Username: student__

Oracle BIEE 11g Reports and Dashboard Hands On

Vlamis Software Solutions is one of the most respected training organizations in the Oracle Business Intelligence community because our training programs and materials are informed by our experience leading implementations in many of the world's foremost corporations. Through our roles as implementers, beta testers, and trainers, we develop and codify many of the "best practices" that are propagated throughout the industry. Our training materials reflect this expertise and are centered on hands-on exercises that build confidence and competence. With more than 200 Oracle BI implementations under our banner, our trainers are not just presenters, but accomplished consultants who incorporate their real world experience into the classroom ensuring that participants are optimally prepared. This Hands-on Lab is an excerpt from our OBIEE 11g classroom / web-based class.

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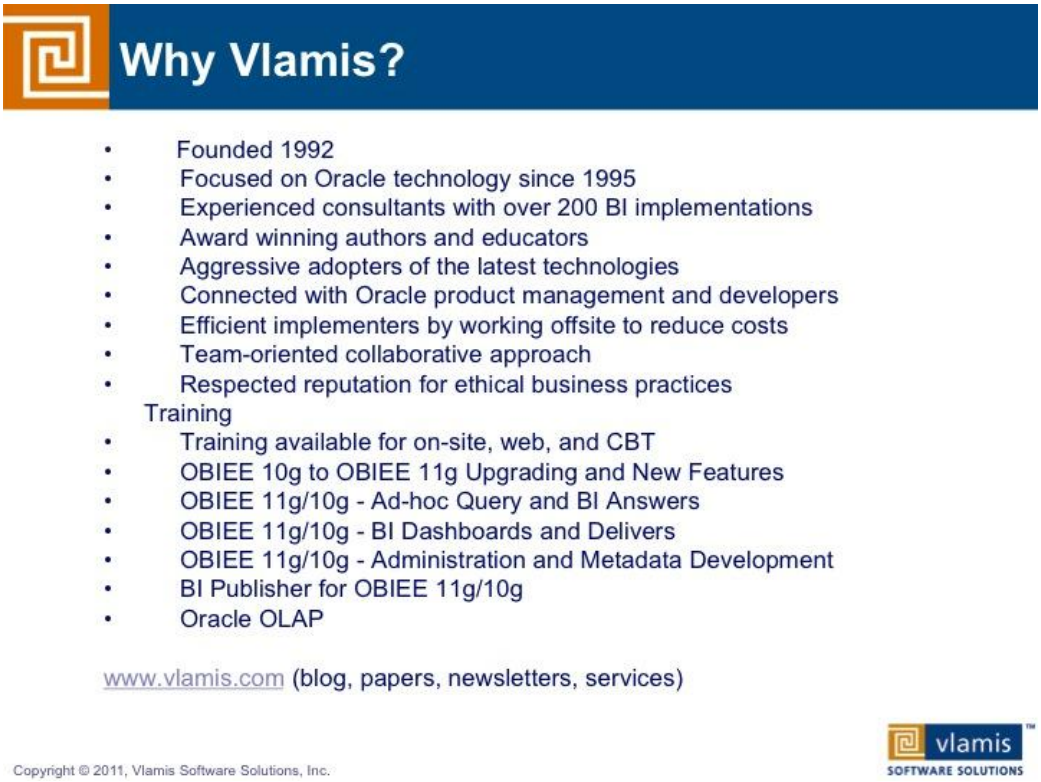
Oracle BIEE 11g Report and Dashboard Hands On

The Oracle BI Answers and Dashboards are the reporting components of the Oracle Business Intelligence environment.

This Hands on will consist of 2 1 hour sessions covering the following:

Part One
Overview of What's New
The New Analysis Look and Feel
Answers – New Features
  Lesson #1 Working with New Column Types
Graphs New Features
  Lesson #2 Working with New Graphs
Part Two
Using Maps – A whole new world!
  Lesson #3 – Using Maps
Prompts – New Features
  Lesson #4 Working with Prompts
Dashboards Putting it All Together
  Lesson #5 Building Dashboards



OBIEE 11g Architecture

What has changed?

- Weblogic replaces OC4J and OAS
- Security is now done with Weblogic
- Servers now stay up!
- RPD and Webcat management done in Enterprise Manager (Weblogic)
- Can now setup and administrate shared servers

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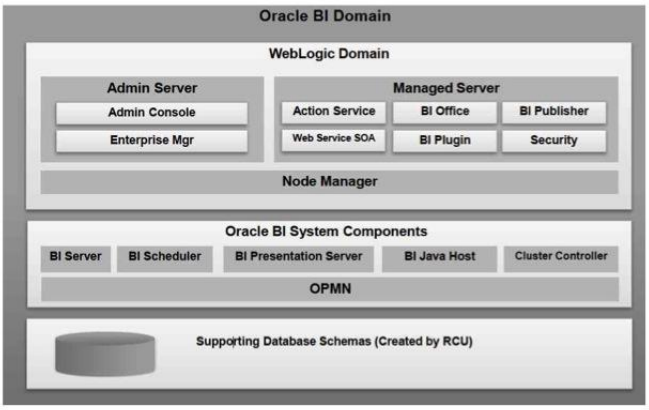
OBIEE 11g Architecture



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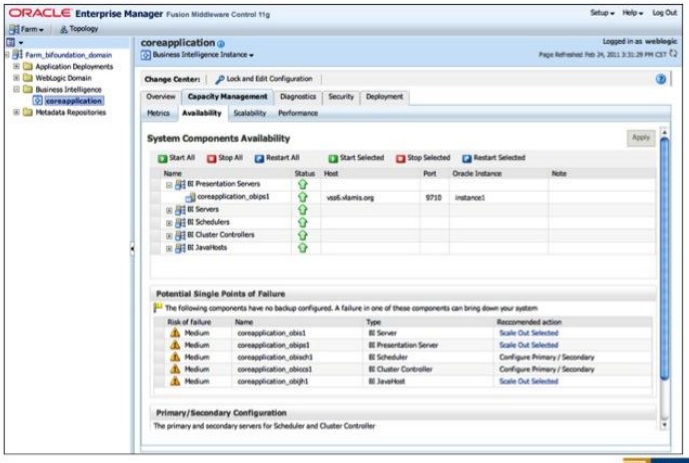
Enterprise Manager 11g



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New Answers, Dashboards and BI Publisher Features

New Features

- Unified Framework
- Column Types
  - Interaction
  - Selection steps
  - Groups
  - Calculated Items
- Unified Prompting
- New Graph Features
- Maps
- BI Publisher Integration and Web Editor

