

Oracle BI 11g Reports and Dashboards

Introduction to Dashboards

PEAK
indicators

Introduction to Dashboards

Agenda

- Dashboards Overview
- Best Practices
- Building Dashboards
 - Edit Dashboard
 - Dashboard Editor
 - Adding Content
 - Sections/Columns
 - Alerts
 - Action Links & Action Link Menus
 - Links, Text & External Content
 - Folders
 - Column Properties
 - Section Properties
 - Report Properties
 - Save and Run
 - Add a Page
 - Moving between Pages
 - Dashboard Properties

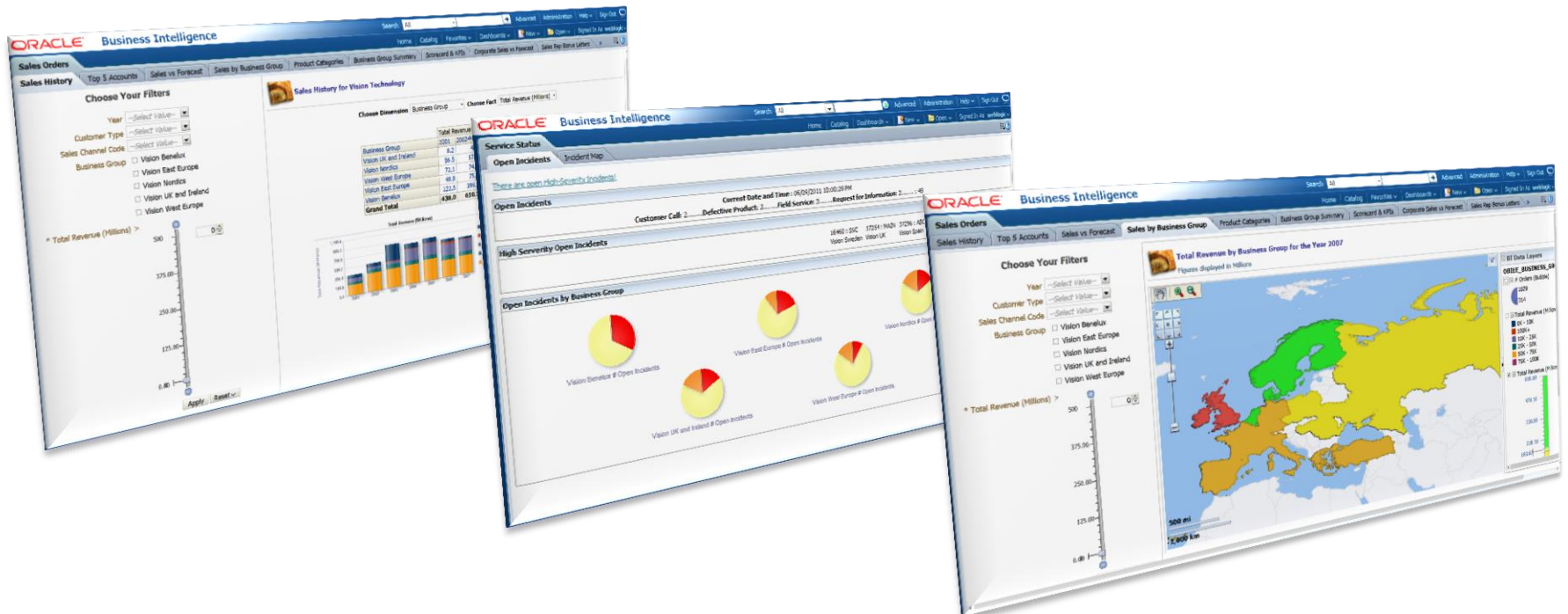


Introduction to Dashboards Overview

Overview

Accessing

- Most Oracle BI end users will consume their reporting content via one or more interactive “Dashboards”
- Dashboards can be role-based and personalised
- Although there is nothing technical stopping every end user from building their own Dashboards, typically it will be the job of “power users” to build Dashboards on behalf of their business colleagues



Overview

Accessing

- Dashboards can be accessed at any time using the “Dashboards” menu at the top of the screen, the menu will show:
 - Your most recent Dashboard
 - Your “My Dashboard” (if you have permission to have a “My Dashboard”)
 - One or more “Shared” Dashboards, separated by their “Shared Folder”

The screenshot displays the Oracle Business Intelligence web interface. At the top, the Oracle logo and 'Business Intelligence' text are visible, along with a search bar and navigation links like 'Advanced', 'Administration', 'Help', and 'Sign Out'. Below this, a 'Sales Orders' tab is active, showing a 'Sales History' view. A 'Choose Your Filters' section on the left includes dropdowns for 'Year', 'Customer Type', and 'Sales Channel Code', and a checkbox for 'Business Group' (Vision Benelux). The main content area shows a 'Sales History for Vision Technology' chart. A red box highlights the 'Dashboards' menu in the top navigation bar. The dropdown menu shows a list of dashboards: 'Most Recent(Sales Orders - Sales History)', 'My Dashboard', 'Sales Orders', 'Service Incidents', 'Service Status', 'Spatial', and 'Spatial'. A red callout box points to the menu with the text: 'In this case, the user has access to three Dashboards within three separate Shared Folders'.

Overview

Contents

- A Dashboard will typically consist of:
 - One or more Pages
 - A Dashboard Prompt (to allow users to apply their own filters)
 - One or more Analyses



This Dashboard Page contains one Analysis

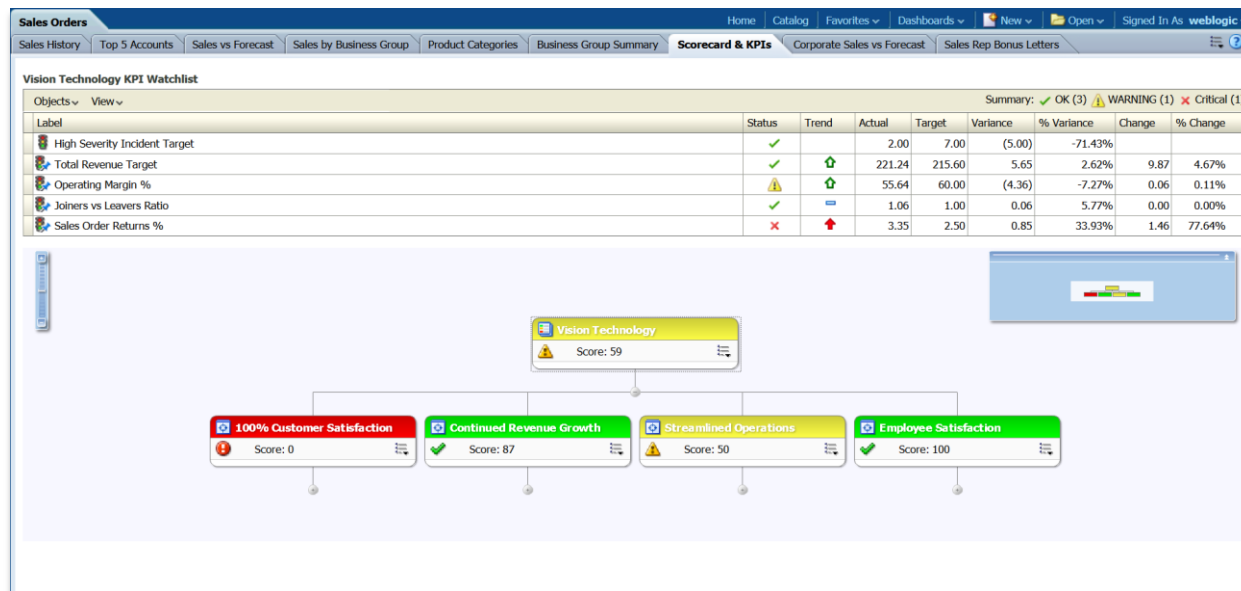
Dashboard Pages

Dashboard Prompt

Overview

Other Content

- But Dashboards can contain lots of things! For example:
 - KPI Watchlists, Balanced Scorecards (shown below)
 - Action Links
 - BI Publisher Reports
 - Embedded web pages, javascript and external links/images



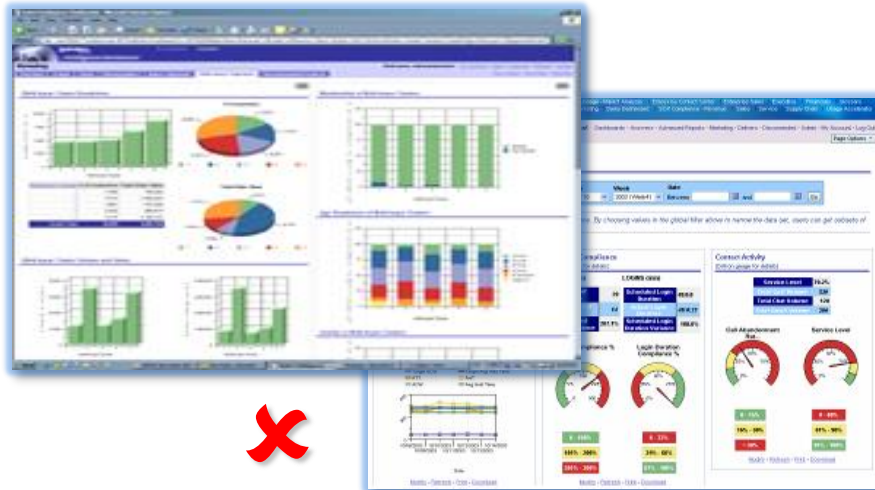


Introduction to Dashboards Best Practices

Best Practices

Reports per Page

- Typically, whenever you see an Oracle BI demo or sample application, every Dashboard Page is crammed full with various pieces of complex analysis
- This can give the impression that Dashboards are only good if they contain multiple reports, don't be mislead by this
- Quite often you will find that the best approach is to simply have a single request per dashboard page (the application will still look great and it will be more usable!)



