Oracle BI 11g Reports and Dashboards

Selections, Groups and Calculated Items

PEAK indicators

Agenda

- Selections, Groups and Calculated Items
  - Overview
  - Scenario
- Selections
- Groups
- Calculated Items

PEAK indicators

Selections, Groups and Calculated Items

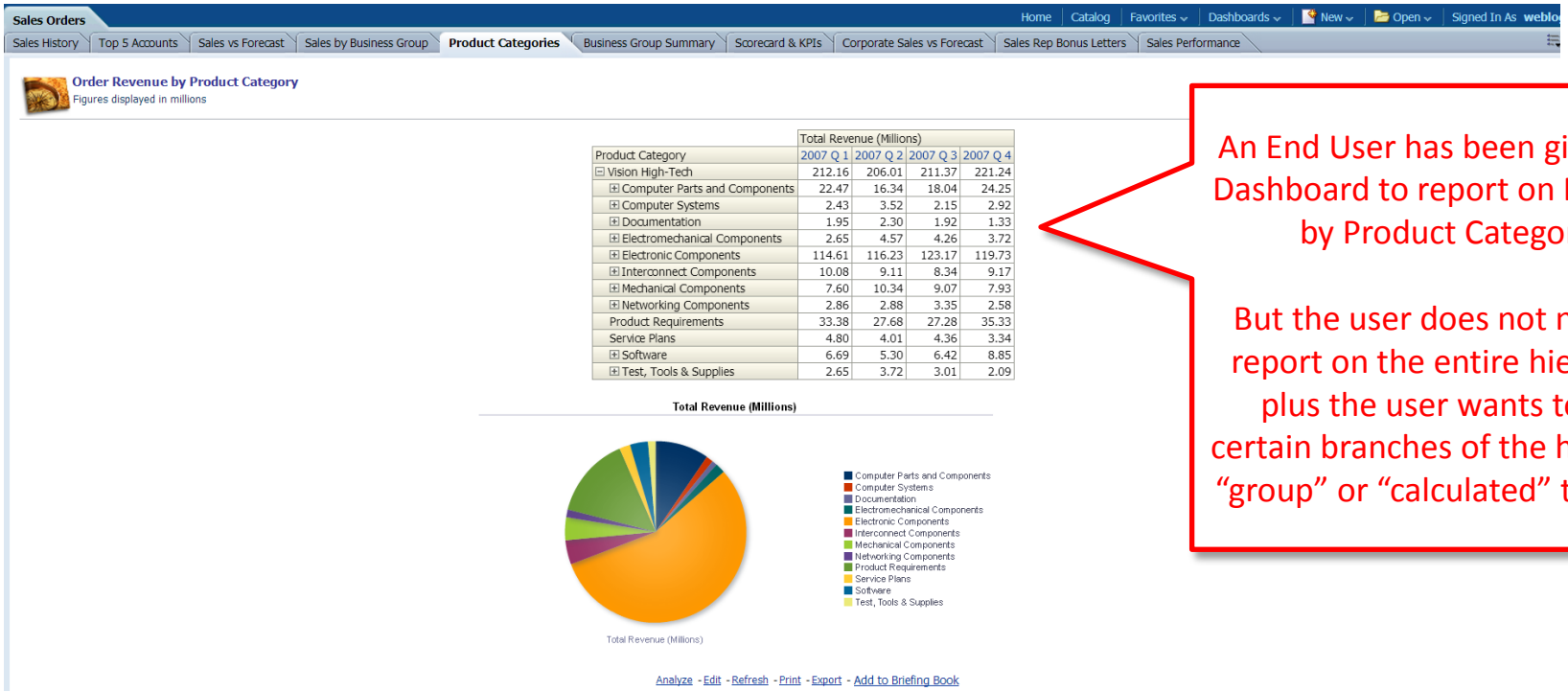
Overview

Overview

- There are several features available in Answers that help you to manipulate the member list seen in an Analysis
  - Selections
  - Groups
  - Calculated Items
- These features are available to both Hierarchy and Attribute Columns
- The important point to note is that these features do not change the Analysis' definition or the underlying data set that is returned by the BI Server
  - You can treat it as if it were a second phase of filtering/processing that is performed by the "Presentation Layer" once the data has been retrieved from the BI Server

Scenario

- Consider this example….

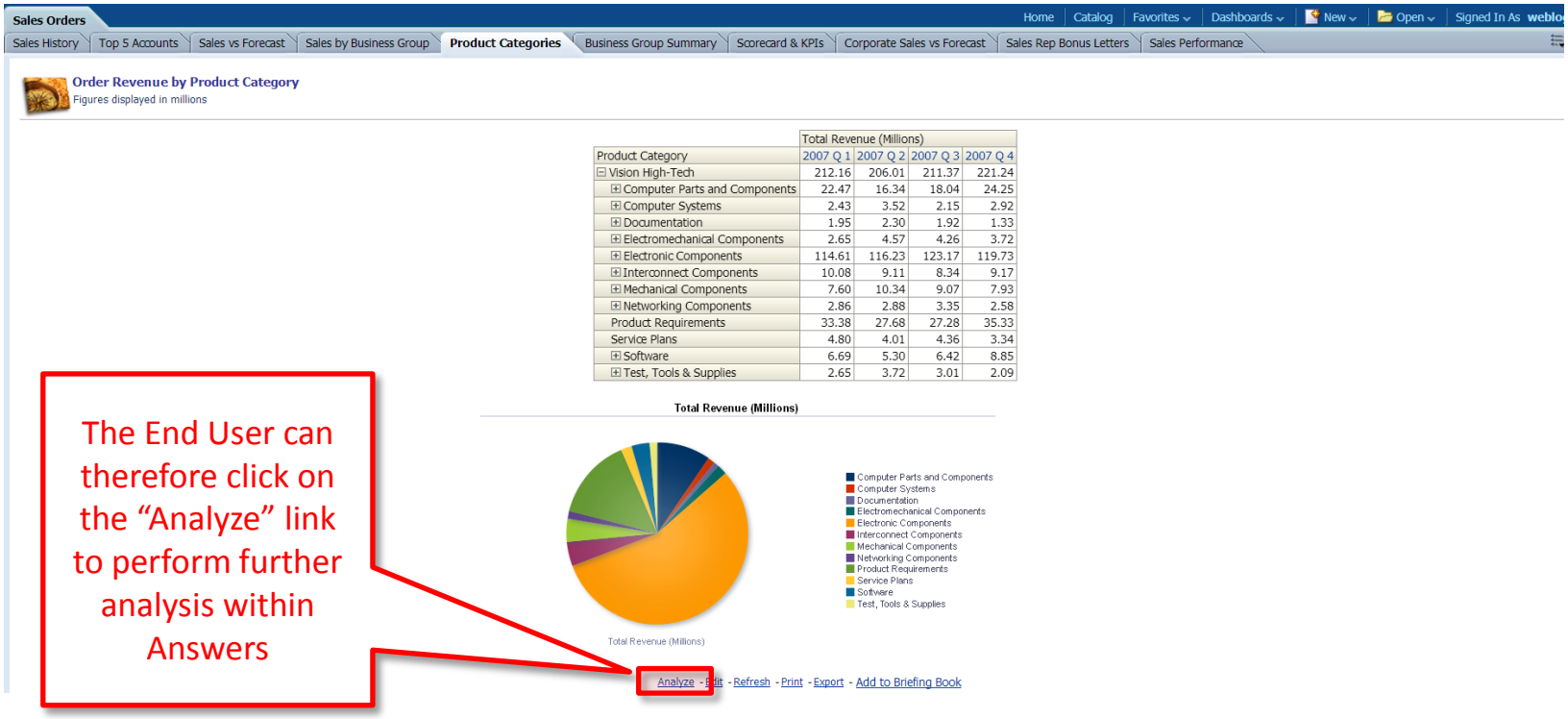


An End User has been given this Dashboard to report on Revenue by Product Category.

But the user does not need to report on the entire hierarchy, plus the user wants to see certain branches of the hierarchy "group" or "calculated" together

Scenario

- Consider this example….