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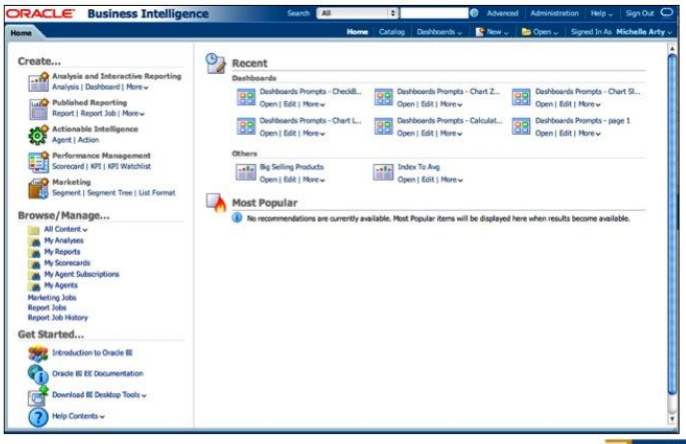
New Home Page



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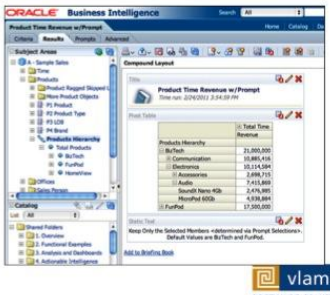
Answers 11g Overview

- 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 Prompts
- New dashboard controls
- New gauge types and graphics



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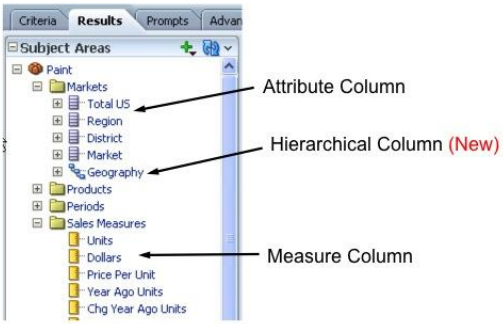
OBIEE Column Types



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Lesson 1 – Using the New Hierarchical Columns
Exercise 1a: Creating a query

In this lesson, you will

1. Create a simple query in Answers
2. Apply filters to the query
3. Format the query

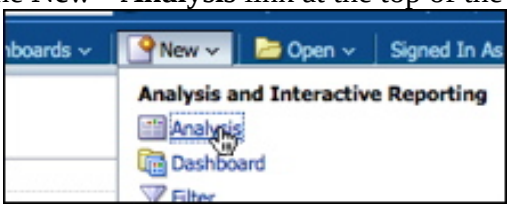
Use your browser to reach **http://50.16.24.214:9704/analytics**, and enter **studentXX** (ex. student01) as the username where XX is the ID given on the first page of this document. The password will be shown on the overhead or given to you by the instructor.

Scenario

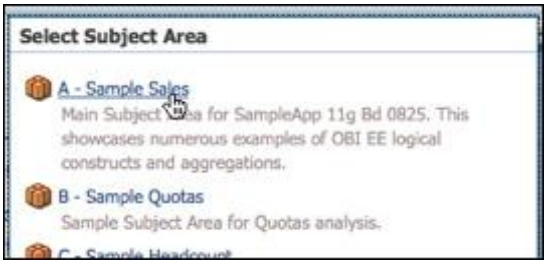
Build an Analysis that will show Revenue by Office by Time. The Offices Total value should be the aggregate of all Companies but only display the Companies that have Revenue greater than $5,100,000 for year 2008.

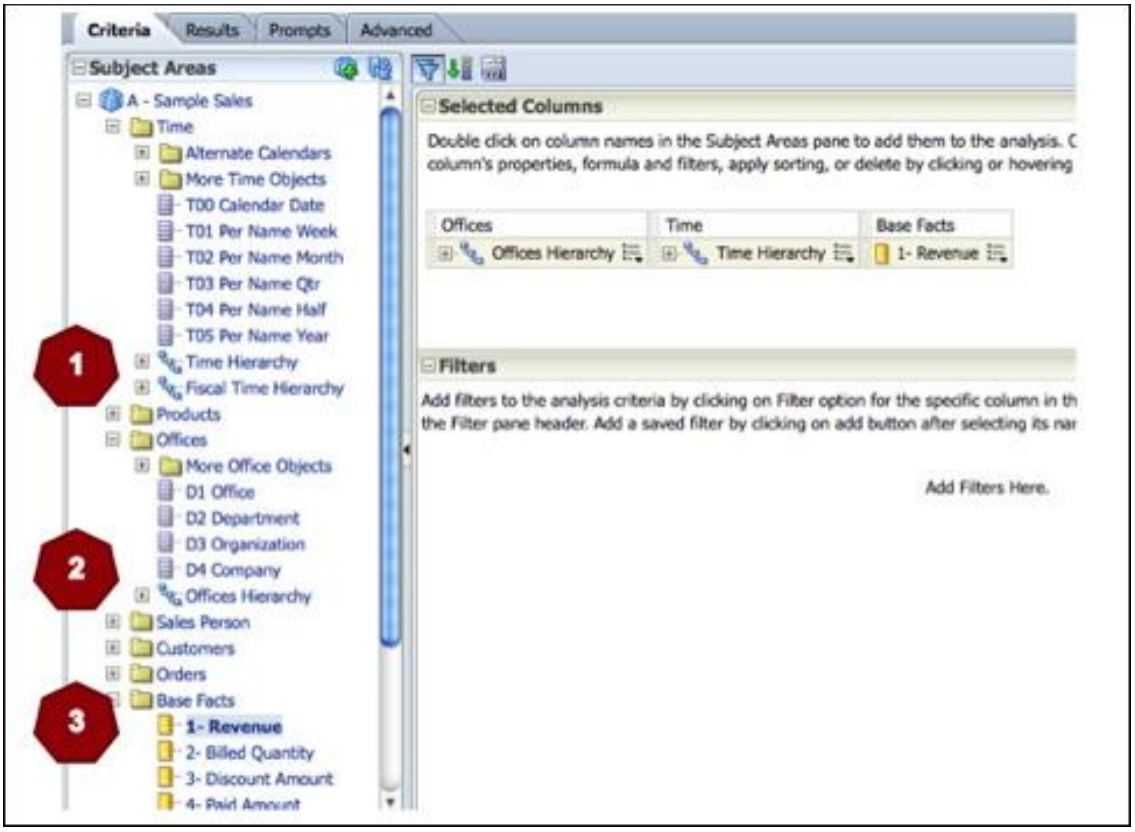
Create a Query

Click the **New->Analysis** link at the top of the screen to navigate to the Answers start page.



Click on the **Global** subject area link.

