

Oracle BI 11g Reports and Dashboards

Introduction to Answers

PEAK
indicators

Introduction to Answers

Agenda

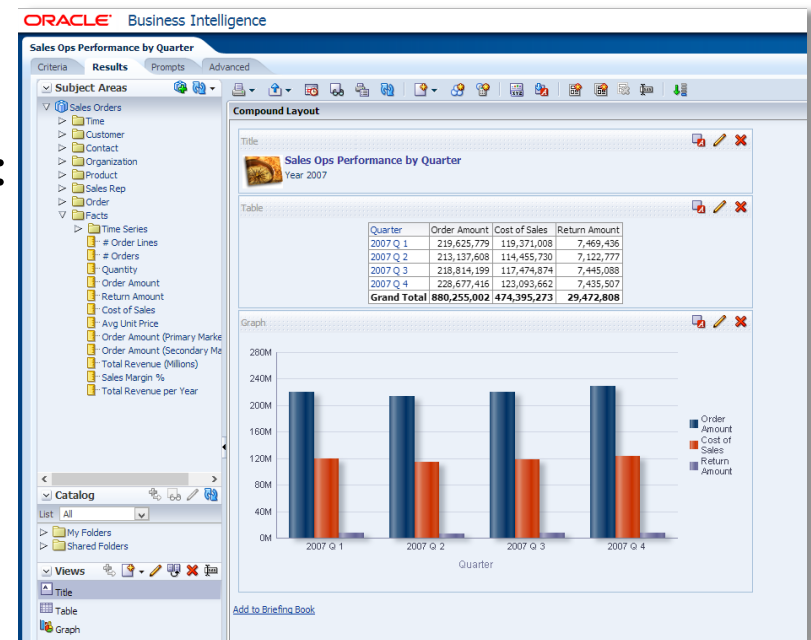
- Overview
- Creating a New Analysis
 - Choosing a Subject Area
 - About Subject Areas
 - The Criteria Tab
 - Selecting Columns
 - Rearranging Columns
 - Apply a Sort Order
 - Adding Filters
 - The Results Tab
 - Editing Views
 - Edit Table View
 - Edit Title View
 - Creating a New View
 - Arranging the Compound Layout
 - Standard Options
 - Preview Analysis
 - Save Analysis
 - Browse Catalogue for Analysis



Introduction to Answers Overview

Overview

- Answers is the component of Oracle BI used for building interactive reports (referred to as “**Analyses**”)
- It can also be used for ad-hoc analysis
- The following types of users are typically granted access to Answers:
 - System Administrators
 - Local Administrators
 - Power Users
 - Business Analysts





Introduction to Answers Creating a New Analysis

Creating a New Analysis *Options*

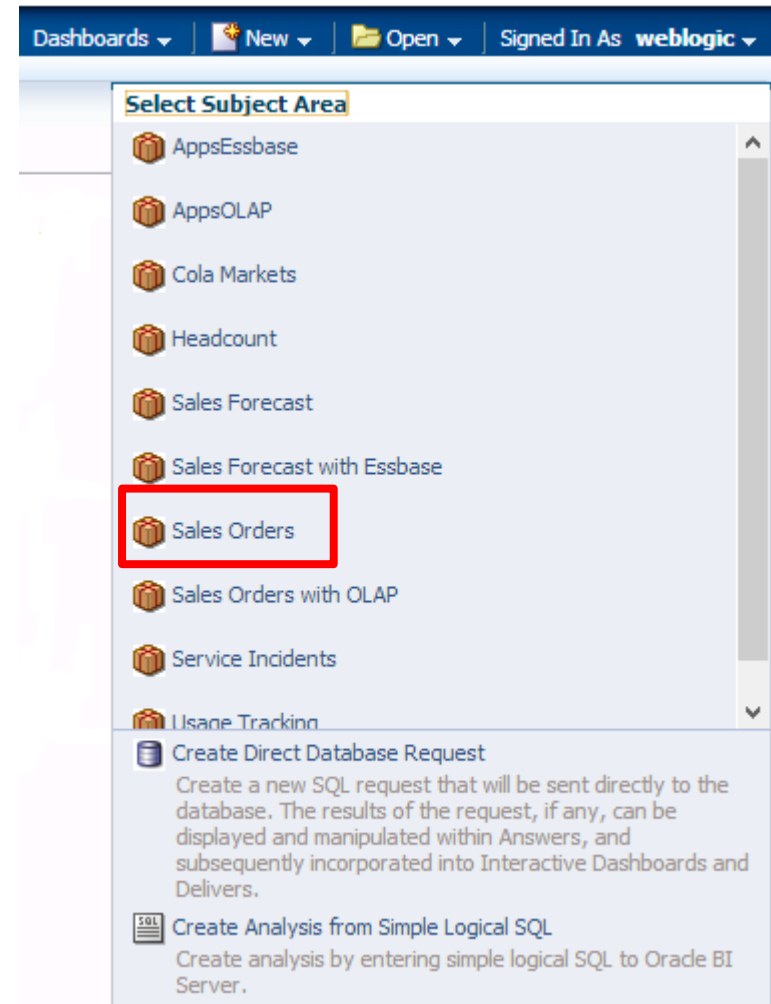
- You can create a new “Analysis” in two ways

The screenshot displays the Oracle Business Intelligence Home page. The top navigation bar includes the Oracle logo, 'Business Intelligence', a search bar, and links for 'Advanced', 'Administration', 'Help', and 'Sign Out'. Below this, a secondary navigation bar contains 'Home', 'Catalog', 'Favorites', 'Dashboards', and a 'New' button. The 'New' button is highlighted with a red box, and a red callout bubble points to it with the text 'Choose “Analysis” from the “New” menu'. On the left side, under the 'Create...' section, the 'Analysis' option is highlighted with a red box, and a red callout bubble points to it with the text 'Create... “Analysis” on the Home page'. The right side of the page features a dropdown menu for 'Analysis and Interactive Reporting', which is also highlighted with a red box. This menu lists various options including 'Dashboard', 'Filter', 'Dashboard Prompt', 'Condition', 'Published Reporting' (with sub-items like 'Report', 'Report Job', 'Data Model', 'Style Template', 'Sub Template'), 'Actionable Intelligence' (with sub-items like 'Agent', 'Action', 'Performance Management', 'Scorecard', 'KPI', 'KPI Watchlist'), and 'Marketing' (with sub-items like 'Segment', 'Segment Tree', 'List Format').

