Oracle Business Intelligence 11g Masterclass

Introductions

Who Am I?

- Oracle BI&W Architecture and Development Specialist
- Co-Founder of Rittman Mead Consulting
  - Oracle BI&W Project Delivery Specialists
- 10+ years with Discoverer, OWB etc
- Oracle ACE Director, ACE of the Year 2005
- Writer for OTN and Oracle Magazine
- Longest-running Oracle blog
  - http://www.rittmanmead.com/blog
- Ex-Chair of UKOUG BIRT SIG
- Co-Chair of ODTUG BI&DW SIG
- Editor of "Oracle Scene" UKOUG magazine
- Speaker at IOUG and BIWA events

Rittman Mead Consulting

- Oracle BI&DW Project Specialists providing consulting, training and support
- Clients in the UK, USA, Europe, Middle-East
- Voted UKOUG BI Partner of the Year 2008 and 2010
- Consultants in Europe and North America
- Regular speakers at user group and Oracle events

UKOUG BI Partner of the Year 2008

Thank you, UKOUG Members, for voting us UKOUG BI Partner of the Year 2008

UK▸OUG
PARTNER OF THE YEAR
AWARD WINNER 2008/2009

1st

Rittman Mead Blog

- Longest-running Oracle (BI) Blog
  - http://www.rittmanmead.com/blog
- Ten authors including Mark Rittman, Borkur Steingrimsson, Stewart Bryson, Peter Scott
  - and now Venkat J (ex-http://oraclebizint.wordpress.com)
- Articles on OBIEE, OWB, DW, Hyperion etc
- All past presentations and articles

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OBIEE Enterprise Methodology Group

- Expert-level OBIEE Design Discussion Forum
  - http://groups.google.com/group/obiee-enterprise-methodology
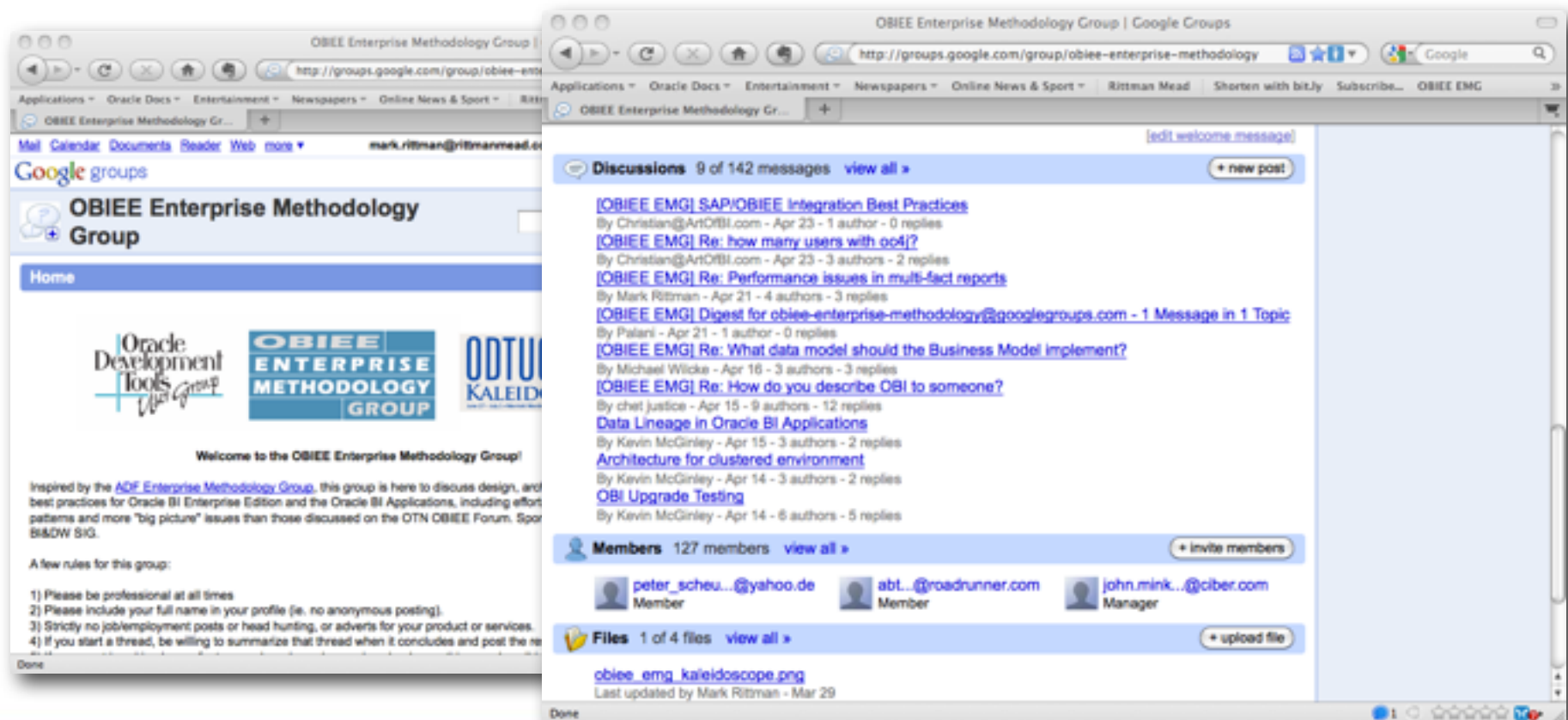
Rittman Mead BI Forum

- Expert-level conference in Brighton, UK, focusing on OBIEE, Essbase and ODI-EE
- Second year of running, 50 partners, consultants and developers from around the world