PEAK indicators

Selections, Groups and Calculated Items

Selections

Selections

- Selections allow the End User to pick and choose the members from the hierarchy are to be displayed (or removed)

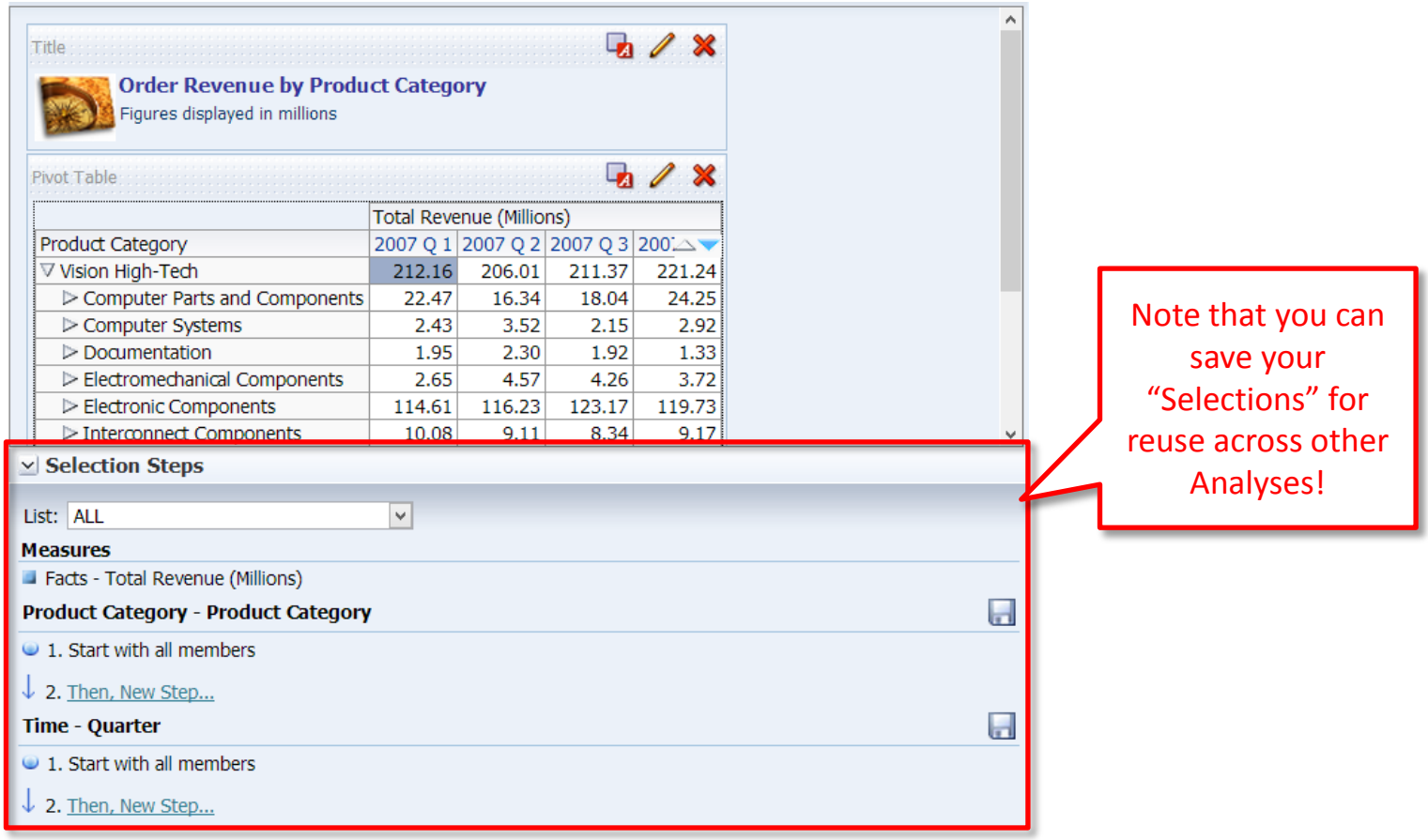
- There are various ways to define the member list:
  - Explicit Member Selection
  - Condition Results
  - Hierarchical Relationships

- Once the member list is determined, you choose to add, keep-only or remove those members from the analysis
  - You can trim the analysis down so that you are not distracted by extraneous information

Selections

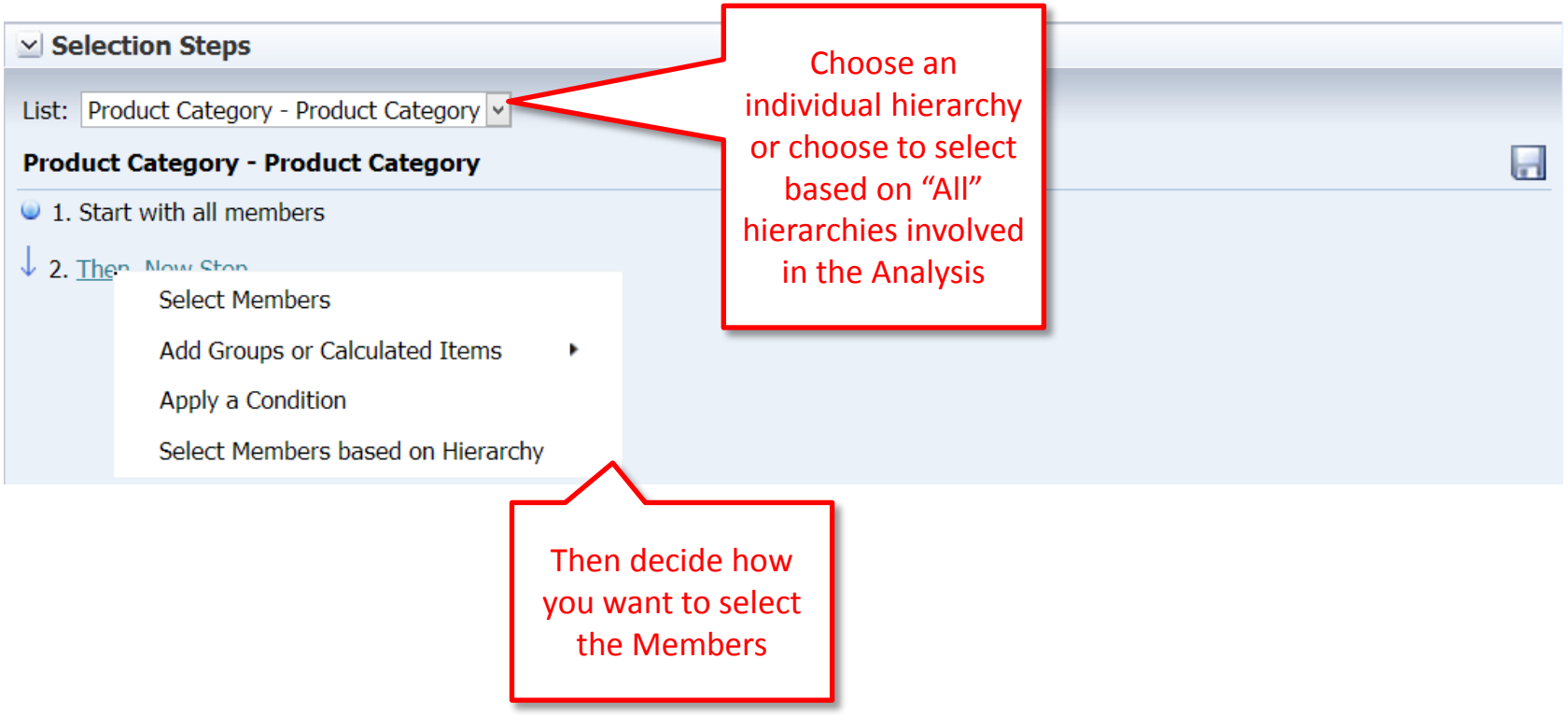
Selection Pane

- You can configure Selections by expanding the “Selections Pane” at the bottom of the Results tab