Best Practices

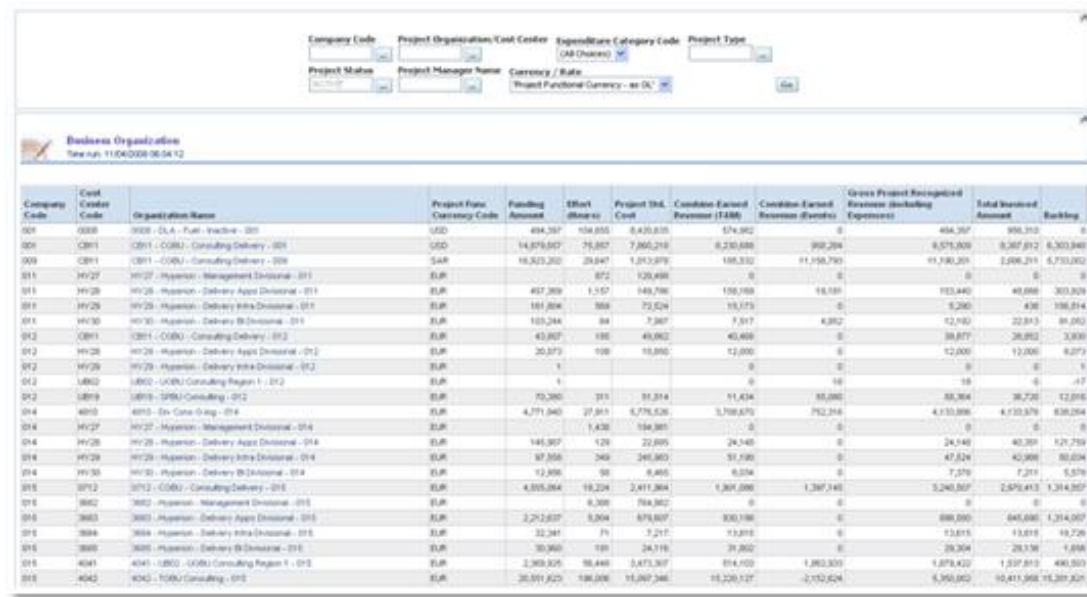
Reports per Page

- Try not to have more than 4 reports on any dashboard page
- Try to make sure all the content fits on a single screen without the user needing to scroll down or across (they may never view a report if it is not visible!)
- When building your Dashboards, use a screen resolution of 1024 x 768
 - A projector will only allow you to have a resolution of 1024x768, so you want your Dashboards to look good and its contents to fit nicely on the screen during demonstrations!
 - The same issue occurs when you do web-casts
 - Not all users have large screen sizes, so its best to design your layout with the smallest screen size in mind
- Pressing F11 will put your browser in “Full Screen Mode” enabling more content to be visible

Best Practices

Adequate Summarisation

- A lot of Businesses are still used to a “spread sheet” style of reporting
- Power Users, Developers and Business Analysts therefore need to work hard to make sure the Dashboards are designed for analysis, rather than just for producing long lists (which will probably just end up being downloaded into a spread sheet for further analysis!)
- Having Dimension Hierarchies of good quality will facilitate this



The screenshot displays a web-based dashboard for business organization data. At the top, there are several filter controls: 'Company Code' (dropdown), 'Project Organization/Cont Center' (dropdown), 'Expenditure Category Code' (dropdown), 'Project Type' (dropdown), 'Project Status' (dropdown), 'Project Manager Name' (dropdown), 'Currency / Rate' (dropdown), and 'Project Functional Currency - as of' (dropdown). Below these filters, the dashboard title 'Business Organization' is shown with a timestamp 'Thu Sep 11 04:00:00 2008 05:04:12'. The main content area is a large table with the following columns: 'Company Code', 'Cont Center Code', 'Organization Name', 'Project Func. Currency Code', 'Funding Amount', 'Effect (thous)', 'Project Std. Cost', 'Cumulative Earned Revenue (TAM)', 'Cumulative Earned Revenue (Expend)', 'Gross Project Encumbrance (Expenditure)', 'Total Encumbrance', and 'Billing'. The table contains 30 rows of data, each representing a different project or organizational unit, with numerical values in various currencies and formats.

Company Code	Cont Center Code	Organization Name	Project Func. Currency Code	Funding Amount	Effect (thous)	Project Std. Cost	Cumulative Earned Revenue (TAM)	Cumulative Earned Revenue (Expend)	Gross Project Encumbrance (Expenditure)	Total Encumbrance	Billing
001	0000	0000 - C.A. - Full - Inactive - 001	USD	494,367	104,855	8,420,000	574,362	0	494,367	956,310	0
001	0011	0011 - COBU - Consulting Delivery - 001	USD	14,979,897	75,897	7,865,219	8,230,688	969,284	8,575,809	9,367,812	8,303,940
001	0011	0011 - COBU - Consulting Delivery - 001	SAR	18,323,302	29,847	1,013,979	188,532	11,158,760	11,158,760	2,098,214	5,733,002
011	0127	0127 - Hyperion - Management Divisional - 011	EUR	0	672	126,488	0	0	0	0	0
011	0128	0128 - Hyperion - Delivery Apps Divisional - 011	EUR	407,389	1,107	148,788	156,168	16,161	163,440	40,089	303,829
011	0129	0129 - Hyperion - Delivery Infra Divisional - 011	EUR	181,894	388	72,524	16,175	0	9,240	498	188,914
011	0130	0130 - Hyperion - Delivery B Divisional - 011	EUR	103,244	84	7,367	7,317	6,892	12,160	22,813	85,090
012	0011	0011 - COBU - Consulting Delivery - 012	EUR	43,867	198	46,862	40,468	0	38,877	28,862	3,006
012	0128	0128 - Hyperion - Delivery Apps Divisional - 012	EUR	20,379	108	10,890	12,000	0	12,000	13,006	6,273
012	0129	0129 - Hyperion - Delivery Infra Divisional - 012	EUR	1	1	0	0	0	0	0	1
012	0002	0002 - COBU Consulting Region 1 - 012	EUR	1	1	0	0	16	16	0	-17
012	0019	0019 - COBU Consulting Region 1 - 012	EUR	70,380	313	31,314	11,434	15,080	38,364	36,726	12,016
014	4010	4010 - Ex Core Group - 014	EUR	4,771,940	27,813	5,776,526	3,768,670	762,318	4,133,888	4,733,976	636,084
014	0127	0127 - Hyperion - Management Divisional - 014	EUR	0	1,438	184,381	0	0	0	0	0
014	0128	0128 - Hyperion - Delivery Apps Divisional - 014	EUR	148,367	128	22,895	24,148	0	24,148	40,391	121,759
014	0129	0129 - Hyperion - Delivery Infra Divisional - 014	EUR	37,358	249	249,363	31,590	0	47,624	40,988	80,024
014	0130	0130 - Hyperion - Delivery B Divisional - 014	EUR	12,958	98	8,405	6,554	0	7,370	7,211	5,576
015	0012	0012 - COBU - Consulting Delivery - 015	EUR	4,885,864	19,224	2,411,384	1,301,086	1,387,140	5,240,867	2,870,413	1,314,067
015	0002	0002 - Hyperion - Management Divisional - 015	EUR	0	8,308	784,382	0	0	0	0	0
015	0003	0003 - Hyperion - Delivery Apps Divisional - 015	EUR	2,212,637	5,304	575,307	830,198	0	888,080	845,686	1,314,067
015	0004	0004 - Hyperion - Delivery Infra Divisional - 015	EUR	32,341	71	7,217	13,016	0	13,016	13,016	18,726
015	0005	0005 - Hyperion - Delivery B Divisional - 015	EUR	30,960	191	24,716	31,862	0	28,304	28,736	1,686
015	4041	4041 - COBU - COBU Consulting Region 1 - 015	EUR	2,369,305	18,446	3,673,307	614,102	1,362,303	1,878,420	1,537,813	480,503
015	4042	4042 - COBU Consulting - 015	EUR	38,991,925	186,098	15,767,346	18,236,127	2,712,624	8,350,962	16,411,968	18,236,127

Best Practices

Avoid “One-Size-Fits-All” Dashboards

- Your own dashboards will almost certainly be deployed to users of different Responsibilities and Business Streams
- Do not attempt to build a single “one-size-fits-all” dashboard that caters for multiple Responsibilities and/or Business Streams
- Each Responsibility / Business Stream will:
 - Require different security
 - Need different drill-downs and navigation paths
 - Want to start reporting at a different levels of granularity
 - Will ask for enhancements that are not suitable for everyone else
- It is unlikely that one dashboard can cater for all your users effectively

Best Practices

Removing Clutter

- By default, each Dashboard Section will be “collapsible” and also have a Border:

ORACLE Business Intelligence

Search: All

Home | Catalog | Favorites | Dashboards

Sales Orders | Sales History | Top 5 Accounts | Sales vs Forecast | Sales by Business Group | Product Categories | Business Group Summary | Scorecard & KPIs | Corporate Sales vs Forecast | Sales Rep Bonus Letters

Choose Your Filters

Year: --Select Value--
Customer Type: --Select Value--
Sales Channel Code: --Select Value--
Business Group:
☐ Vision Benelux
☐ Vision East Europe
☐ Vision Nordics
☐ Vision UK and Ireland
☐ Vision West Europe

* Total Revenue (Millions) >

500
375.00
125.00
0.00

0

Apply Reset

Sales History for Vision Technology

Choose Dimension: Business Group Choose Fact: Total Revenue (Millions)

Business Group	2001	2002	2003	2004	2005	2006	2007
Vision UK and Ireland	8.2	4.2	16.8	17.3	17.7	39.5	16.4
Vision Nordics	86.5	57.5	56.7	261.2	268.7	267.7	274.8
Vision West Europe	72.1	74.1	369.9	116.7	106.2	75.6	49.5
Vision East Europe	48.8	75.3	98.2	91.0	93.6	94.3	93.0
Vision Benelux	222.5	399.5	415.3	422.4	471.5	388.0	417.1
Grand Total	438.0	610.5	957.0	908.5	957.7	865.0	850.8

Total Revenue (Millions)

1,199.4
999.5
799.6
599.7
399.8
199.9
0.0

2001 2002 2003 2004 2005 2006 2007

Vision West Europe
Vision UK and Ireland
Vision Nordics
Vision East Europe
Vision Benelux

Analyze - Edit - Refresh - Print - Export - Add to Briefing Book

Best Practices

Removing Clutter

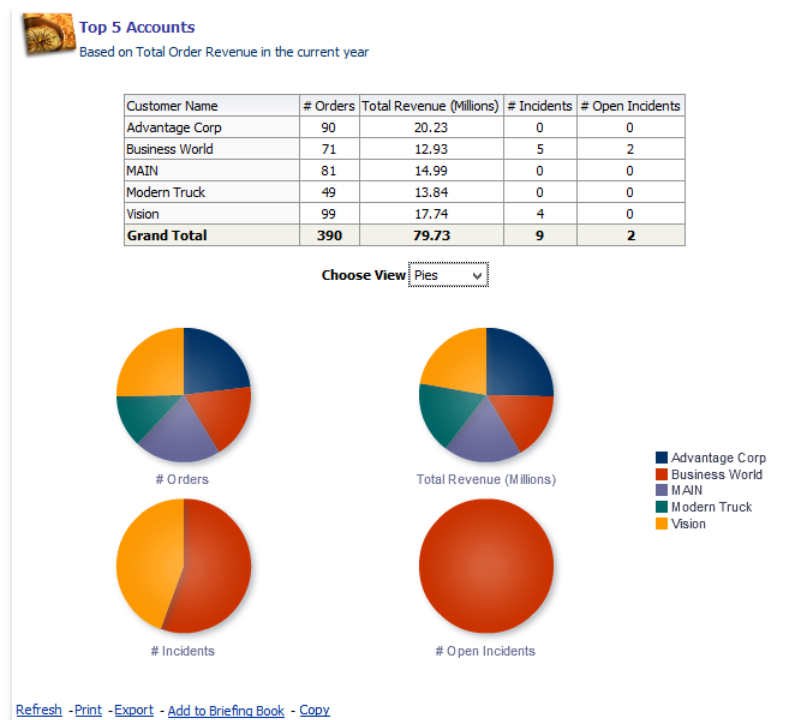
- Simple things like removing unnecessary clutter can make the Dashboards look simpler and visually more pleasing to the eye:



Best Practices

Column/View Selectors

- Use Column / View Selectors to reduce the number of chart objects needed on a request:

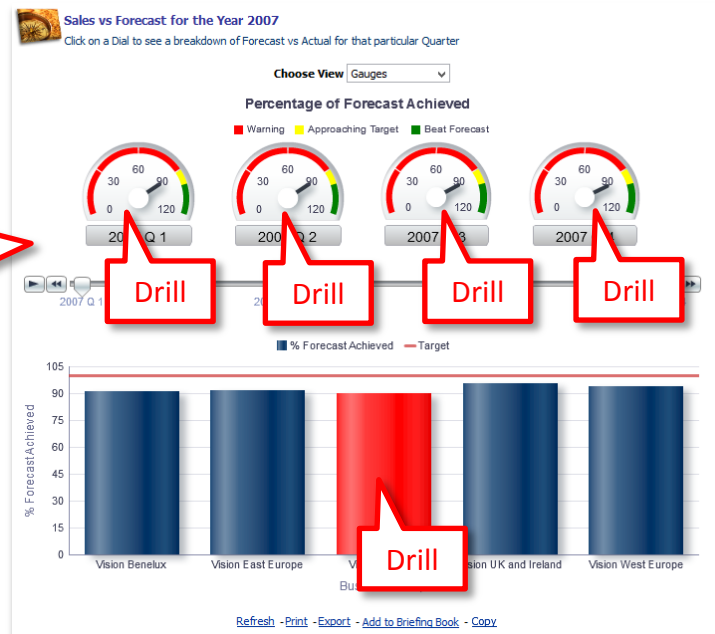


Best Practices

Drill-Downs/Navigation

- Building an Analysis in Answers can be done very quickly, but making them interactive with intuitive drill-downs does take time, it is therefore important to make every effort to implement drill-downs and/or navigations for each request on a dashboard page
- When estimating timescales factor in the time required to implement additional detail reports – it takes longer than you think!