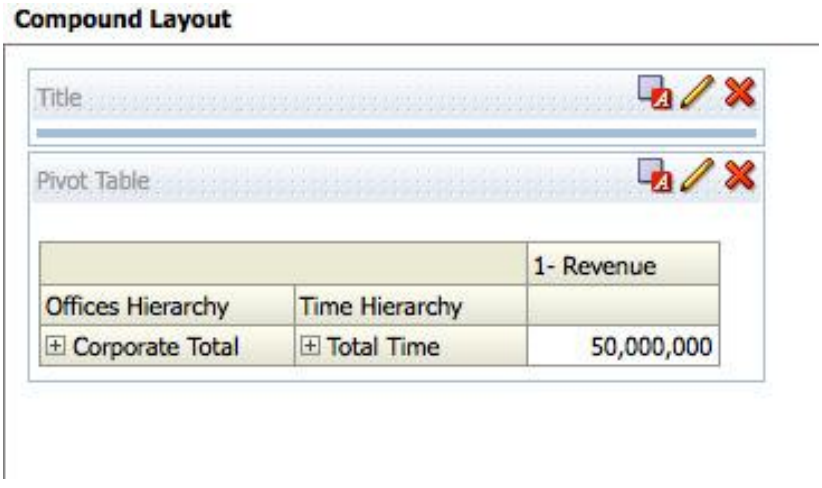




1. In the left-hand selection pane of the Answers interface, click the Plus ⊞ icon next to **Time Dimension** to drill down and see the columns associated with the **Time** dimension. Click the **Time Hierarchy** column to add it to your query criteria, which appears in the right pane.

2. Click the Plus ⊞ icon next to **Offices Dimension** to drill down and see the columns for the Offices dimension. Click the **Offices Hierarchy** column to add it to your query criteria.

3. Finally, drill on **Base Facts** and add the **Revenue** column. Click on the Results Tab. Your query should look like this:

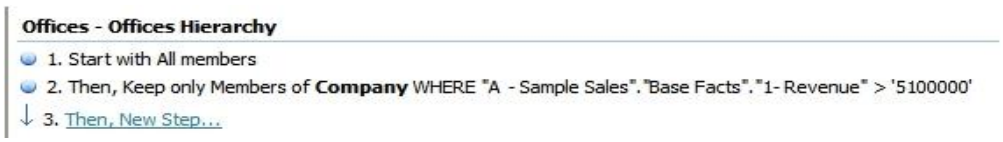


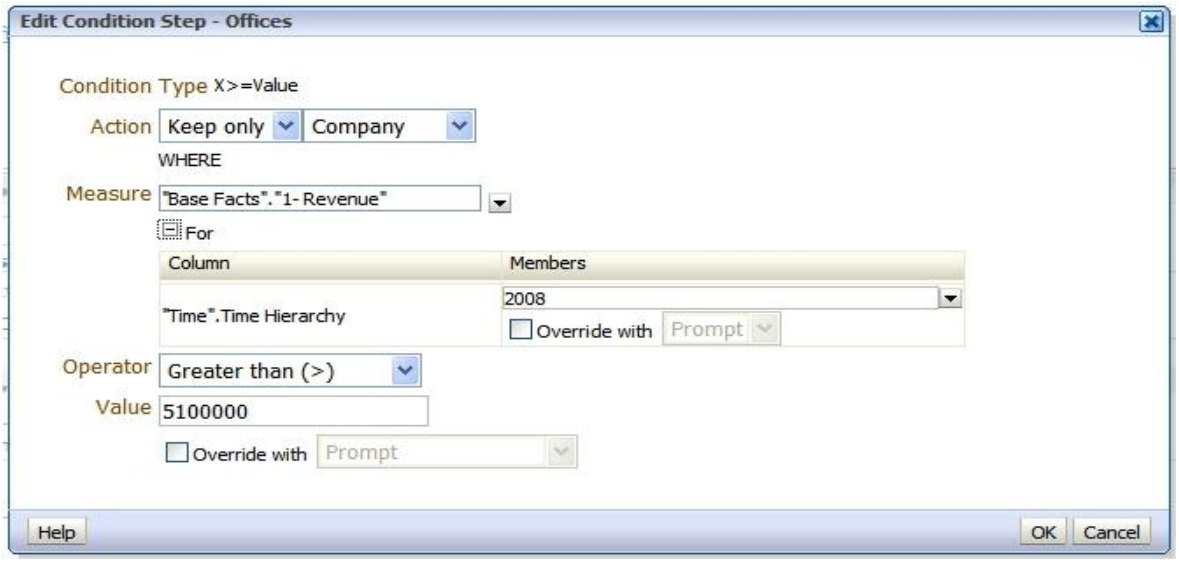
Filtering Data

Exercise 1b:Using Selection Steps

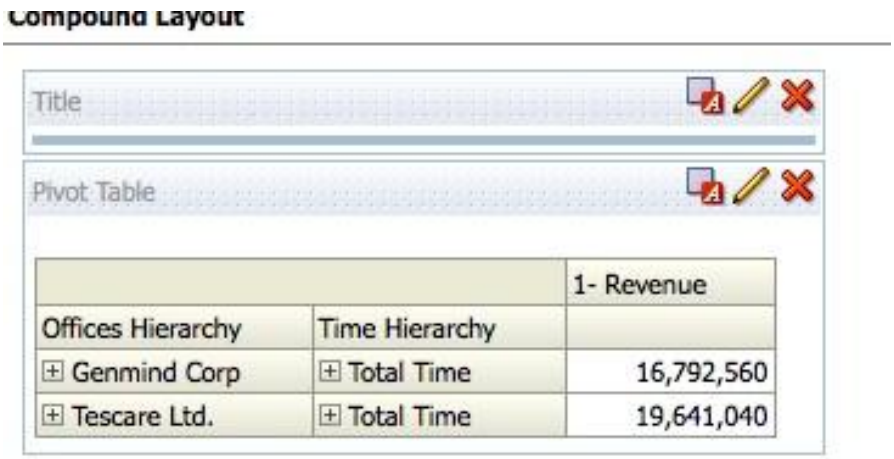
In addition to traditional Filters OBIEE11g now has Selection Steps. We will use Selection steps to chose the correct Offices to display.

Under Office Click "Then, New Step" and add a Condition Step with the following information:





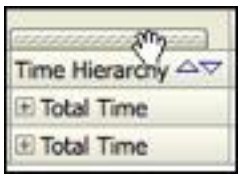
Your query should look like this:



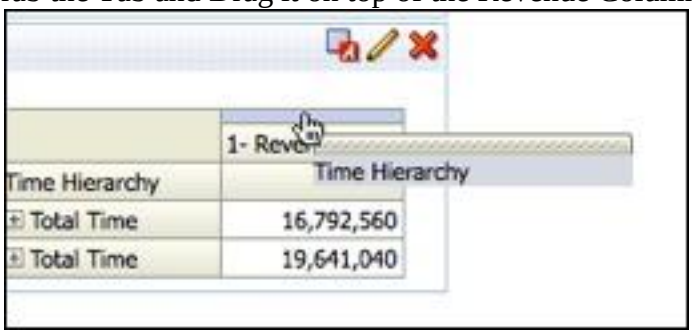
Exercise 1c: Pivot Table and Hierarchies

Now lets work with the Pivot Table. One new Feature of is the ability to Drag and Drop columns on Pivot Tables.

