts (drop-downs)
- Section sliders can be used to animate graph over timescale

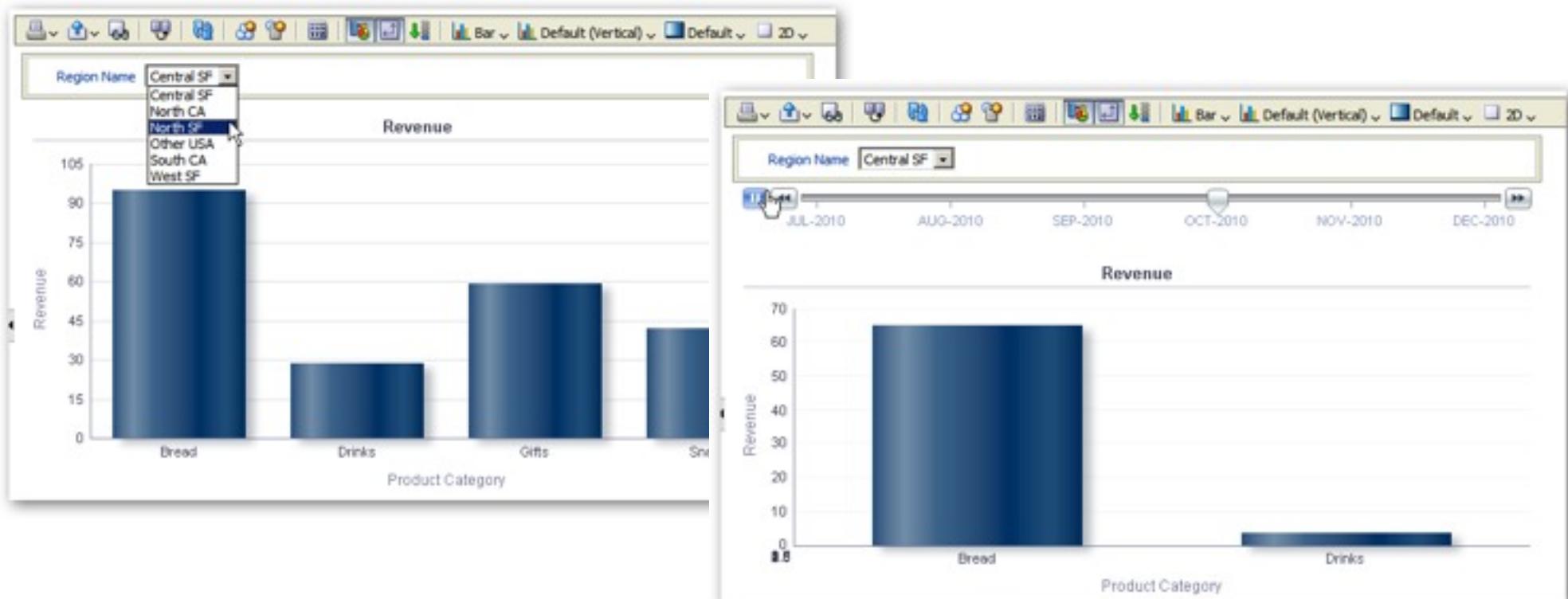
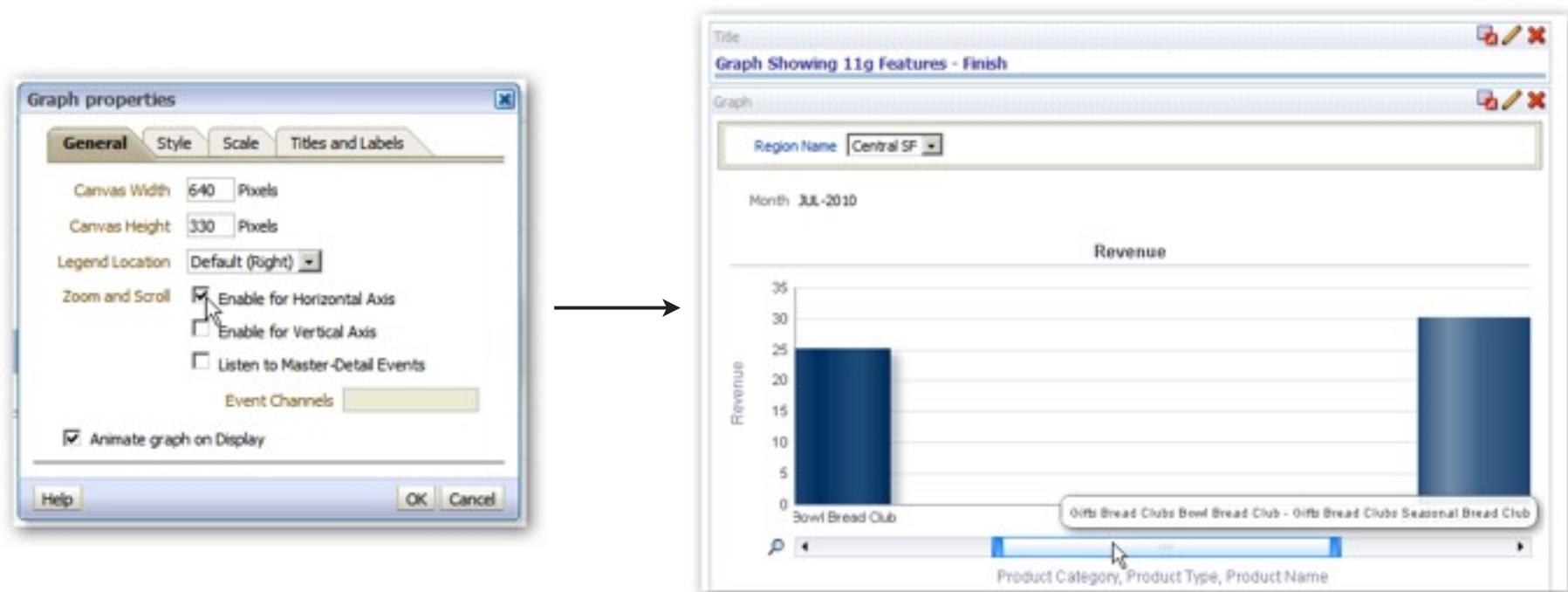


Chart Zoom

- Can be used to “drill-into” a wide hierarchy
- Zoom in and zoom out to show more/less detail
- Enabled through Graph Properties dialog



The diagram illustrates the process of enabling chart zoom. On the left, a screenshot of the 'Graph properties' dialog box is shown. The 'General' tab is selected, displaying settings like 'Canvas Width' (640 Pixels), 'Canvas Height' (330 Pixels), and 'Zoom and Scroll' options. Under 'Zoom and Scroll', the checkbox 'Enable for Horizontal Axis' is checked, while 'Enable for Vertical Axis' and 'Listen to Master-Detail Events' are unchecked. An arrow points from this dialog to the right, where a screenshot of a chart titled 'Graph Showing 11g Features - Finish' is displayed. The chart shows a bar chart with 'Revenue' on the Y-axis (0 to 35) and categories on the X-axis. A tooltip for the first bar indicates 'Bowl Bread Club'. The legend at the bottom identifies the bars: 'Gifts Bread Clubs Bowl Bread Club - Gifts Bread Clubs Seasonal Bread Club'.



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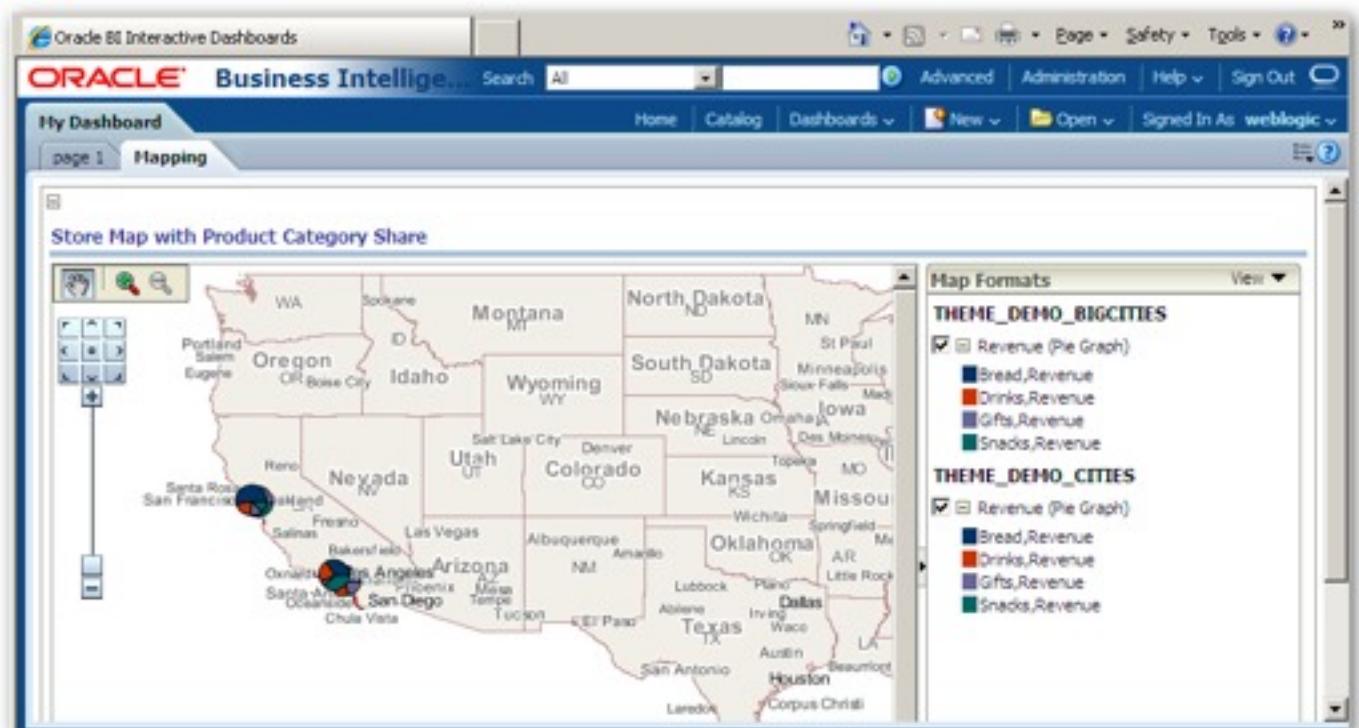
Demonstration

New Graphing Features

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Mapping and Location Intelligence

- OBIEE 11gR1 ships with Oracle MapViewer 11g
- Use in conjunction with Oracle RDBMS and spatial datasets to add map views
- Good way to help visualize geographic/location element of BI dataset



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Creating a Map View Step 1 : Link Maps to Dataset Columns

- Administration task, one-off at system configuration stage
- Import maps from Oracle MapViewer and associate theme keys with subject area columns
- Columns then need to be included in the request criteria when map created
- Note - basic (state/county/global) data available on OTN, more detailed data needs to be licensed from NAVTEC



BI Associations

Associate map layers to BI columns to enable their display on maps.

Layer Key: STATE_ABRV Sample Data: AL

BI Key Delimiter:

Geometry Type: Polygon

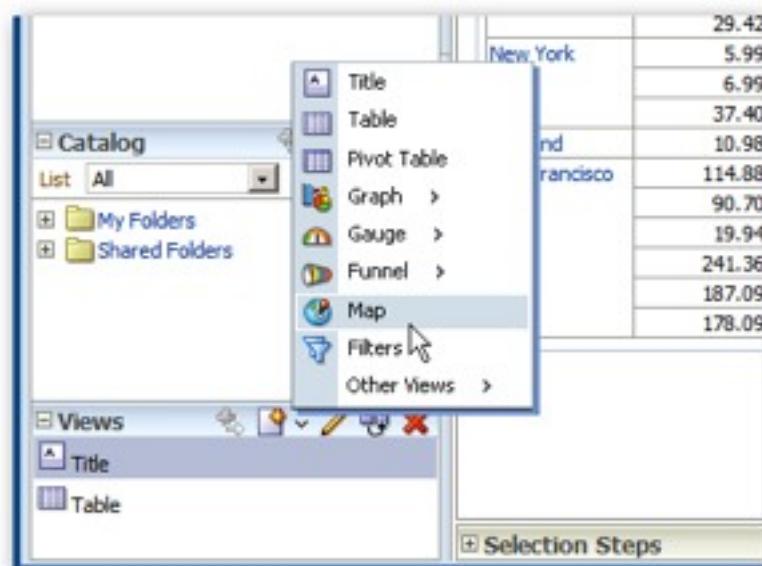
BI Key Columns

BI Key	Subject Areas
"Store GIS State Abbr" Sample Data:	"Sales - Fact Sales"

+ X /

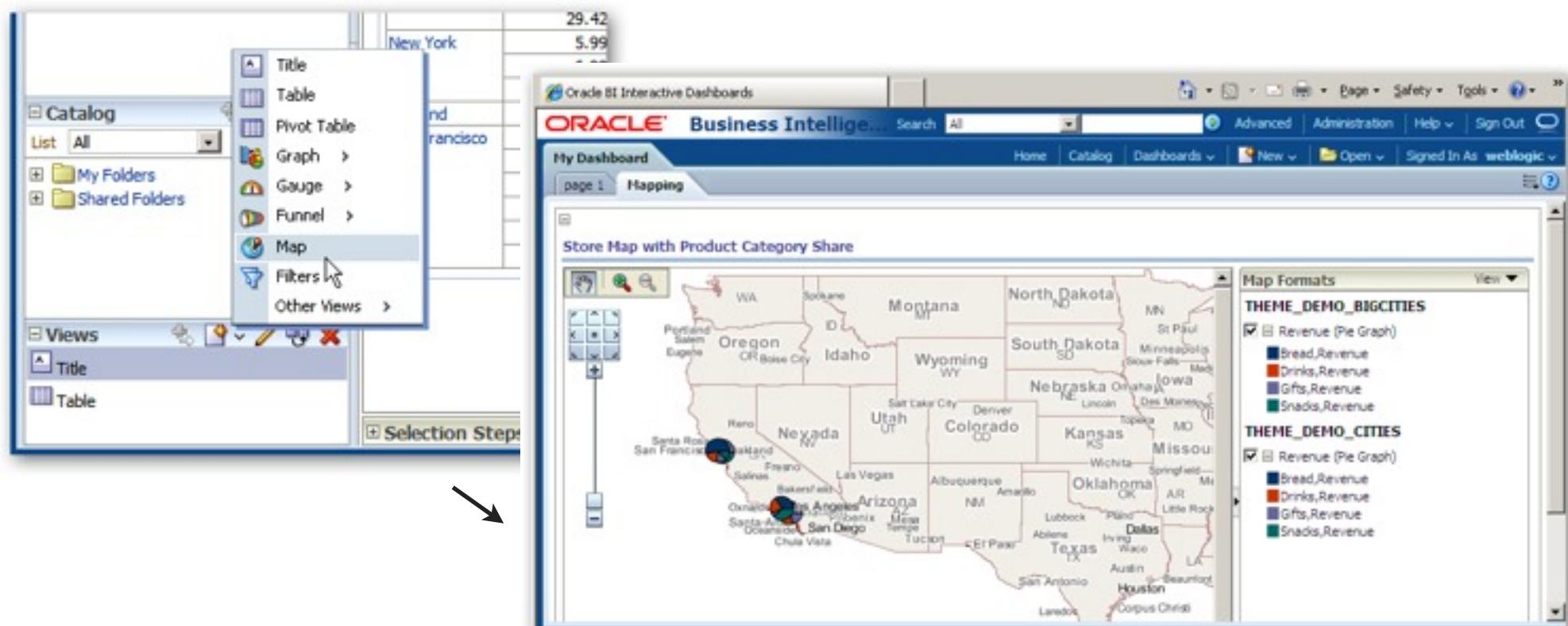
Creating a Map View Step 2 : Add View to Analysis

- Select New View > Map from Answers Results tab
- Requires setup in advance (integration with MapViewer, Spatial dataset)



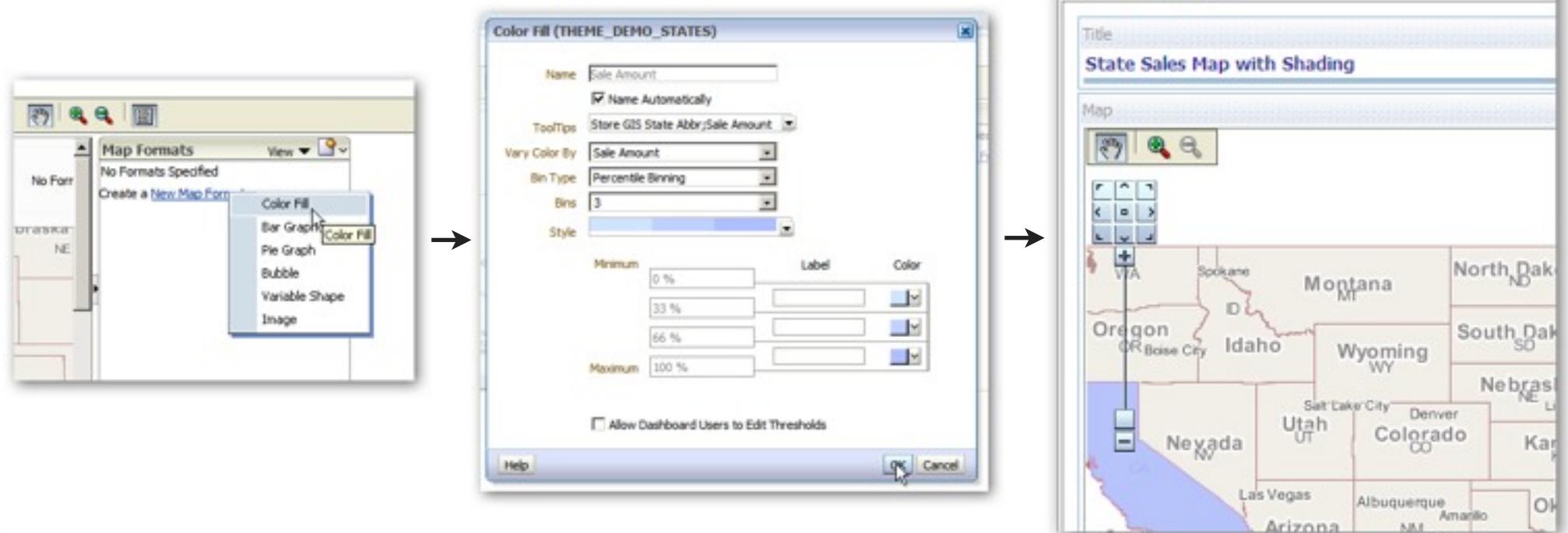
Creating a Map View Step 2 : Add View to Analysis