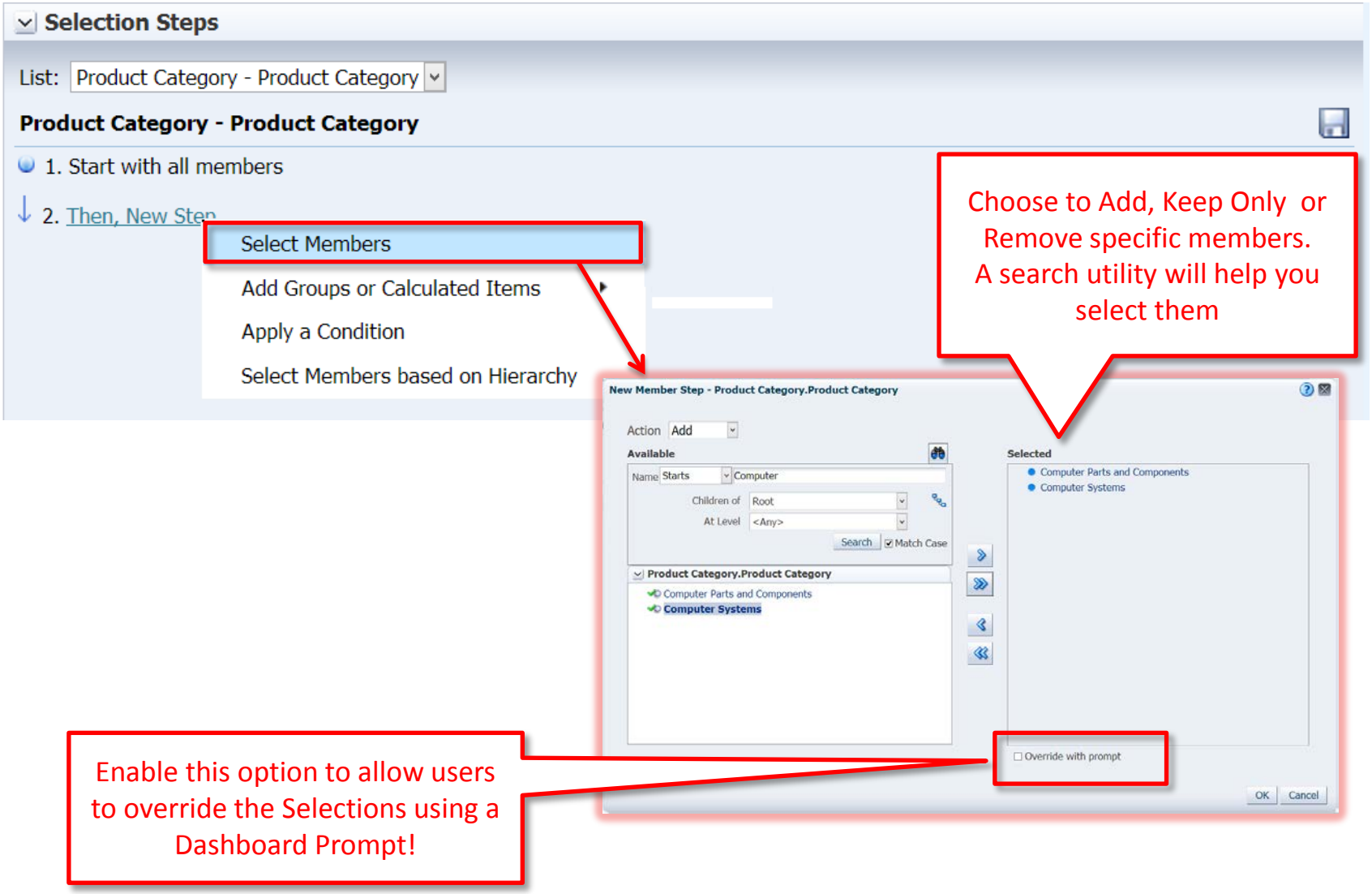
Selections

Begin Selecting



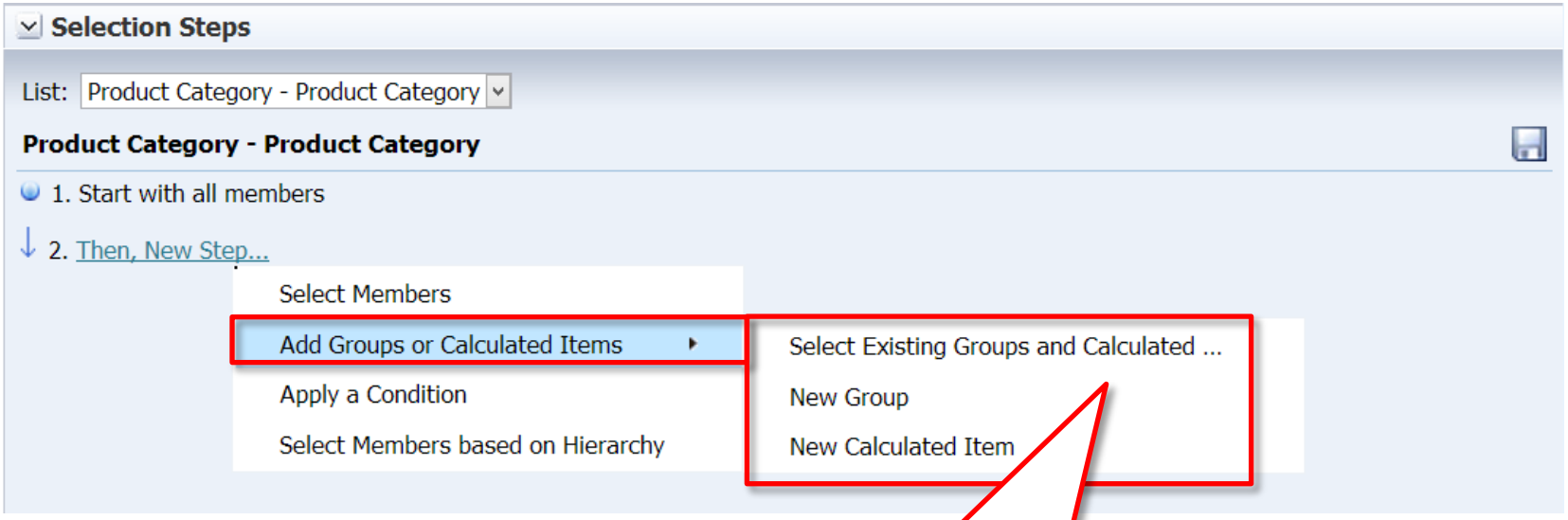
Selections

Select Members



Selections

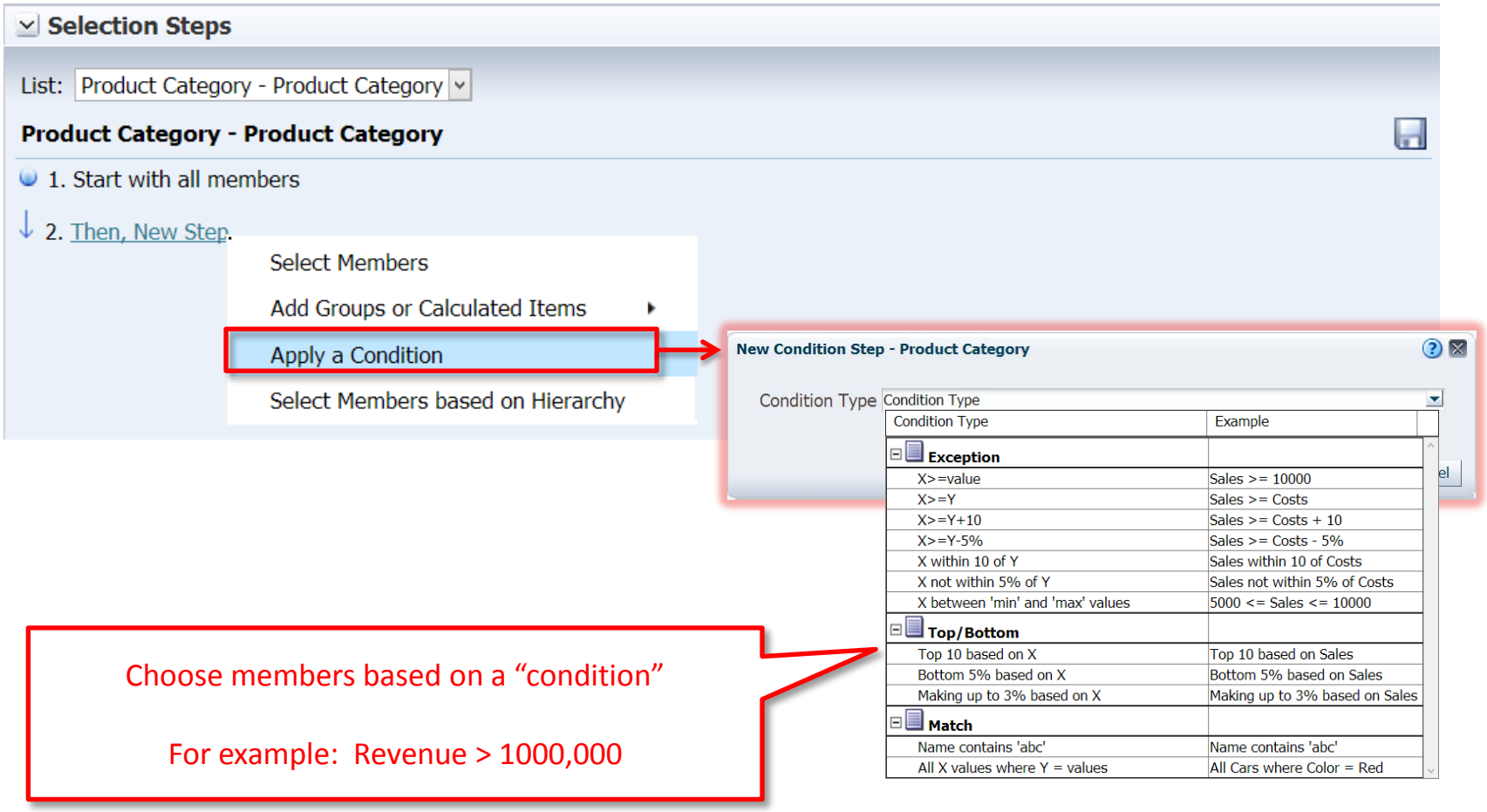
Select Groups or Calculated Items