If you highlight the Time Hierarchy column you will see a Grey Tab Show up (and the mouse pointer will change to a hand):



Now Grab the Tab and Drag it on top of the Revenue Column



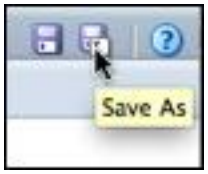
The display will now show this:

Click the + next to Total Time to Expand the Time Dimension and your Display should look like this:

	⊟ Total Time			
		⊞ 2008	⊞ 2009	⊞ 2010
	1- Revenue	1- Revenue	1- Revenue	1- Revenue
Offices Hierarchy				
⊞ Genmind Corp	16,792,560	5,470,146	5,036,331	6,286,083
⊞ Tescare Ltd.	19,641,040	6,455,758	5,963,833	7,221,449

You can Expand the Offices and you will see that they stay within the same column. Expanding The Time will add columns but they are linked to the parentage and can expand and contract.

Save the Query as Lesson1 so we can use it in the next lesson.



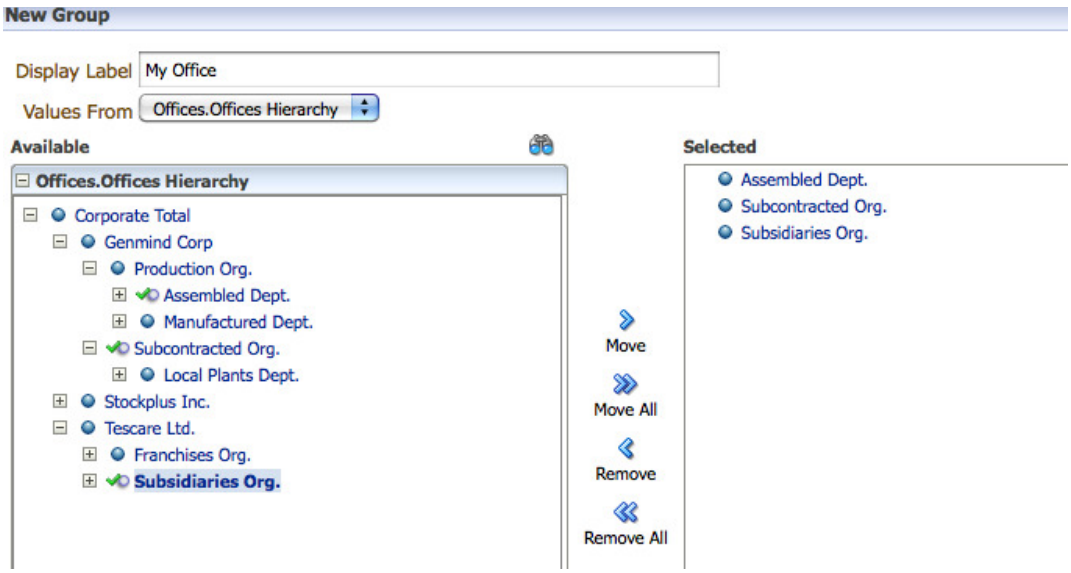
Exercise 1d: Grouping

Next we will use the new Group Function to create an Aggregate Group

- Return to the **Results** tab.
- At the top of the area in the menu bar click on **New Group**

This you to create a separate aggregate group from selected members within a hierarchy.

- Give the Group a name (My Office).
- Select Production Org → Assembled Dept, Subcontracted Org and Tescare → Susidiaries Org.



- Click **Done**

Expand My Office and your screen should look like this:

	Total Time			
		2008	2009	2010
	1- Revenue	1- Revenue	1- Revenue	1- Revenue
Offices Hierarchy				
Genmind Corp	16,792,560	5,470,146	5,036,331	6,286,083
Production Org.	10,399,704	3,369,506	3,071,684	3,958,514
Subcontracted Org.	6,392,856	2,100,640	1,964,647	2,327,568
Tescare Ltd.	19,641,040	6,455,758	5,963,833	7,221,449
Franchises Org.	9,145,845	2,922,692	2,885,277	3,337,877
Subsidiaries Org.	10,495,195	3,533,066	3,078,556	3,883,572
My Office	19,425,604	6,449,148	5,832,312	7,144,144
Assembled Dept.	2,537,553	815,442	789,108	933,003
Subcontracted Org.	6,392,856	2,100,640	1,964,647	2,327,568
Subsidiaries Org.	10,495,195	3,533,066	3,078,556	3,883,572

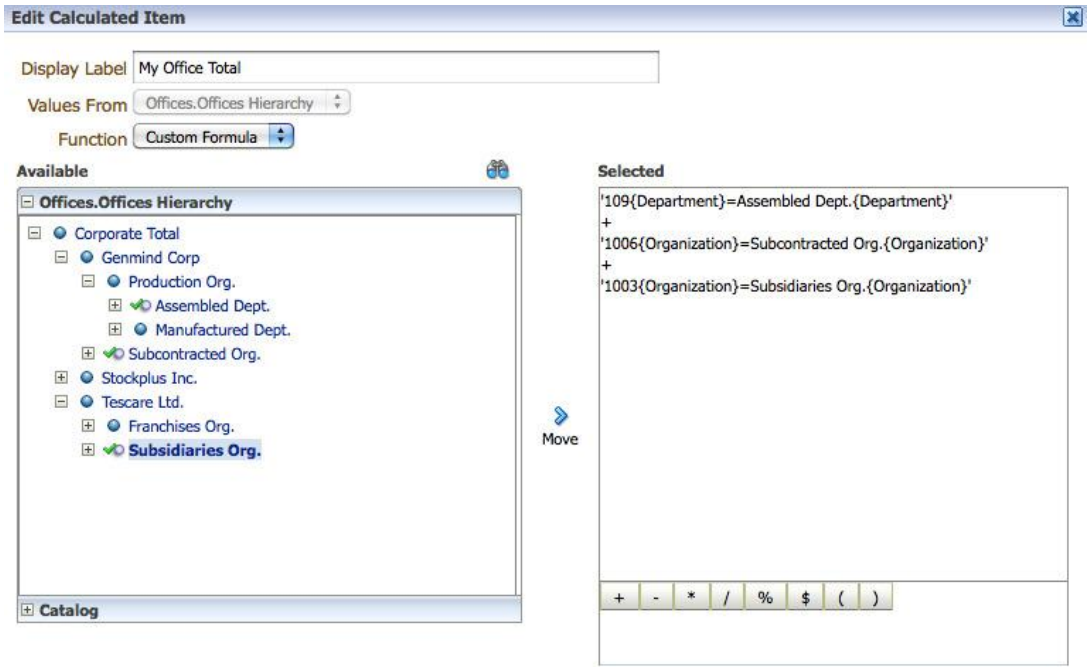
Exercise 1e: Calculated Members

Next we will use the new Calculated Item Function to create an Custom Aggregate

- Return to the **Results** tab.
- At the top of the area in the menu bar click on **New Calculated Item**

This you to create a separate aggregate from selected members within a hierarchy.