- Select New View > Map from Answers Results tab
- Requires setup in advance (integration with MapViewer, Spatial dataset)



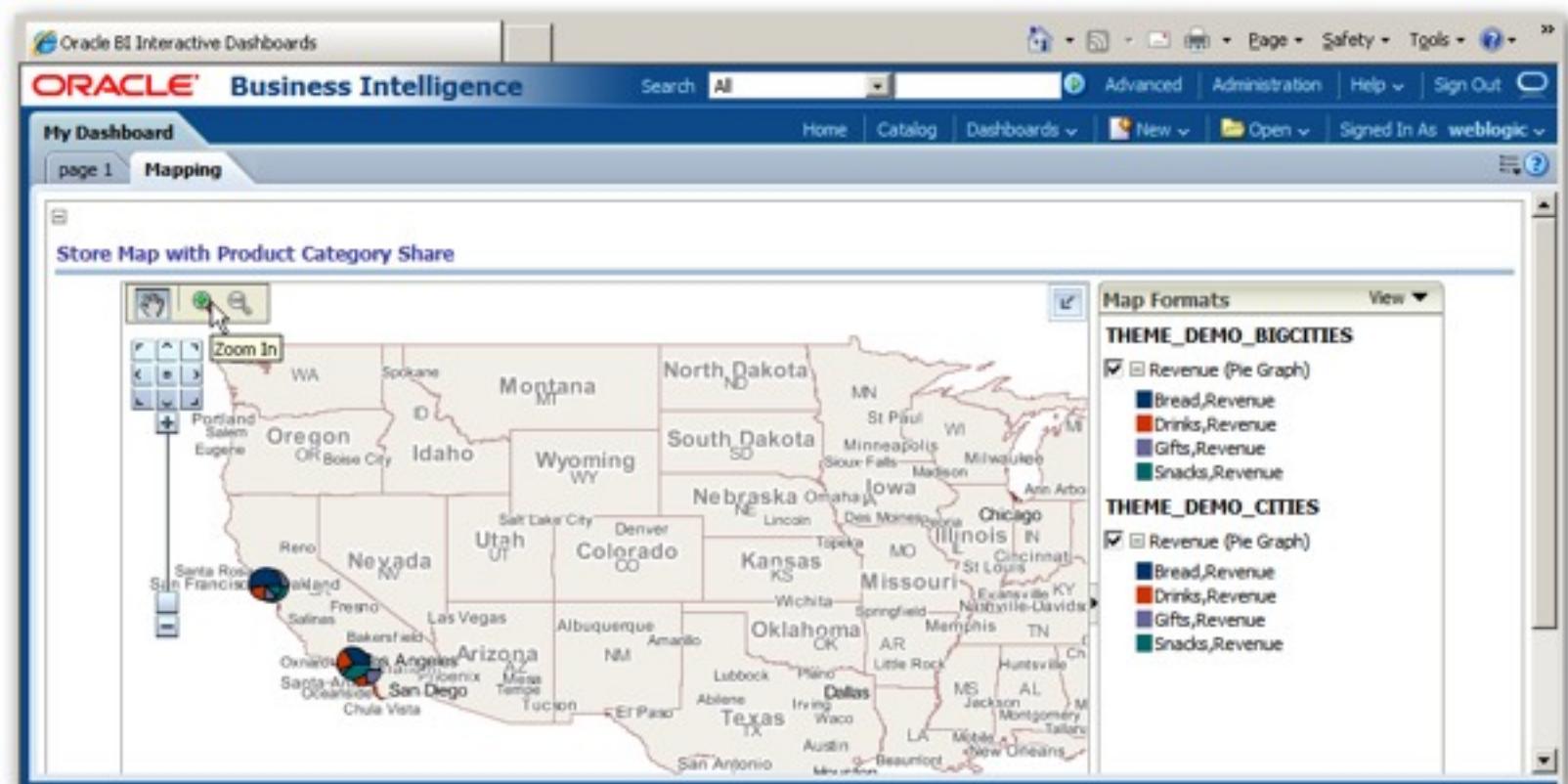
Creating a Map View Step 2 : Select Graphs for Layer Themes

- Graphs and other visualizations can be added for individual layers in view
- Pie charts, bar charts, variable size bubbles, icon selection etc
- Shade polygons based on measure binning/ value ranges



Creating a Map View Step 4 : Embed in Dashboard, Pan & Zoom

- Embed map in dashboard, use as any other view
- Link to dashboard prompts, Master-Detail links etc



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Mapping

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New Dashboard Prompts

- Wider range of dashboard prompts now available with OBIEE 11gR1
- Radio buttons, check-boxes, multi-select lists etc

ORACLE Business Intelligence

My Dashboard page 1 Dashboard Prompts

Perishable Y/N: N Y

Product Name:

Product Name	Product Type	List Price
Breakfast Muffin	Sandwiches	6.99
Clam Chowder	Soup	8.99
Dipping Oils	Gifts & Baskets	3.99
Harvest Bread Trio	Bread Assortments	29.95
Heet's Cafe Latte	Hot Drinks	3.99
Heet's Earl Grey Tea	Hot Drinks	2.49
Holiday Bread Trio	Bread Assortments	26.95

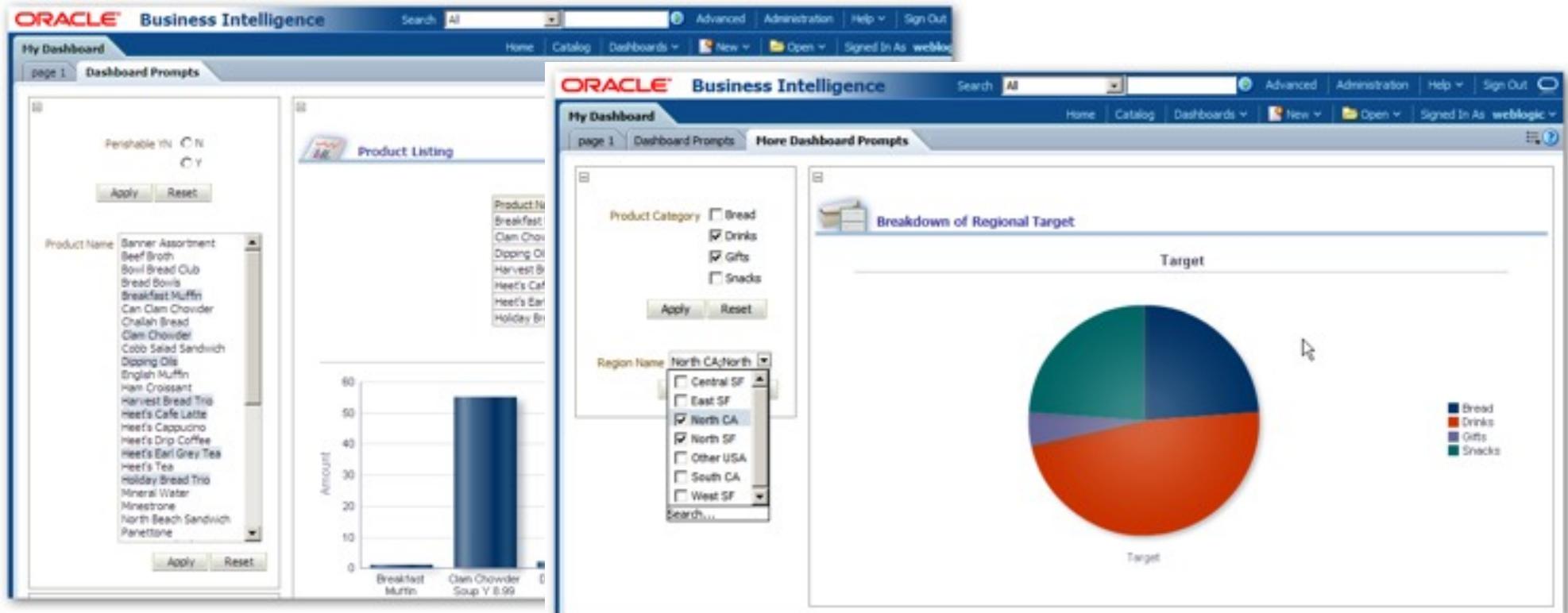
Amount

Product	Amount
Breakfast Muffin	~1
Clam Chowder	~55
Dipping Oils	~2
Harvest Bread Trio	~3
Heet's Cafe Latte	~3
Heet's Earl Grey Tea	~2
Holiday Bread Trio	~3

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New Dashboard Prompts

- Wider range of dashboard prompts now available with OBIEE 11gR1
- Radio buttons, check-boxes, multi-select lists etc





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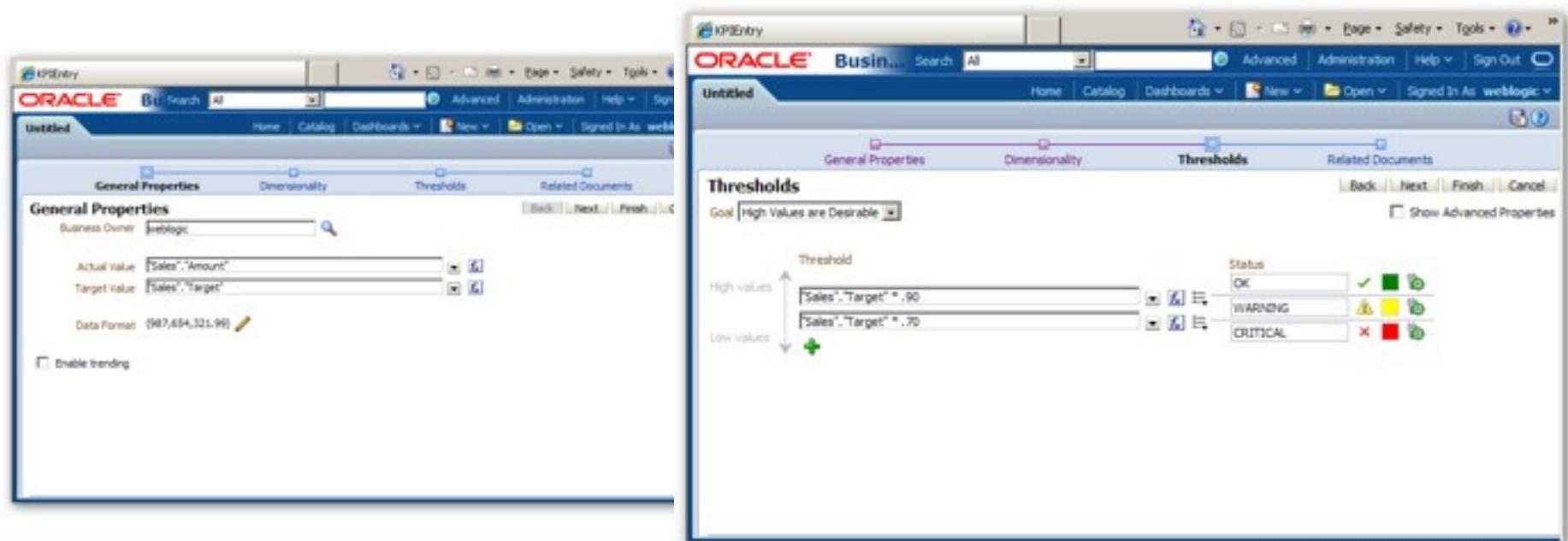
Demonstration

New Dashboard Features

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Key Performance Indicators

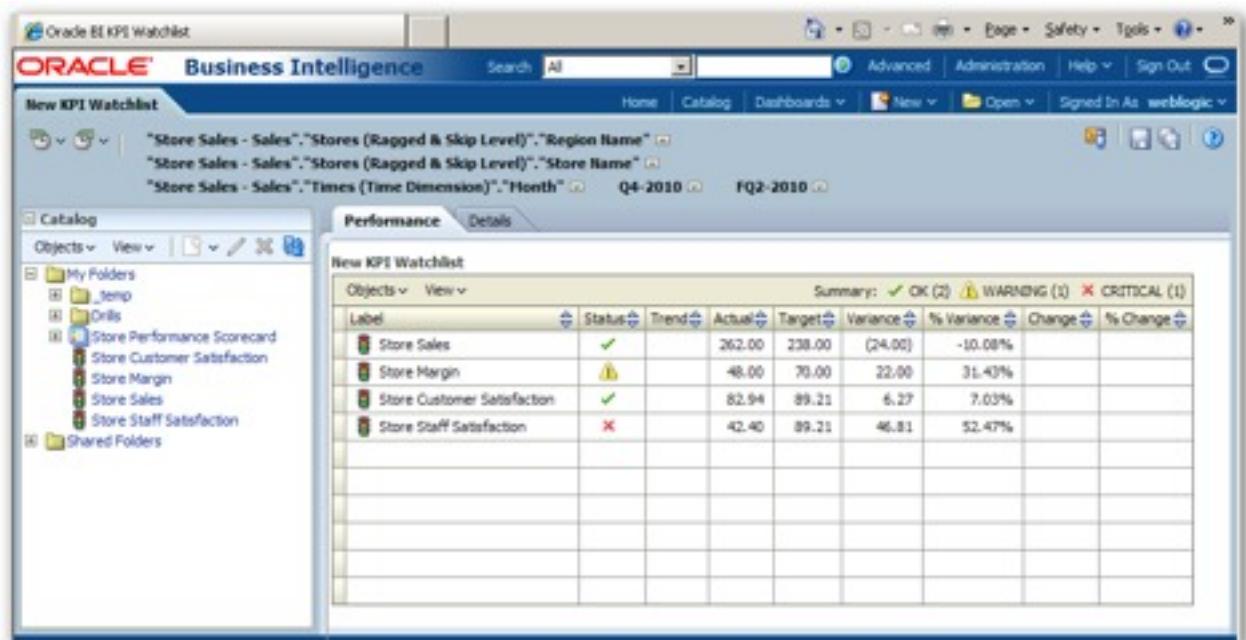
- OBIEE 11gR1 provides support for KPIs
- KPIs are defined using Presentation Services and are stored in the web catalog
- Requires measures for actual and target, Thresholds for good, bad etc
- KPIs can be dimensioned (time, customer, product etc)



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KPI Watchlists

- Users can define watchlists, to monitor their KPIs
- KPIs can be pinned, or user can analyze them by their allowed dimensions
- Supports collaboration with KPI owner to record comments etc
- KPI Watchlists are then included in dashboards along with analyses, charts etc

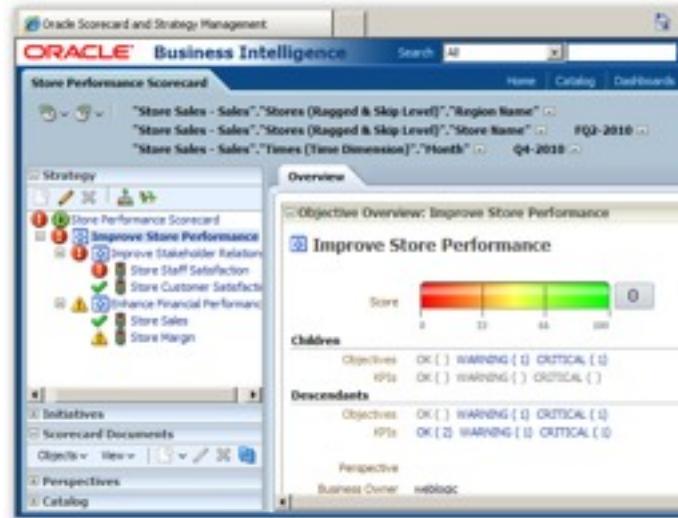


The screenshot shows the Oracle Business Intelligence KPI Watchlist application. The left side features a navigation pane with 'Catalog' and 'Objects' dropdowns, displaying 'My Folders' containing items like '_Temp', 'Drills', 'Store Performance Scorecard', 'Store Customer Satisfaction', 'Store Margin', 'Store Sales', 'Store Staff Satisfaction', and 'Shared Folders'. The main area is titled 'Performance' and displays a 'New KPI Watchlist' table. The table has columns for 'Label', 'Status', 'Trend', 'Actual', 'Target', 'Variance', '% Variance', 'Change', and '% Change'. The data rows are:

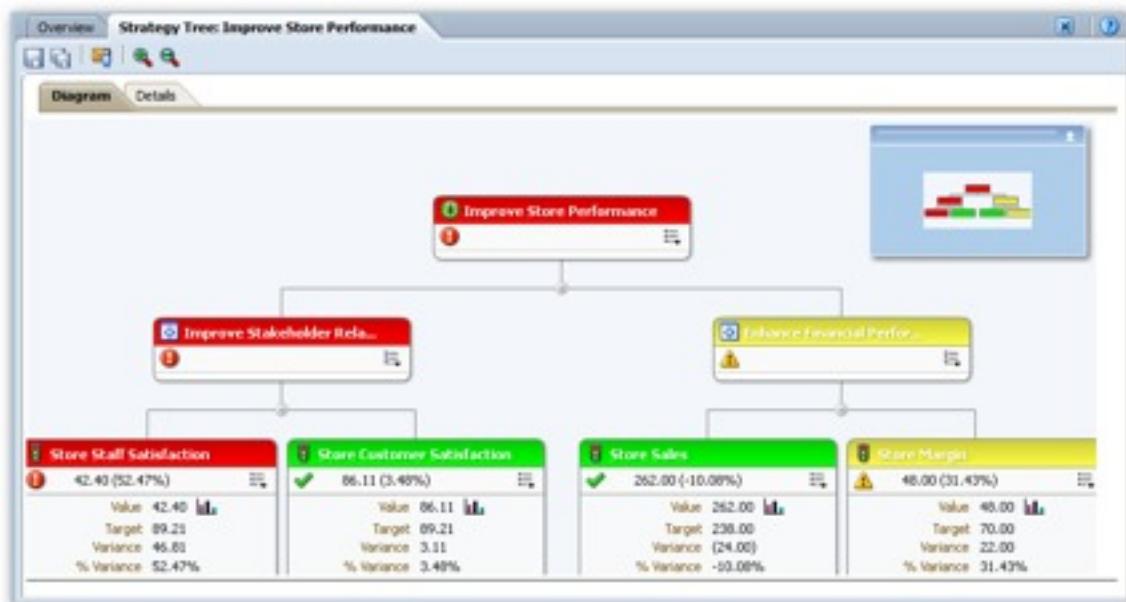
Label	Status	Trend	Actual	Target	Variance	% Variance	Change	% Change
Store Sales	✓		262.00	238.00	(24.00)	-10.08%		
Store Margin	⚠		48.00	70.00	(22.00)	31.43%		
Store Customer Satisfaction	✓		82.94	89.21	6.27	7.03%		
Store Staff Satisfaction	✗		42.40	89.21	46.81	52.47%		

KPI Scorecards

- Scorecards arrange KPIs into hierarchies, strategies etc
- Administrator defines objectives and initiatives and associates KPIs with them
- Visualised through strategy trees, strategy maps, cause-and-effect maps
- Analyzed through interactive points-of-view



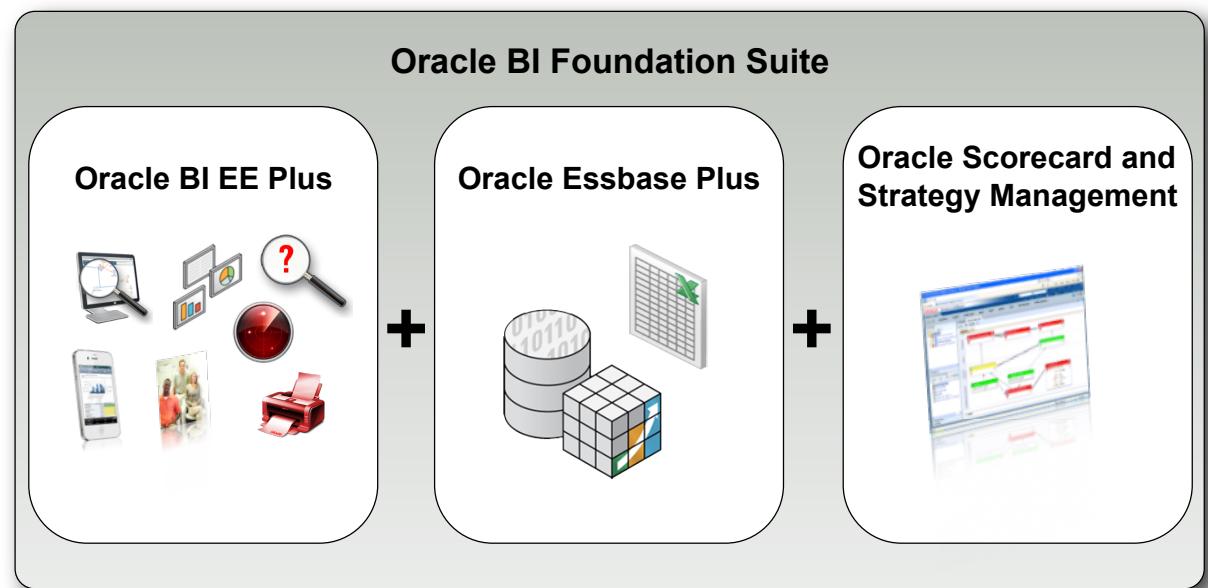
The screenshot shows the Oracle Business Intelligence Scorecard and Strategy Management interface. The main title is "Store Performance Scorecard". The left sidebar includes sections for "Strategy", "Initiatives", "Scorecard Documents", "Objects", "Perspectives", and "Catalog". The central area displays an "Objective Overview" for "Improve Store Performance" with a score of 0. It lists "Children" (Objectives: OK, KPIs: OK) and "Descendants" (Objectives: OK, KPIs: OK). A "Perspective" section shows "Business Owner: heliosac".



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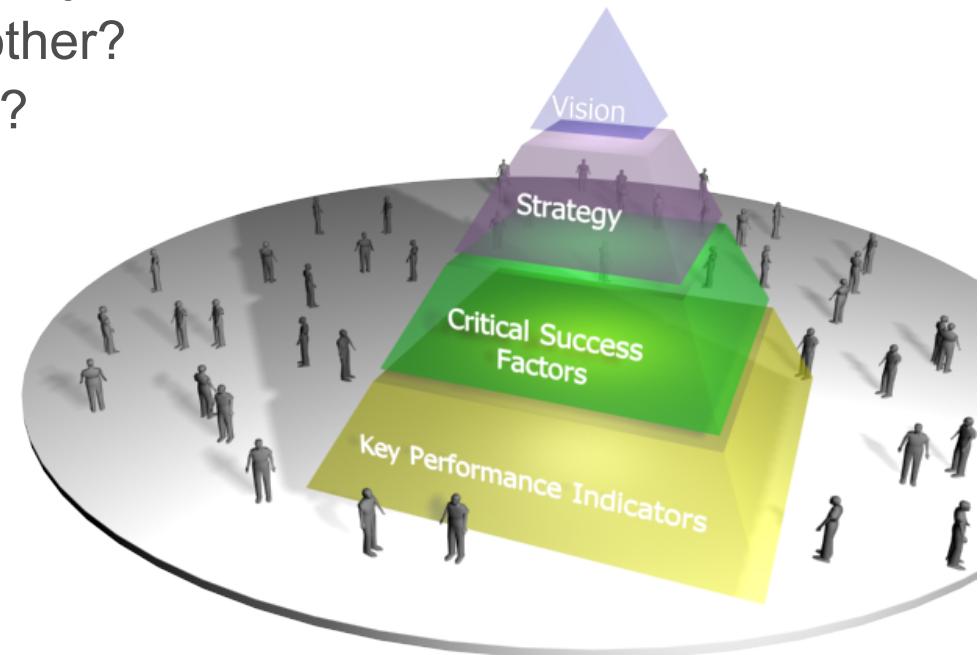
Licensing and Packaging

- Oracle Scorecarding and Strategy Management is a pay-extra option for OBIEE
- Usually sold along with Essbase and OBIEE as “Oracle BI Foundation”
- Take care: no indication in UI that you are using premium functionality
- Adds \$995 to base \$2000/named user cost for OBIEE+



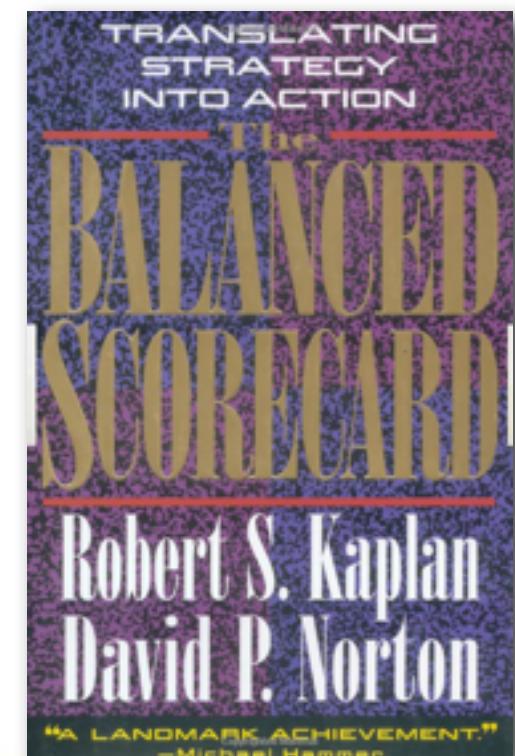
Scorecards and KPIs

- Scorecards and KPIs give you the ability to create BI applications that address more strategic questions
 - How are we progressing against our strategy?
 - What influences our progress towards objectives?
 - How do our objectives relate to each other?
 - How are our key indicators performing?
- Balanced scorecards allow us to consider multiple perspectives
 - Financial, Customer, Internal Process, Learning & Growth
- Provides an effective means to communicate company objectives and goals



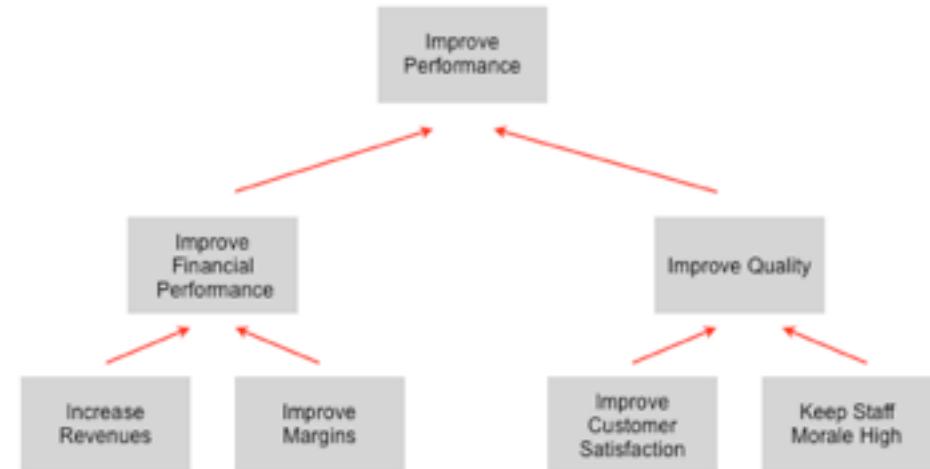
Balanced Scorecard Theory

- Oracle Scorecard incorporates several elements of (Balanced) Scorecard theory
 - ▶ Art Schneiderman, Kaplan & Norton, “The Balanced Scorecard”
- Aim is to identify a small number of financial and non-financial measures, and attach targets to them, to enable progress to be measured and judged
- Consider all aspects of achieving strategic goals, including quality and sustainability over time
- Oracle Scorecard implements several features, including
 - ▶ The standard K&N four perspectives
 - ▶ Actual and Target values
 - ▶ Leading & Lagging Measures
 - ▶ Strategy maps and strategy trees
 - ▶ Cause-and-effect links



Positioning Scorecarding as a Solution

- Balanced Scorecards are not just another type of report
- They are the end result of a thinking and design process about company strategy
- The Scorecard in effect just enables viewing of strategy process
- The real value in a scorecard project is the design process, namely:
 1. Translate company vision into operational goals
 2. Communicate the vision and link to individual performance
 3. Business planning, index setting
 4. Feedback and Learning, and adjust strategy accordingly
- The Scorecard is the visualization tool, not the strategy in itself
- Position as a solution, not a BI tool



Scorecard Perspectives

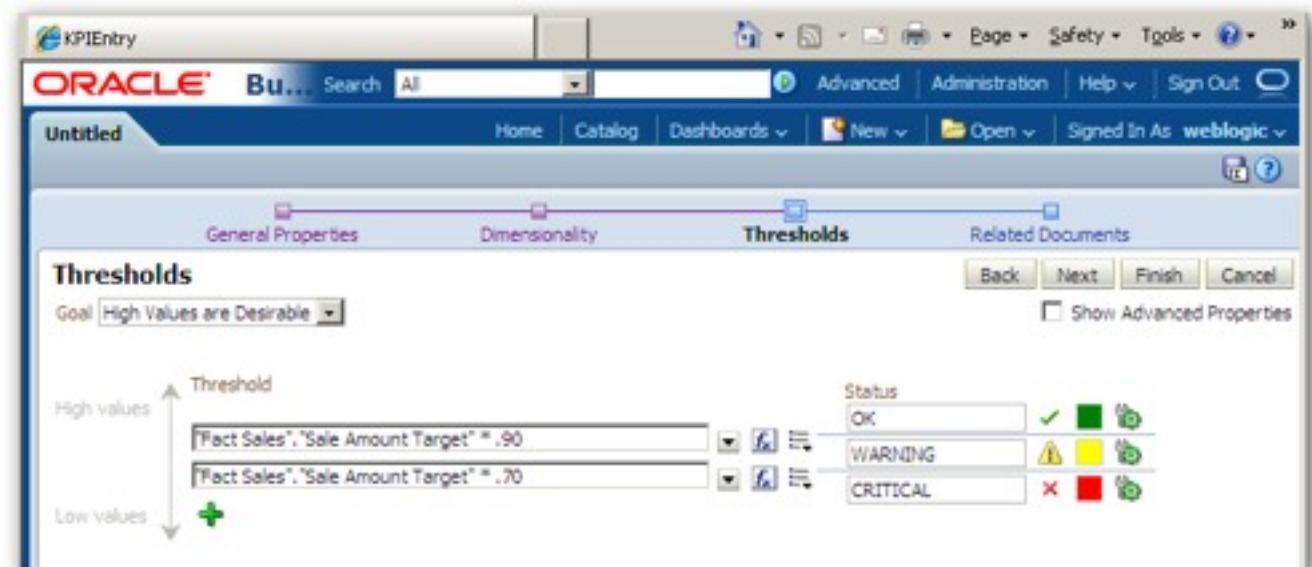
- Kaplan & Norton's Balanced Scorecard book suggested four perspectives
 - ▶ **Financial** : the stockholder's view, the financial performance of the organization
 - ▶ **Customer** : how you treat your customers or other stakeholders
 - ▶ **Internal Process** : efficiency of internal processes
 - ▶ **Learning & Growth** : how do you sustain success over the longer term?
- Oracle Scorecard uses these as default perspectives, and allows you to define alternative ones
 - ▶ May be more suitable for non-profits, educational establishments etc



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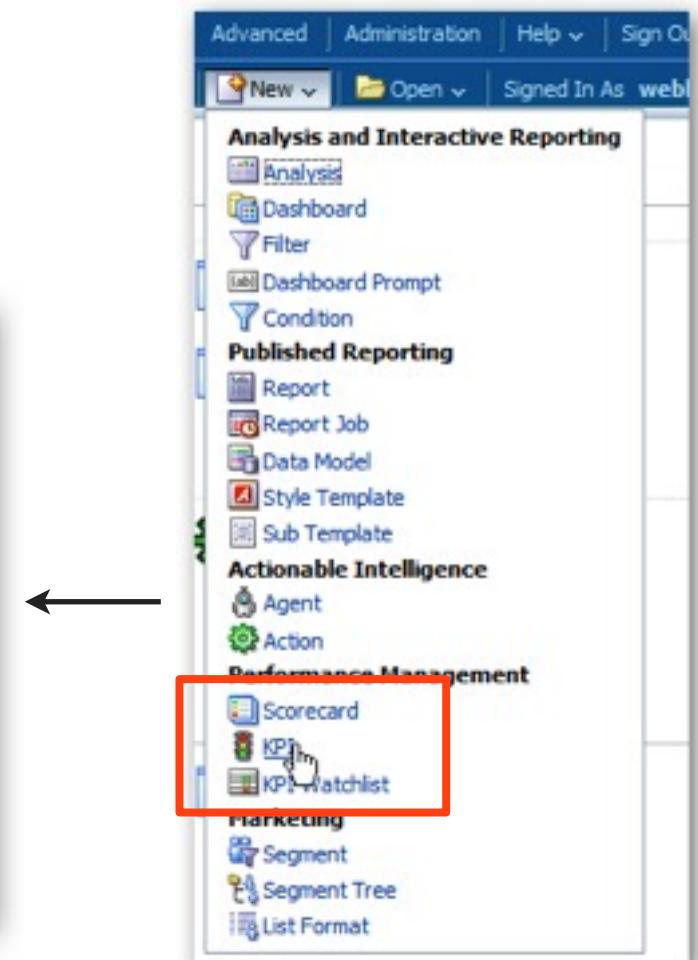
OBIEE 11gR1 KPIs Overview

- KPIs are the building blocks of scorecards, and can be defined in the web catalog
- Require an actual and target value, and can be linked to a time period for trending
- Permissions and privileges associated with them (read, write, create etc)
- Actions and Agents can be linked to KPIs for Actionable Intelligence
- Through scorecards, can be annotated and collaborated on



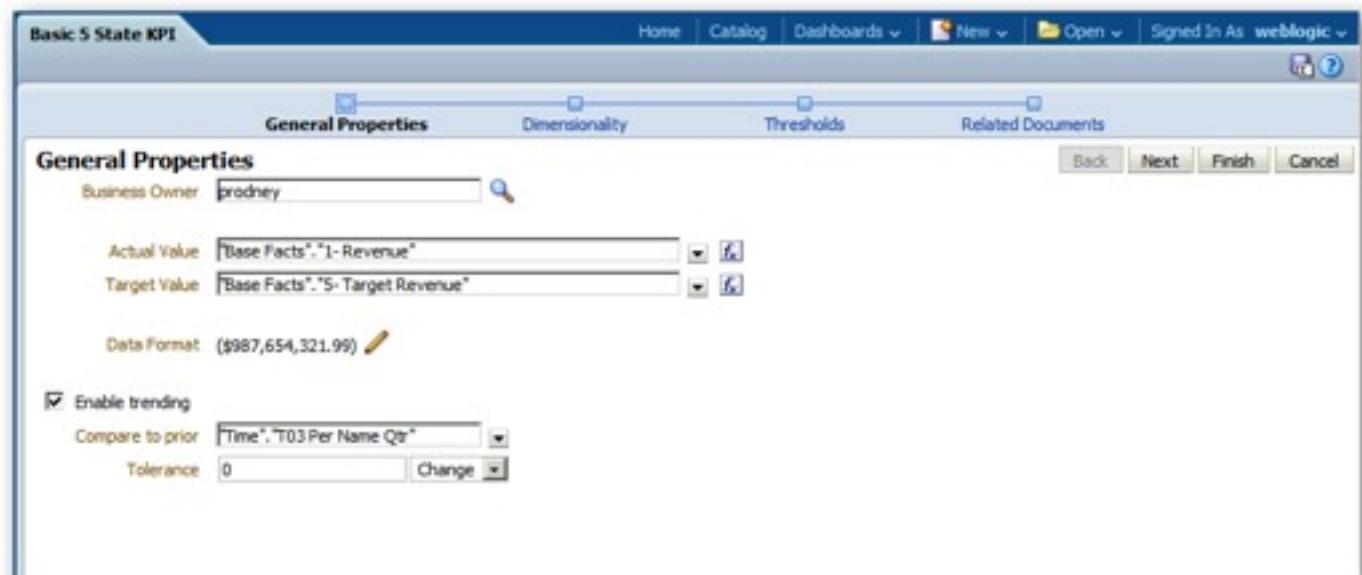
Creating a KPI Step 1 : Create KPI from Menu