You can choose to add Groups and Calculated Items to the selection. These features are covered a bit later on

Selections

Apply a Condition

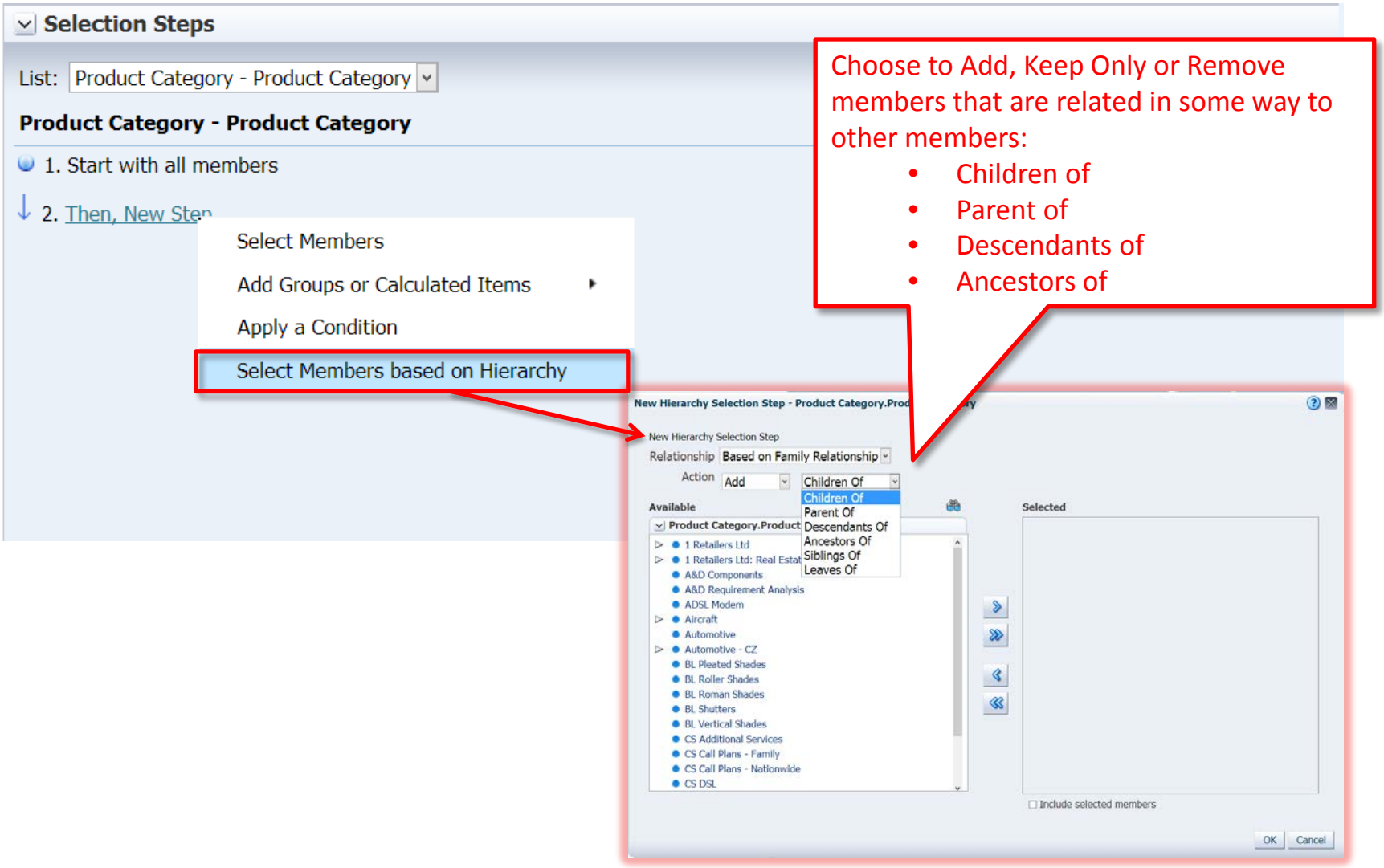


Choose members based on a "condition"