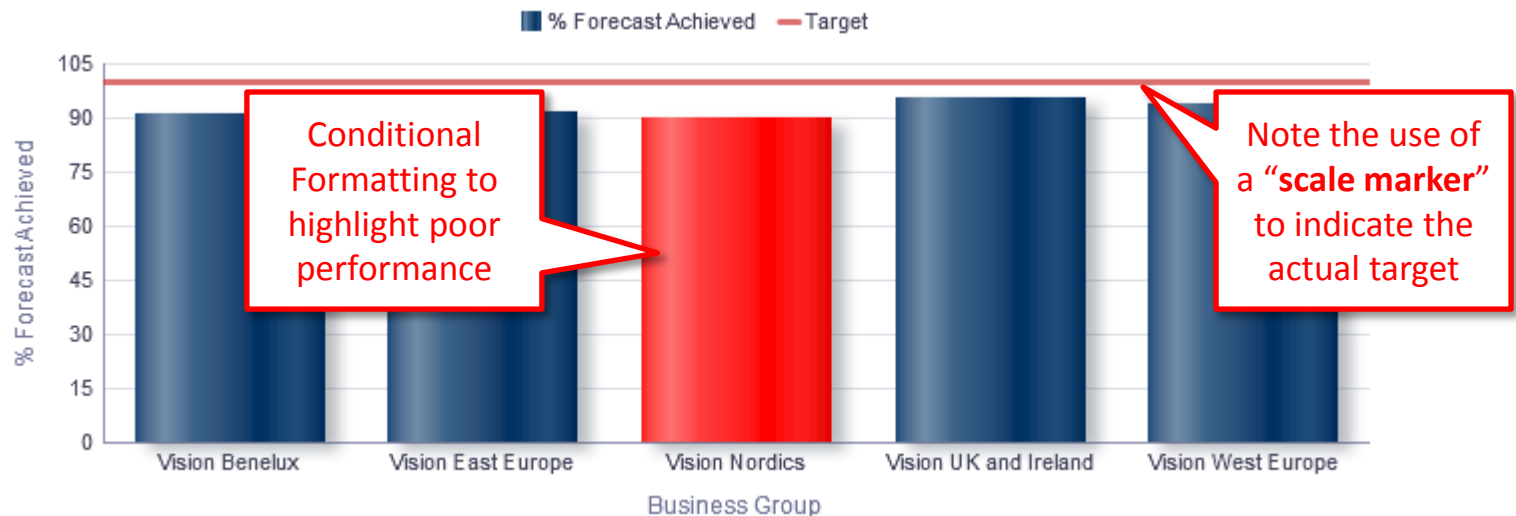
This Dashboard is useless unless users are able to analyse the figures in more detail



Best Practices

Conditional Formatting

- Make as much use of Conditional Formatting as possible – it significantly increases the visual appeal of the dashboards
- This requires the report developer to “think” about what exceptions, trends and problems the users want to see
- If you are not sure, then ask the Business users “*what are you really looking for in these reports?*”





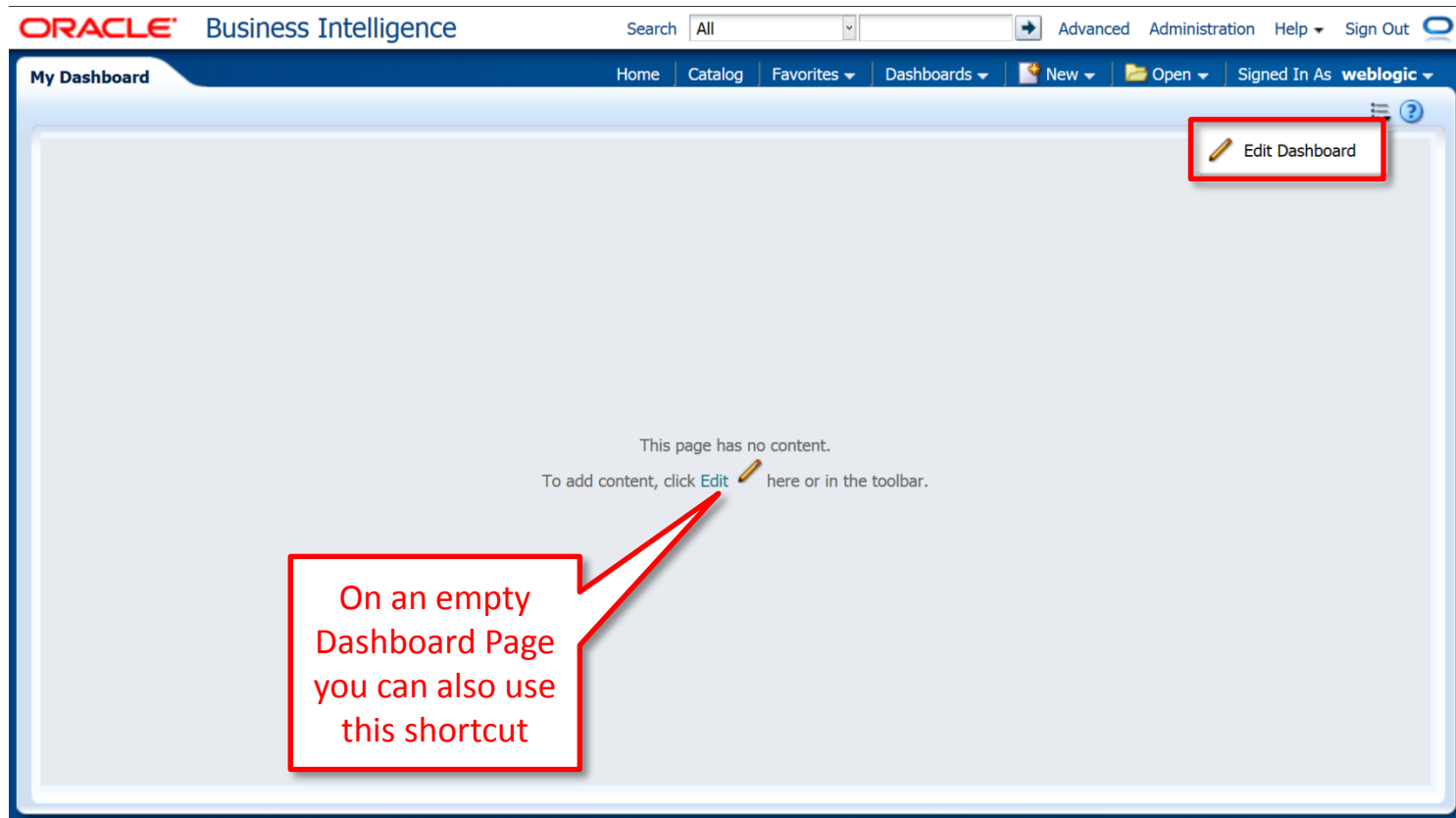
Introduction to Dashboards

Building Dashboards

Building Dashboards

Edit Dashboard

- If you have sufficient privileges, you can edit a dashboard via the “Page Options > Edit Dashboard” menu on the right-hand side

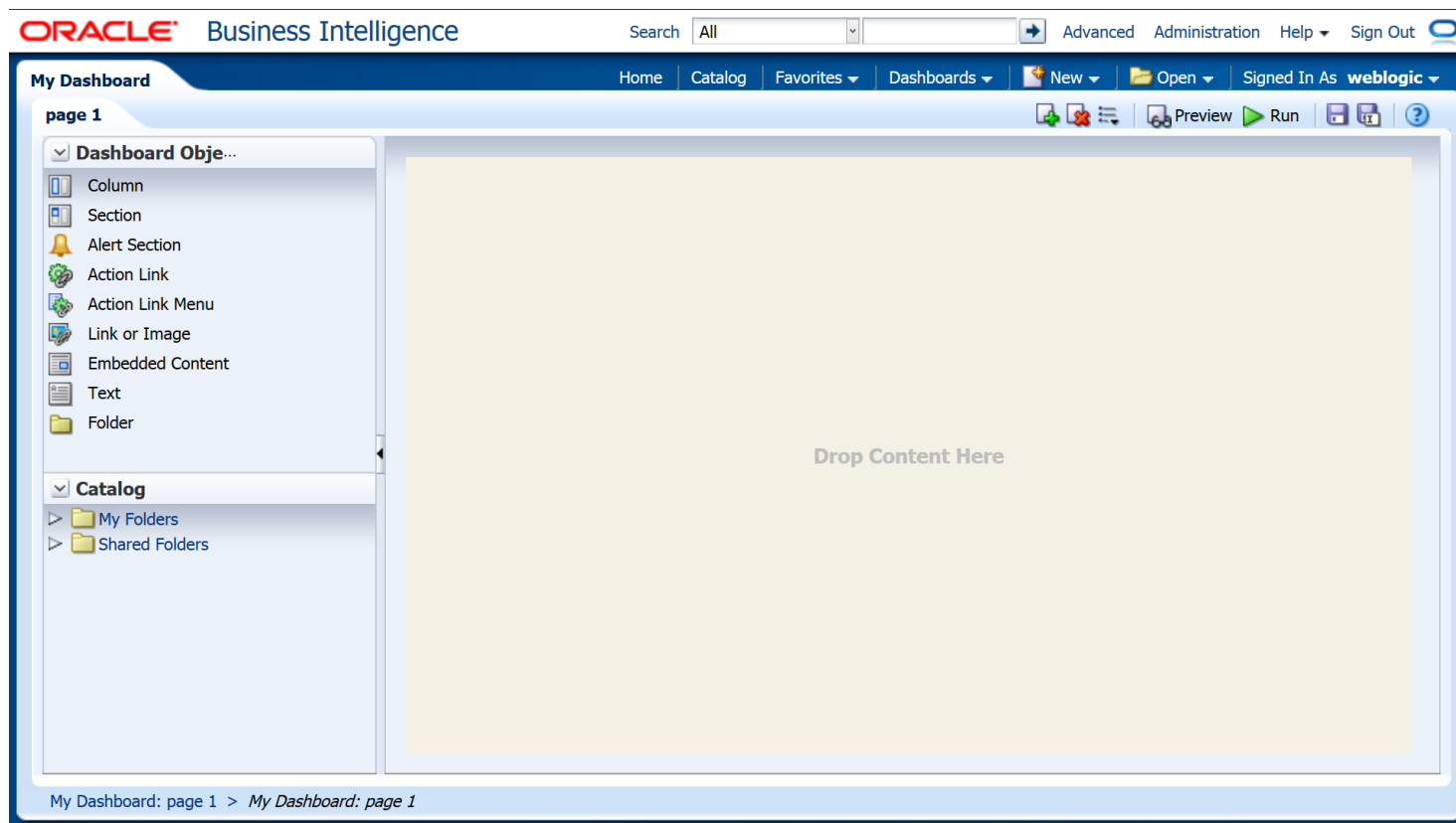


On an empty
Dashboard Page
you can also use
this shortcut

Building Dashboards

Dashboard Editor

- The “Dashboard Editor” will then open up
- By default, you will have a single empty Dashboard Page called “page 1”