- Select **New > KPI** from common header menu
- Select subject area that will contain the actual and target measures



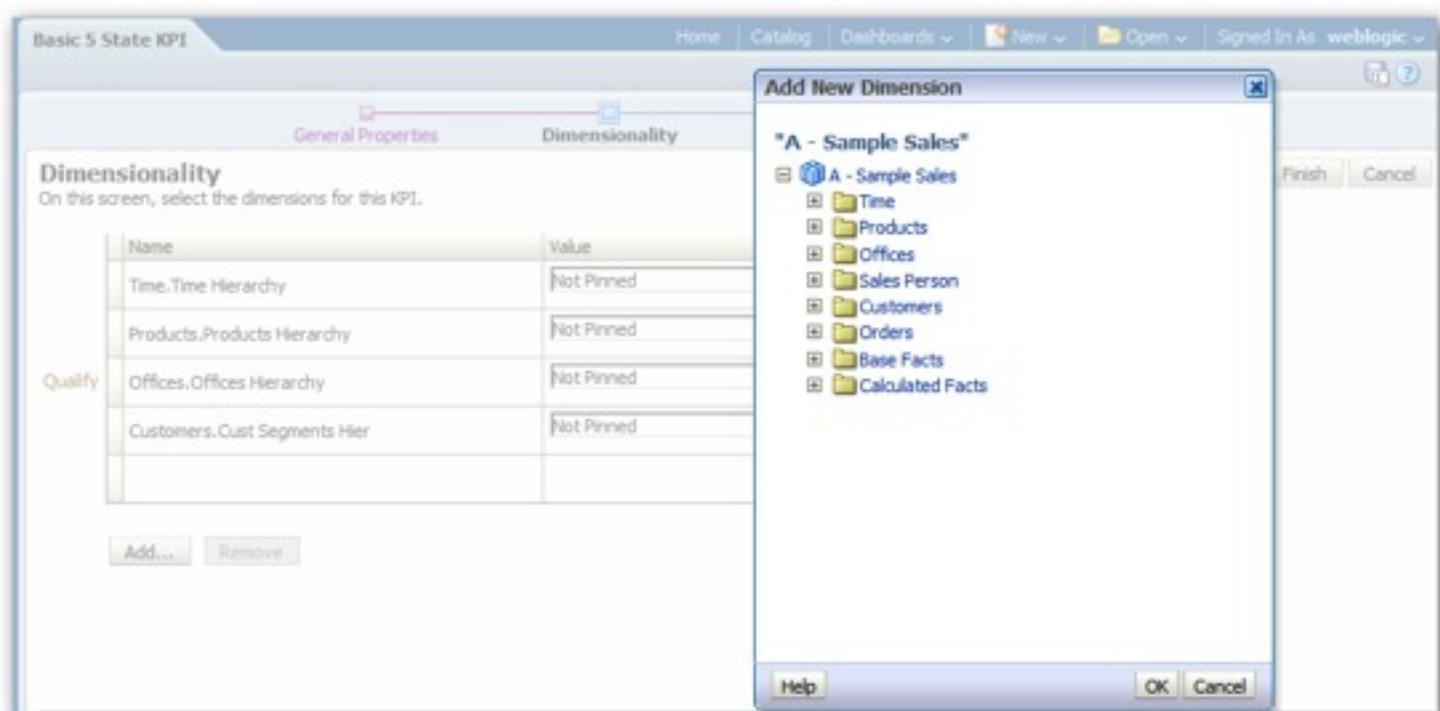
Creating a KPI Step 2 : Select Actual and Target Measures

- Select actual and target measures
- Can include formulas, calculations
- Good practice is to include trend information
 - ▶ Time period to trend against, plus tolerance value/percentage
 - ▶ Requires time dimension in RPD



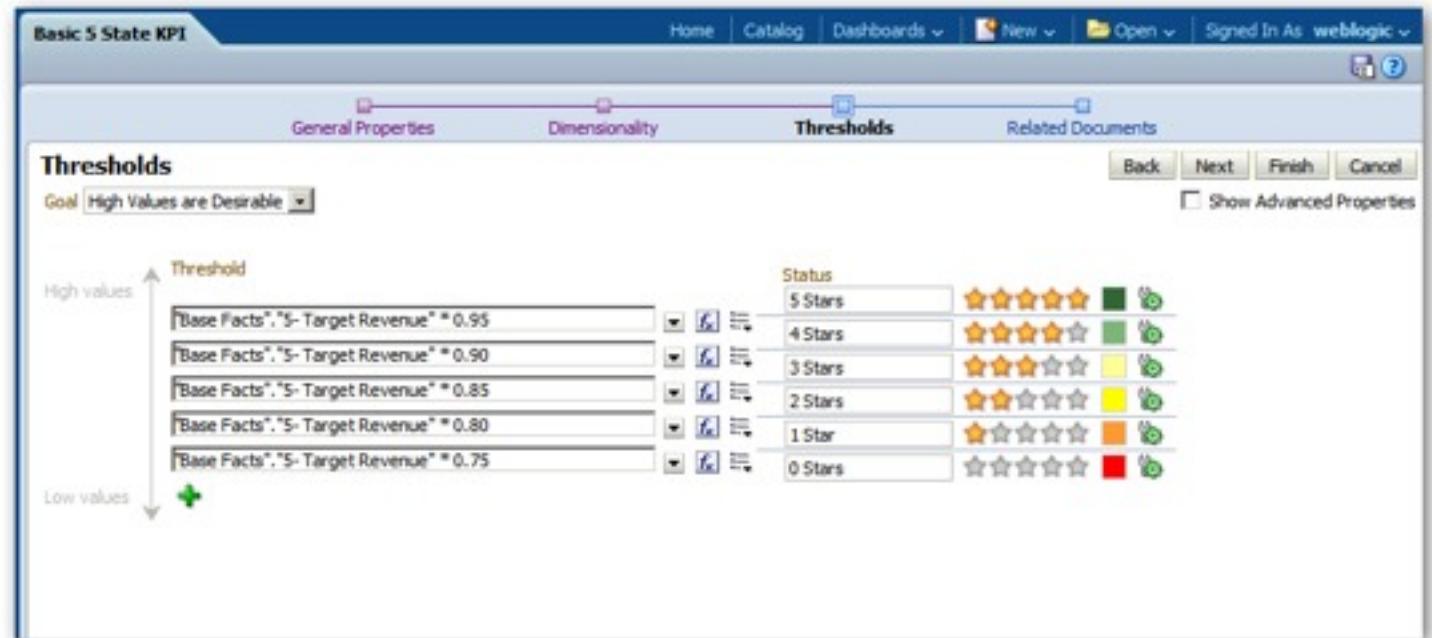
Creating a KPI Step 3 : Define Dimensionality

- Defines over what dimensions KPI can be analyzed
- Can reference attribute or hierarchical columns
- Values can be pinned (pre-defined) or user can vary via interactive point-of-view



Creating a KPI Step 4 : Set Thresholds

- Determines how status of KPI is reported
- Can set many threshold limits, plus icon for each threshold range
- Again can use formulas and calculations
- KPI owner can manually override status when used in dashboard



The screenshot shows the 'Basic 5 State KPI' application interface. The top navigation bar includes 'Home', 'Catalog', 'Dashboards', 'New', 'Open', and 'Signed In As: weblogic'. Below the navigation is a tab bar with 'General Properties', 'Dimensionality', 'Thresholds' (which is selected), and 'Related Documents'. The main content area is titled 'Thresholds' and has a dropdown 'Goal' set to 'High Values are Desirable'. It lists five thresholds with formulas:

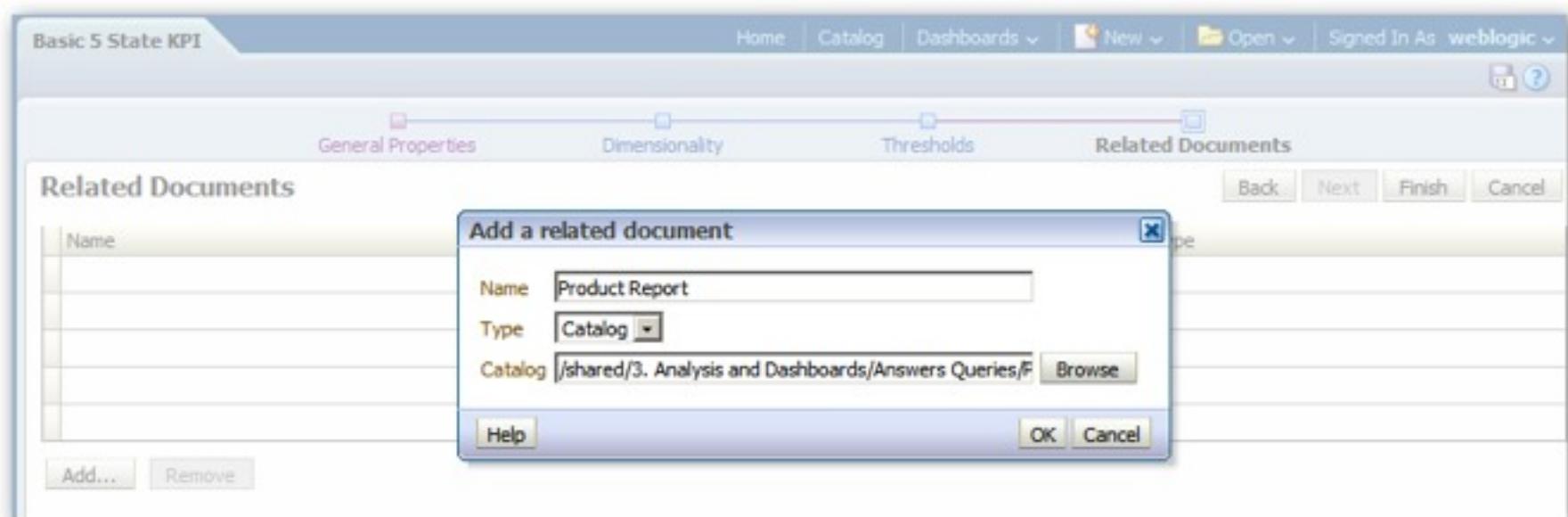
- 'Base Facts"."5- Target Revenue" * 0.95
- 'Base Facts"."5- Target Revenue" * 0.90
- 'Base Facts"."5- Target Revenue" * 0.85
- 'Base Facts"."5- Target Revenue" * 0.80
- 'Base Facts"."5- Target Revenue" * 0.75

 To the right, a 'Status' table maps these thresholds to star ratings and colors:

Status	5 Stars	4 Stars	3 Stars	2 Stars	1 Star	0 Stars
5 Stars	★★★★★	★★★★	★★★	★★	★	
4 Stars	★★★★	★★★★	★★★	★★	★	
3 Stars	★★★★	★★★★	★★★	★★	★	
2 Stars	★★★★	★★★★	★★★	★★	★	
1 Star	★★★★	★★★★	★★★	★★	★	
0 Stars	★★★★	★★★★	★★★	★★	★	

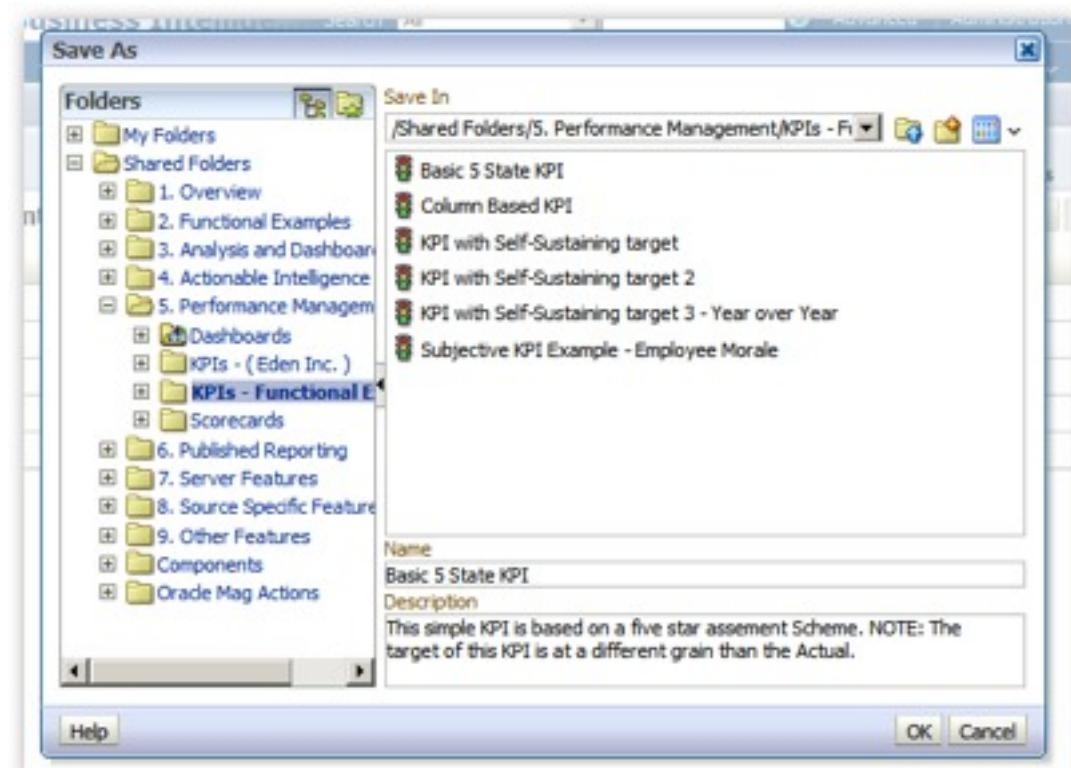
Creating a KPI Step 5 : Add Associated Documents

- Associated reports and documents can be linked to the KPI
- Will become available to users when viewing KPI
- Can be used alongside actions and agents (defined later in scorecard)



Creating a KPI Step 6 : Save KPI to Web Catalog

- Save the KPI to the web catalog like any other BI object
- Can be secured and limited to certain users



Analyzing KPIs

- KPIs when created open up into an Analysis view
- Shows the KPI with dimensions along with variance and status in table form
- Attribute column dimensions will be exploded, hierarchical ones can be drilled into
- KPIs can be analyzed on demand when used later in watchlists, scorecards

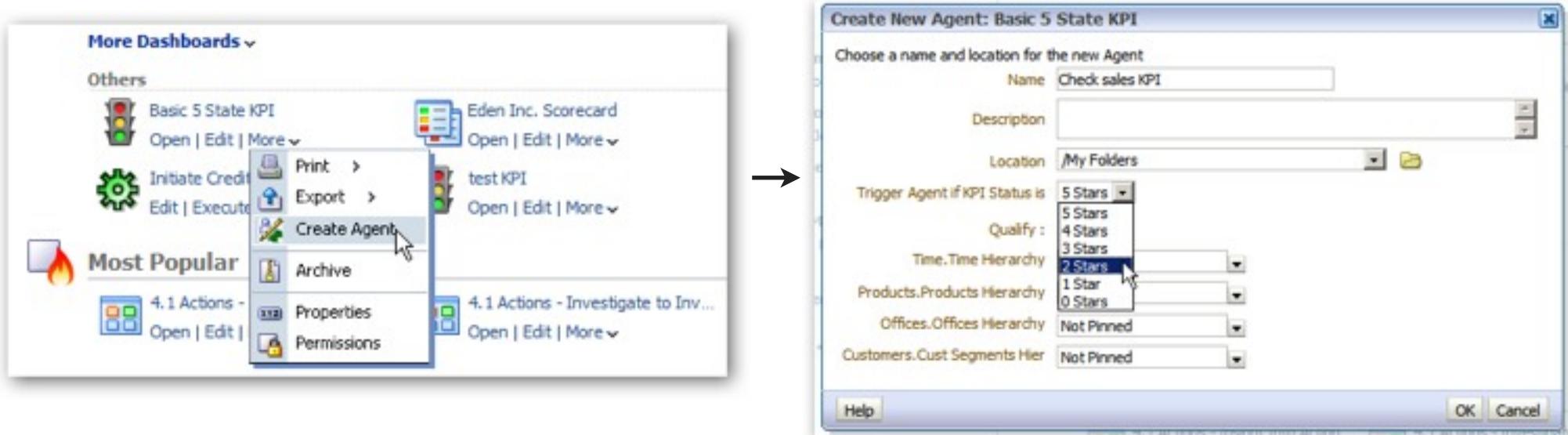
Basic 5 State KPI

Basic 5 State KPI

Time Hierarchy	Products Hierarchy	Offices Hierarchy	Cust Segments Hier	Actual	Target	Status	Variance	% Variance
↳ Total Time	↳ Total Products	↳ Corporate Total	↳ Total Customers	\$50,000,000.00	\$54,000,000.00	★★★★☆	\$4,000,000.00	7
		↳ Genmind Corp	↳ Total Customers	\$16,792,559.76	\$20,430,300.00	★★☆☆☆	\$3,637,740.24	18
		↳ Stedplus Inc.	↳ Total Customers	\$13,566,400.09	\$13,656,400.00	★★★★★	\$89,999.91	1
		↳ Tescare Ltd.	↳ Total Customers	\$19,541,040.15	\$19,913,300.00	★★★★★	\$272,259.85	1
	↳ BizTech	↳ Corporate Total	↳ Total Customers	\$21,000,000.00	\$22,310,000.00	★★★★☆	\$1,310,000.00	6
		↳ Active Singles		\$4,814,500.67				
		↳ Baby Boomers		\$1,428,726.47				
		↳ Others		\$911,177.71				
		↳ Rural based		\$2,608,006.27				
		↳ Seniors		\$3,340,174.78				
		↳ Students		\$4,097,034.68				
		↳ Urban based		\$3,800,379.42				
	↳ FunPod	↳ Corporate Total	↳ Total Customers	\$17,500,000.00	\$20,522,000.00	★★★★☆	\$3,022,000.00	15
	↳ Digital	↳ Corporate Total	↳ Total Customers	\$7,735,104.57	\$9,050,700.00	★★★★☆	\$1,315,595.43	15
	↳ Games	↳ Corporate Total	↳ Total Customers	\$9,764,895.43	\$11,471,300.00	★★★★☆	\$1,706,404.57	15
	↳ HomeView	↳ Corporate Total	↳ Total Customers	\$11,500,000.00	\$11,168,000.00	★★★★★	(\$332,000.00)	-3