For example: Revenue > 1000,000

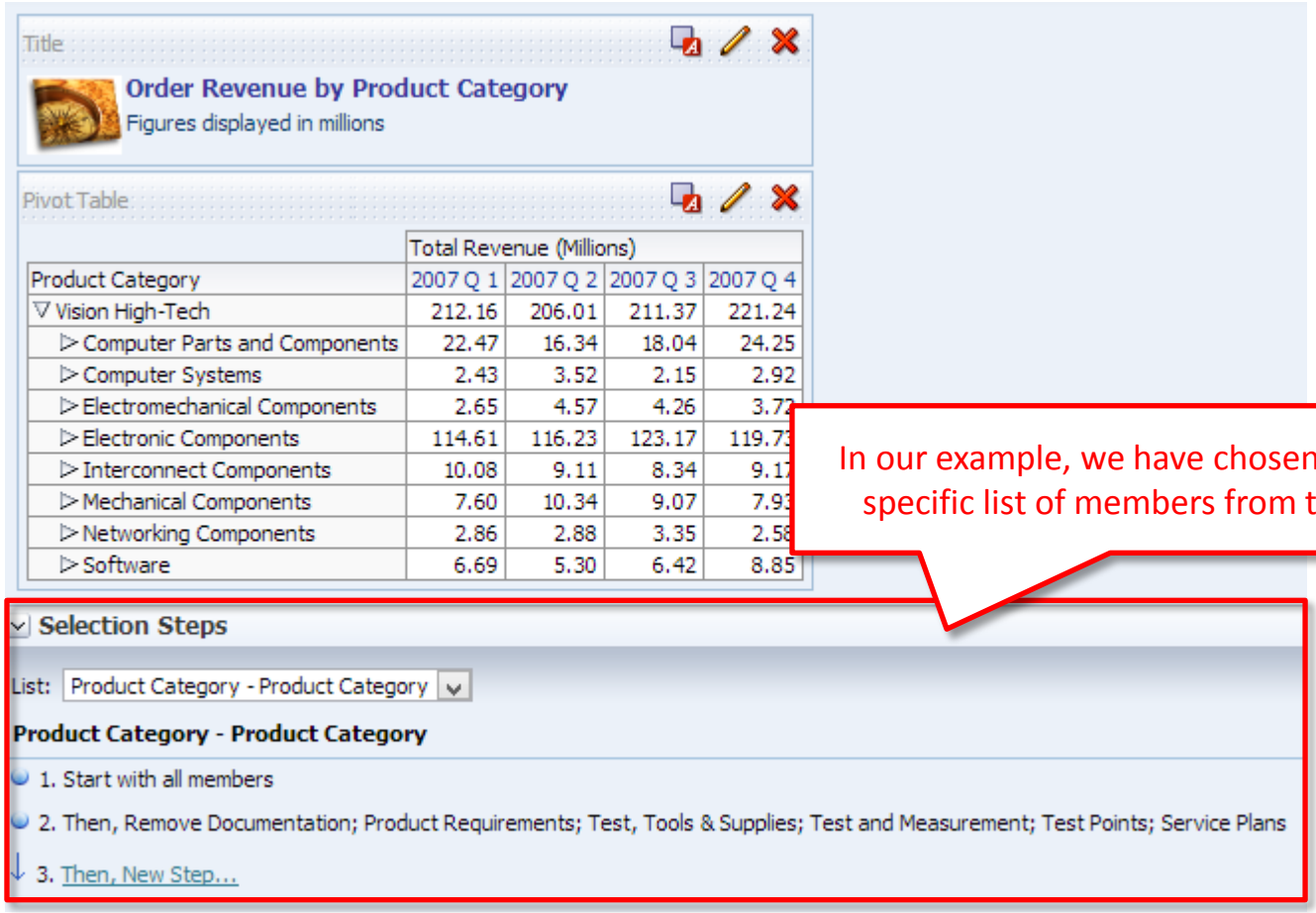
Selections

Select Members Based on Hierarchy



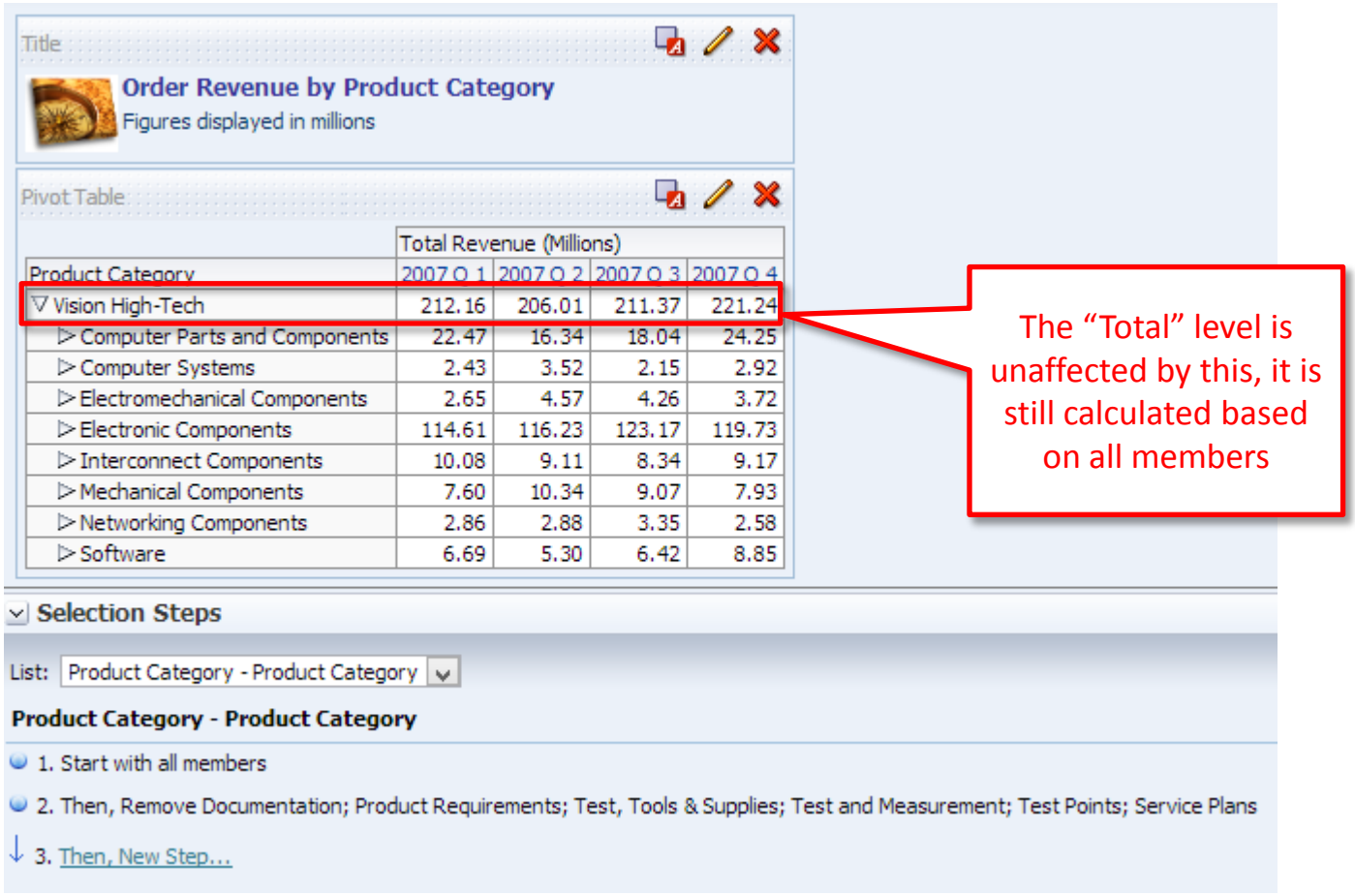
Selections

Our Example….



Selections

Our Example….



PEAK indicators

Selections, Groups and Calculated Items

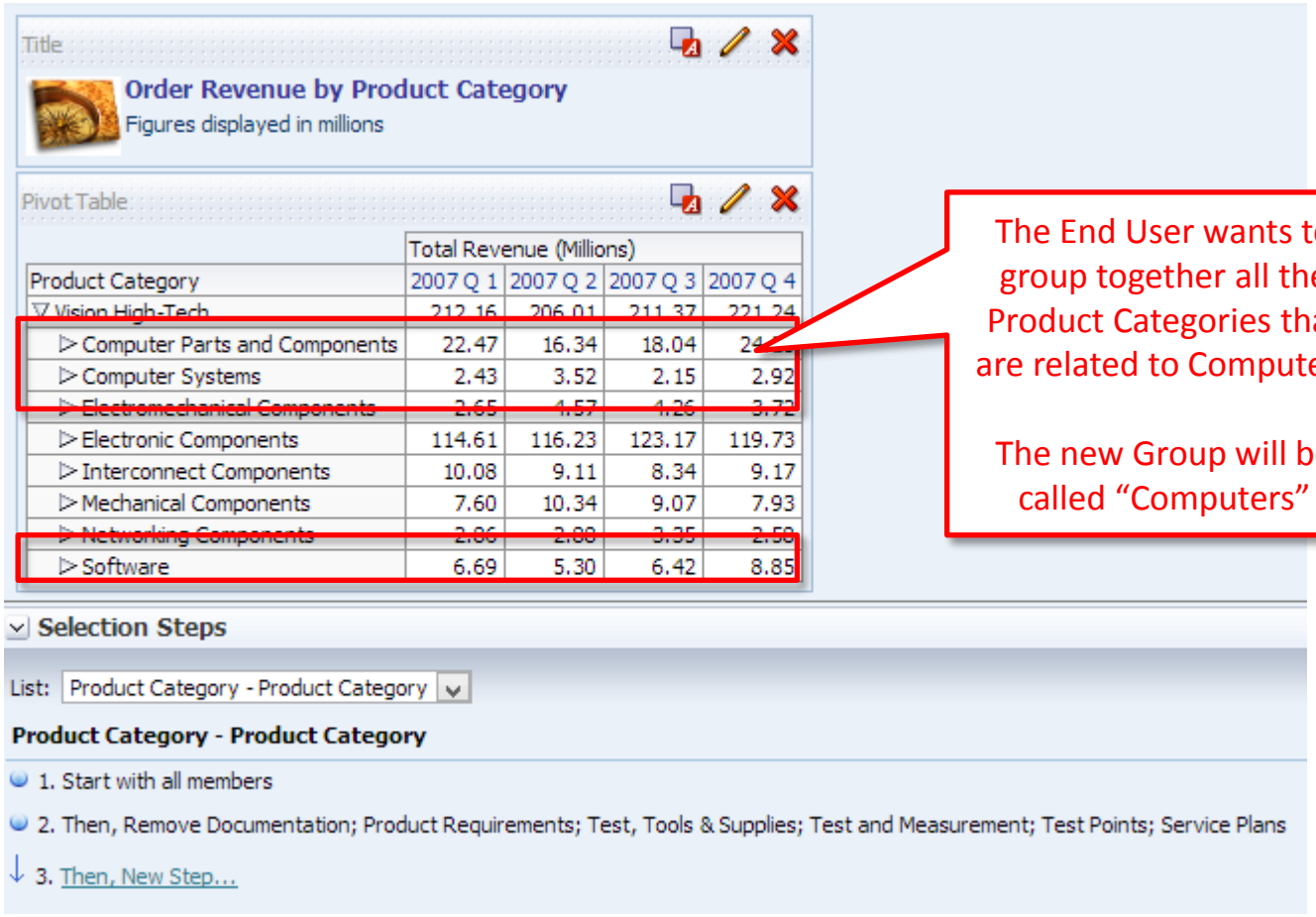
Groups

Groups

- Groups allow the End User to add new members to the Analysis which are effectively a collection of other members “grouped” together
- This new member can contain members for any level of a hierarchy and can be expanded/collapsed just like all the other members
- It can be formatted but is always placed at the bottom (or end) of the column