The Rittman Mead BI Forum,
Brighton Marina, May 19th-21st 2010

SPECIAL EVENT

An expert-Level conference aimed at OBI EE, ODI EE, Essbase and OLAP developers, with an optional one-day masterclass by Kurt Wolff

Writer for Magazines and Forthcoming OBIEE Book

- Regular author for Oracle Magazine, OTN, Oracle Scene, ODTUG Technical Journal
- Contributing Author for Oracle Discoverer 10g Handbook
- Co-Author of forthcoming
  Oracle Press
 Oracle BI Suite EE
  Developers Guide
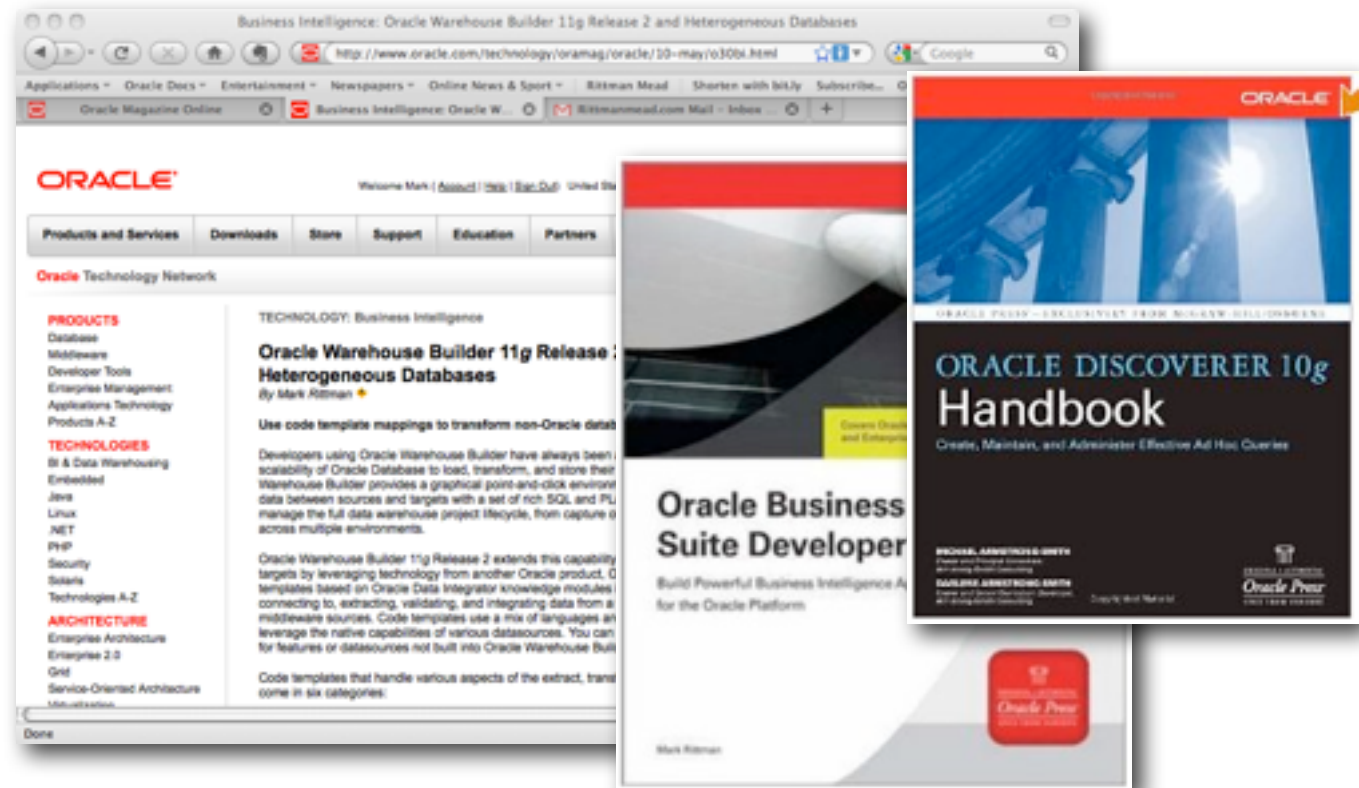
~~Two~~ ~~Three~~ Four Years of Oracle BI and EPM Product Releases

- The Release of Oracle Business Intelligence Enterprise Edition
- Oracle Acquires Hyperion
- Oracle Database 11g is now out
- The Rise of Oracle Fusion Middleware
- Coming together of OWB and ODI
- Emphasis on Standards and Hot Pluggability
- Pre-built data warehouse solutions now possible
- **New! Oracle BI 11g, OWB 11gR2 and ODI 11g are now out!**