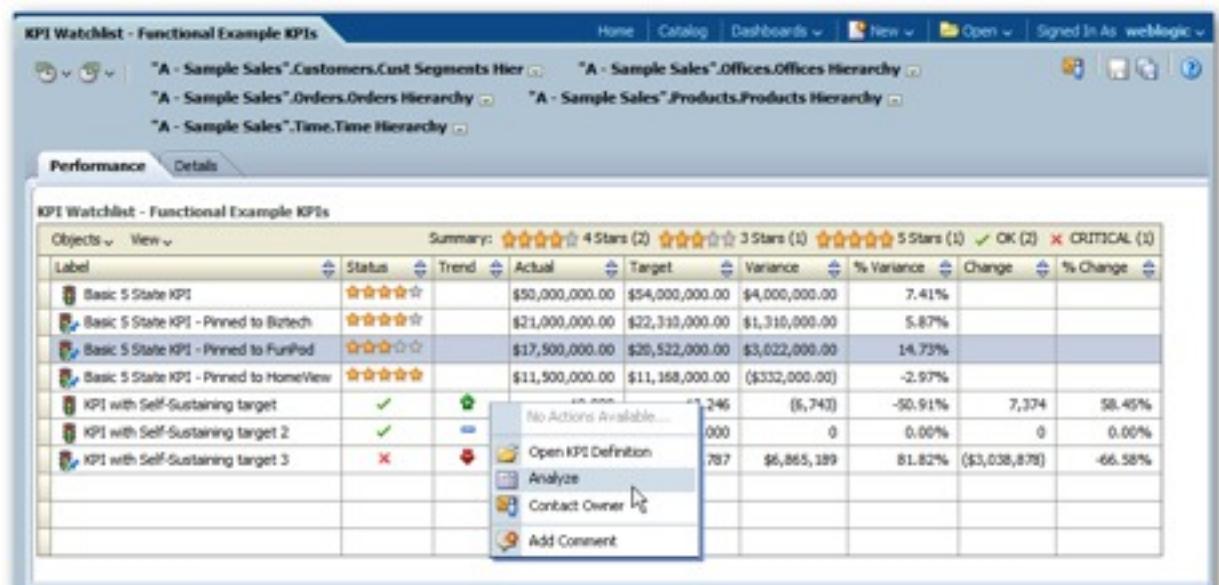
KPIs and Agents

- Agents can be created for KPIs, to automate their use
- Select **More > Create Agent** from dashboard catalog views
- Uses thresholds defined for the KPI to define condition for the agent
- Agent can then deliver payload (analysis, email, trigger workflow) based on threshold value being met



KPI Watchlists

- KPI watchlists allow the user to gather together KPIs for monitoring
- Can include multiple copies of the same KPI with different pinning
- Point-of-view can be altered to analyze via dimensions
- Actions can be defined which link to KPIs, based on status
- KPI can be launched as an analysis; comments can be added



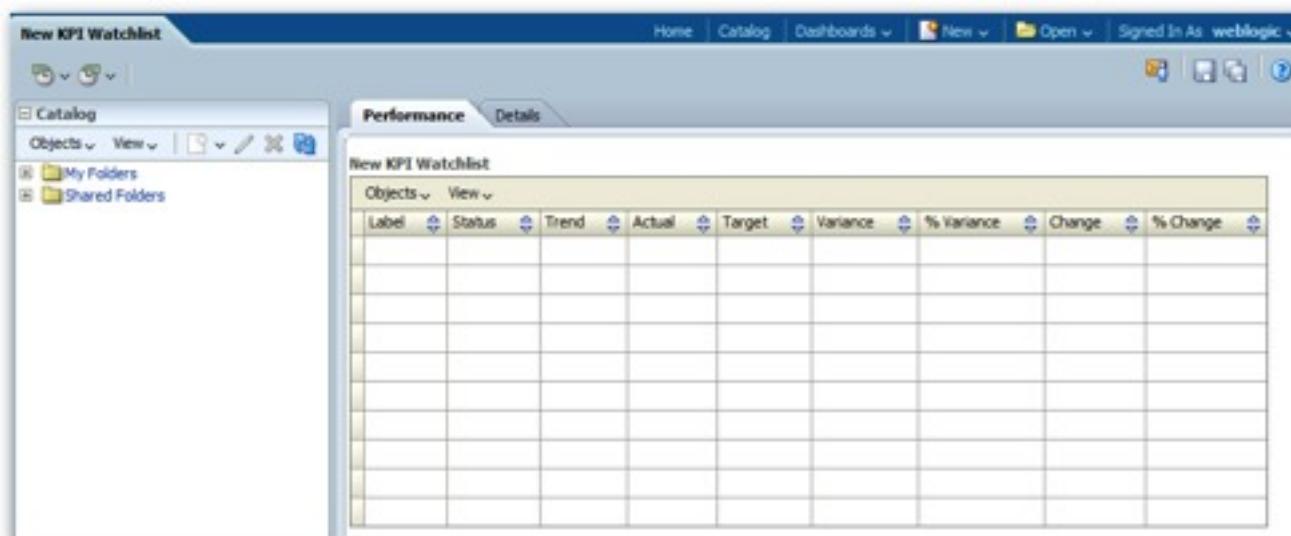
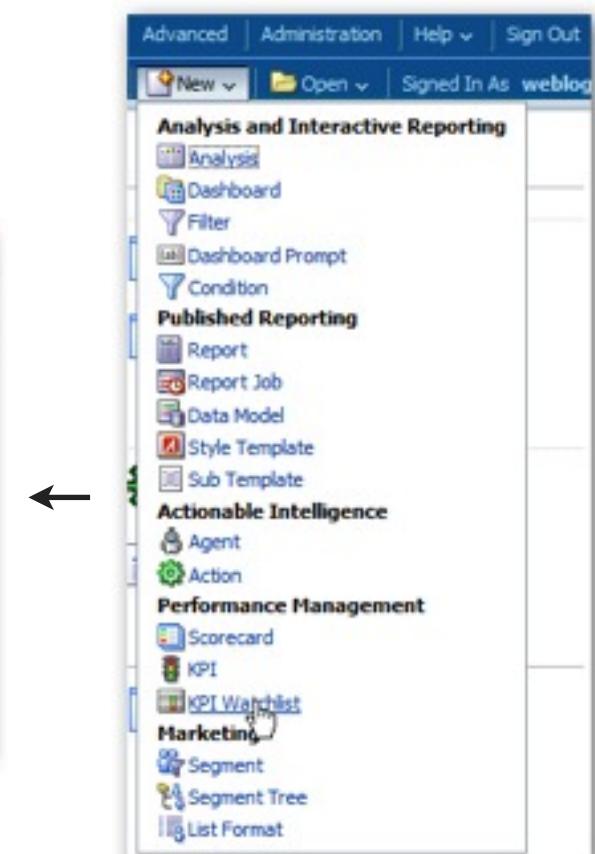
The screenshot shows a software application window titled "KPI Watchlist - Functional Example KPIs". The window has a toolbar at the top with buttons for Home, Catalog, Dashboards, New, Open, Signed In As, and webMagic. Below the toolbar is a navigation bar with dropdown menus for "A - Sample Sales".Customers.Cust Segments Hierarchy, "A - Sample Sales".Offices.Offices Hierarchy, "A - Sample Sales".Orders.Orders Hierarchy, "A - Sample Sales".Products.Products Hierarchy, and "A - Sample Sales".Time.Time Hierarchy.

The main area is divided into two tabs: "Performance" (selected) and "Details". The "Performance" tab displays a table of KPIs with columns for Label, Status, Trend, Actual, Target, Variance, % Variance, Change, and % Change. The table includes rows for "Basic 5 State KPI", "Basic 5 State KPI - Pinned to Biotech", "Basic 5 State KPI - Pinned to FunPad", "Basic 5 State KPI - Pinned to HomeView", "KPI with Self-Sustaining target", "KPI with Self-Sustaining target 2", and "KPI with Self-Sustaining target 3".

A context menu is open over the last row ("KPI with Self-Sustaining target 3"), showing options: "No Actions Available", "Open KPI Definition", "Analyze", "Contact Owner", and "Add Comment".

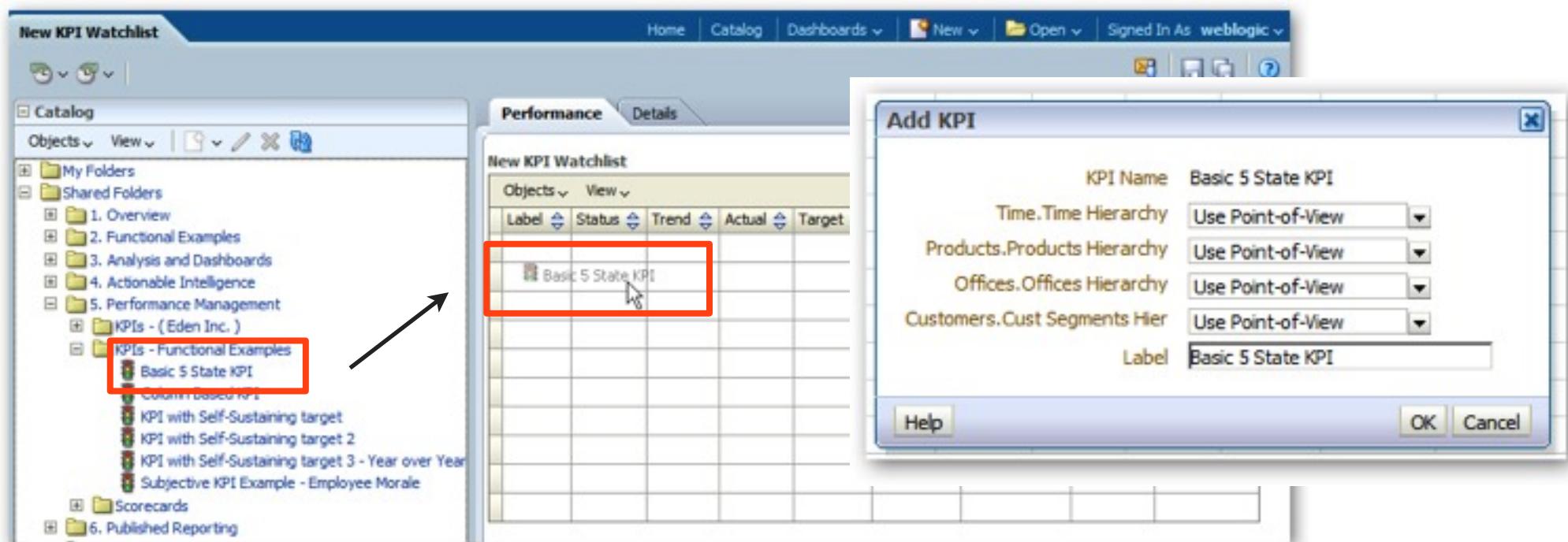
Creating a KPI Watchlist Step 1 : Create from Menu

- Select **New > KPI Watchlist** from common header menu
- Displays blank KPI Watchlist on the screen, ready for KPIs to be added to the list

Creating a KPI Watchlist Step 2 : Add KPIs to watchlist

- Select KPI from the web catalog to add to watchlist
- Select pinning values for point of view (or leave open)
- Provide label for KPI on watchlist



New KPI Watchlist

Home | Catalog | Dashboards | New | Open | Signed In As weblogic | ?

Catalog

Objects View |

- My Folders
- Shared Folders
 - 1. Overview
 - 2. Functional Examples
 - 3. Analysis and Dashboards
 - 4. Actionable Intelligence
 - 5. Performance Management
 - KPIs - (Eden Inc.)
 - KPIs - Functional Examples**
 - Basic 5 State KPI**
 - Column based KPI
 - KPI with Self-Sustaining target
 - KPI with Self-Sustaining target 2
 - KPI with Self-Sustaining target 3 - Year over Year
 - Subjective KPI Example - Employee Morale
 - Scorecards
 - 6. Published Reporting

Performance Details

New KPI Watchlist

Label	Status	Trend	Actual	Target
Basic 5 State KPI				

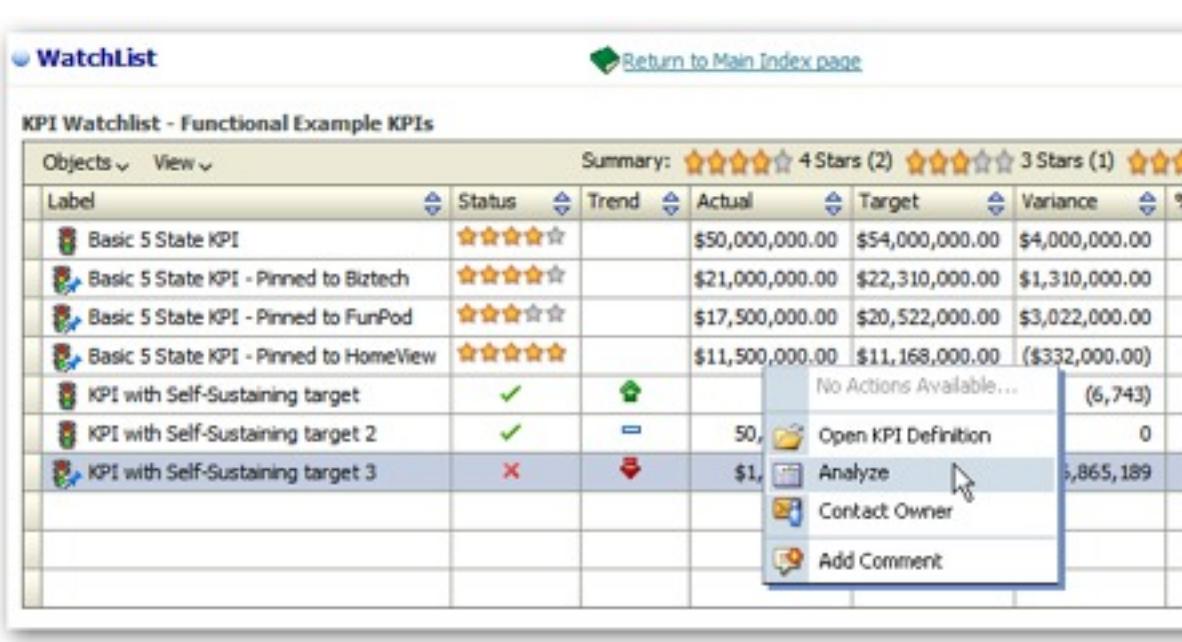
Add KPI

KPI Name	Basic 5 State KPI
Time.Hierarchy	Use Point-of-View
Products.Hierarchy	Use Point-of-View
Offices.Hierarchy	Use Point-of-View
Customers.Cust Segments Hier	Use Point-of-View
Label	Basic 5 State KPI

Help OK Cancel

Creating a KPI Watchlist Step 3 : View KPIs on Watchlist

- View complete list of KPIs on watchlist
- Right-click and select Analyze to view as an analysis
- Right-click and select Add Comment to add annotation to the KPI
- Save the watchlist to the web catalog as with any other BI object



The screenshot shows a 'WatchList' interface titled 'KPI Watchlist - Functional Example KPIs'. It displays a grid of KPIs with columns for Label, Status, Trend, Actual, Target, Variance, and % Change. A context menu is open over the last row of the grid, listing options: 'Open KPI Definition', 'Analyze' (which is highlighted), 'Contact Owner', and 'Add Comment'.

New Comment

KPI	KPI with Self-Sustaining target
Trend	
Subject	Why bad performance?
Comment	Can you give me an explanation for this out-of-threshold performance?