Building Dashboards

Adding Content

- You can start adding content by dragging objects from the “Catalog” window pane
 - The object will be placed inside a new “**Section**” and “**Column**”

The screenshot shows the Oracle Business Intelligence dashboard builder interface. On the left, the 'Catalog' pane lists various objects under 'Dashboard Objects' and 'Catalog'. The 'Sales Ops Performance by Quarter' object is highlighted in the 'Catalog' pane. A red arrow points from this object to the 'Section 1' container in the main workspace. The main workspace shows a 'Column 1' container with a 'Section 1' container inside it. The 'Section 1' container contains the 'Sales Ops Performance by Quarter' object. Two red callout boxes provide definitions: 'A Section can consist of multiple Analyses or other reporting content e.g. Dashboard Prompts' and 'A Column can consist of multiple Sections'.

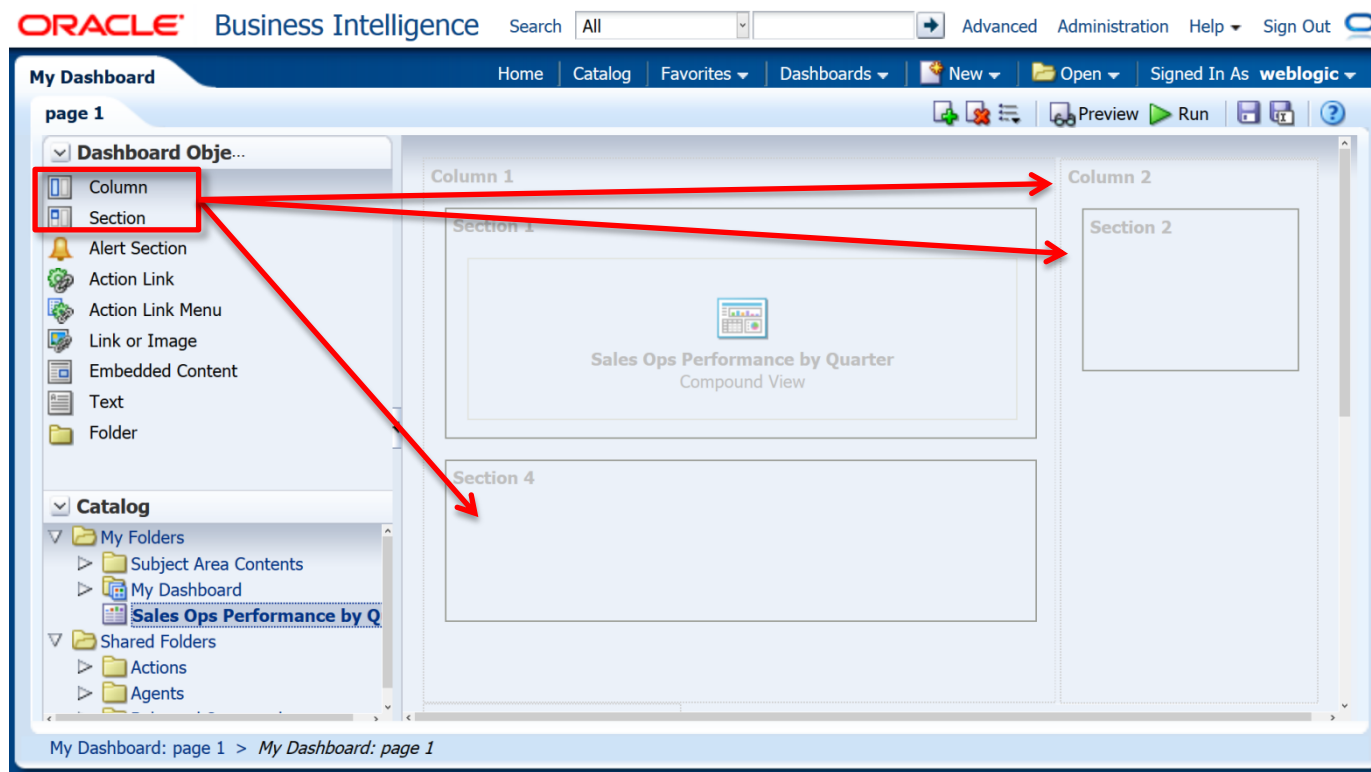
A Section can consist of multiple Analyses or other reporting content e.g. Dashboard Prompts

A Column can consist of multiple Sections

Building Dashboards

Sections/Columns

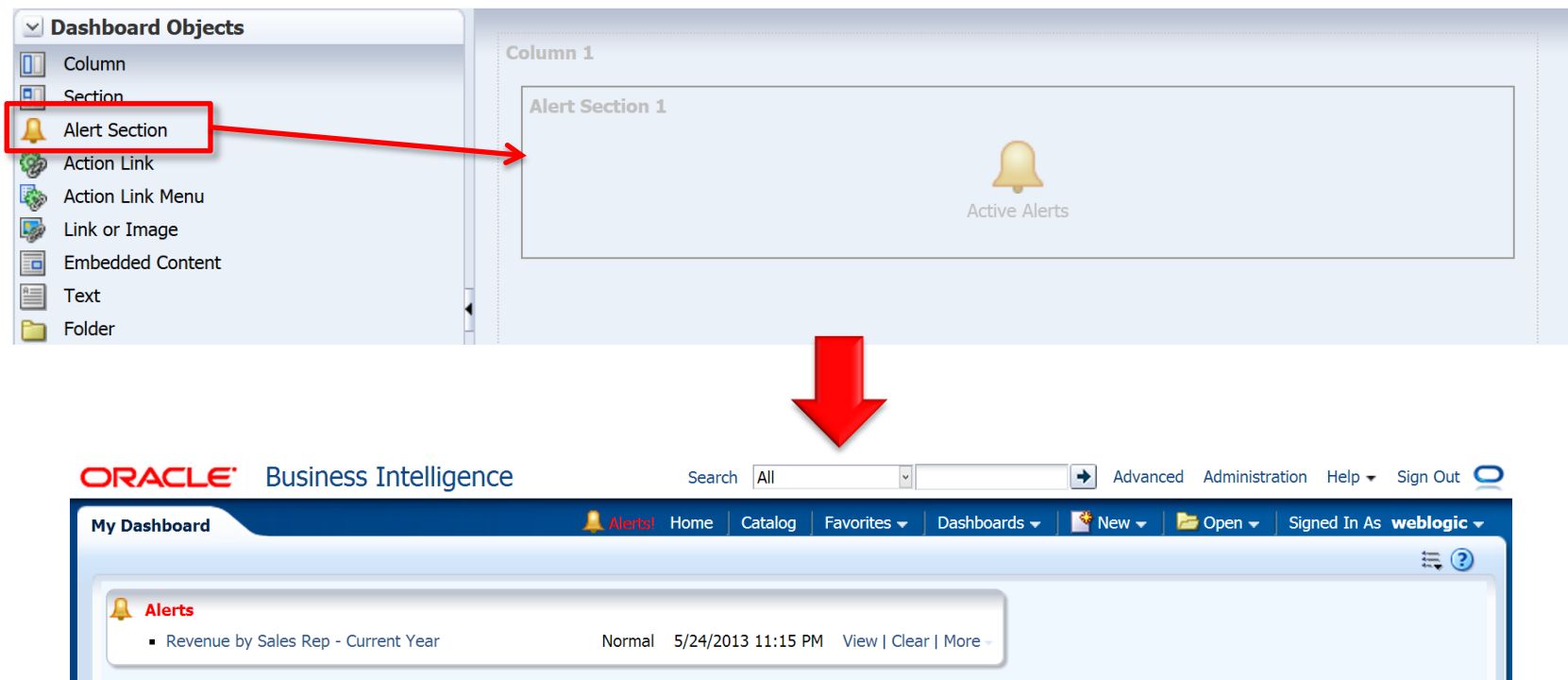
- You can drag additional Sections and Columns from the “Dashboard Objects” panel
 - You can place Sections above or below existing Sections
 - You can place Column above, below, left or right of existing Columns



Building Dashboards

Alerts

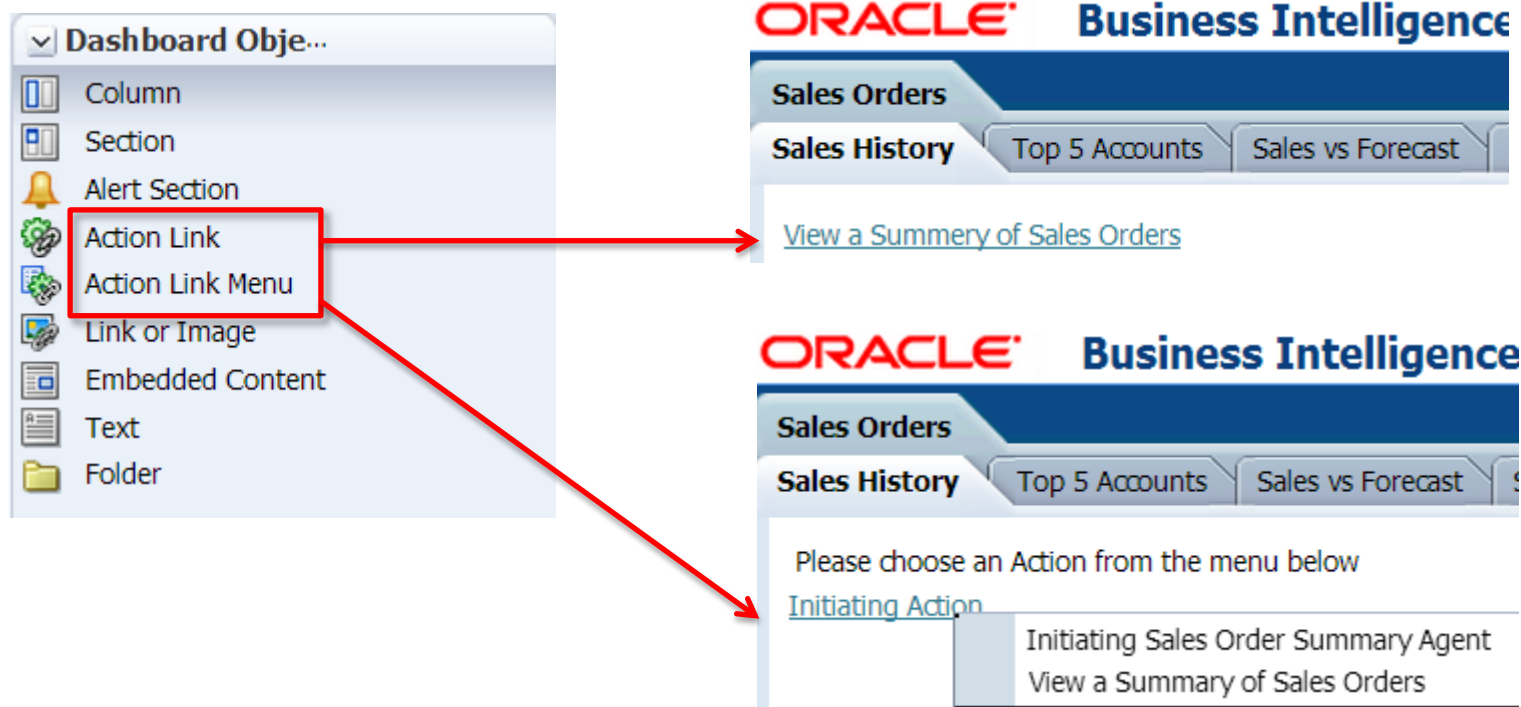
- Adding an “**Alert Section**” will result in the user being alerted on the Dashboard Page whenever they are the recipient of a BI Delivers “**Agent**”