Oracle Business Intelligence 11g

- The latest release of OBIEE (Oracle BI Enterprise Edition)
- Major changes to front-end, integration, architecture
- Objective is to make it more "enterprise-ready"
- Closely integrated with Oracle Fusion Middleware 11g
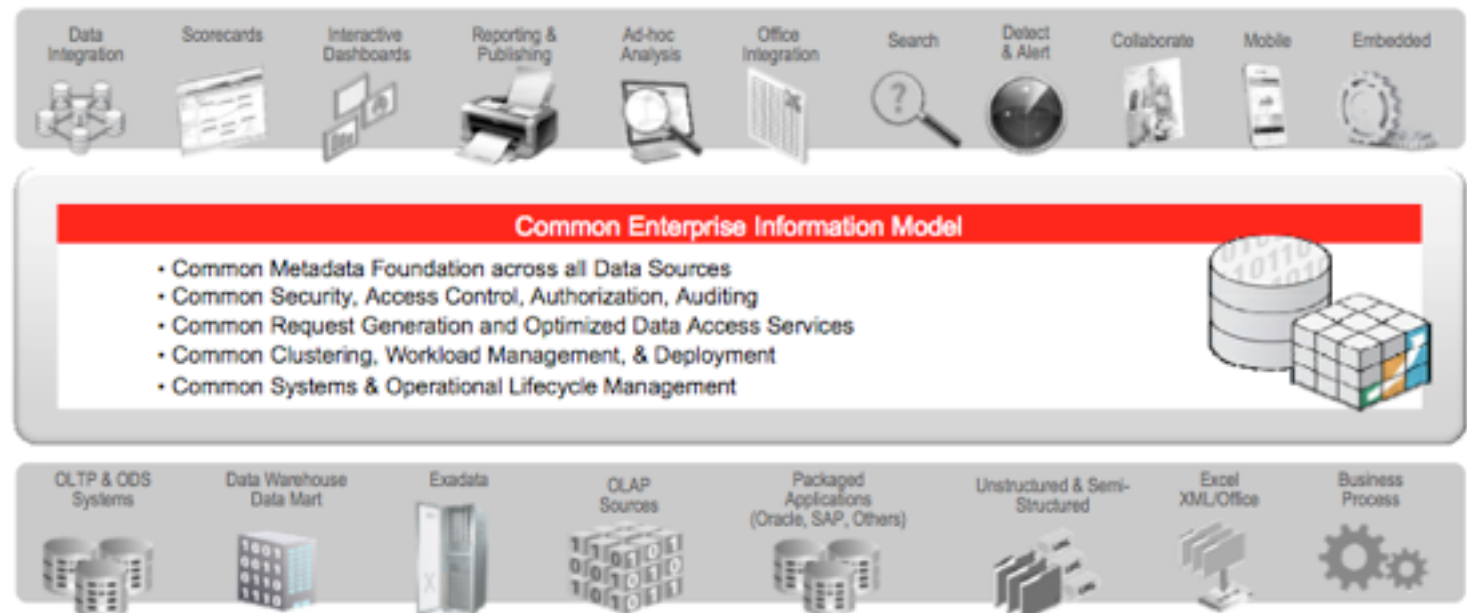
Oracle BI Publisher 11g

- The 11g Release of Oracle BI Publisher comes with many new features
  - Available now, currently at version 11.1.1.3
- Web-Based Online Layout Editor
- Web-Based Interactive Viewer
- New Data Model Editor
- Style Templates and Sub-Templates
- Closer Integration with OBIEE
- New Report Storage and Document Types
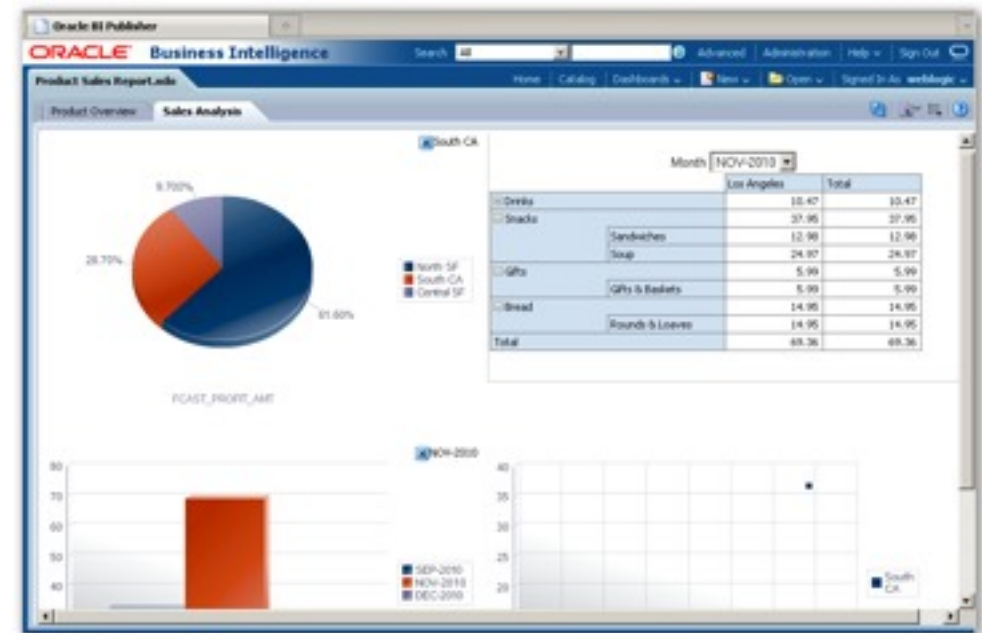
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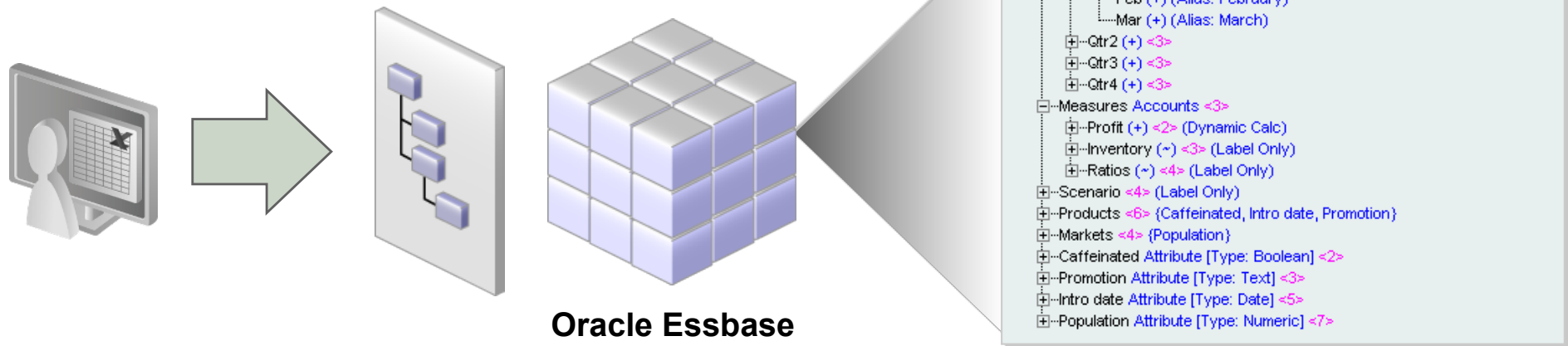
Oracle Scorecard & Strategy Management