OK Cancel



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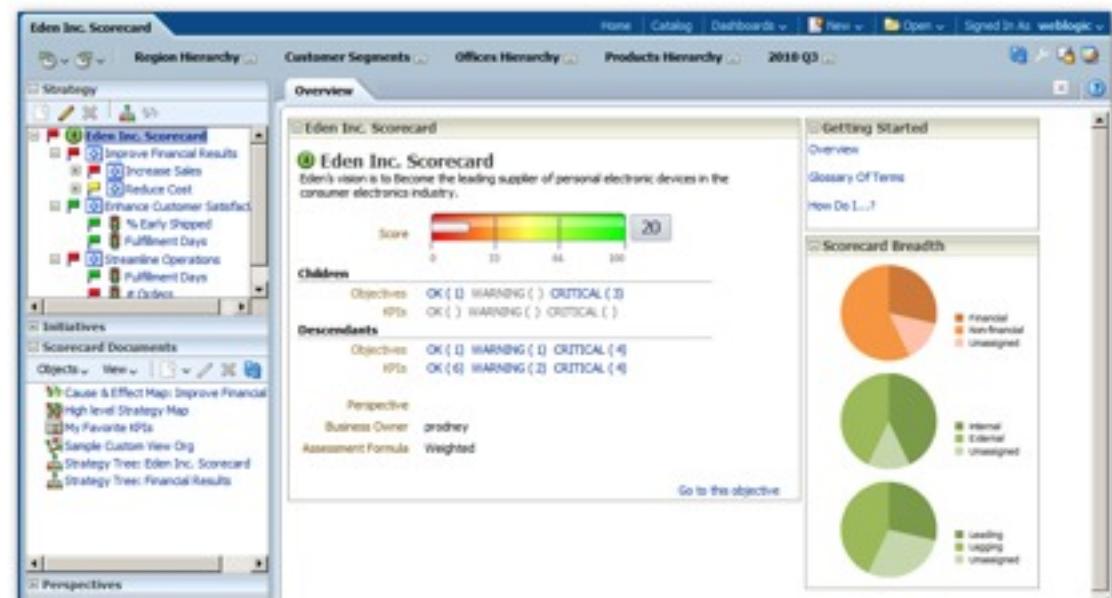
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KPIs and KPI Scorecards

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Oracle Scorecards

- Scorecards take KPIs, and combine with objectives and initiatives to articulate progress against organizational objectives
- Can be analyzed using dimensional points of view
- Actions, comments and agents can be added to the scorecard
- Scorecards can be visualized as strategy maps, strategy trees and other views
- Created using the Scorecard editor within Presentation Services UI

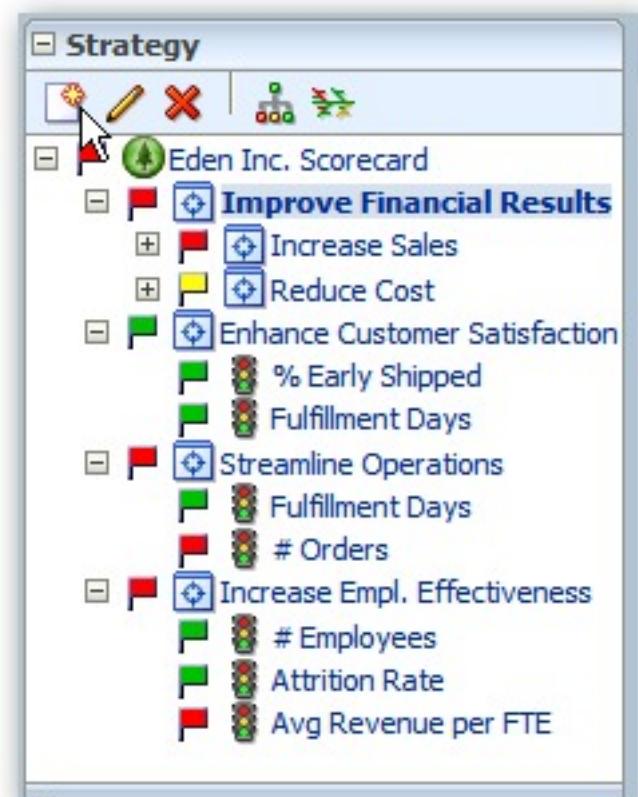


Key Scorecard Components

- Objectives
 - ▶ The required or desired outcomes that form your strategy
 - ▶ KPIs are assigned to objectives to measure progress and performance
- Initiatives
 - ▶ Time-specific tasks that are necessary to achieve objectives
 - ▶ KPIs are also assigned to objectives to measure performance
- KPIs
 - ▶ Results of a business measure evaluated against a target measure
- Perspectives
 - ▶ Financial and non-financial categories with which the above are associated
- Scorecard Documents
 - ▶ Strategy maps, strategy trees, KPI watchlists, Corporate visions and other documents used to express and visualize the scorecard

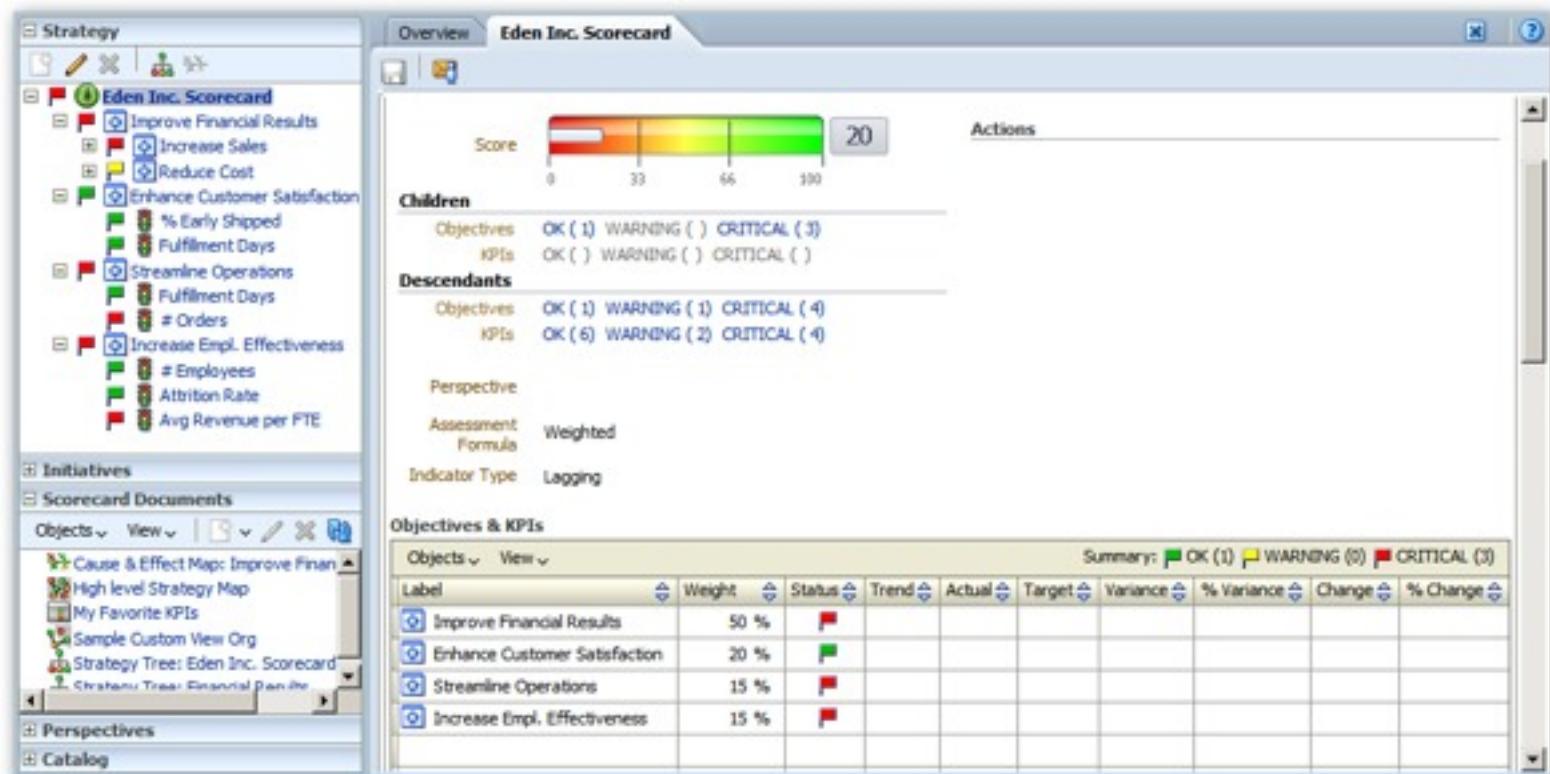
Objectives

- Objectives are listed in the Strategy pane in the scorecard editor
- Top-most objective represents the organisation, child objectives represent the strategy components
- Organize into a hierarchy, and associate KPIs with the objectives
- KPI can be picked up from web catalog, or defined and saved within the scorecard



Master Objective View

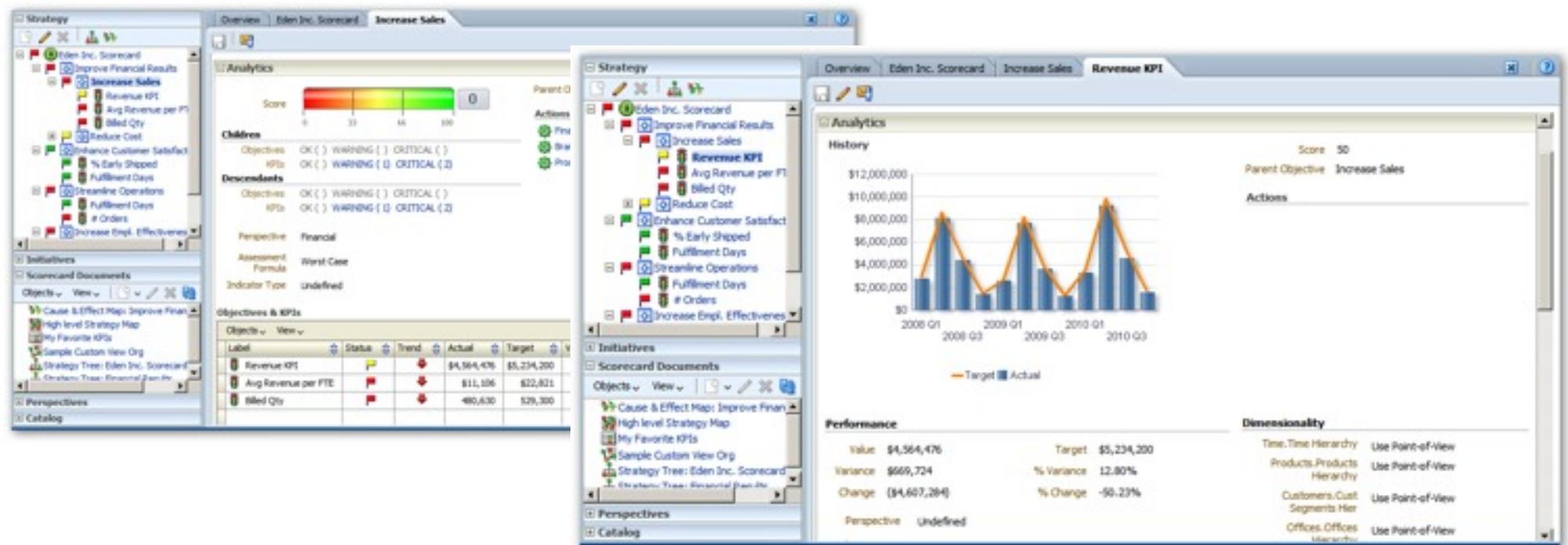
- Shows the organization at the top, with top-level child objectives under it
- High-level overall view of the organization's progress against strategy



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Child Objective Views

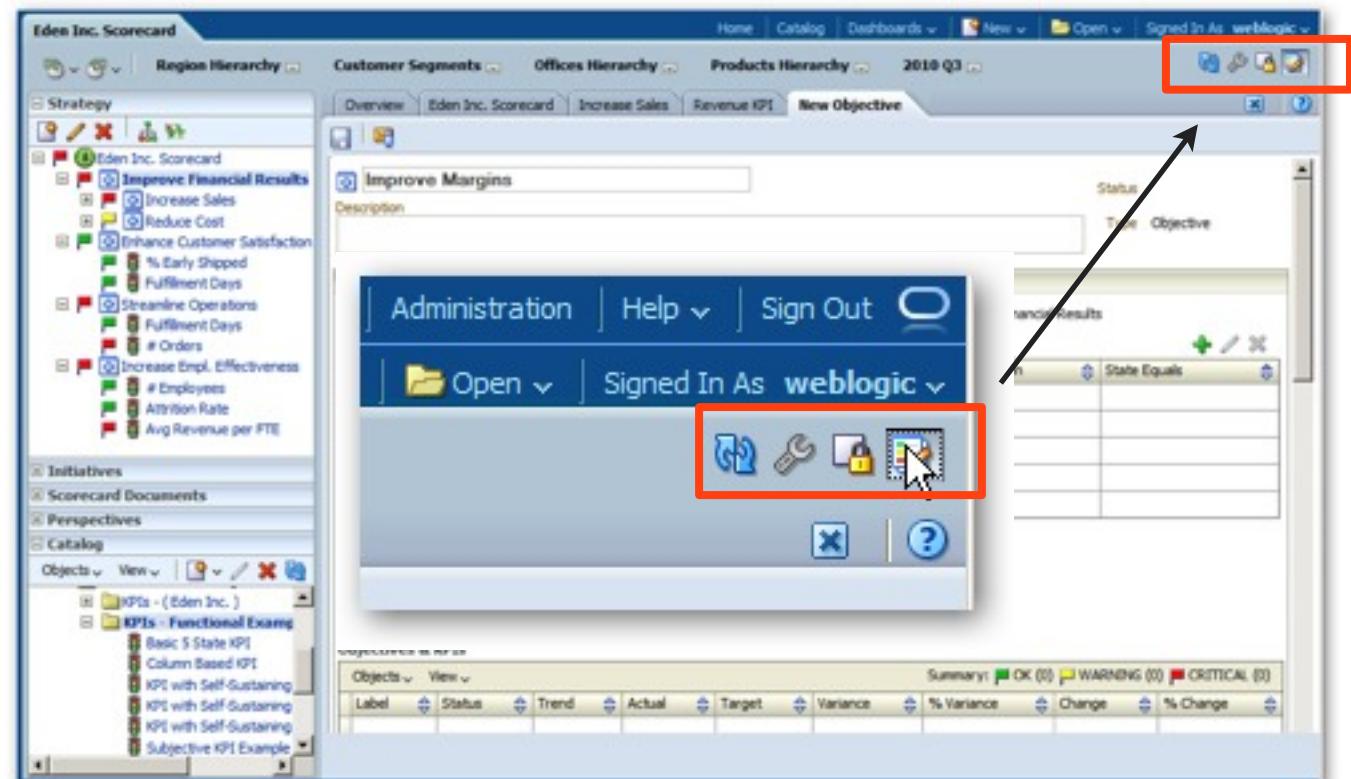
- Child objective views allow you to display progress against component objectives
- View trend data on KPIs
- See contributory scores from dependent KPIs and objectives



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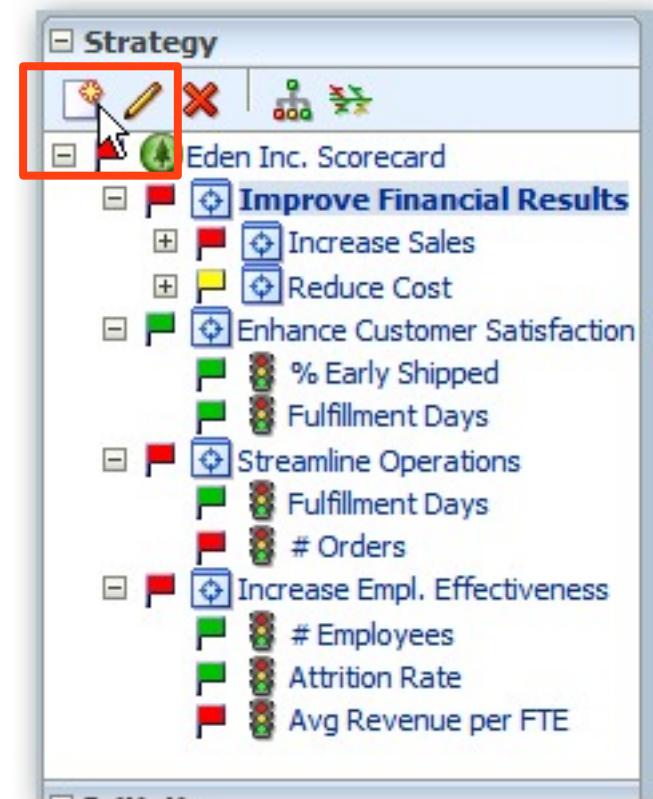
Creating an Objective Step 1 : Enable Scorecard Edit Mode

- Scorecards have **View** and **Edit** modes
- Select **Edit Mode** using the toggle in the top right-hand corner



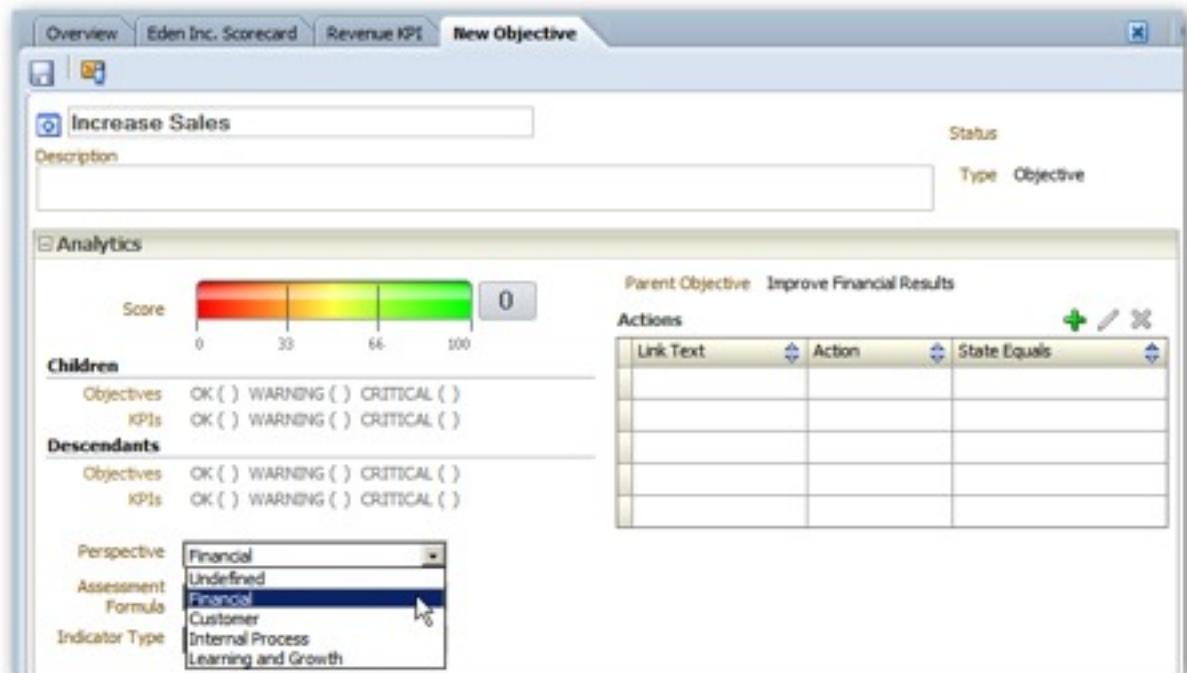
Creating an Objective Step 2 : Press Create New Objective Button