- Give the Item a name (My Office Total).
- Select Production Org → Assembled Dept, Subcontracted Org and Tescare → Susidiaries



Notice that the Select looks different. It is showing the calculations instead of just the members selected you will need to put + to add each member

- Click **OK**
  The Results should look like this:

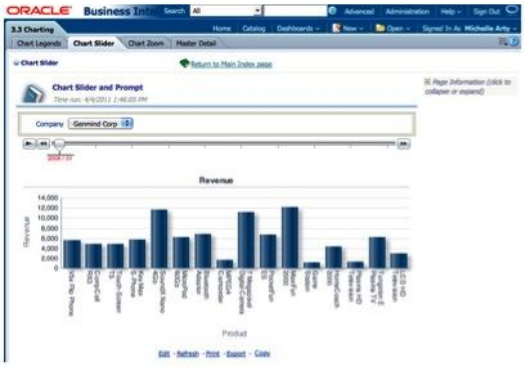
	Total Time			
		2008	2009	2010
	1- Revenue	1- Revenue	1- Revenue	1- Revenue
Offices Hierarchy				
Genmind Corp	16,792,560	5,470,146	5,036,331	6,286,083
Production Org.	10,399,704	3,369,506	3,071,684	3,958,514
Subcontracted Org.	6,392,856	2,100,640	1,964,647	2,327,568
Tescare Ltd.	19,641,040	6,455,758	5,963,833	7,221,449
Franchises Org.	9,145,845	2,922,692	2,885,277	3,337,877
Subsidiaries Org.	10,495,195	3,533,066	3,078,556	3,883,572
My Office	19,425,604	6,449,148	5,832,312	7,144,144
Assembled Dept.	2,537,553	815,442	789,108	933,003
Subcontracted Org.	6,392,856	2,100,640	1,964,647	2,327,568
Subsidiaries Org.	10,495,195	3,533,066	3,078,556	3,883,572
My Office Total	19,425,604	6,449,148	5,832,312	7,144,144

Notice that the Calculated Item is not Drillable but the Group is Drillable. The Total for both are the same.

OBIEE 11g Charts and Graphs

New Graphs and Visualizations

- Additional Graph Features implemented
- Sliders, Zoom and Legends
- Master Detail links



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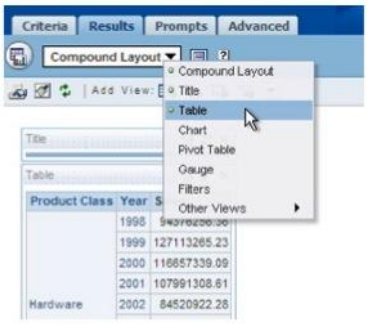
The View Selector

- Reports in Oracle Answers can have multiple Views associated with them
- Default views are Table, Title and Compound
  - Table view is a simple listing
  - Title view provides a title, subtitle and icon
  - Compound view combines multiple views
- Compound view is normally the view displayed in the dashboard



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There are several types of Graphs Available:

- Area
- Horizontal Bar
- Bubble
- Vertical Bar
- Line
- Line-Bar Combo
- Pareto
- Pie
- Radar
- Scatter
- Step

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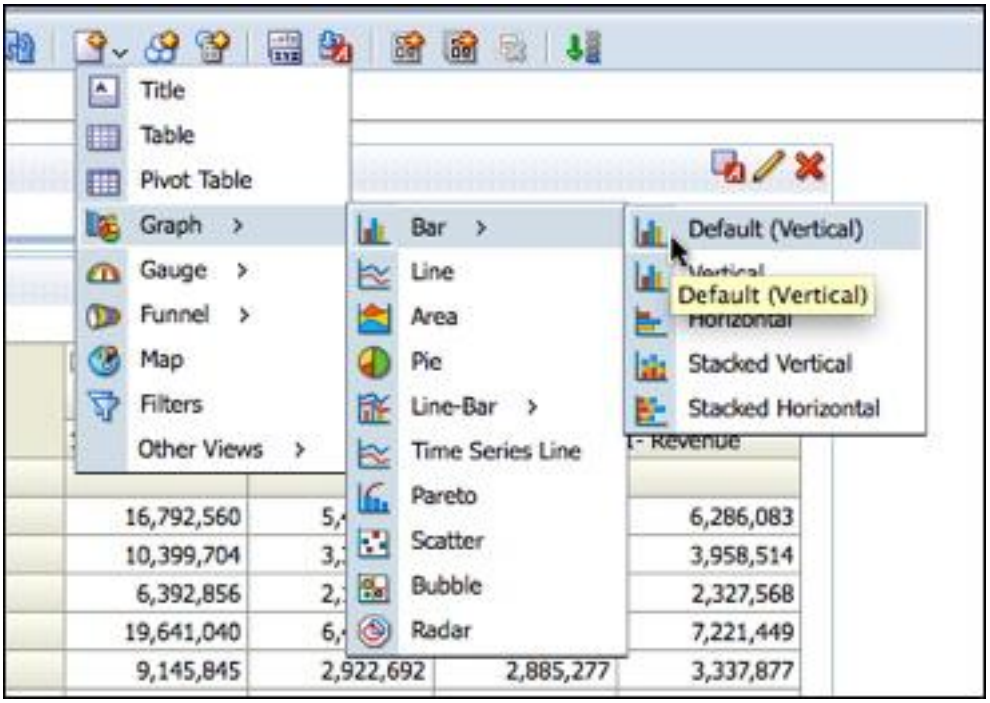
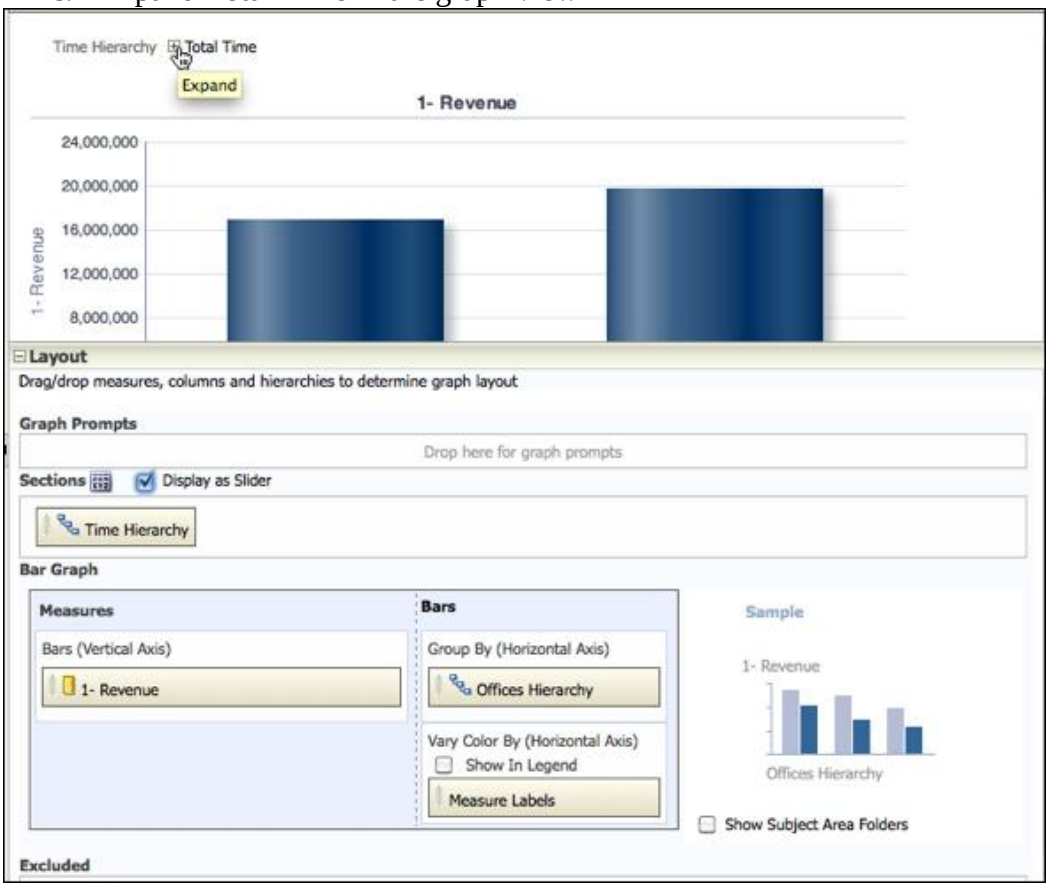
Lesson 2 – Using the New Graph Features
Exercise 2a: Graph Slider