- Scorecards take KPIs (new in OBIEE 11g), 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
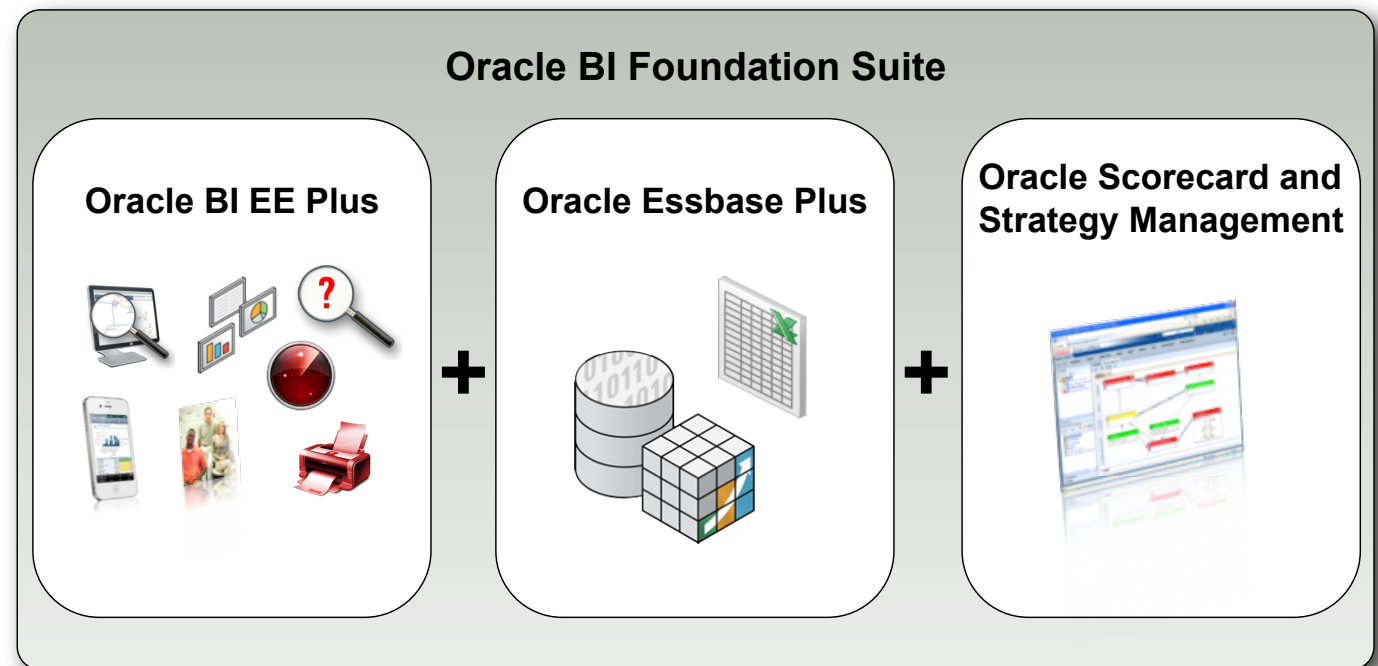- Created using the Scorecard editor within Presentation Services UI
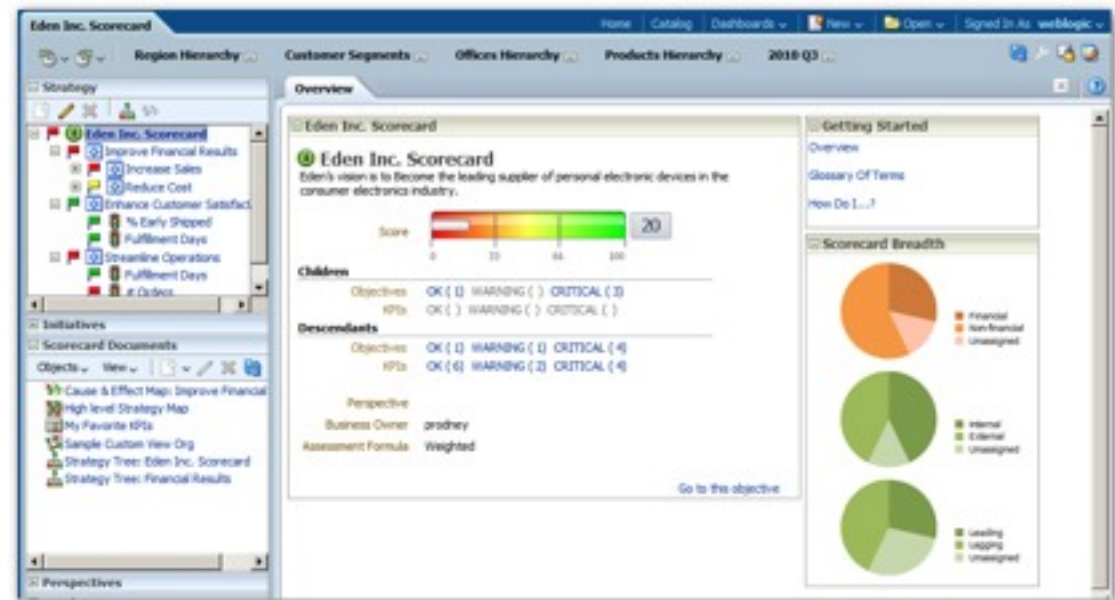
Oracle Essbase 11.1.2