- Press the **New Objective** button in the Strategy pane
- Located in the top-left hand corner of the Scorecard editor
- Only enabled when in **Edit Mode**



Creating an Objective Step 3 : Enter Objective Details

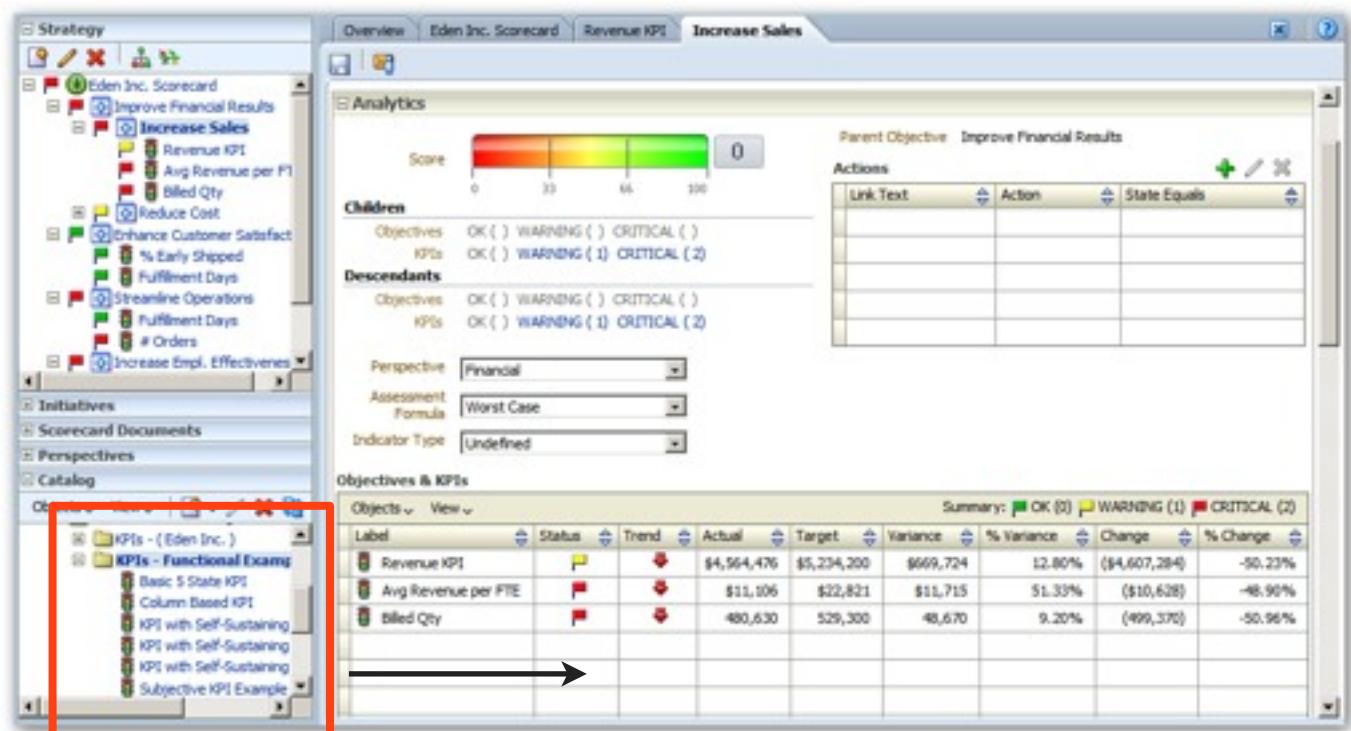
- Enter a name for the objective
- Choose a perspective
- Determine the assessment formula (best case/worst case etc)
- Choose indicator type (lagging/leading)



The screenshot shows the 'New Objective' screen in the Rittman Mead software. The objective 'Increase Sales' is selected. The 'Analytics' section displays a score of 0 on a scale from 0 to 100. The 'Children' and 'Descendants' sections show no data. The 'Perspective' dropdown menu is open, with 'Financial' selected. Other options include 'Undefined', 'Customer', 'Internal Process', and 'Learning and Growth'. The 'Actions' section shows a table with columns for Link Text, Action, and State Equals.

Creating an Objective Step 4 : Add KPIs to Analytics Pane

- KPIs are then added to the **Analytics** pane
- Select from web catalog or create new
- KPIs can be weighted if **Indicator Type** is set to **Weighted**



The screenshot shows the Rittman Mead software interface for creating an objective. On the left, the 'Strategy' tree view displays the hierarchy of objectives and initiatives. A red box highlights the 'KPIs - Functional Examples' folder under 'Scorecard Documents'. An arrow points from this folder to the 'Analytics' pane on the right. The 'Analytics' pane includes a score bar, sections for 'Children' and 'Descendants' (both showing OK, WARNING, and CRITICAL levels), and tabs for 'Perspective' (Financial), 'Assessment' (Worst Case), and 'Indicator Type' (Defined). Below these is a table titled 'Objectives & KPIs' with columns for Label, Status, Trend, Actual, Target, Variance, % Variance, Change, and % Change. The table lists three KPIs: Revenue KPI, Avg Revenue per FTE, and Billed Qty, all showing red status and trend indicators.

Label	Status	Trend	Actual	Target	Variance	% Variance	Change	% Change
Revenue KPI	Red	Red	\$4,564,476	\$5,234,200	\$669,724	12.80%	(\$4,607,284)	-50.23%
Avg Revenue per FTE	Red	Red	\$11,106	\$22,821	\$11,715	51.33%	(\$10,628)	-46.90%
Billed Qty	Red	Red	480,630	529,300	-48,670	9.20%	(499,370)	-50.96%

Creating an Objective Step 5 : Assign Actions

- Actions can be associated with the objective
- Action is linked to the objective, and is displayed dependent on objective state
- Actions become visible when viewing in strategy tree, strategy map etc

Parent Objective Improve Financial Results

Actions

Link Text	Action	State Equals
Financial Analysis Dashboard	Navigate to BI Content	CRITICAL
Brand Analysis	Navigate to BI Content	CRITICAL
Product Analysis	Navigate to BI Content	CRITICAL
Financial Analysis Dashboard	Navigate to BI Content	OK
Top Customers Bookings	Navigate to BI Content	OK

Creating an Objective Step 6 : Add Related Items

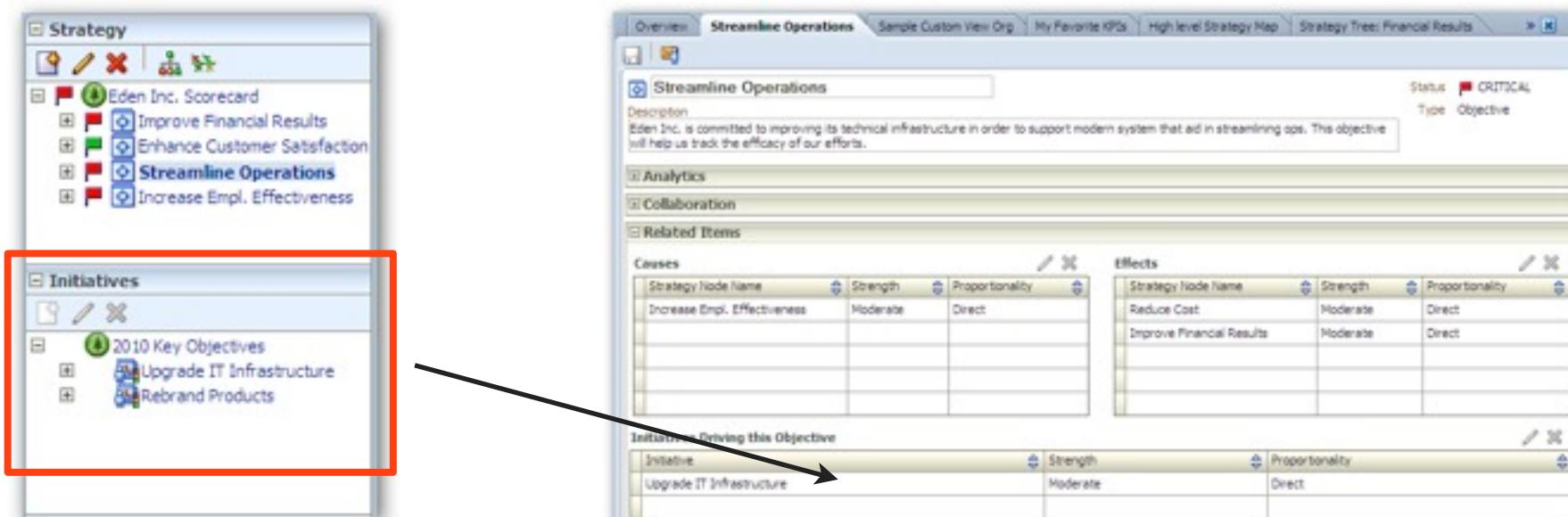
- Add causes and effect objectives to the Related Items pane
 - ▶ Select objective, strength and proportionality
- Do the same for initiatives driving the objective
- Used in cause-and-effect maps; does not affect scorecard score, but helps users understand the implications of future strategic changes

Causes			Effects		
Strategy Node Name	Strength	Proportionality	Strategy Node Name	Strength	Proportionality
Enhance Customer Satisfaction	Moderate	Direct	Improve Financial Results	Strong	Direct
Avg Order Size	Moderate	Direct			
Billed Qty	Moderate	Direct			
Avg Revenue per FTE	Moderate	Direct			
Revenue KPI	Moderate	Direct			

Initiatives Driving this Objective		
Initiative	Strength	Proportionality
Rebrand Products	Moderate	Direct

Initiatives

- Initiatives, like objectives, can be defined in a hierarchy in the scorecard
- Initiatives are time-bound and support the objectives of the organization
- Have their own cause and effect linkages, and are linked to objectives
- Optional, can be used to help illustrate wider range of required activities to support a set of objectives



The screenshot displays two windows from the Oracle Scorecard & Strategy Management application.

Left Window (Strategy View):

- Top Bar:** Strategy
- Objectives:**
 - Eden Inc. Scorecard
 - Improve Financial Results
 - Enhance Customer Satisfaction
 - Streamline Operations** (selected)
 - Increase Empl. Effectiveness
- Bottom Bar:** Initiatives
- Initiatives List:**
 - 2010 Key Objectives
 - Upgrade IT Infrastructure
 - Rebrand Products

A red box highlights the "Initiatives" section in the left window, and a black arrow points from it to the "Upgrade IT Infrastructure" row in the "Initiatives Driving this Objective" table of the right window.

Right Window (Streamline Operations Detail View):

- Top Bar:** Streamline Operations
- Description:** Eden Inc. is committed to improving its technical infrastructure in order to support modern system that aid in streamlining ops. This objective will help us track the efficacy of our efforts.
- Analytics**
- Collaboration**
- Related Items**
- Causes:**

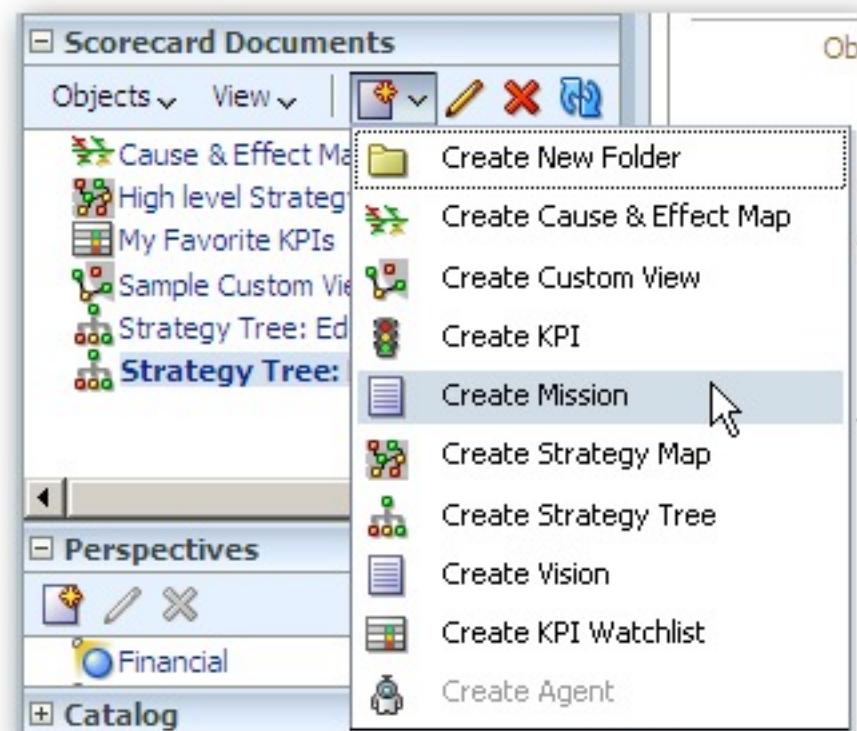
Strategy Node Name	Strength	Proportionality
Increase Empl. Effectiveness	Moderate	Direct
- Effects:**

Strategy Node Name	Strength	Proportionality
Reduce Cost	Moderate	Direct
Improve Financial Results	Moderate	Direct
- Initiatives Driving this Objective:**

Initiative	Strength	Proportionality
Upgrade IT Infrastructure	Moderate	Direct

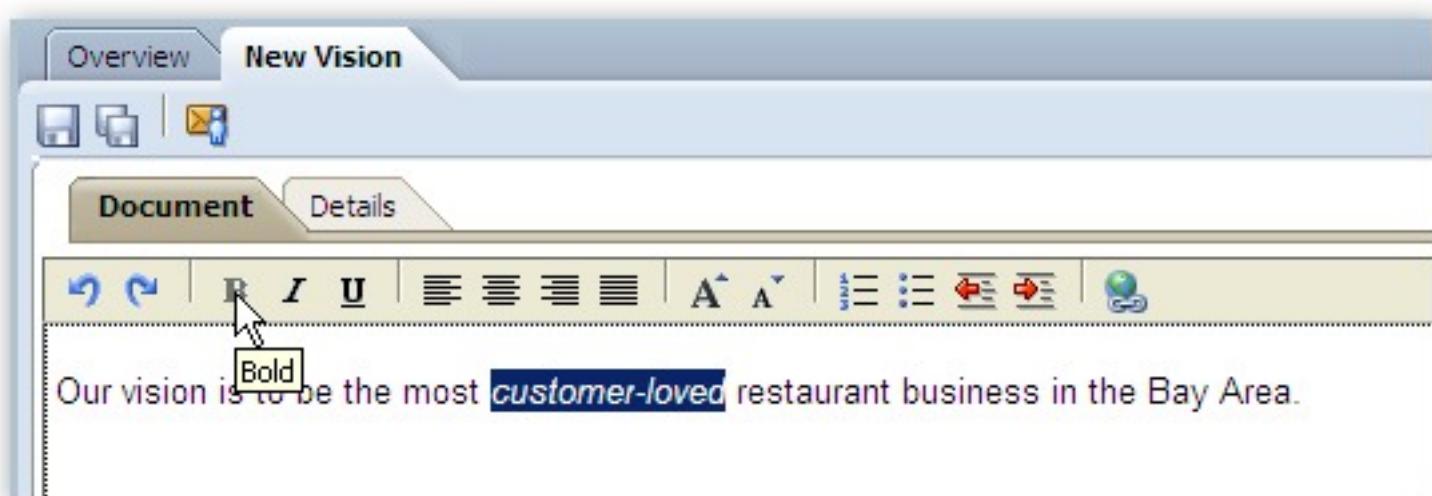
Scorecard Documents

- Once objectives, KPIs and initiatives have been defined, scorecard documents can be created to help communicate scorecard activity
- Documents include
 - ▶ Mission and Vision statements
 - ▶ Strategy Trees
 - ▶ Strategy Maps
 - ▶ Cause and Effect Maps
 - ▶ KPI Watchlists
 - ▶ Custom Views