Creating a New Analysis

Choosing a Subject Area

- When you choose to create a new Analysis, you will be asked to select a “**Subject Area**”
- Subject Areas contain related sets of reporting objects. Users will typically have access to one or more subject areas, depending on their application privileges
- For example, the “Sales Orders” Subject Area will contain objects relevant to reporting on sales orders:
 - Year
 - Organization
 - Customer
 - Total Revenue
 - Cost of Sales



Creating a New Analysis

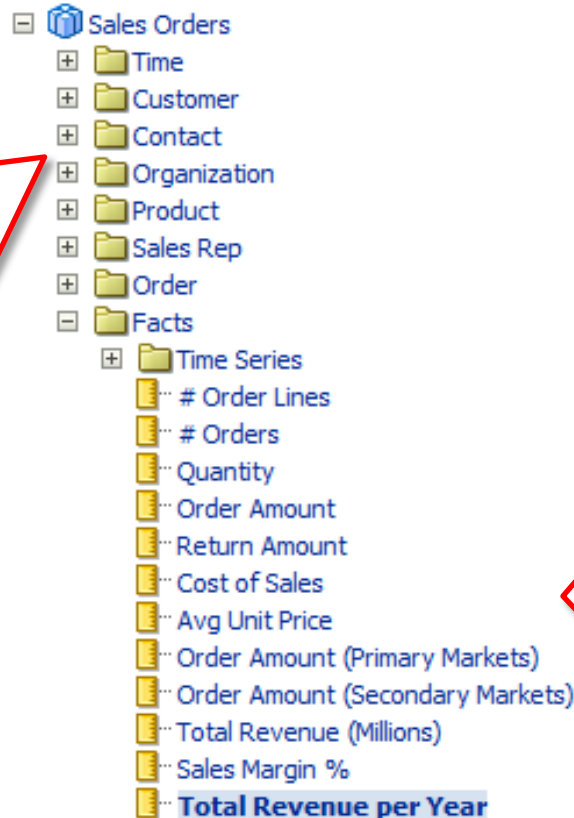
About Subject Areas

- A Subject Area consists of “**Facts**” and “**Dimensions**”. When you create an Analysis, you will typically want to select a combination of both Facts and Dimensions to appear on it

Dimensions are usually listed first in the subject area. Dimensions are typically character or date columns, they are defined as objects that cannot be “aggregated” (summarised).

Examples:

- Year, Month, Date
- Customer Name, Customer Type
- Organization Name
- Order Status, Order Type



Facts or Measures are typically listed at the bottom. Facts return numeric values and are defined as objects that can be “aggregated” i.e. summarised by month or averaged

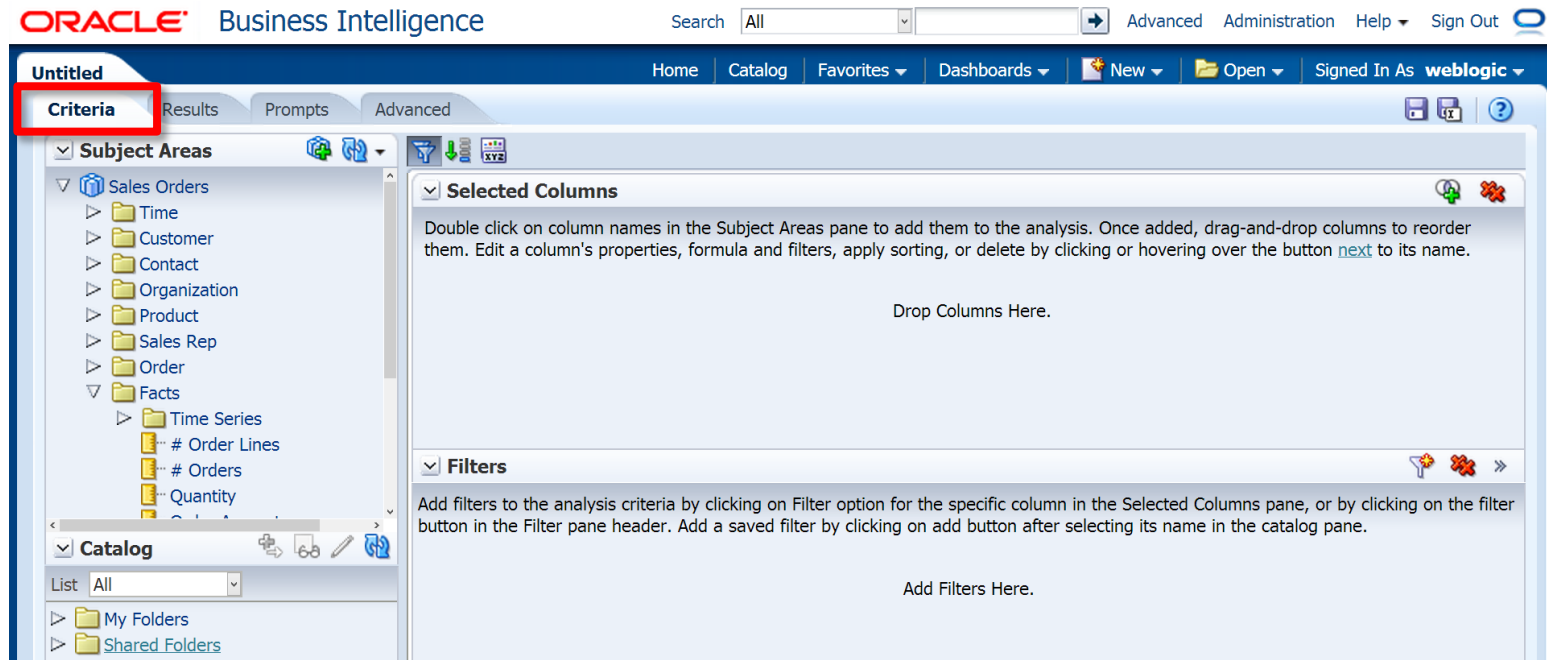
Examples:

- # Orders
- Quantity
- Order Amount
- Avg Unit Price

Creating a New Analysis

The Criteria Tab

- Once you have chosen your Subject Area, you will be taken to the Answers “**Criteria**” tab where you can define the data content of your Analysis



Creating a New Analysis

Selecting Columns

- The first step is to choose the desired columns from the **Subject Area** which should appear on the Analysis

Oracle Business Intelligence

Search All [v] [Go] Advanced Administration Help Sign Out

Untitled Home Catalog Favorites Dashboards New Open Signed In As weblogic

Criteria Results Prompts Advanced

Subject Areas

- Month
- Quarter
- Year
- Time
- Customer
- Contact
- Organization
- Product
- Sales Rep
- Order
- Facts
 - Time Series
 - # Order Lines
 - # Orders
 - Quantity
 - Order Amount
 - Return Amount**
 - Cost of Sales

Selected Columns

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.