- Focus on manageability, scalability
- Industry-leading analytics engine with built-in financial intelligence
- New in Release 11.1.2: Fusion Middleware Integration for enterprise-class manageability
  - ▸ Oracle Enterprise Manager
  - ▸ Oracle Single Sign-on and Security integration
  - ▸ Oracle Diagnostic Logging
  - ▸ Oracle OPMN Failover

Oracle Essbase

Oracle BI Foundation Suite

- New marketing package combining OBIEE 11g Plus, Oracle Essbase Plus and Oracle Scorecard and Strategy Management
- Complete technology foundation for Oracle BI & EPM

Oracle BI Foundation Suite

Oracle BI EE Plus + **Oracle Essbase Plus** + **Oracle Scorecard and Strategy Management**

Converging ODI and OWB ETL Tools

- New release of OWB11gR2, includes ODI functionality
- Integration with OBIEE
- New 11g release of ODI, features WLS integration
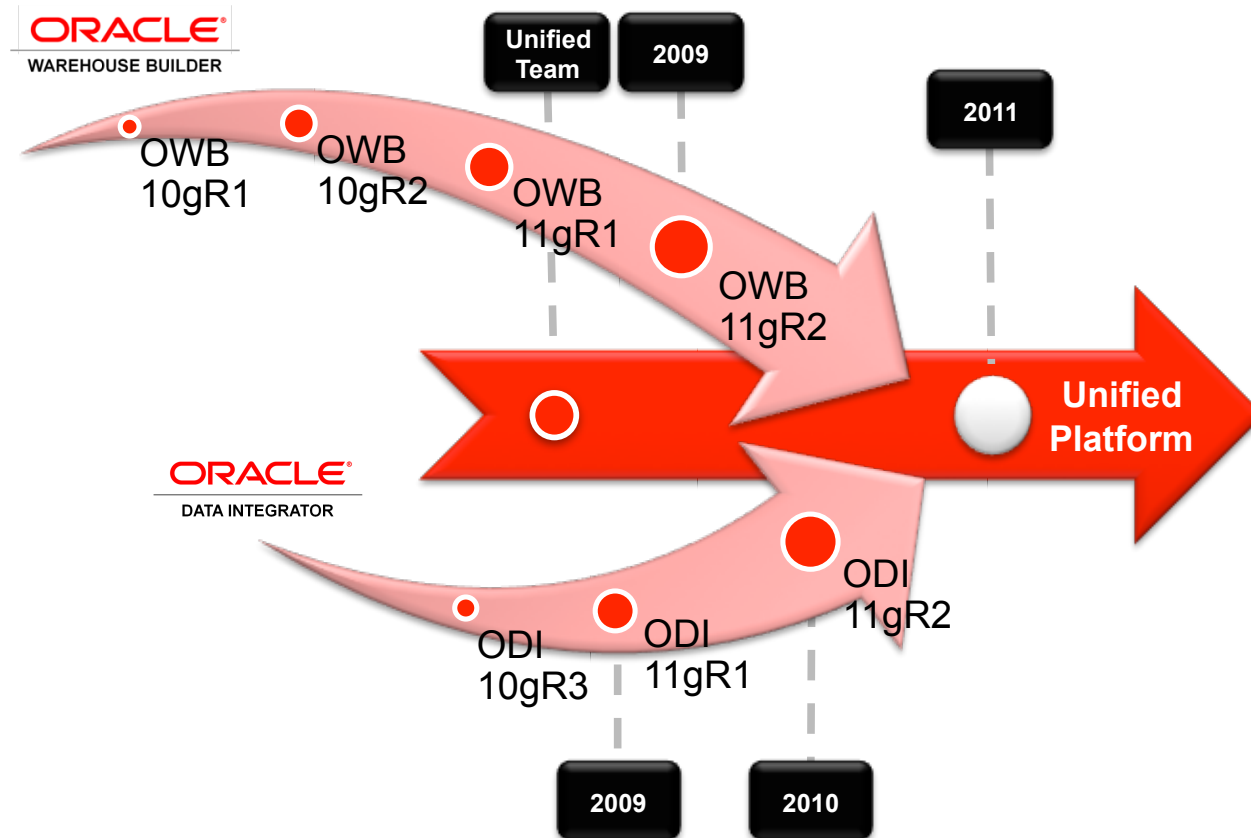
Oracle Business Intelligence 11g Masterclass

- Two days of deep-dive insight into Oracle's 11g Business Intelligence Suite

- Day 1
  - OBIEE 11g Overview and Architecture
  - Oracle BI Server 11g New Features, and Data Modeling Best Practices
  - Building Reports, Dashboards and Scorecards using OBIEE 11g
  - ETL Integration with OWB 11gR2 and ODI 11g
- Day 2
  - Enhancements to Oracle BI Publisher 11g
  - Oracle Essbase New Features and Integration with OBIEE 11g
  - Oracle BI & FMW11g Security
  - OBIEE 11g Actionable Intelligence