1. Go to Selection Steps and Delete the My Office Group and My Office Total Calc

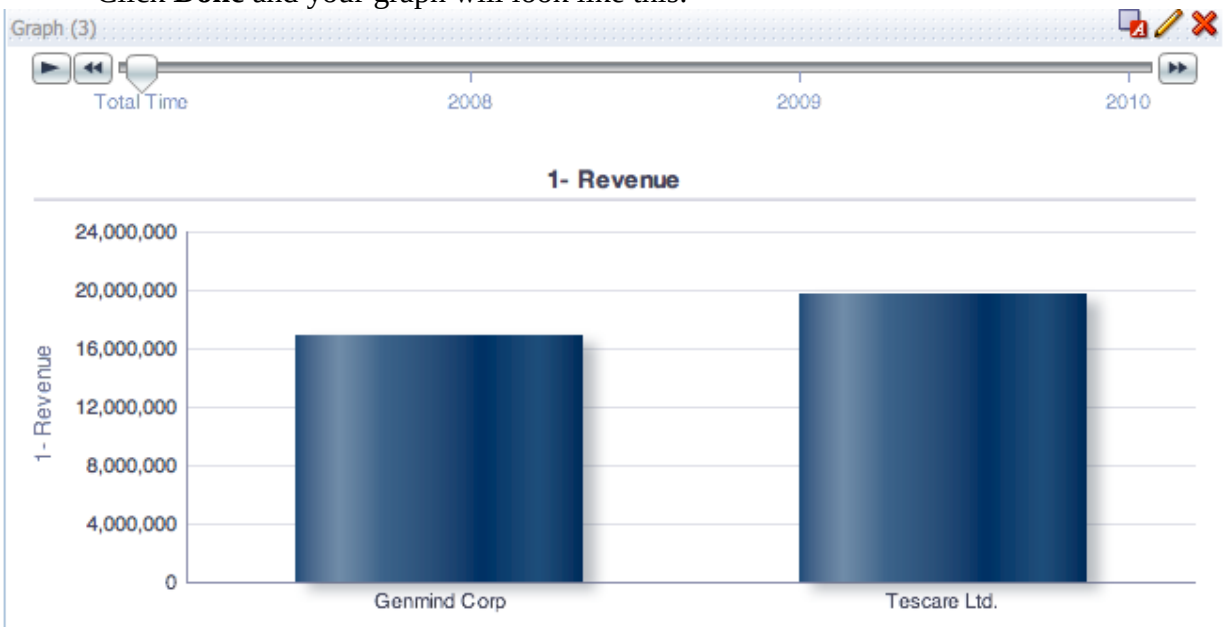
2. Working with the same query, select new View → Graph → Bar → Default.



3. Edit the Graph and Perform the following:
    a. Move Time Hierarchy under Sections
    b. Check "Display as Slider" in the Sections
    c. Expand Total Time in the graph view



Click **Done** and your graph will look like this:

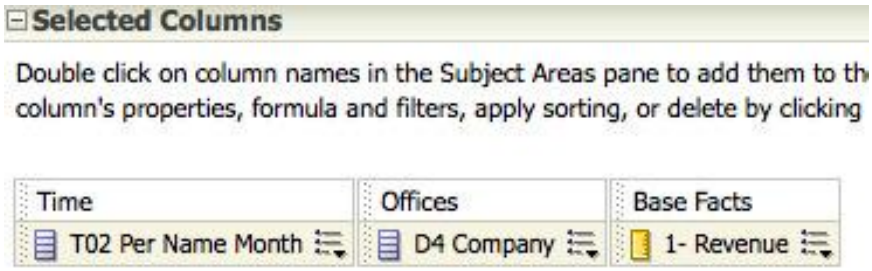


Click the Play button on the slider or move the slider to display results for various years.