Time	Facts
Quarter	Order Amount Return Amount Cost of Sales

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.

Add Filters Here.

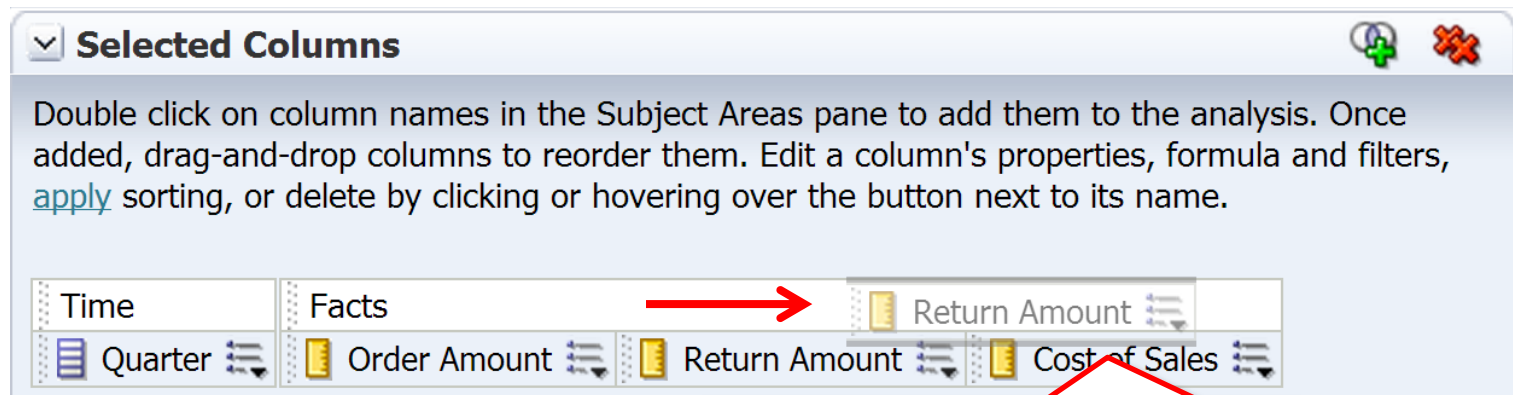
Simply **double-click** on a column to add it to the Analysis.

You can also **"drag"** it from the Subject Area to the desired location

Creating a New Analysis

Rearranging Columns

- If the columns are not listed in the correct order, you can rearrange them simply by dragging and dropping them onto the desired location:



As you are "dragging" the column, a grey bar will appear. When you are in the correct position "drop" the column onto a new location

Creating a New Analysis

Apply Sort Order

- By default, the Analysis will be sorted alphabetically starting with the first column, however you can choose a different sort order using the menu beside each column selected:

The screenshot shows the 'Selected Columns' pane in the Peak Indicators software. The 'Order Amount' column is selected, and a context menu is open. The menu options are:

- Sort Ascending
- Sort Descending
- Add Ascending Sort
- Add Descending Sort
- Clear Sort
- Clear All Sorts in All Columns

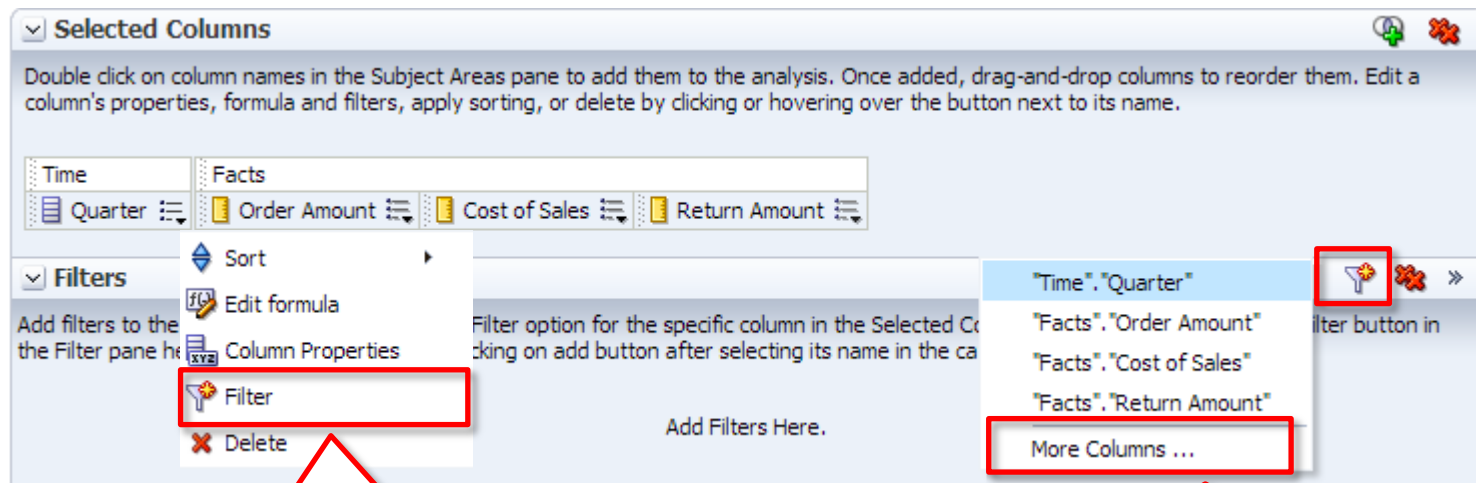
Three red callout boxes provide instructions:

- "Sort Ascending/Descending"** will sort the entire Analysis on this single column
- To sort on multiple columns, **"Add Ascending/Descending Sort"** options to apply sorts on further additional columns
- The **"Clear Sort"** options will remove the sort specifications from the Analysis

Creating a New Analysis

Adding Filters

- Filters can be applied to limit the results returned by your Analysis
 - Filters can be added in two ways, depending on whether or not the relevant column exists in your Analysis



Use this menu option to apply a filter on a column which already exists on the Analysis

You should use this **"Create Filter > More Columns"** menu option to apply a filter on a column which is not already included on the Analysis

Creating a New Analysis

Adding Filters

- Once you have selected the column on which to filter, specifying the filter criteria is easy:

The image shows two screenshots of the 'New Filter' dialog box, connected by a large red arrow pointing from left to right.