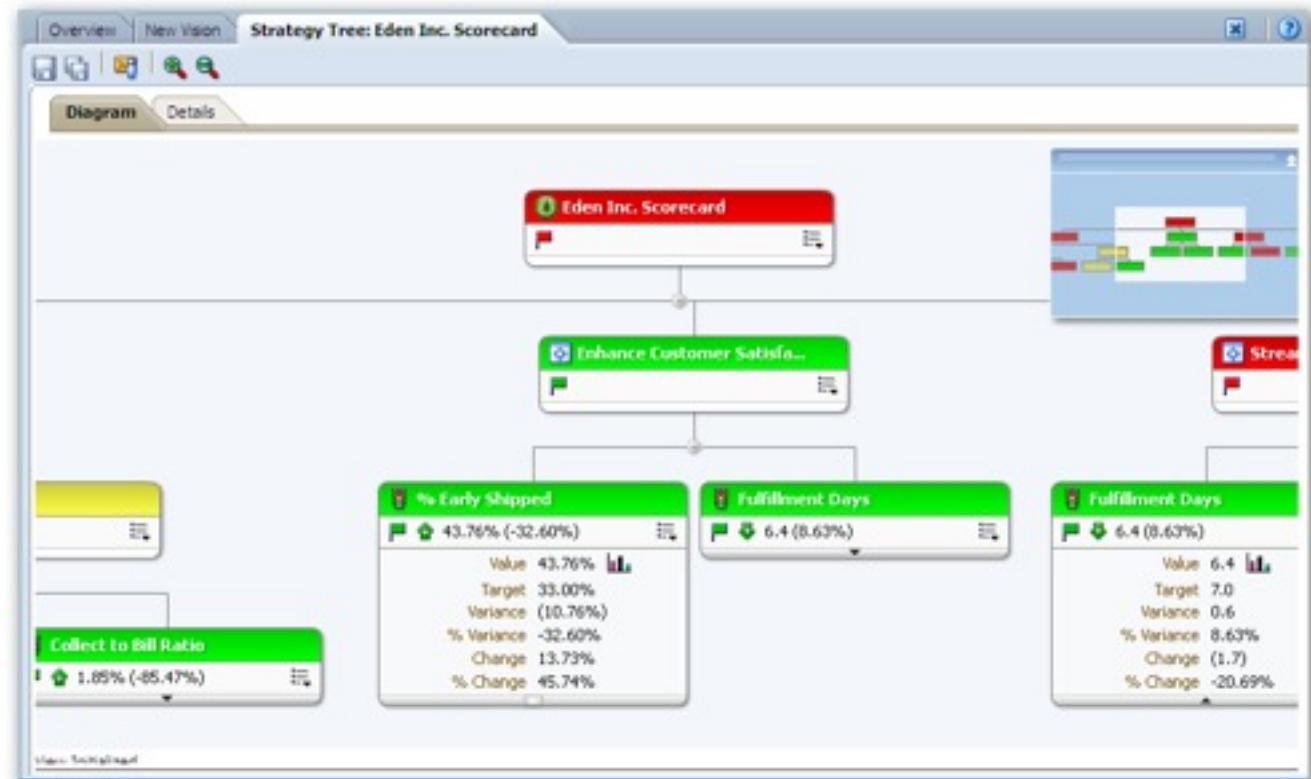
Vision and Mission Statements

- Textual high-level outlines of the organization's purpose and objectives
- Vision statement : describes what the organization wants to become in the future
 - ▶ “To be the most customer-loved restaurant business in the Bay Area”
- Mission statement : specifies the key business goals to achieve vision
- Both are optional, but useful to add context to the scorecard



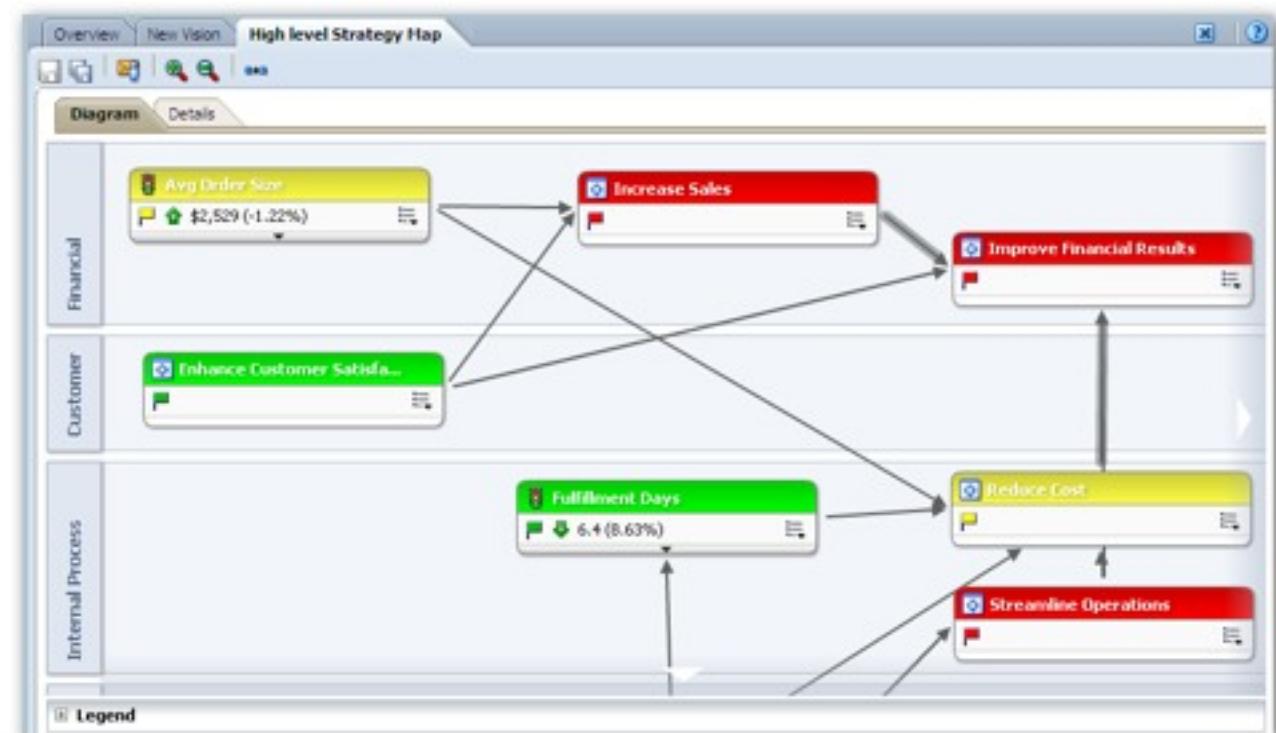
Strategy Trees

- The “traditional” view of a balanced scorecards
- Shows objectives in a hierarchy, contributing to parent objectives
- Expand tree nodes to see full KPI details



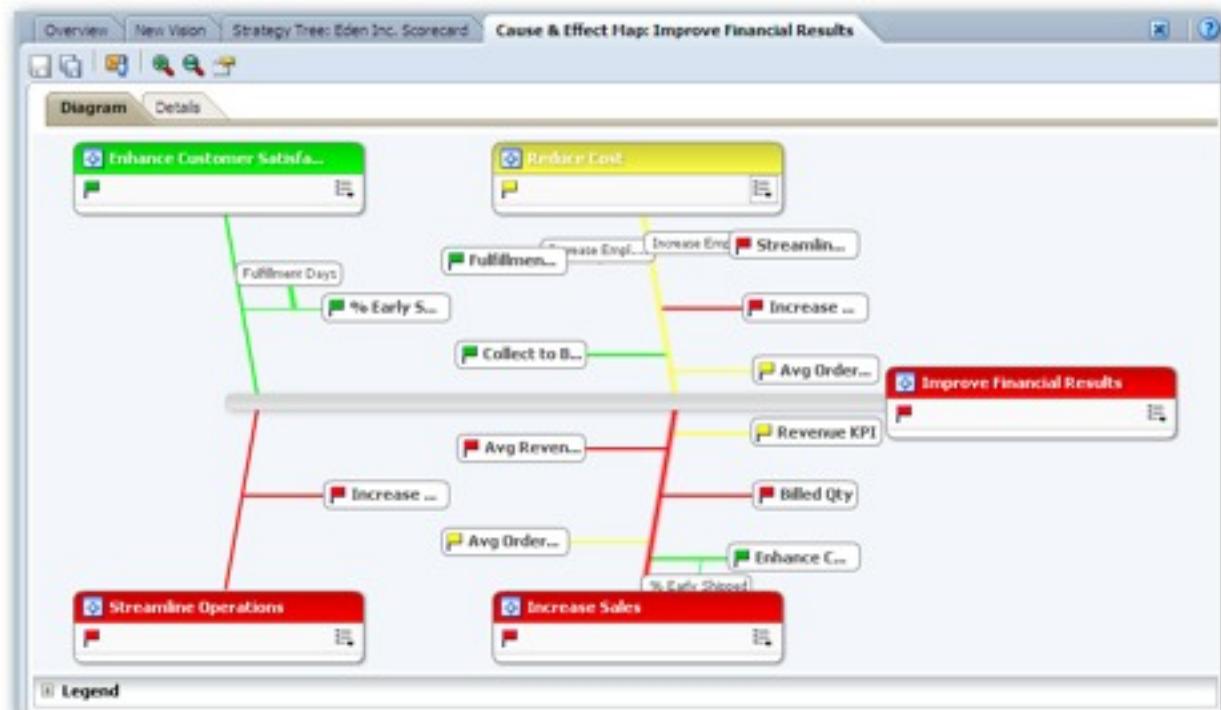
Strategy Maps

- Organizes objectives into perspectives, showing cause and effect relationships between them
- “Joins the dots” between objectives
- Provides greater contextual justification for the KPIs on the dashboard
- Proposed by Kaplan & Norton as the “2nd Generation” of balanced scorecards



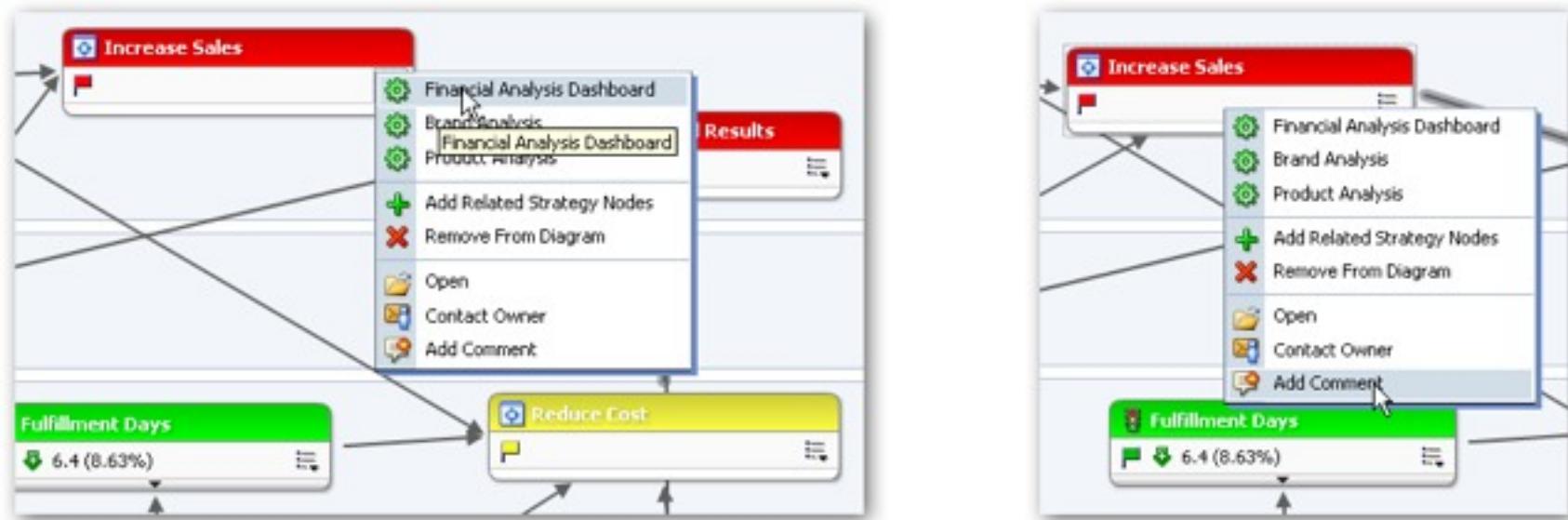
Cause and Effect Maps

- “Fishbone” diagram, shows how objectives contribute to final outcome via cause and effect relationships
- Also indicates proportionality and strength of the relationship



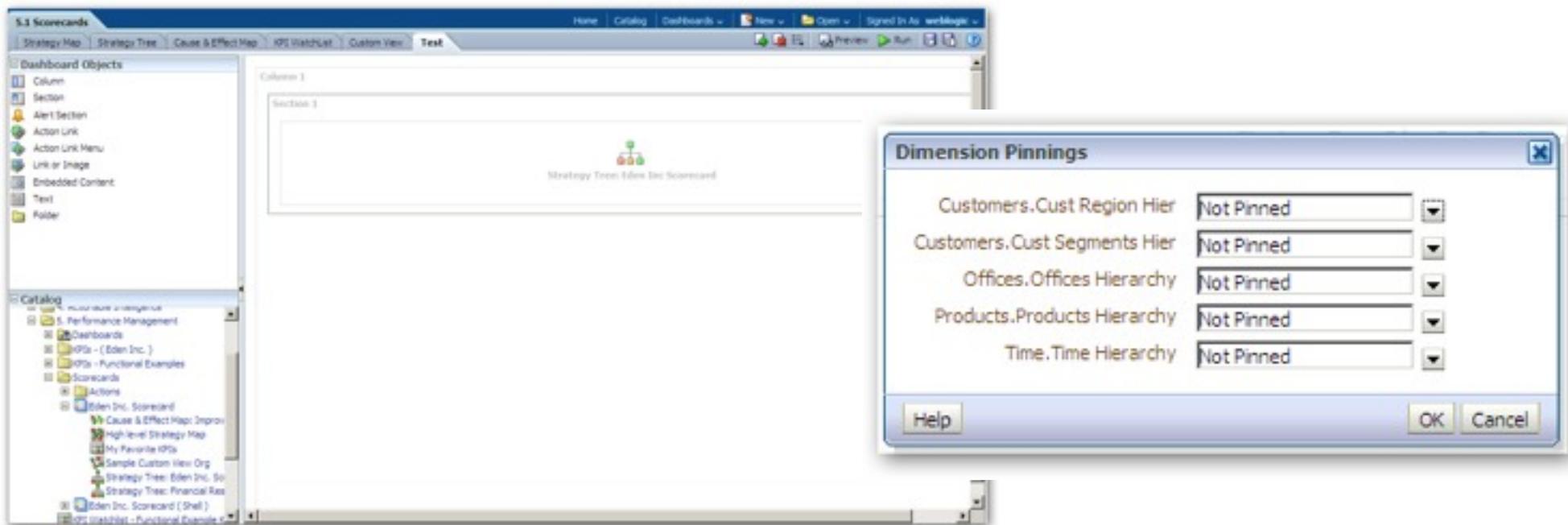
Actions, Comments and Scorecards

- Actions assigned in the objective and initiative definition screens can then be accessed from the scorecard
- Take action based on results shown in the scorecard view
- Pass context to an analysis, or trigger external workflow
- Comments can be added, and will be available to other users to view



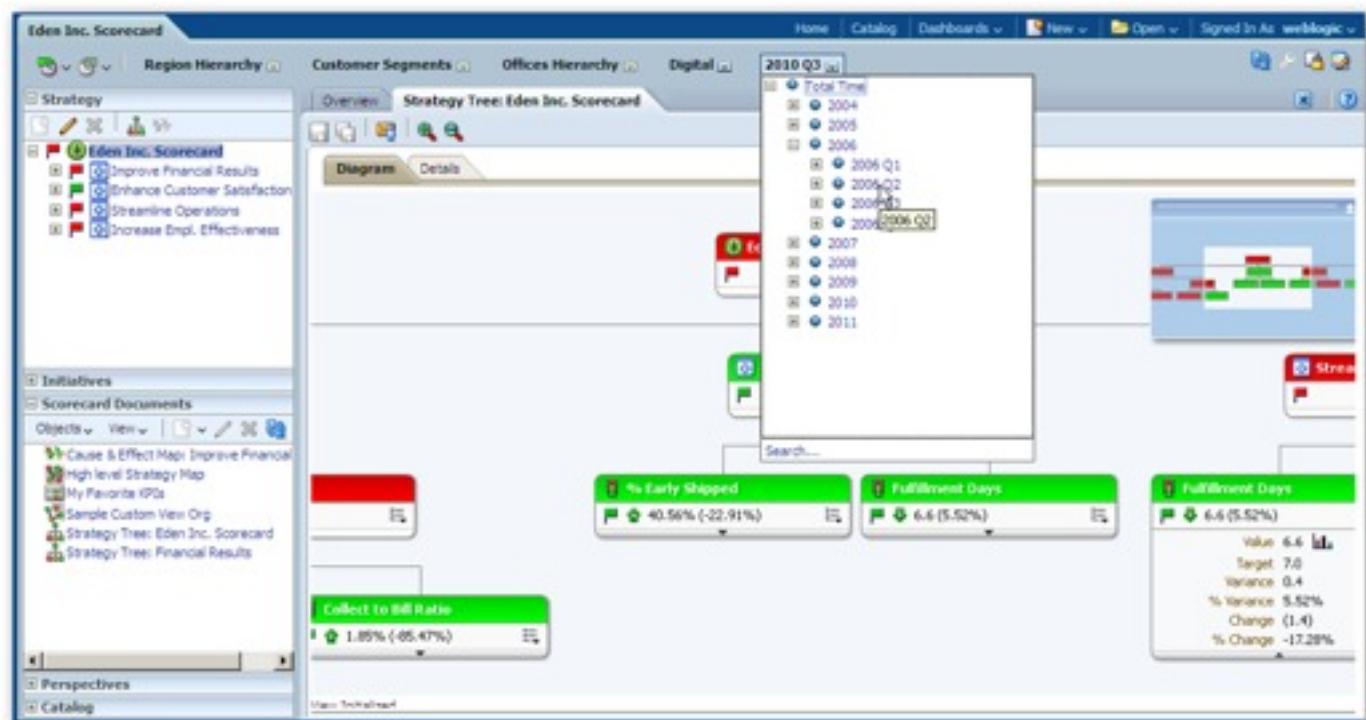
Including Scorecards in Dashboards

- Scorecards can be added to dashboards like any other BI content
- Scorecard documents are added to the dashboard, pinning selected and saved
- KPI Scorecards can also be added in the same way



Analyzing Scorecards

- To interactively analyze a scorecard, view in the Scorecard application
- For un-pinned KPIs, use the point of view selector to change dimension values
- Ensure scorecard is running in **View** mode (disable **Edit Mode** for users)



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Creating Scorecards

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Summary

- OBIEE 11g comes with an updated user interface built using FMW11g
- Analyses, scorecards, agents and reports can be created
- New hierarchical columns provide powerful OLAP-analysis capabilities
- New in 11g are mapping views, useful for displaying spatially-enabled data
- New KPI feature allows actuals and targets to be monitored
- Initiatives and objectives can be defined and used to create scorecards
- Web catalog still used to store report definitions



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