Participant Introduction

- The most important people in this room are you
- It helps if I know a bit about you
  - Your Oracle BI experience
  - Your course objectives
  - Where you work
- Introduce yourself to me, and to the other seminar participants

Seminar Participation

- Questions are welcome at any time
  - During the session
  - During breaks
  - At the end of the day
- Hopefully I'll know the answer
  - If not, I'll get back to you
- Your feedback is appreciated
  - What worked well, what could be better
  - Flow of slides and product coverage
  - Fill in the evaluation forms

Download Seminar Materials

- Seminar materials, including additional slides and materials not on agenda, can be downloaded from our website

  `http://www.rittmanmead.com/obiee11g_masterclass.zip`

- Send any questions, feedback etc to me at

  `mark.rittman@rittmanmead.com`

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Scenario Used in the Masterclass Examples

- "The Gourmet Coffee and Bakery Co."
- San Francisco's most long established sourdough bakery
- Founded in 1849, uses piece of the original "mother dough" for each loaf baked
- Now sells eat-in, and take-out, drinks, snacks, sandwiches and gifts at 20+ stores
- Retail business, in-house bakery
  and distribution of wholesale goods

Background

- We have been asked to create an OBIEE 11g proof of concept
- We are now on-site, to determine requirements and build the PoC
- We have spoken with key stakeholders earlier in the week
- We will now build an initial prototype
- Review and refine the design based on feedback and analysis
- Leave the PoC onsite and available for further analysis

Let's start by interviewing key stakeholders, then build a prototype to help refine their requirements.

Interview with the CEO - Strategic Objectices

- GCBC are looking to continuously make improvements to the business
- They have two main financial objectives
    1. To increase revenue from the stores, and
    2. Maintain and improve profit margins
- GCBC, as responsible corporate citizens, also has non-financial objectives:
    1. To improve customer satisfaction, and
    2. To improve staff satisfaction
- Both sets of objectives need to be in-balance, for GCBC to succeed long-term

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We need to define objectives, KPIs, and measure success against our corporate strategy
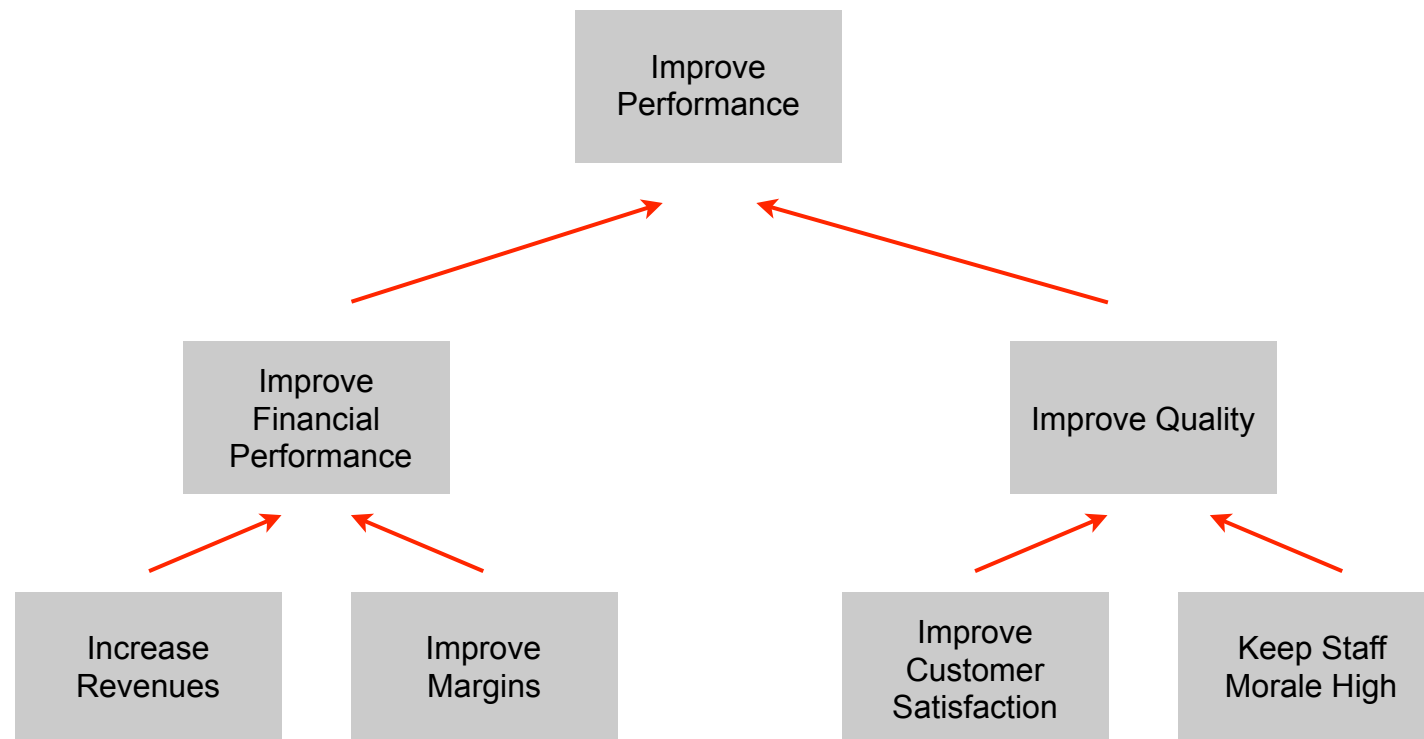
GCBC Key Performance Indicators