Left Screenshot: The 'Column' is set to 'Year'. The 'Operator' dropdown is open, showing a list of filter criteria. The criteria 'is equal to / is in' is highlighted. A red box is drawn around the entire list of criteria.

Right Screenshot: The 'Operator' is set to 'is equal to / is in'. The 'Value' field is set to '2007'. A list of years from 2000 to 2007 is shown below the 'Value' field. The year '2007' is selected with a checkmark. A red box is drawn around the list of years. A red callout box points to the 'Value' field with the text 'You can enter values manually'. Another red callout box points to the selected '2007' with the text 'You can select one or more values from the list'. A third red callout box points to the 'Search...' button with the text 'Or you can use the "Search" function to search for the specific values'.

Creating a New Analysis

Adding Filters

- Once defined, you can see all of the filters listed in the “Filters” pane at the bottom of the Criteria tab

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to re-order them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Time	Facts
Quarter	Order Amount
	Cost of Sales
	Return Amount

button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

Year is equal to / is in 2007

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Hover the mouse over the filter to view its Edit, Copy, Paste and Delete options

Creating a New Analysis

The Results Tab

- Once the content of your request has been defined, you can go to the “**Results**” tab to see the actual results returned
 - You will be shown the “**Compound Layout**” which is the default view of the request when it is opened on a dashboard


The screenshot shows a software interface with a top navigation bar containing 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As weblogic'. Below this is a tabbed interface with 'Criteria', 'Results' (highlighted with a red box), 'Prompts', and 'Advanced'. The 'Results' tab displays a 'Compound Layout' view. On the left, there is a 'Subject Areas' tree with 'Sales Orders' expanded, showing 'Time', 'Customer', 'Contact', 'Organization', and 'Product'. Below this is a 'Catalog' section with a 'List' dropdown set to 'All' and 'My Folders'. At the bottom left, there is a 'Views' section with 'Title' and 'Table' options. The main area of the 'Compound Layout' shows a 'Title' view and a 'Table' view. The 'Table' view contains a table with the following data:

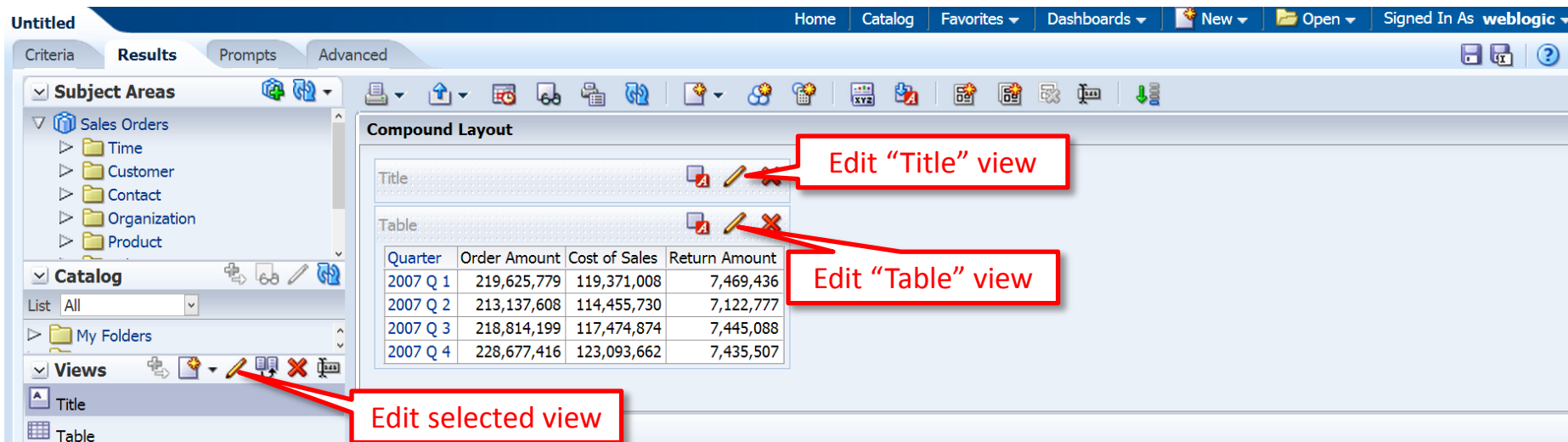
Quarter	Order Amount	Cost of Sales	Return Amount
2007 Q 1	219,625,779	119,371,008	7,469,436
2007 Q 2	213,137,608	114,455,730	7,122,777
2007 Q 3	218,814,199	117,474,874	7,445,088
2007 Q 4	228,677,416	123,093,662	7,435,507

A red callout box points to the 'Table' view with the text: 'The Compound Layout will consist of a “Title” view and a “Table” view by default'.

Creating a New Analysis

Editing Views

- You can edit views simply by clicking on the  buttons either in the “Views” pane or at the top of each view in the Compound Layout:



The screenshot shows the Peak Indicators software interface. The 'Views' pane on the left lists 'Title' and 'Table' views. The 'Compound Layout' pane on the right shows a preview of the 'Title' and 'Table' views. Red callout boxes highlight the edit buttons (pencil icons) for the 'Title' and 'Table' views, and the 'Edit selected view' button in the 'Views' pane.

Compound Layout

Title

Table

Quarter	Order Amount	Cost of Sales	Return Amount
2007 Q 1	219,625,779	119,371,008	7,469,436
2007 Q 2	213,137,608	114,455,730	7,122,777
2007 Q 3	218,814,199	117,474,874	7,445,088
2007 Q 4	228,677,416	123,093,662	7,435,507

Creating a New Analysis

Edit Table View

- Editing a Table view allows you to add Grand Totals and modify the layout and formatting

The screenshot shows the 'Edit Table View' interface. At the top, it says 'Editing from: "Compound Layout"' with 'Done' and 'Revert' buttons. Below is a table with 4 columns: Quarter, Order Amount, Cost of Sales, and Return Amount. The table has 5 rows, including a 'Grand Total' row. Annotations with red boxes and arrows point to various features: 'Table Properties' (top toolbar icon), 'Content Properties' (Table Prompts section), 'Grand Total' (Columns and Measures section), 'Subtotal' (Quarter column icon), and 'Rearrange the column order' (Order Amount column icon).