Building Dashboards

Action Links and Action Link Menus

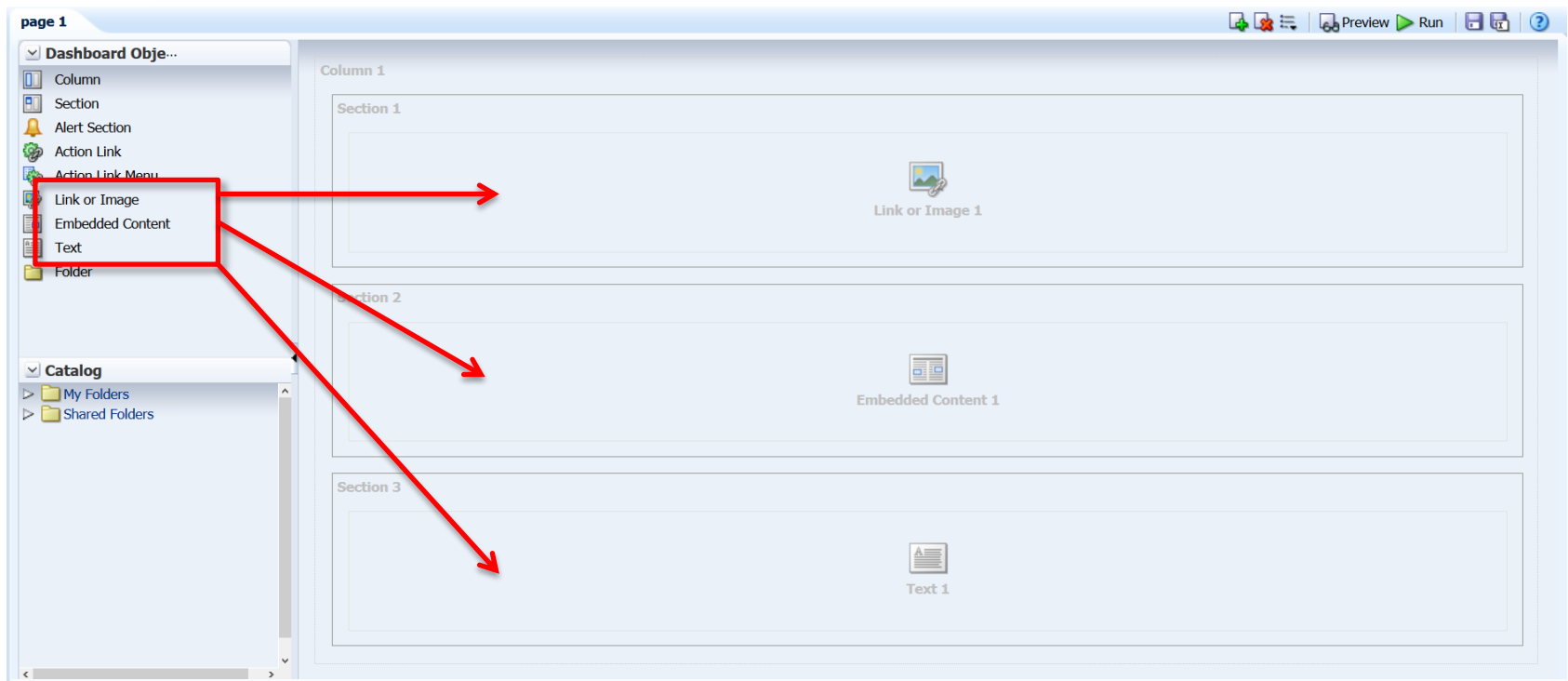
- Action Links and Action Link Menus allow you to add links for invoking Oracle BI “Actions” on to the Dashboard Page:
 - The Action Links can be configured to appear conditionally



Building Dashboards

Links, Text and External Content

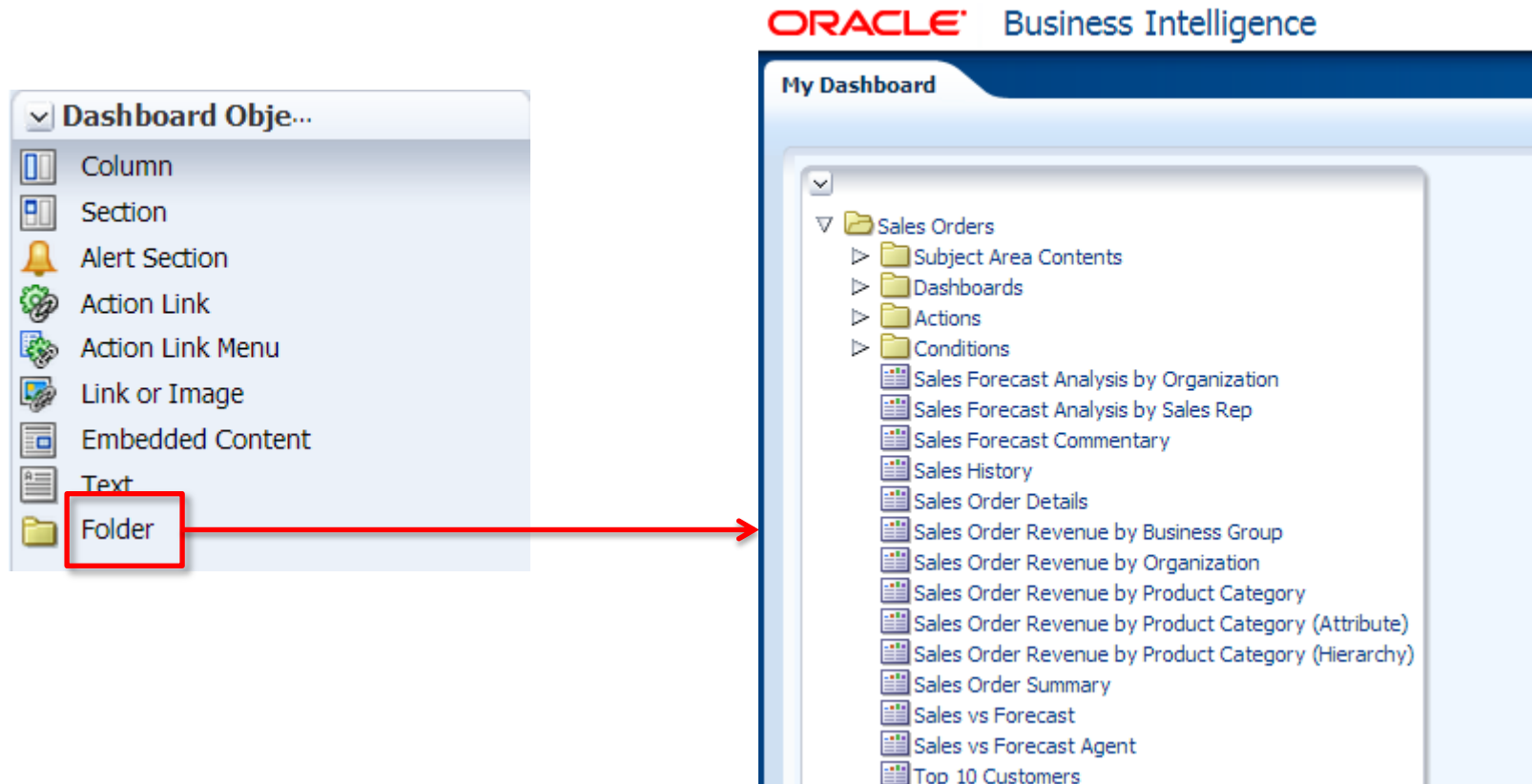
- You can also drag in other objects such as:
 - Links or images: Include a link to another dashboard page or request
 - Embedded Content: Embed another web-site
 - Text: Place custom text on the Dashboard using a text editor