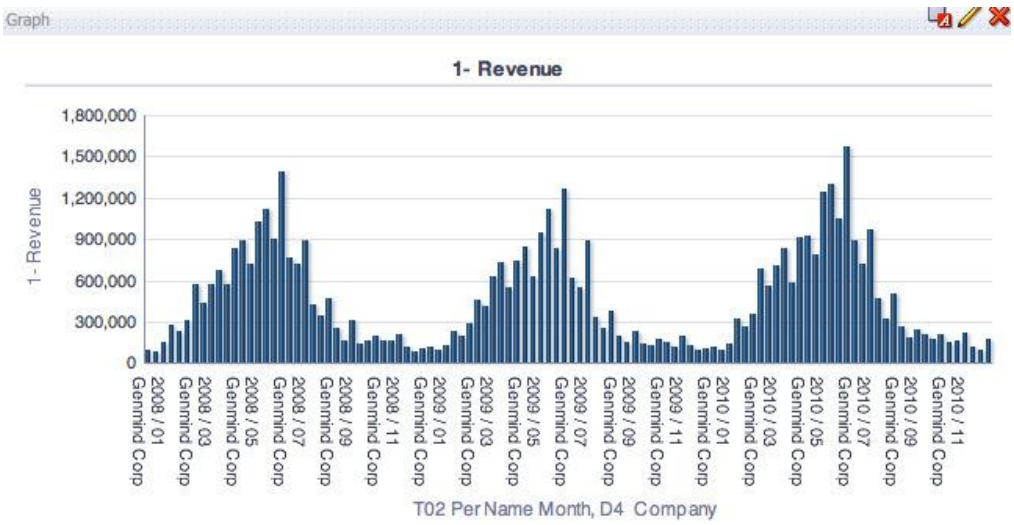
Save this as Lesson 2A

Exercise 2b: Graph Zooming

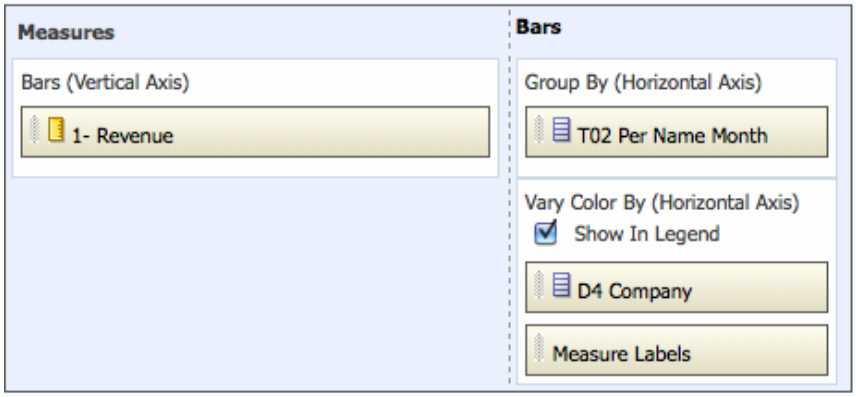
1. Create a new Analysis using the columns shows below:



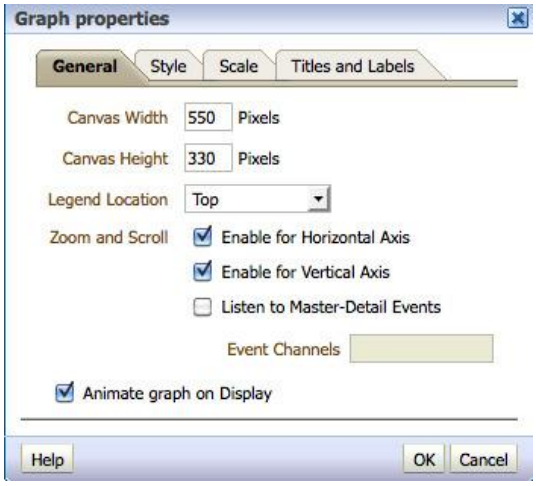
2. Create a new View → Graph Vertical Stacked Bar



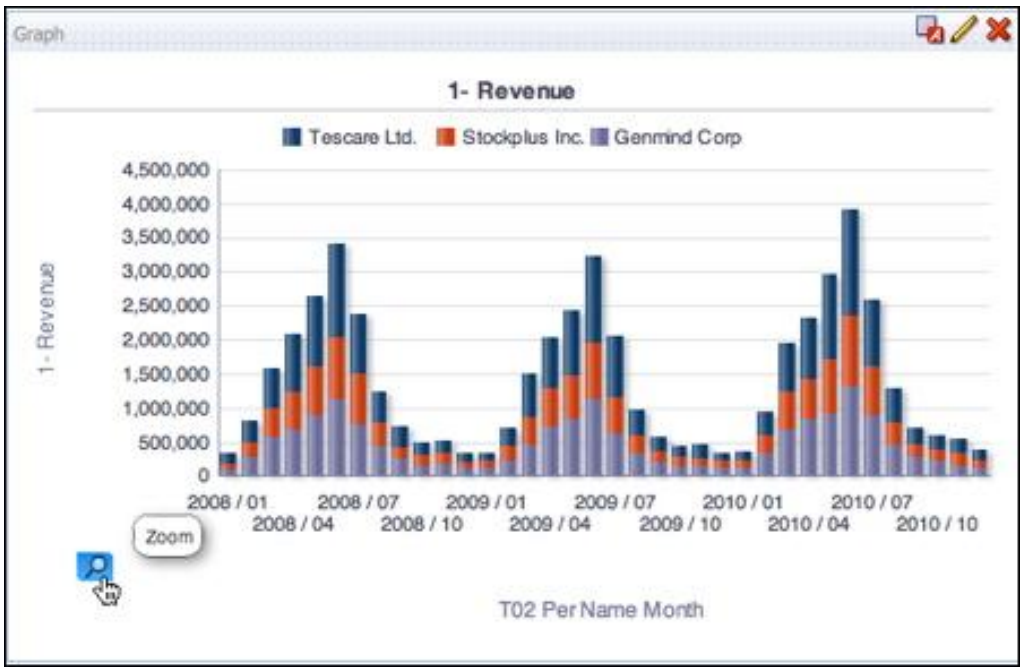
3. Edit the Graph and set Company into the Legend



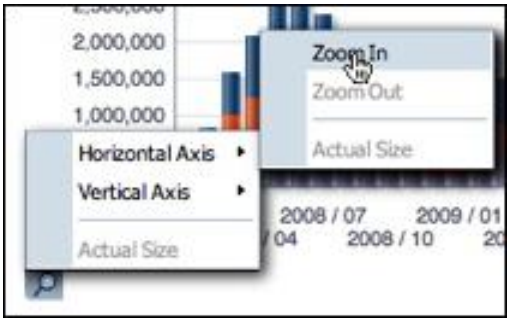
4. Now Edit the Graph Properties and set the following:
    a. Zoom Enabled for Horizontal and Vertical Axis
    b. Legend on the Top
    c. Canvas Width to 550