1. Revenue against Target
2. Margin against Target
3. Customer Satisfaction to Target, and
4. Staff satisfaction to target
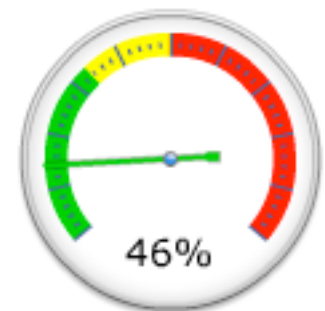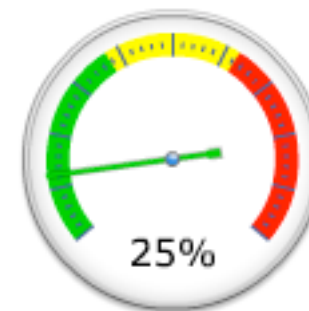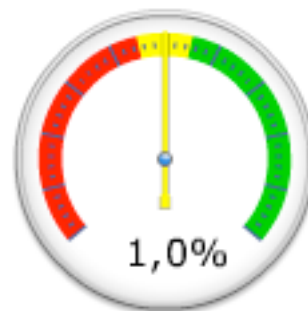
Interview Findings - Balanced Scorecard

- GCBC financial and non-financial metrics, and stated objectives, can be organized into a hierarchy, or a balanced scorecard

Improve Performance

Improve Financial Performance

Improve Quality

Increase Revenues

Improve Margins

Improve Customer Satisfaction

Keep Staff Morale High

Interview with the Lead End-User

- We meet with lead reporting end-user
  - Representative of the users who need to produce the reports and analyses
- Objective is to understand the information needs of the user
- Deliver via graph, table, crosstab, gauges, tickers
- Understand business logic, try and establish design for initial prototype

> Tell me about the analysis you need to perform
> The nature of the data
> The information you require to do your role...?

Analysis Requirements

- To be able to perform three main types of analysis
    1. Store sales analysis
    2. Product sales analysis
    3. Quality assurance analysis
- Data needs to be analyzed by store, staff, time and product
- Access needs to be by role and region
- Delivered via the Web, using tables, graphs, gauges and indicators

We need to be able to analyze store, product and QA data, secured by role and delivered over the Web.

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# New Things We Can Do With Oracle Business Intelligence 11g

1. Show store performance through a map
2. For the product manufacturer share graph, show how share changes over time
3. Add a store sales crosstab that I can dynamically swap dimensions for
4. On the stores dashboard, let me select the stores by a set of tickboxes
5. Add a conditional link to the stores report to request a performance meeting, and a mandatory link for staff sales breakdown for that store
6. And ... not all of our stores have concessions, and our SFO concession reports directly to Head Office.

I've heard good things about Oracle BI 11g...!

Interview Findings : Organizational Chart

- Stores forms a hierarchy, made up of:
  - All Stores > Regions > Stores > Concessions
- Hierarchy is level-based (named levels)
- Will form a logical dimension in OBIEE semantic model
- Reasonably straightforward?
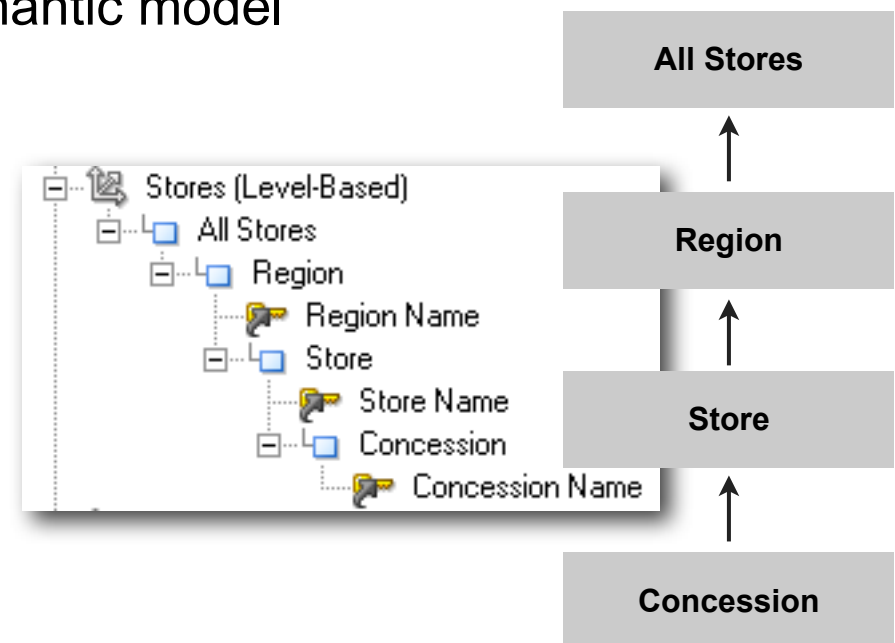
Main Business Processes and Dimensions within Scope