Quarter	Order Amount	Cost of Sales	Return Amount
2007 Q 1	219,625,779	119,371,008	7,469,436
2007 Q 2	213,137,608	114,455,730	7,122,777
2007 Q 3	218,814,199	117,474,874	7,445,088
2007 Q 4	228,677,416	123,093,662	7,435,507
Grand Total	880,255,002	474,395,273	29,472,808

Click "Done" to return back to the Compound Layout

Use "Table Properties" to modify general options such as the number of rows per page

Use Table "Content Properties" to change border style/colour, background colour and horiz/vertical alignment etc

Add "Grand Total"

Add "Subtotal"

Rearrange the column order by dragging and dropping (this does not change the column order on the "Criteria" tab)

Creating a New Analysis

Edit Title View

- Edit the Title view to configure items such as the Title and Subtitle
 - You can also add a Logo and provide a URL to a “Help” document:

Title Editing from: "Compound Layout" Done Revert

Title

☐ Display Saved Name

Optional - URL of a title image. *Note: When running in a secured environment, only resources that are located on the Oracle BI Presentation Server may be used. These resources are referenced using a relative path prefixed with "fmap:".*

Do not display

Help URL

Optional - URL for a document providing help on this analysis. *Note: When running in a secured environment, only resources that are located on the Oracle BI Presentation Server may be used. These resources are referenced using a relative path prefixed with "fmap:".*

Sales Ops Performance by Quarter
Year 2007

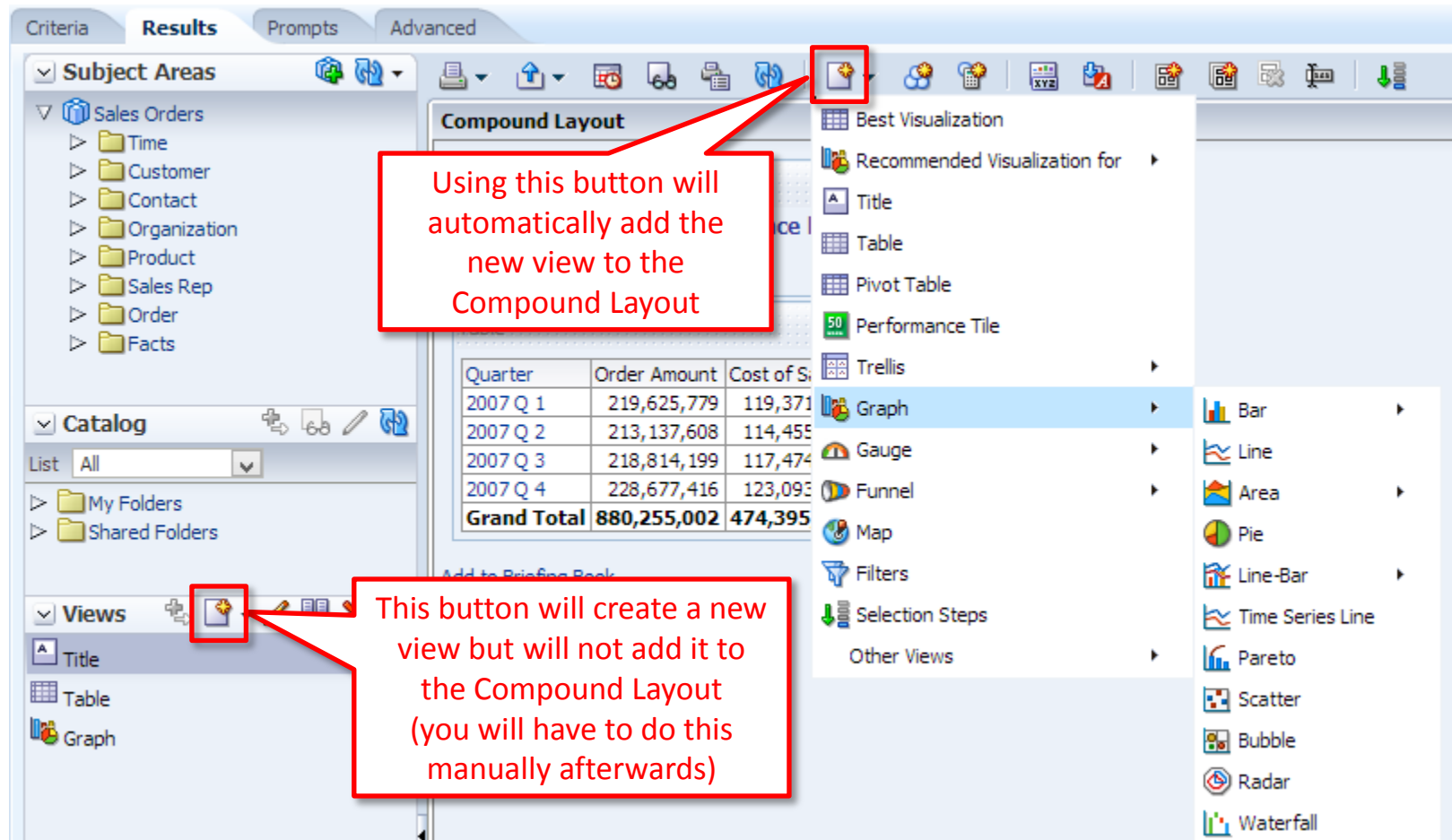
Click to modify font style and formatting

Usually you should uncheck this option if you choose your own custom title

Creating a New Analysis

Creating A New View

- You can add a new view to the Analysis using the  button which exists in two places



Using this button will automatically add the new view to the Compound Layout

This button will create a new view but will not add it to the Compound Layout (you will have to do this manually afterwards)

Quarter	Order Amount	Cost of Sales
2007 Q 1	219,625,779	119,371,111
2007 Q 2	213,137,608	114,455,111
2007 Q 3	218,814,199	117,474,111
2007 Q 4	228,677,416	123,093,111
Grand Total	880,255,002	474,395,111