Building Dashboards

Folders

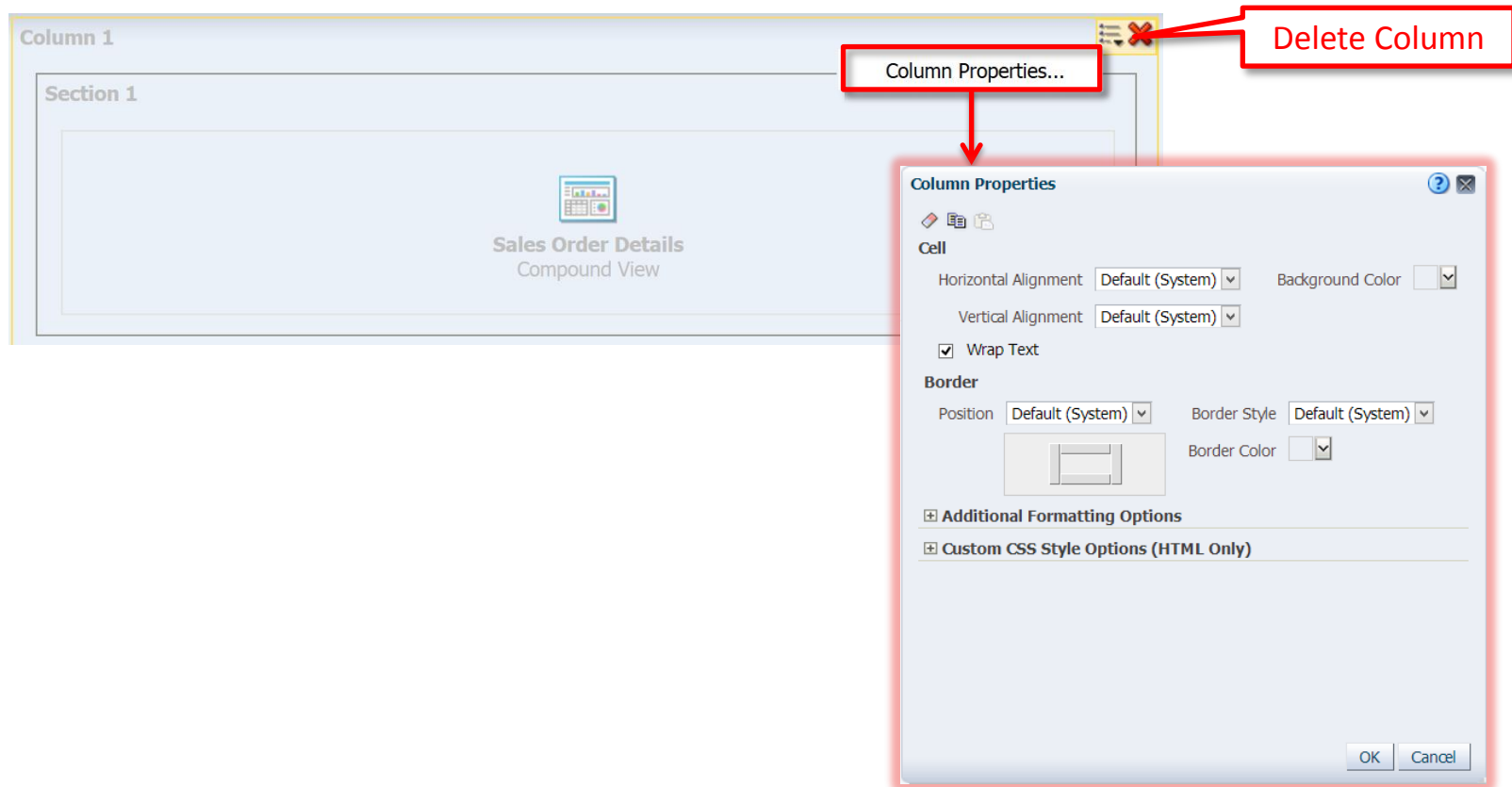
- A “**Folder**” object allows the user to browse and open Catalog contents directly from within the Dashboard Page



Building Dashboards

Column Properties

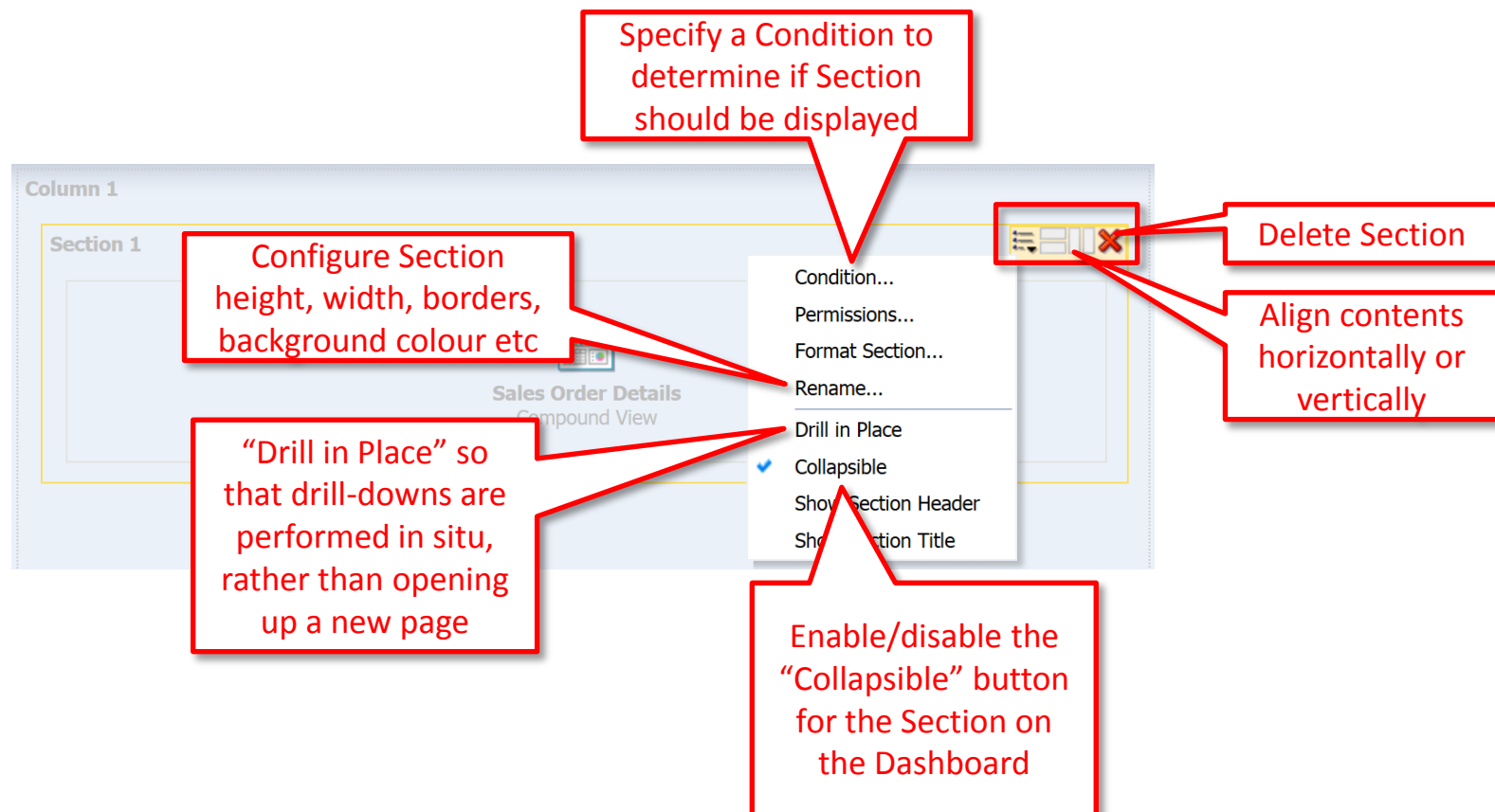
- Moving the mouse over the top-right of a Column will expose its “Properties” menu:
 - Settings for Column height, width, border, background colour, etc



Building Dashboards

Section Properties

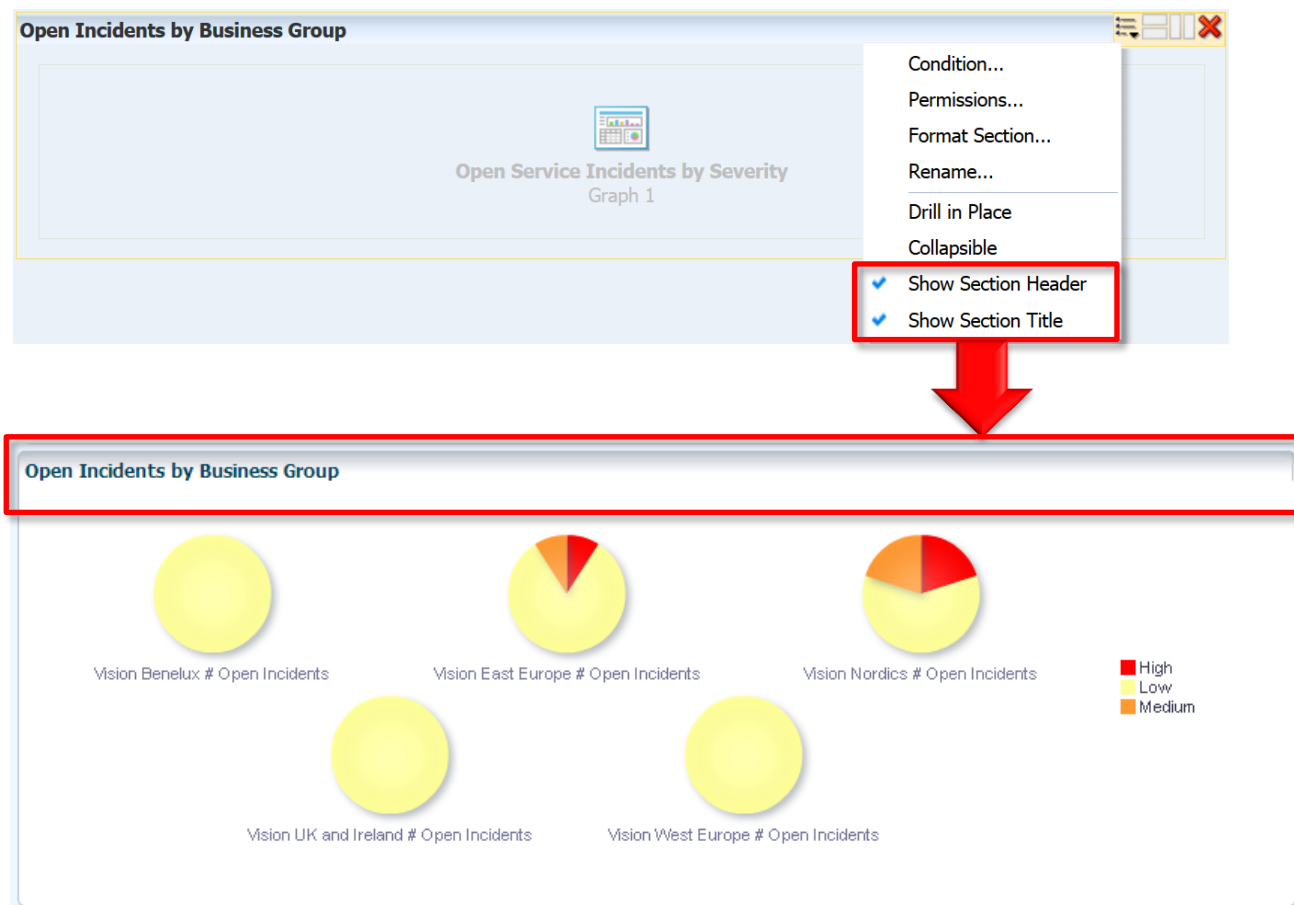
- Moving the mouse over the top-right of a Section will expose its “Properties” menu:



Building Dashboards

Section Properties

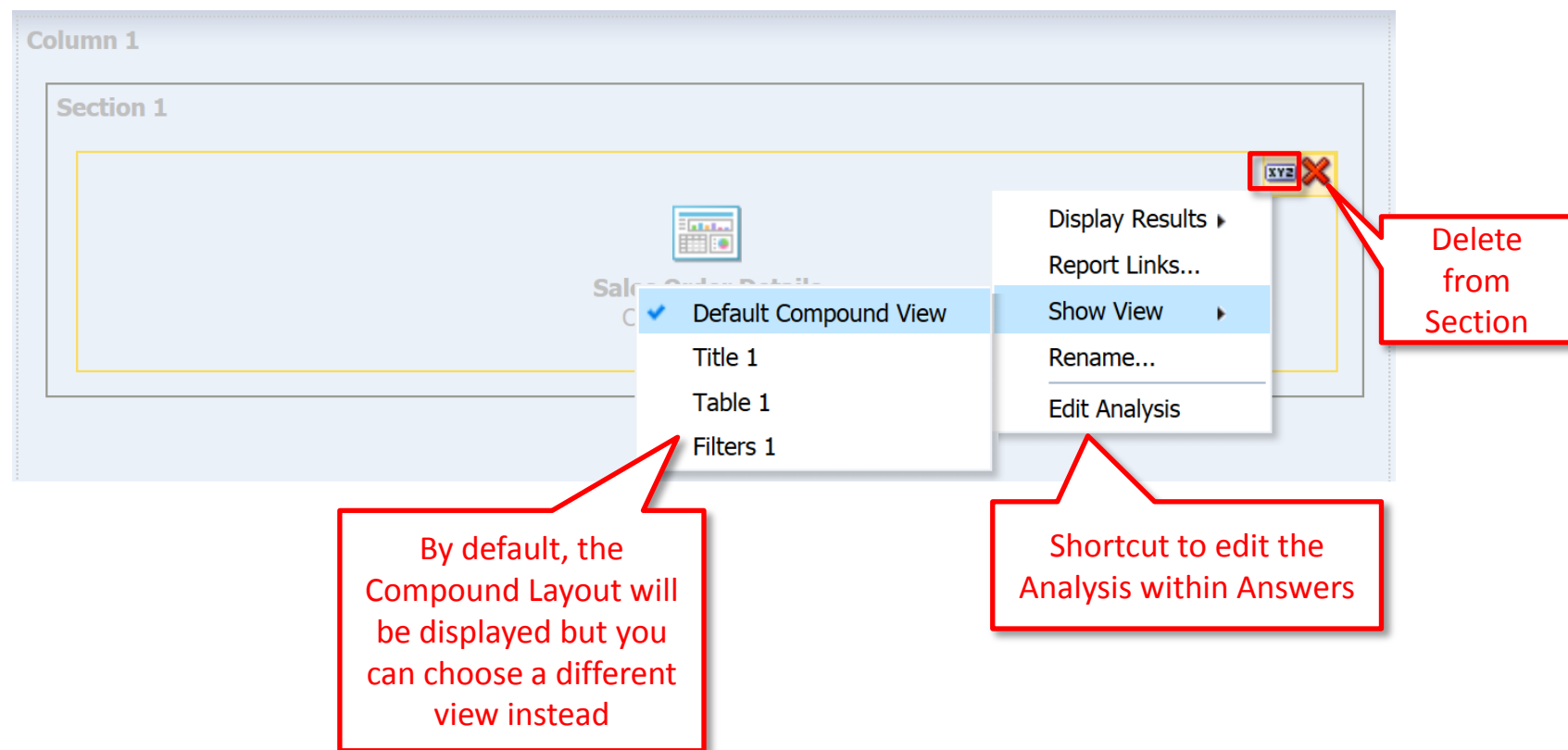
- The “Show Section Header / Title” options will add a header bar with title to the Section:



Building Dashboards

Report Properties

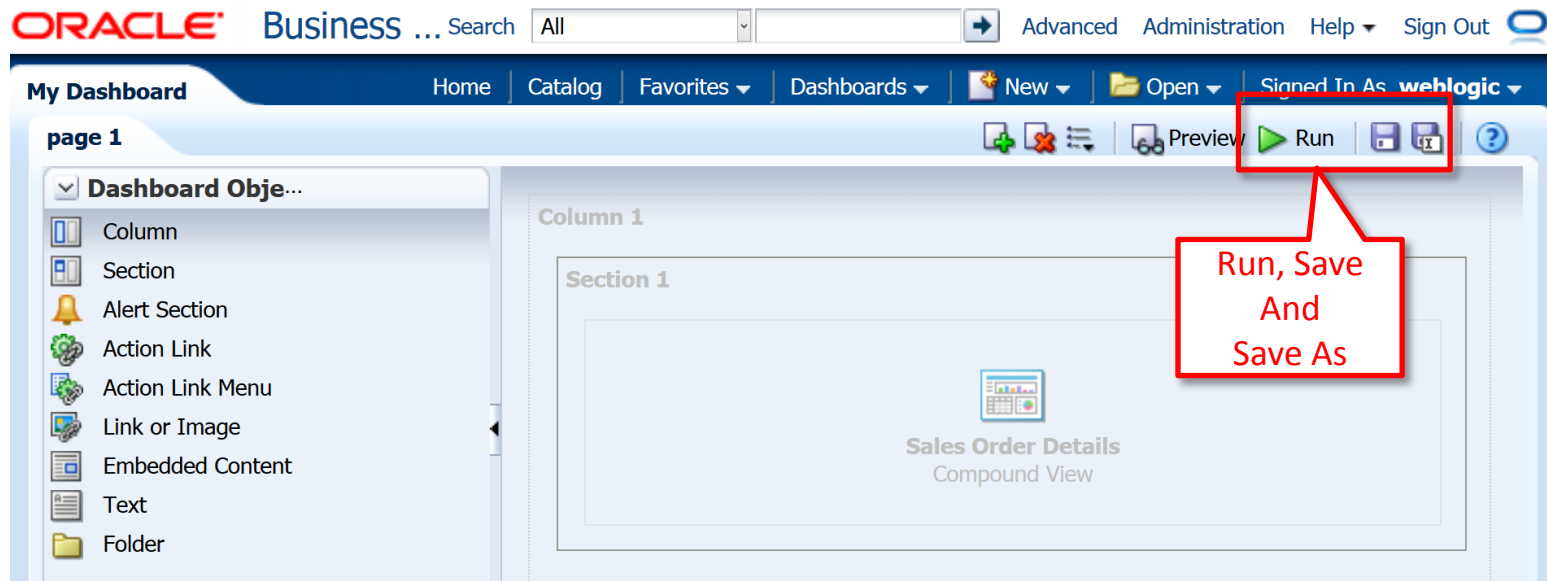
- Moving the mouse over the top-right of an Analysis will expose its “Properties” menu:



Building Dashboards

Save and Run

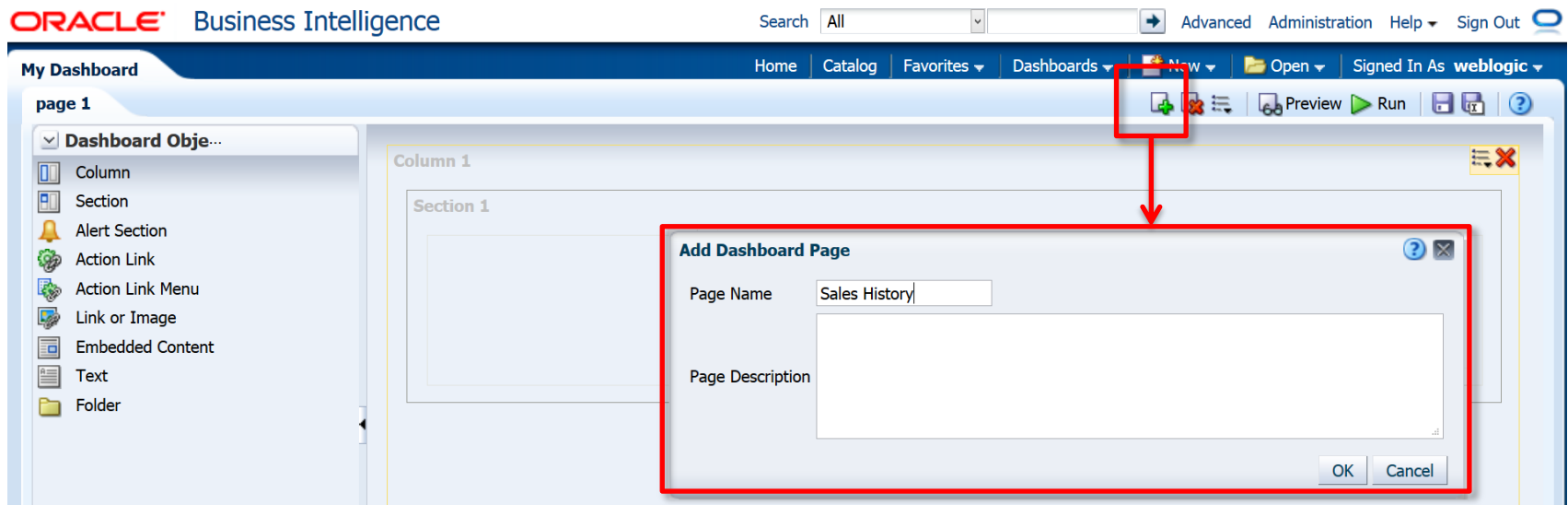
- When you have completed building your Dashboard Page, you should save it before running it or creating a new Page



Building Dashboards

Add Page

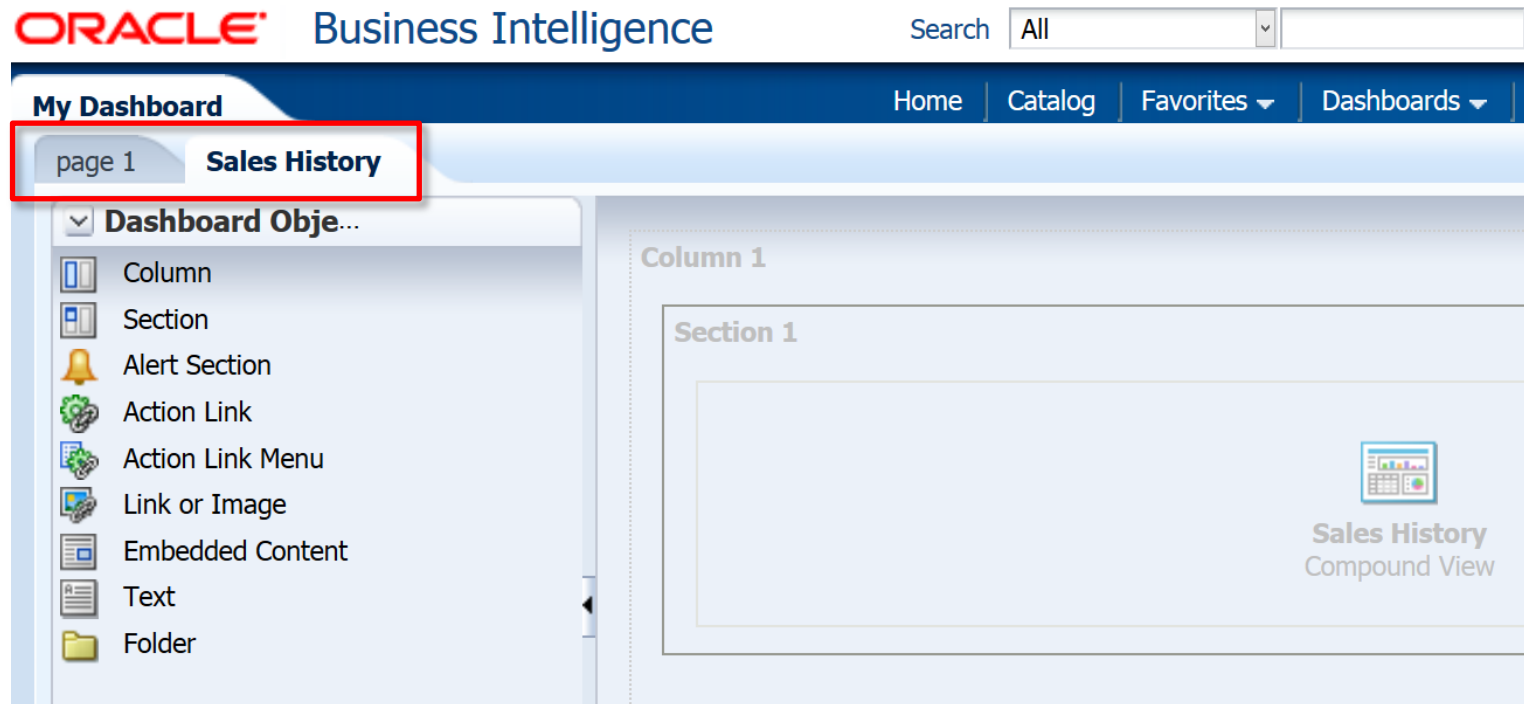
- You can add a new Page by clicking on the  button