Groups

Our Example…

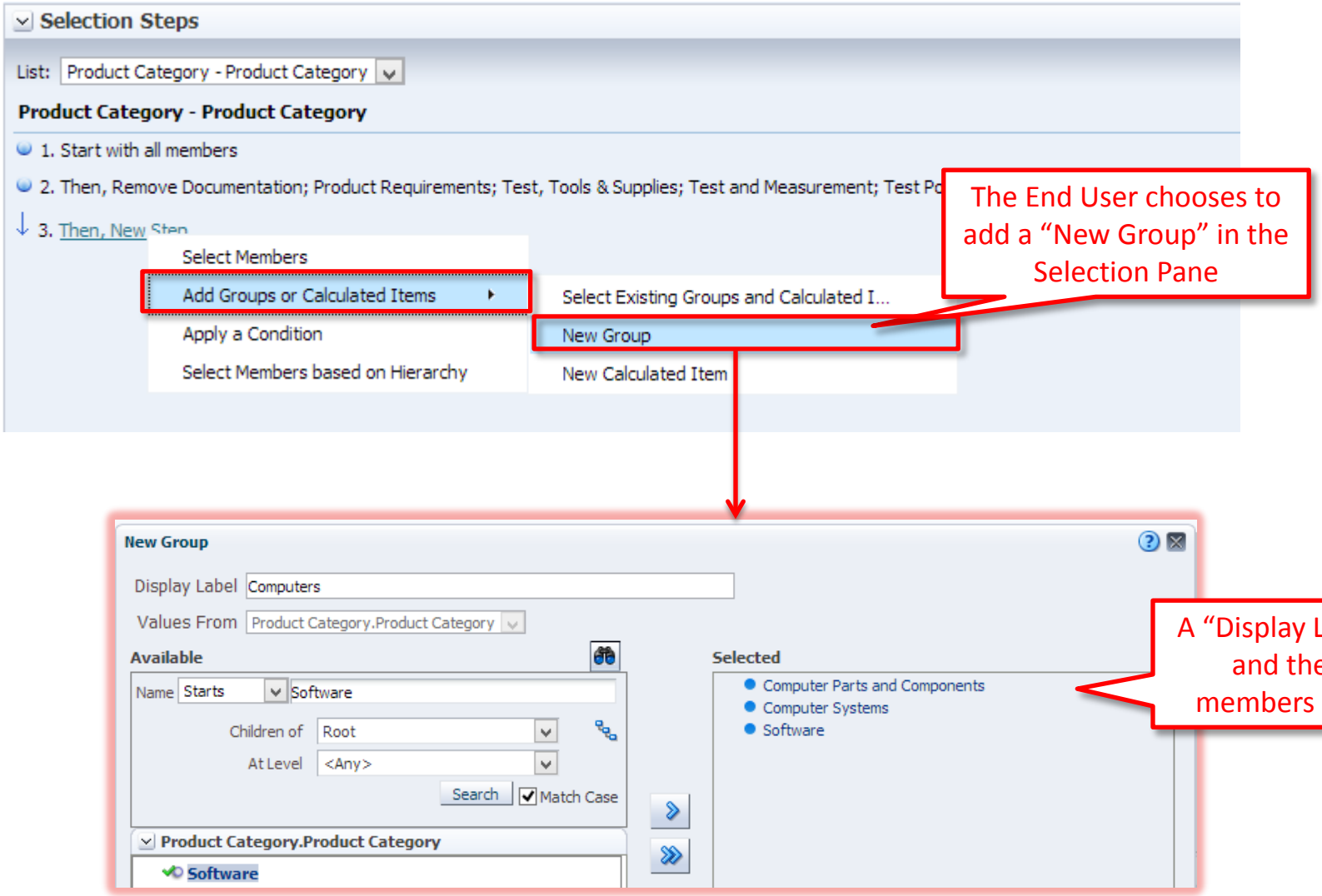


The End User wants to group together all the Product Categories that are related to Computers

The new Group will be called “Computers”

Groups

Adding a Group



Groups

The Result

Pivot Table

	Total Revenue (Millions)			
Product Category	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4
▽ Vision High-Tech	212.16	206.01	211.37	221.24
▷ Computer Parts and Components	22.47	16.34	18.04	24.25
▷ Computer Systems	2.43	3.52	2.15	2.92
▷ Electromechanical Components	2.65	4.57	4.26	3.72
▷ Electronic Components	114.61	116.23	123.17	119.73
▷ Interconnect Components	10.08	9.11	8.34	9.17
▷ Mechanical Components	7.60	10.34	9.07	7.93
▷ Networking Components	2.86	2.88	3.35	2.58
▷ Software	6.69	5.30	6.42	8.85
▽ Computers	31.59	25.16	26.61	36.02
▷ Computer Parts and Components	22.47	16.34	18.04	24.25
▷ Computer Systems	2.43	3.52	2.15	2.92
▷ Software	6.69	5.30	6.42	8.85

The new Group member has been added to the Analysis.

NOTES:

- You can expand/collapse the members within the Group
- The “Vision High-Tech” grand total is not affected
- The Group is always added to the bottom/end of the column
- The aggregation rule is inherited