Best Visualization
Recommended Visualization for
Title
Table
Pivot Table
Performance Tile
Trellis
Graph
Gauge
Funnel
Map
Filters
Selection Steps
Other Views

Bar
Line
Area
Pie
Line-Bar
Time Series Line
Pareto
Scatter
Bubble
Radar
Waterfall

Creating a New Analysis

Arranging the Compound Layout

- You can drag views from the “Views” window pane directly onto the Compound Layout:

The screenshot shows the Peak Indicators software interface. On the left, the 'Views' pane contains a list of views: 'Title', 'Table', and 'Graph'. The 'Graph' view is highlighted with a red box. A red arrow points from this box to a blue line in the 'Compound Layout' pane. The 'Compound Layout' pane shows a 'Title' section with the text 'Sales Ops Performance by Quarter' and 'Year 2007', and a 'Table' section with a table of quarterly performance data. The blue line is positioned below the table, and a red callout box explains that this line indicates where the view will be 'dropped'.

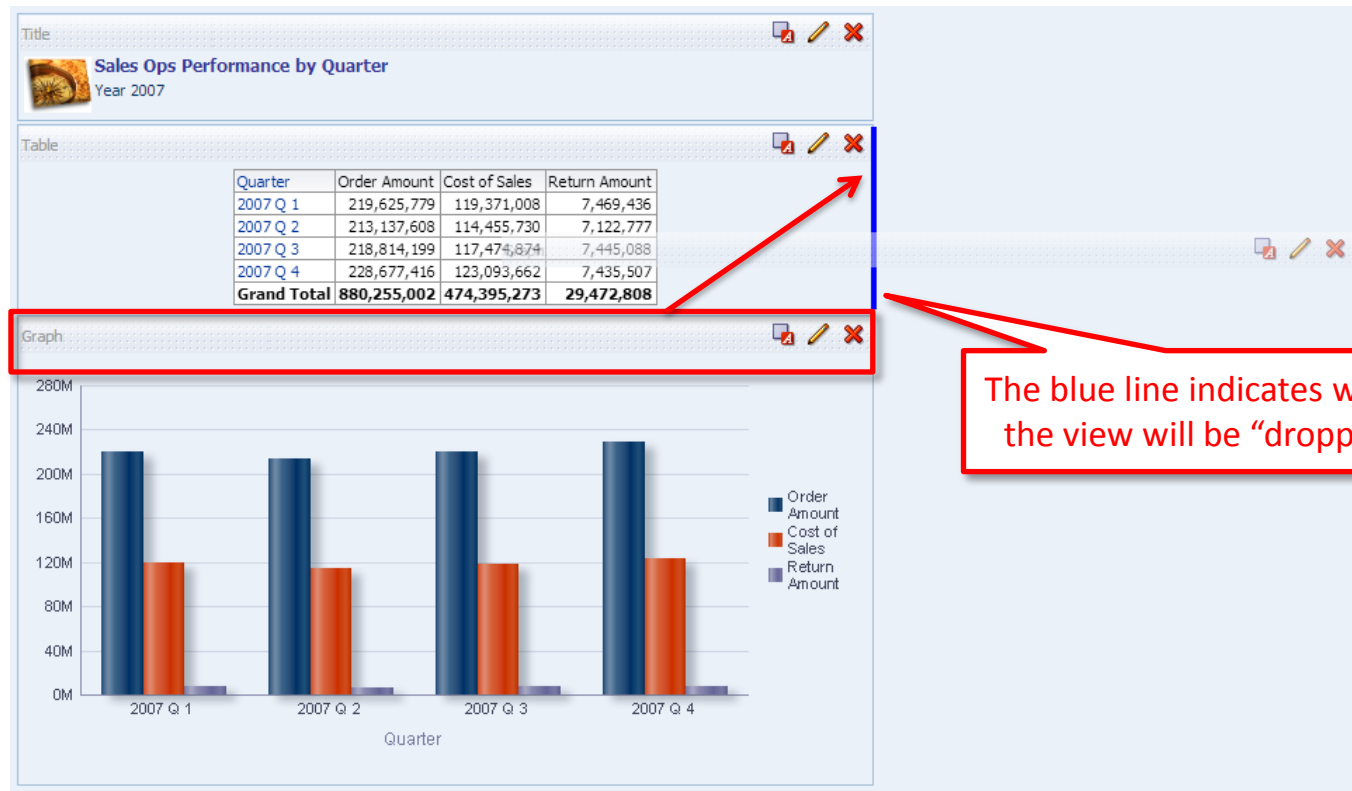
Quarter	Order Amount	Cost of Sales	Return Amount
2007 Q 1	219,625,779	119,371,008	7,469,436
2007 Q 2	213,137,608	114,455,730	7,122,777
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2007 Q 4	228,677,416	123,093,662	7,435,507
Grand Total	880,255,002	474,395,273	29,472,808

The blue line indicates where the view will be “dropped”

Creating a New Analysis

Arranging the Compound Layout

- You can also rearrange the Compound Layout by clicking on a view's header and dragging it to a new location



Creating a New Analysis

Standard Options

Here you can find standard options such as:

- Print
- Download/Export
- Schedule
- Preview
- Print Options
- Refresh

The screenshot shows the Peak Indicators software interface. The 'Results' tab is active. On the left, the 'Subject Areas' tree is expanded, showing 'Sales Orders' and its sub-items: Time, Customer, Contact, Organization, Product, Sales Rep, Order, and Facts. Below this is the 'Catalog' section with a 'List' dropdown set to 'All' and 'My Folders' and 'Shared Folders' listed. The main area is titled 'Compound Layout' and contains three sections: 'Title', 'Table', and 'Graph'. The 'Title' section shows 'Sales Ops Performance by Quarter' for 'Year 2007'. The 'Table' section displays a table with the following data:

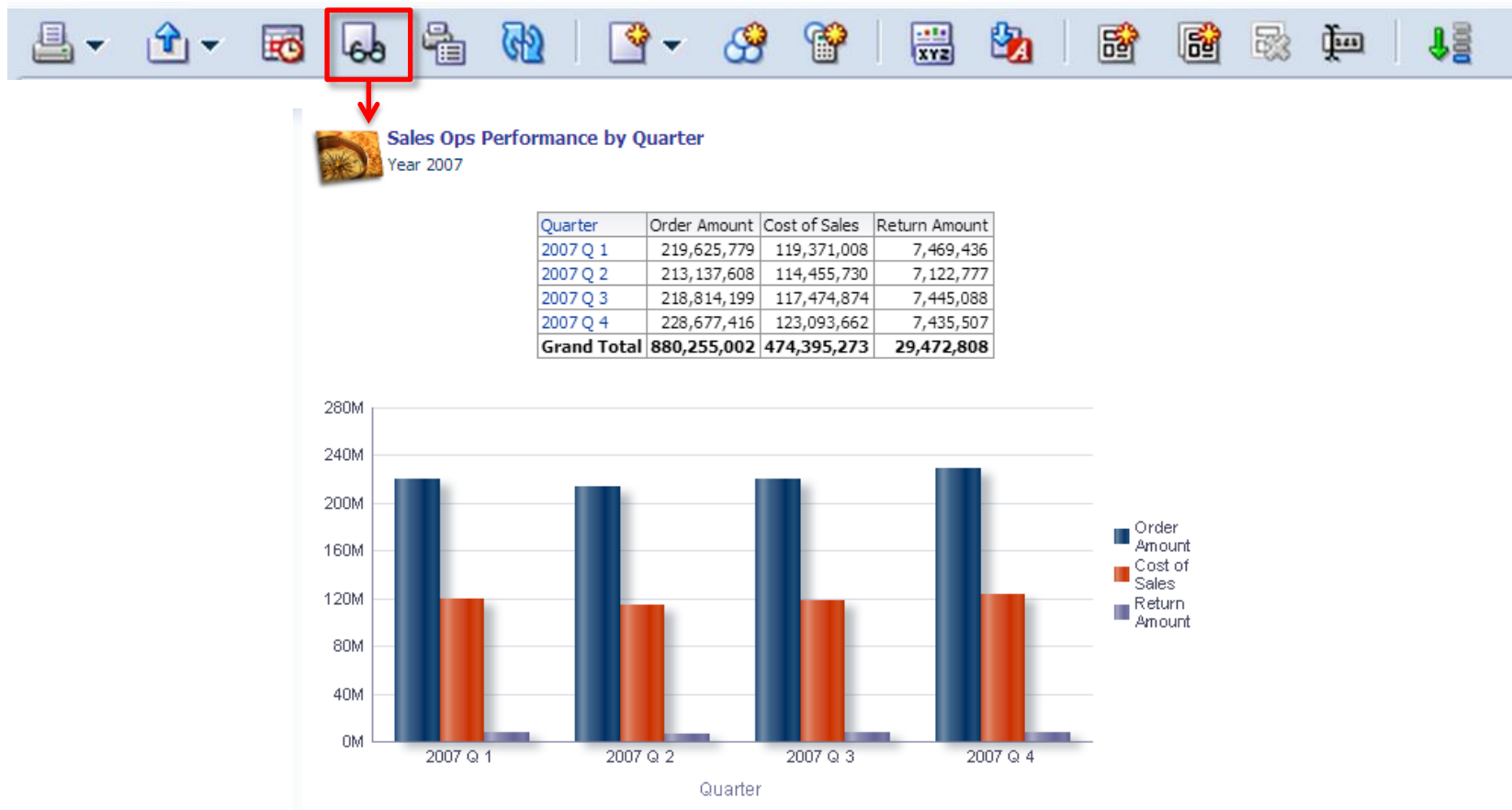
Quarter	Order Amount	Cost of Sales	Return Amount
2007 Q 1	219,625,779	119,371,008	7,469,436
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Grand Total	880,255,002	474,395,273	29,472,808

The 'Graph' section is currently empty, showing only the y-axis labels '280M' and '240M'.

Creating a New Analysis

Preview Analysis

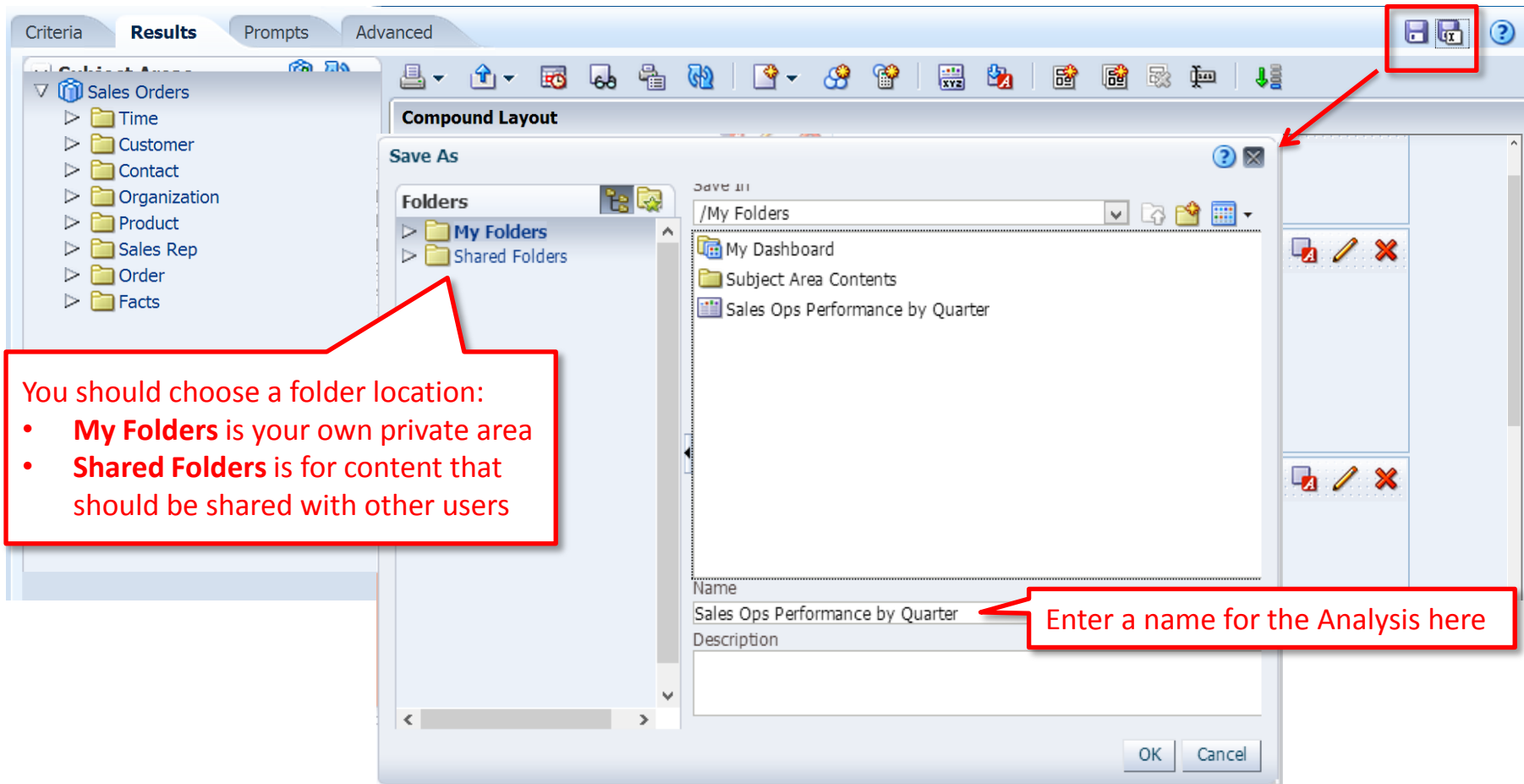
- The “**Preview**” option shows the Analysis exactly as it would appear on a Dashboard:



Creating a New Analysis

Save Analysis

- Save the Analysis using the “**Save**” or “**Save As**” buttons:



Creating a New Analysis

Browse Catalog for Analysis

- Once the Analysis has been saved, you can open/edit the Analysis via the “Catalog” screen:

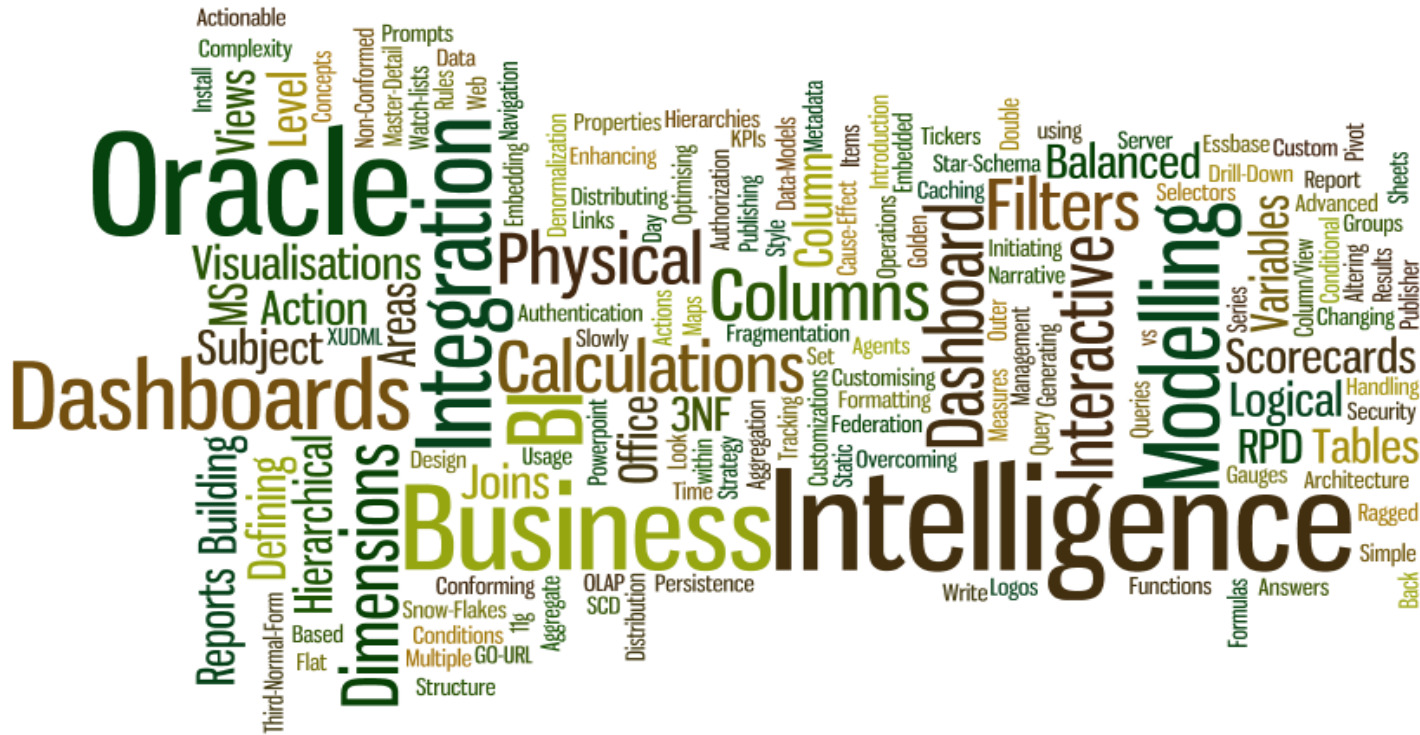
The screenshot shows the Oracle Business Catalog interface. The left sidebar contains 'Folders' (My Folders, Shared Folders) and 'Tasks' (Expand, RSS, Delete, Copy, Rename, Create Shortcut, Archive, Unarchive, Upload, Properties, Permissions). The main area displays a list of analyses. The 'Sales Ops Performance by Quarter' analysis is selected, and its 'Open' button is highlighted with a red box. An arrow points from this button to a detailed view of the analysis.

Sales Ops Performance by Quarter
Year 2007

Quarter	Order Amount	Cost of Sales	Return Amount
2007 Q 1	219,625,779	119,371,008	7,469,436
2007 Q 2	213,137,608	114,455,730	7,122,777
2007 Q 3	218,814,199	117,474,874	7,445,088
2007 Q 4	228,677,416	123,093,662	7,435,507
Grand Total	880,255,002	474,395,273	29,472,808

Bar Chart: Sales Ops Performance by Quarter
The chart displays the Order Amount (blue), Cost of Sales (red), and Return Amount (purple) for each quarter of 2007. The Y-axis ranges from 0M to 280M. The X-axis shows the quarters: 2007 Q 1, 2007 Q 2, 2007 Q 3, and 2007 Q 4.

Questions?



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Intelligence Journey