Building Dashboards

Moving Between Pages

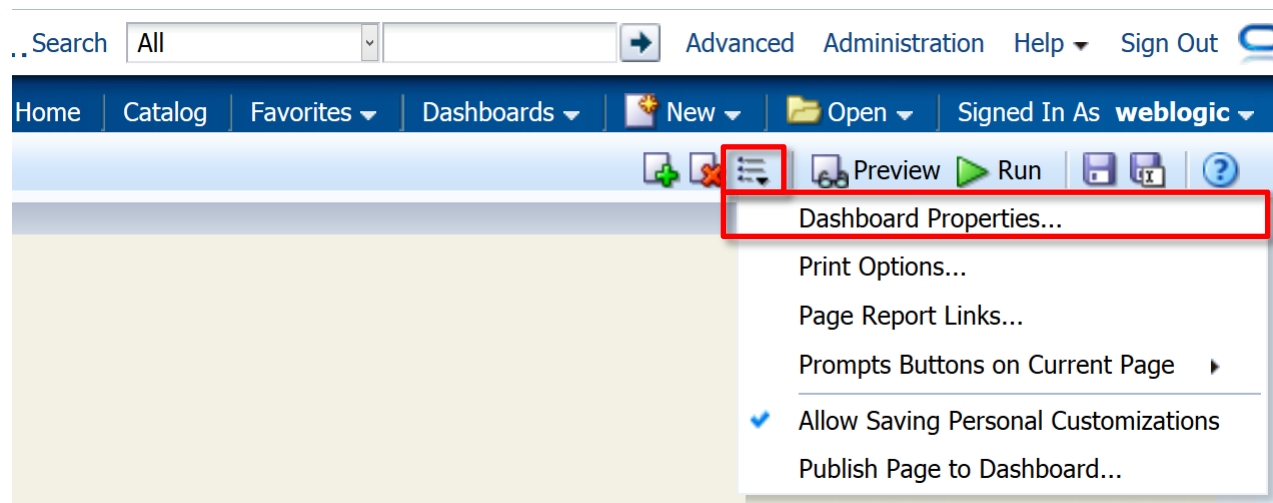
- Within the Dashboard Editor, you can move between Pages by clicking on the tabs at the top-left:



Building Dashboards

Dashboard Properties

- The “**Dashboard Properties**” menu option allows you to:
 - Hide, rename, delete and reorder dashboard pages
 - Set security permissions on each dashboard page




Building Dashboards

Dashboard Properties

Dashboard Properties

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.


General Properties


 /Shared Folders/Sales Orders/Dashboards/Sales Orders

Style:

Description:

Page Size: ☐ Fit Content ☒ Fill Browser Window

Filters and Variables: 

Dashboard Report Links: 

Prompts Apply Buttons:

Prompts Reset Buttons:

Dashboard Pages

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book
Sales History	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Top 5 Accounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sales vs Forecast	<input type="checkbox"/>	<input type="checkbox"/>
Sales by Business Group	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Product Categories	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

You can apply your own custom "Style" e.g. colouring, logos, fonts

- Rename Page
- Default Values for Prompts
- Set Permissions
- Delete Page
- Customization Privileges

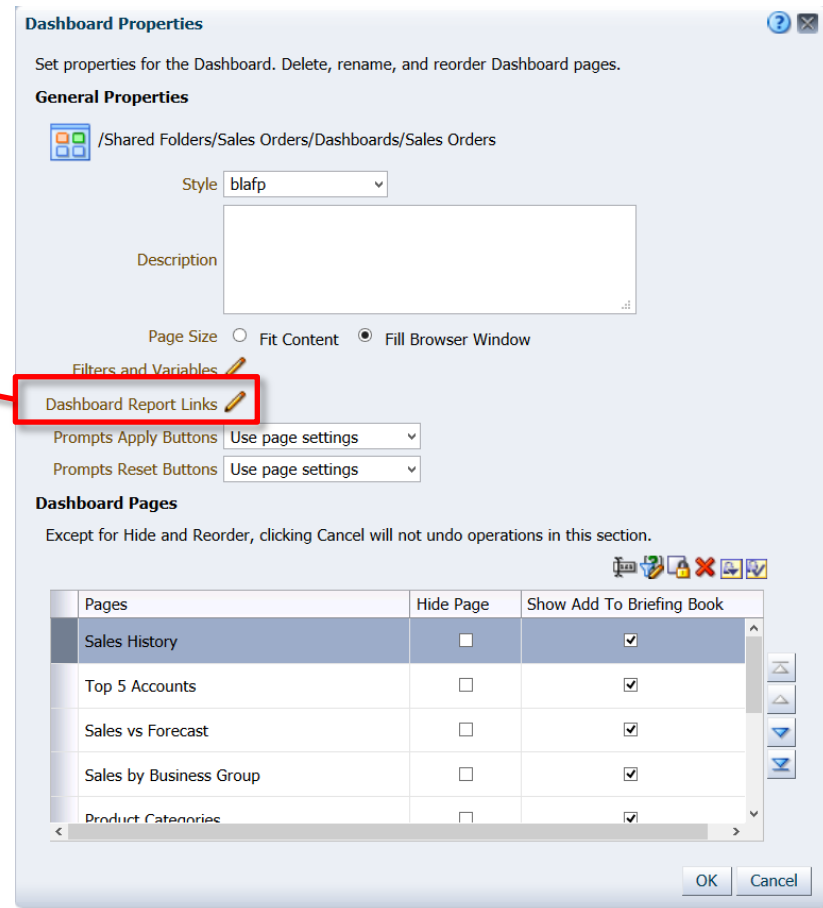
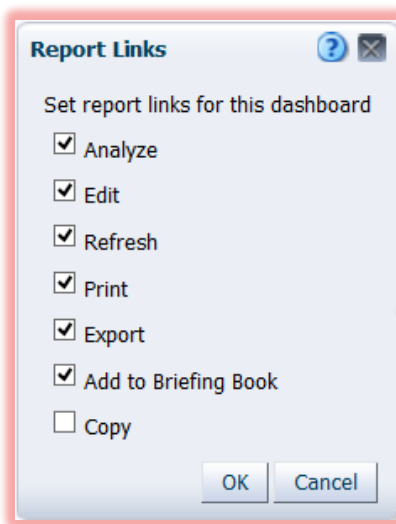
Re-order Pages

Hide Page

Building Dashboards

Dashboard Properties

- An option exists for specifying which links should appear underneath all the Analyses across the Dashboard:



Building Dashboards

Dashboard Properties

- An option exists for specifying default filters and variables:

Dashboard Filters and Variables

To define default filters and variables, embed dashboard prompts with default values. These prompts will not be shown on the dashboard.

Prompt Path

OK Cancel

Specify a list of Dashboard Prompts that contain default values.

The default values will then be used on this Dashboard.

The Dashboard Prompts listed here will not be visible on the Dashboard.

Dashboard Properties

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

General Properties

/Shared Folders/Sales Orders/Dashboards/Sales Orders

Style: blafp

Description:

Page Size: ☐ Fit Content ☒ Fill Browser Window

Filters and Variables

Dashboard Report Links:

Prompts Apply Buttons: Use page settings

Prompts Reset Buttons: Use page settings

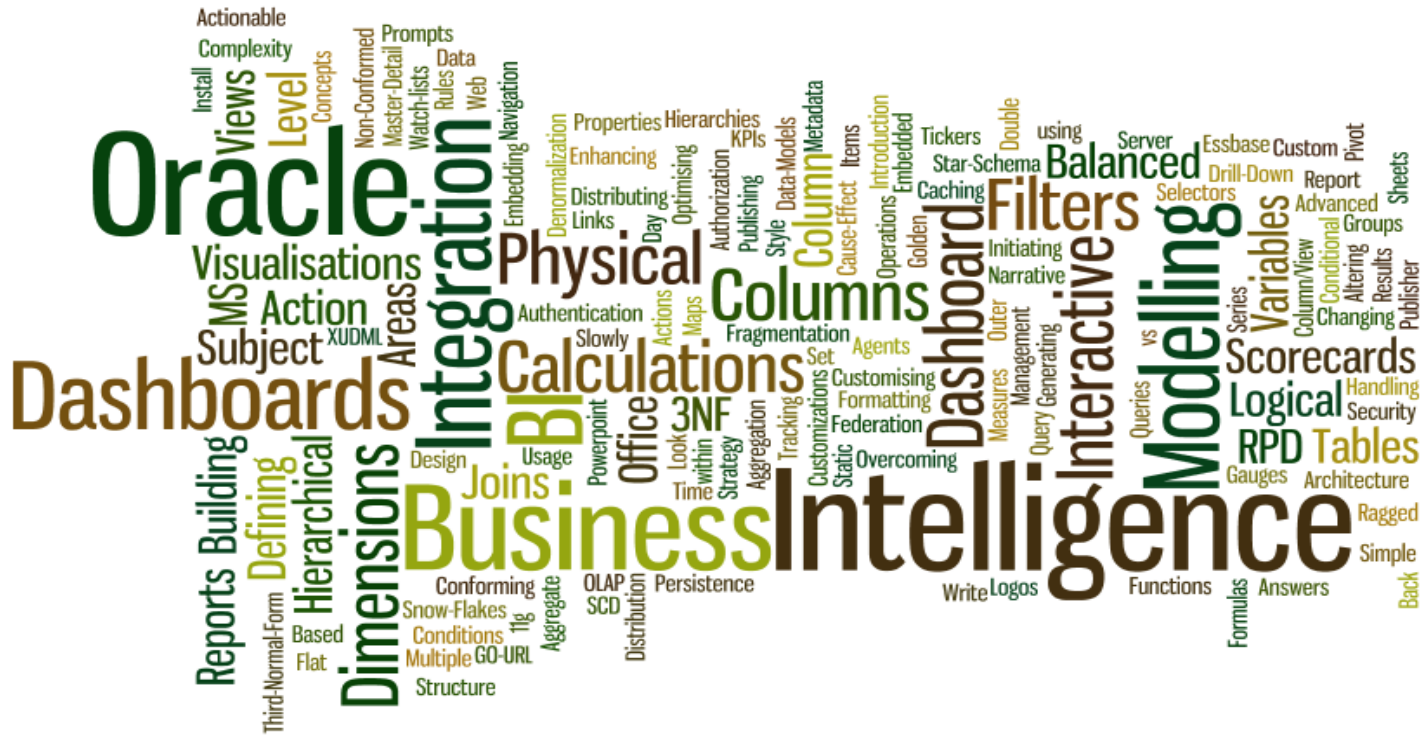
Dashboard Pages

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book
Sales History	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Top 5 Accounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sales vs Forecast	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sales by Business Group	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Product Categories	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

Questions?



PEAK

indicators

PEAK
indicators

Helping Your Business
Intelligence Journey