PEAK indicators

Selections, Groups and Calculated Items

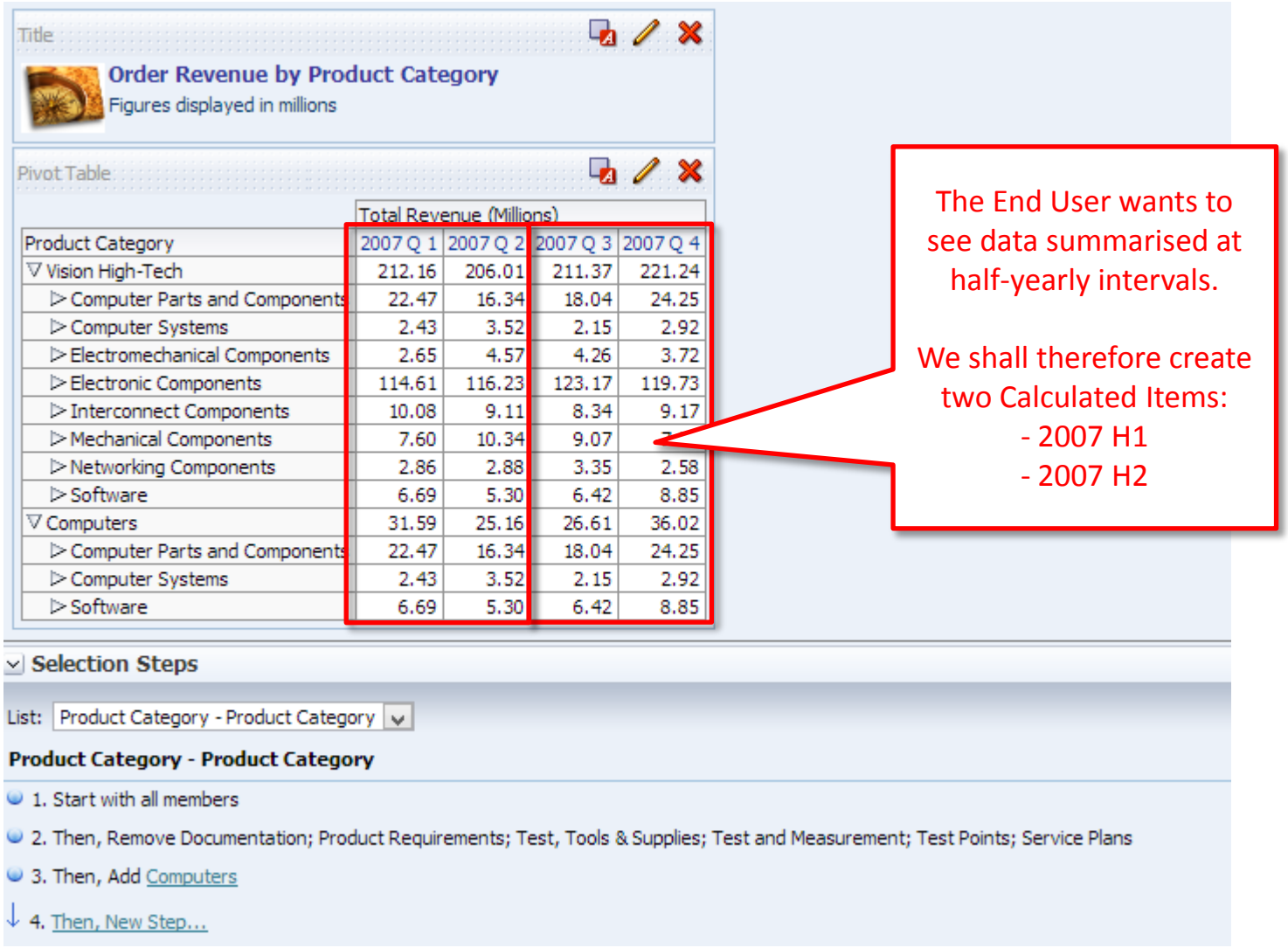
Calculated Items

Calculated Items

- Calculated Items are another type of member that can be added to the Analysis
- Like Groups, they can contain members from any level of the hierarchy, can be formatted and are always placed at the end or bottom of the column
- However, there are some differences:
  - Calculated Items cannot be expanded/collapsed
  - You can apply a different aggregation rule or even specify your own custom formula

Calculated Items

Our Example…



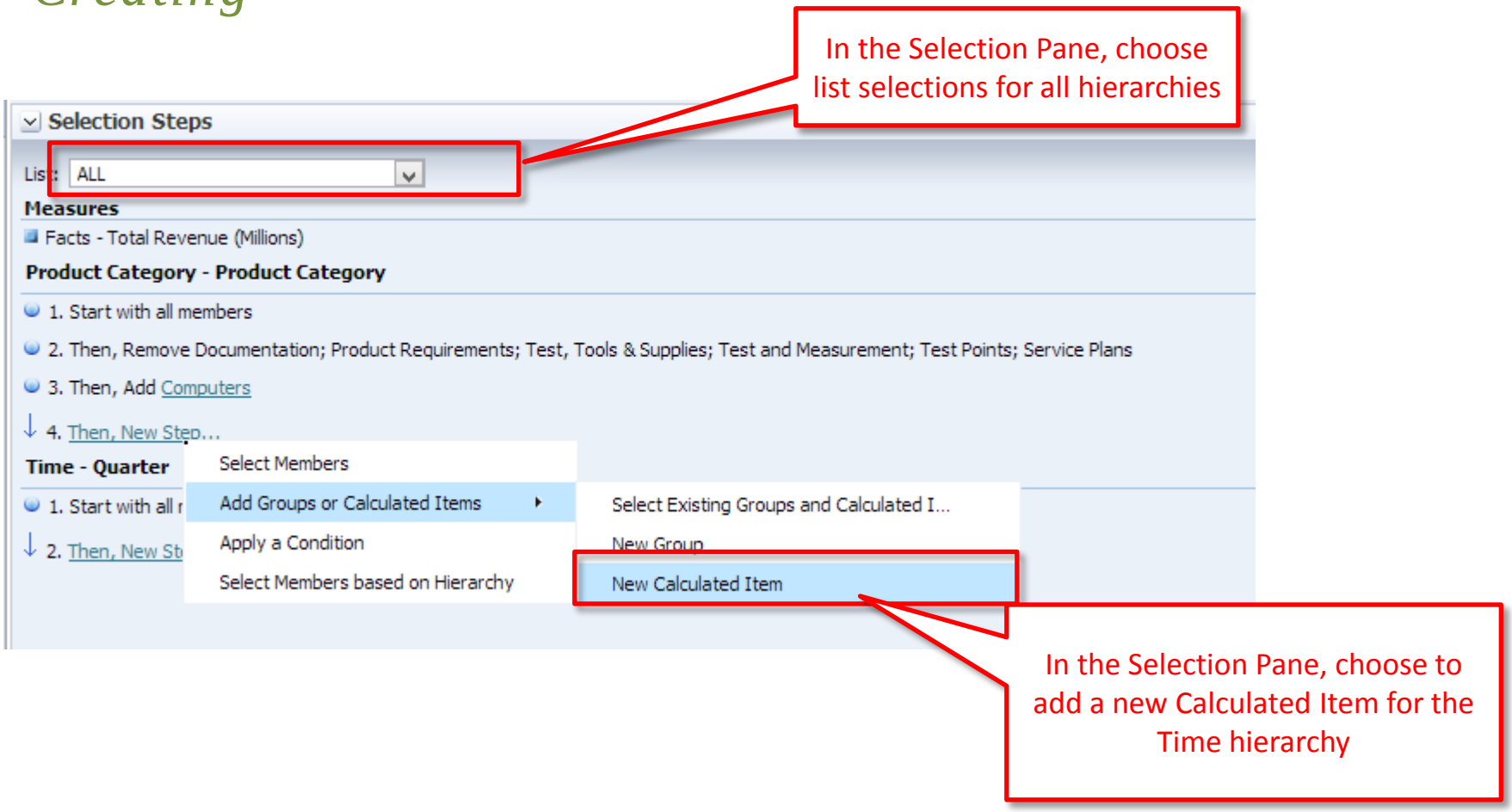
The End User wants to see data summarised at half-yearly intervals.

We shall therefore create two Calculated Items:

- 2007 H1
- 2007 H2

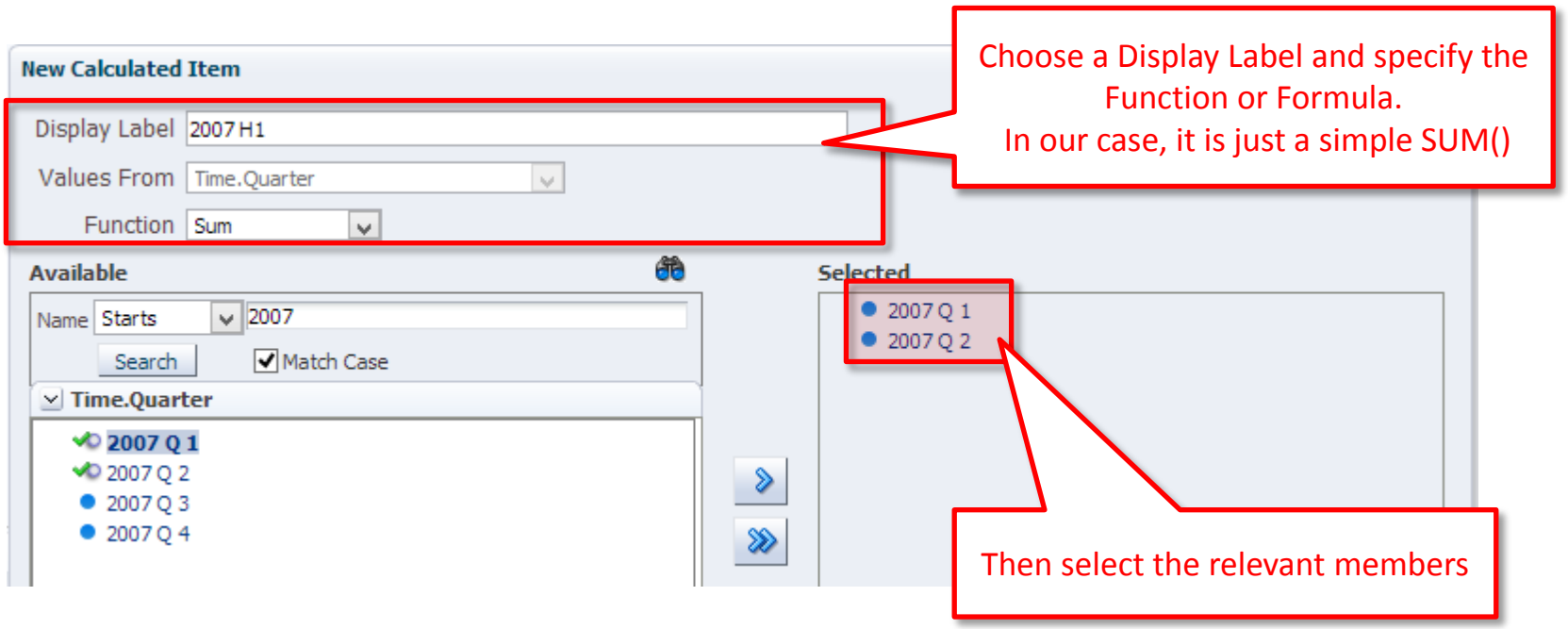
Calculated Items

Creating



Calculated Items

Creating



Calculated Items

The Result

Title

Order Revenue by Product Category

Figures displayed in millions

Pivot Table

	Total Revenue (Millions)					
Product Category	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4	2007 H1	2007 H2
▽ Vision High-Tech	212.16	206.01	211.37	221.24	418.17	432.61
▷ Computer Parts and Components	22.47	16.34	18.04	24.25	38.81	42.29
▷ Computer Systems	2.43	3.52	2.15	2.92	5.95	5.07
▷ Electromechanical Components	2.65	4.57	4.26	3.72	7.21	7.98
▷ Electronic Components	114.61	116.23	123.17	119.73	230.84	242.90
▷ Interconnect Components	10.08	9.11	8.34	9.17	19.19	17.51
▷ Mechanical Components	7.60	10.34	9.07	7.93	17.94	17.00
▷ Networking Components	2.86	2.88	3.35	2.58	5.74	5.93
▷ Software	6.69	5.30	6.42	8.85	11.99	15.27
▽ Computers	31.59	25.16	26.61	36.02	56.76	62.63
▷ Computer Parts and Components	22.47	16.34	18.04	24.25	38.81	42.29
▷ Computer Systems	2.43	3.52	2.15	2.92	5.95	5.07
▷ Software	6.69	5.30	6.42	8.85	11.99	15.27

Half-yearly Calculated Items now created and added to the end of the Column

Selection Steps

List: ALL

Measures

Facts - Total Revenue (Millions)

Product Category - Product Category

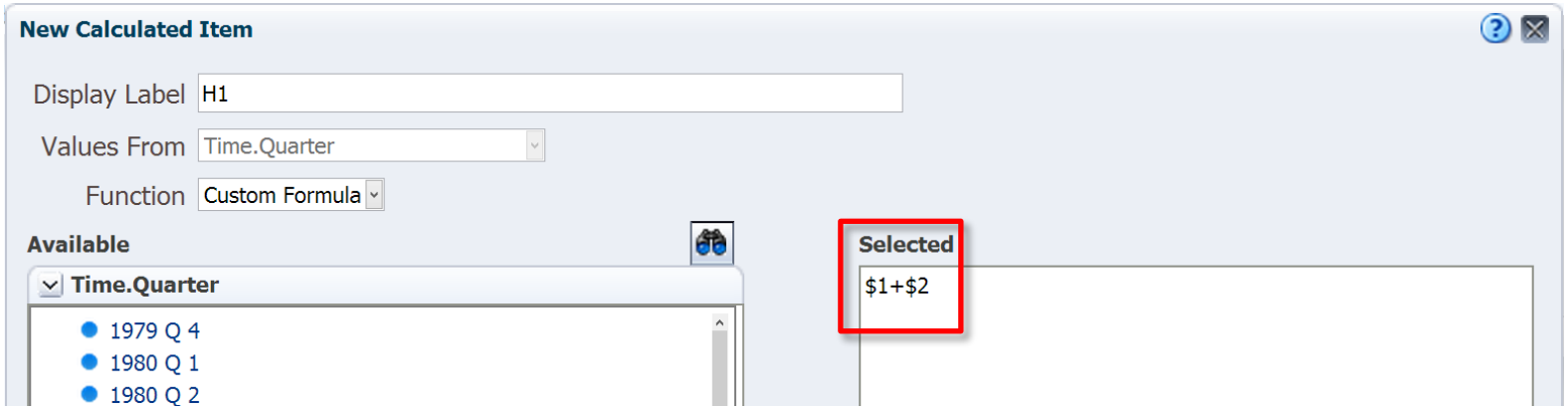
1. Start with all members
2. Then, Remove Documentation; Product Requirements; Test, Tools & Supplies; Test and Measurement; Test Points; Service Plans
3. Then, Add Computers
4. Then, New Step...

Time - Quarter

1. Start with all members
2. Then, Add 2007 H1
3. Then, Add 2007 H2
4. Then, New Step...

Calculated Items

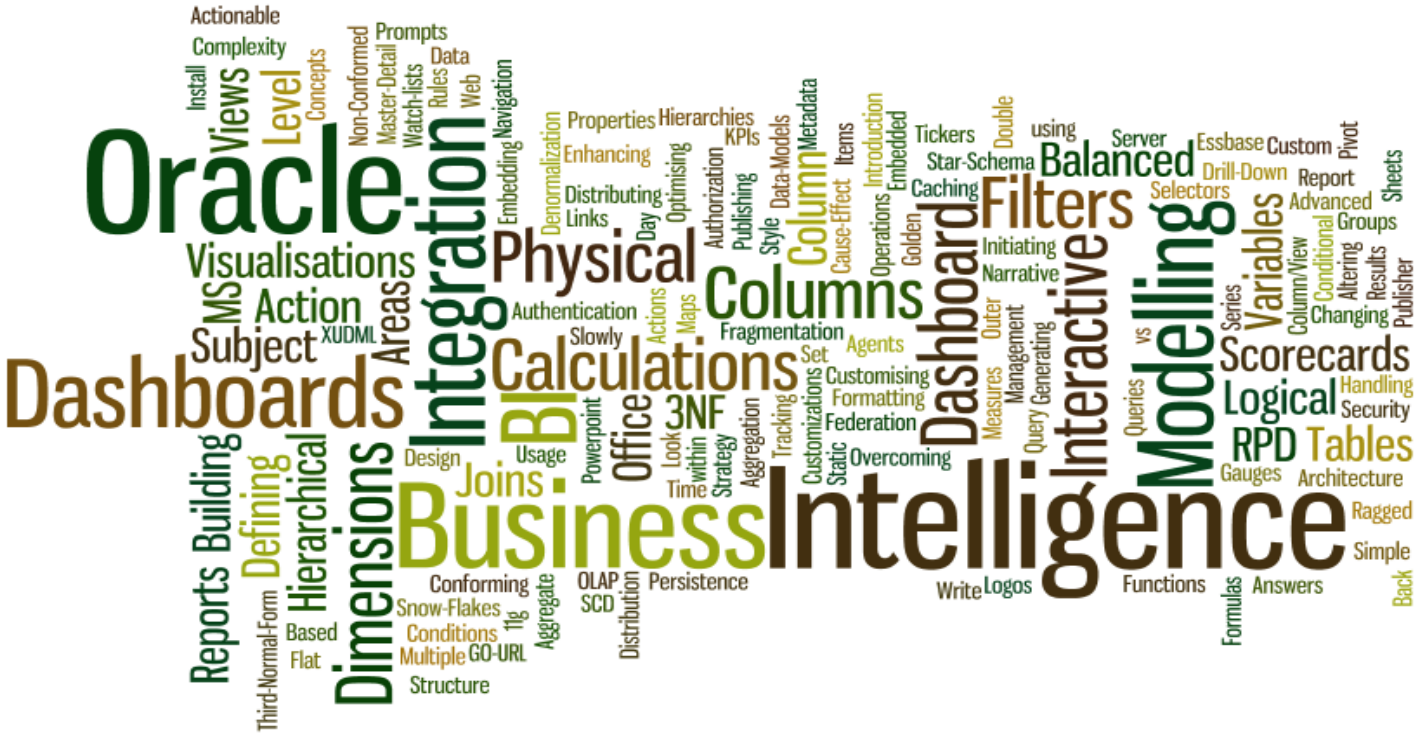
Implicit Column References



$1 + $2

	Total Revenue (Millions)				
Business Group	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4	H1
Vision Benelux	105.51	99.90	105.80	105.94	205.41
Vision East Europe	23.19	24.46	21.12	24.20	47.65
Vision Nordics	63.14	67.09	70.62	73.90	130.24
Vision UK and Ireland	4.20	3.87	2.62	5.73	8.06
Vision West Europe	16.11	10.70	11.20	11.47	26.81
Grand Total	**212.16**	**206.01**	**211.37**	**221.24**	**418.17**

Questions?



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indicators

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