- Main business processes discovered are
  - ▸ **Selling** goods through the branch network
  - ▸ **Surveying** staff and customers for quality purposes
- Financial Metrics include **revenue**, **profit**, **cost**
- Non-financial metrics include **customer** and **staff satisfaction**
- Dimensions include **Customer**, **Branch**, **Time**, **Product**, **Survey Organization**
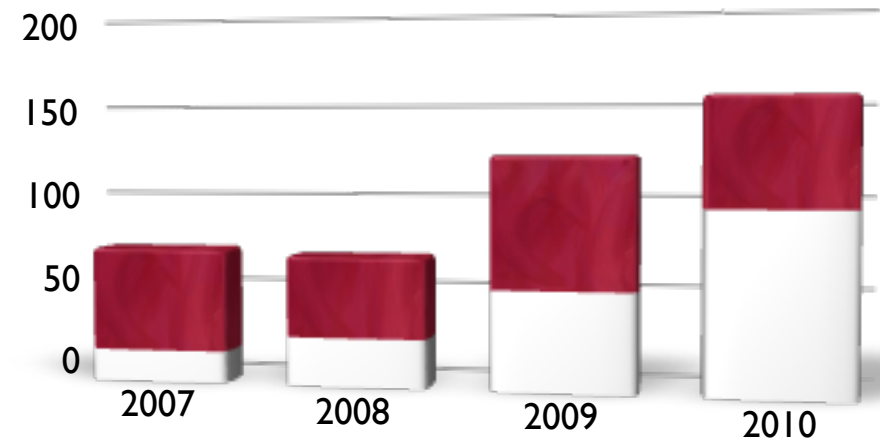
Main Data Sources

- Data for the GCBC Oracle Business Intelligence system will come from three sources
- Key data required for analysis is held in an Oracle Database 11gR2 data mart, built using Oracle Data Integrator 11g
- Supporting data is held in Microsoft SQL Server databases

Interview with the IT Manager

- Purpose is to establish what the current IT infrastructure looks like
- Use of technology stacks, outsourcing, lights-out management
- Establish potential data sources and types
- Requirements around management, maintenance, software lifecycle
- Integrate with existing middleware, identity management, applications and processes

**Tell me about your role?
About the IT Infrastructure
Data sources and types
How you manage IT...?**

Outsourced IT in a Private Cloud, using Fusion Middleware

- GCBC has recently invested in JEE-based Oracle Fusion Middleware
  - ▸ Identity Management, ADF applications, WebLogic Server
- Applications and databases are held in a "private cloud"
- All operations are remote, outsourced and lights-off
- Commodity Linux servers, clustered and with thin-client web desktops

We run IT as a grid/cloud
All ops. are lights-out
We use Java middleware
Commodity servers
Web-based, thin clients

# HA and Availability Enhancements through FMW11g

1. Add additional BI Servers, Presentation Servers and Java Hosts to the existing node, to better make use of spare capacity and introduce limited redundancy
2. Add additional nodes, scaleing out to additional commoditiy servers, to handle expected workload increases and add active/active and active/passive failover for components

I've heard that Oracle BI is now part of FMW11g. Now we can make it more resilient, and integrated.

Oracle Business Intelligence 11g

- All of this will be delivered using Oracle Business Intelligence 11g
- Together with Oracle Database 11gR2, and Oracle Data Integrator EE
- Discussions, demos and questions
- And so, let's start...
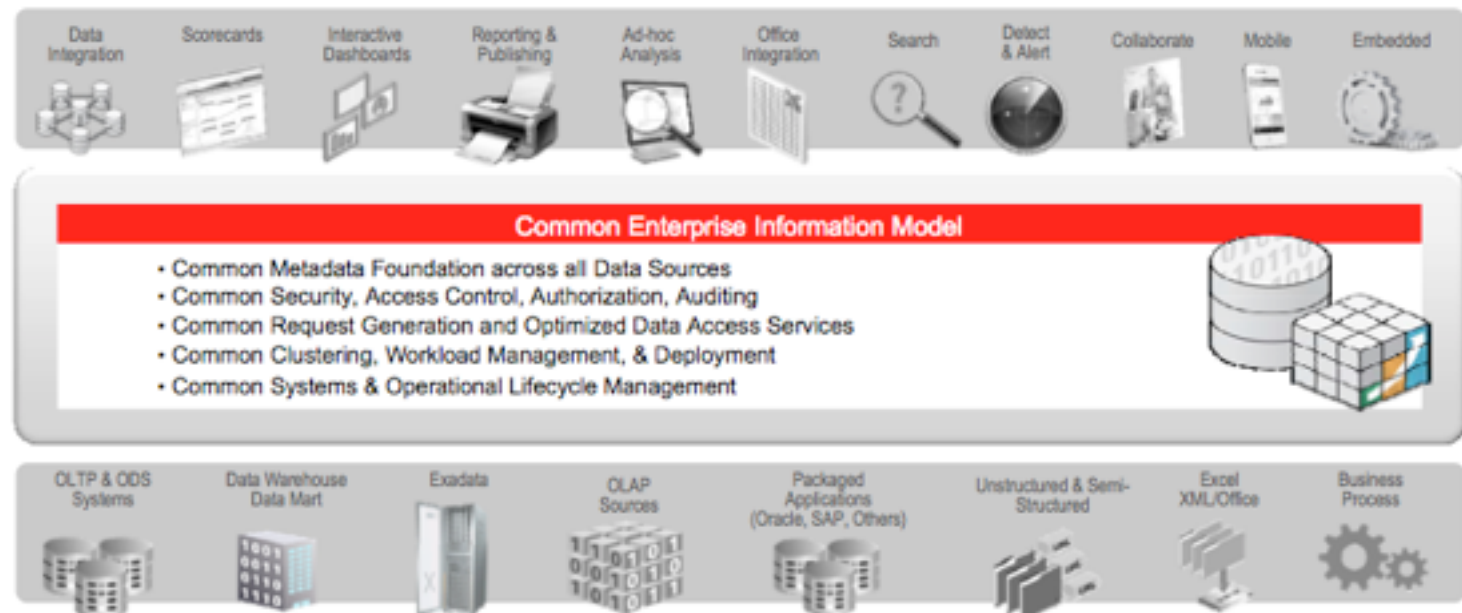
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