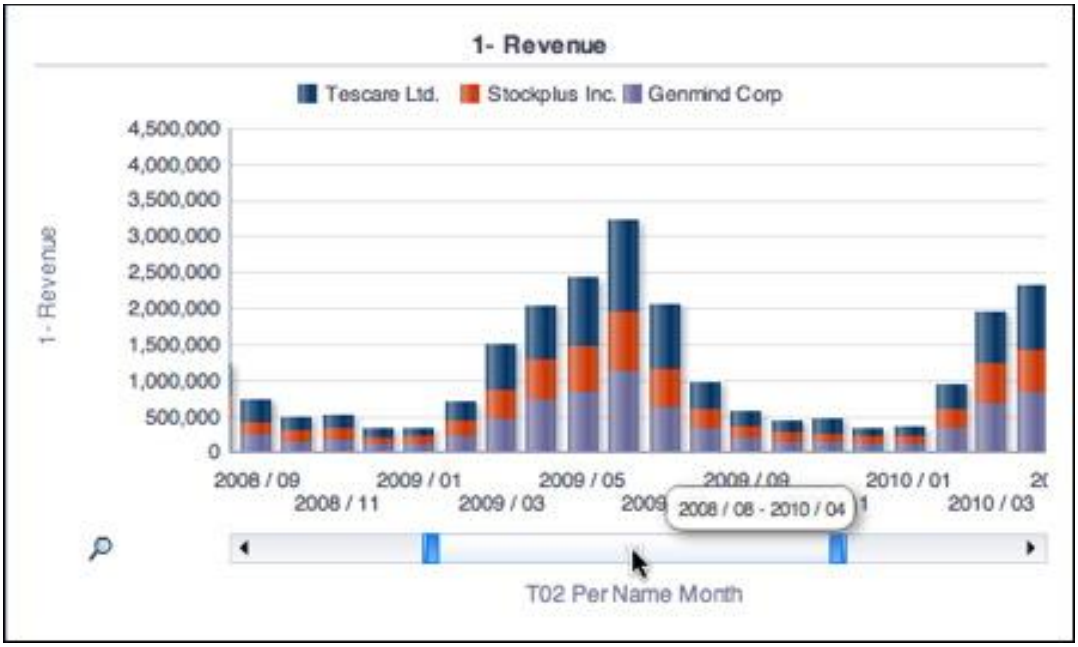
5. Click OK and your Graph should look like this:



6. Click on the Zoom icon and zoom into the Horizontal Axis



7. You can now slide for more detail



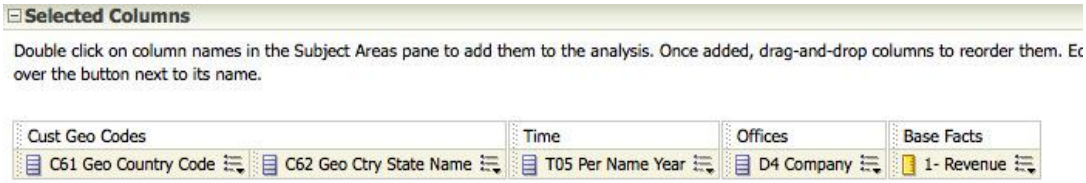
Note: You can also adjust the size of the slider bar by clicking and adjusting the "Blue" ends of the slider.

Save this as Lesson 2B

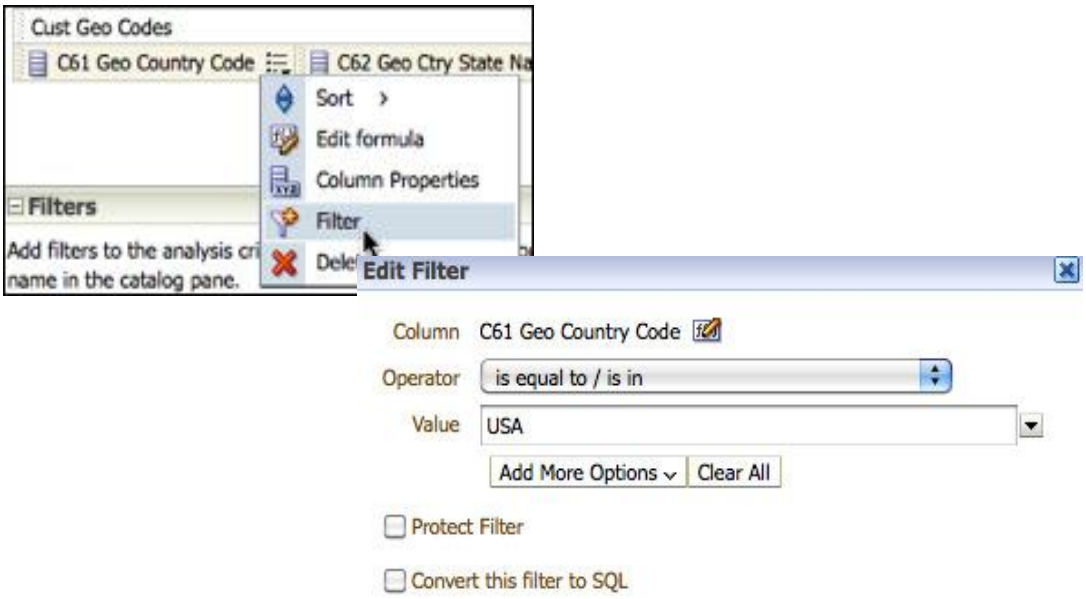
Lesson 3 – Maps
Exercise 3a: Creating a Map View

1. To create a Map view we must first start with data that has some geocoded columns. The Sample data has several columns that can be used. We first create a query with the following columns:

   C61 Geo Country Code, C62 .. State Name (from Customers → Cust Geo Codes) then T05 Name Year, D4 Company and Revenue

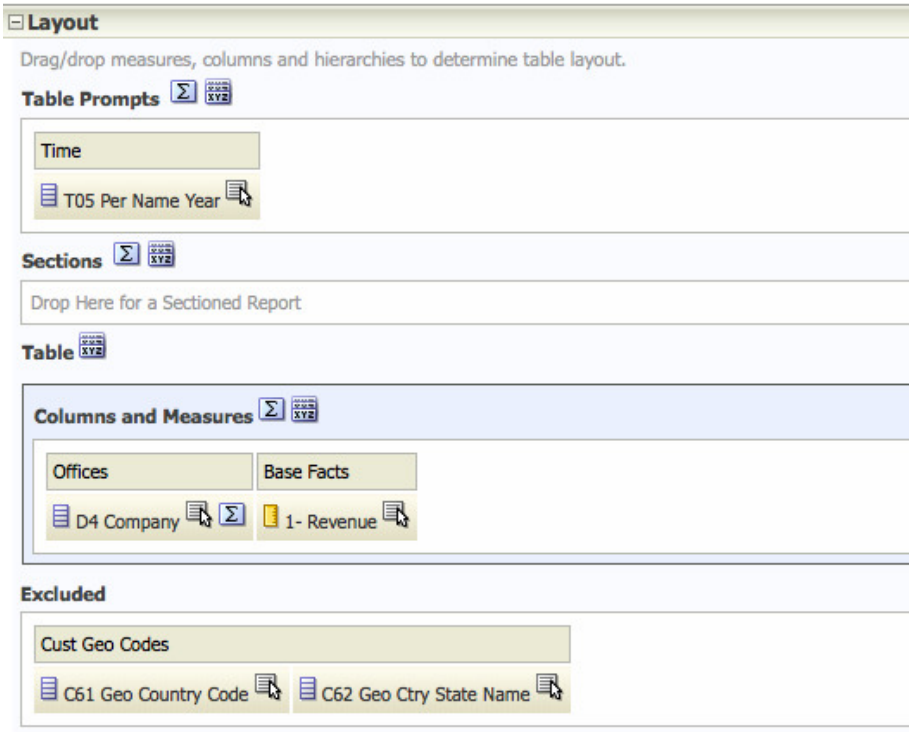


2. Add a Filter for Country Code where the Value is USA

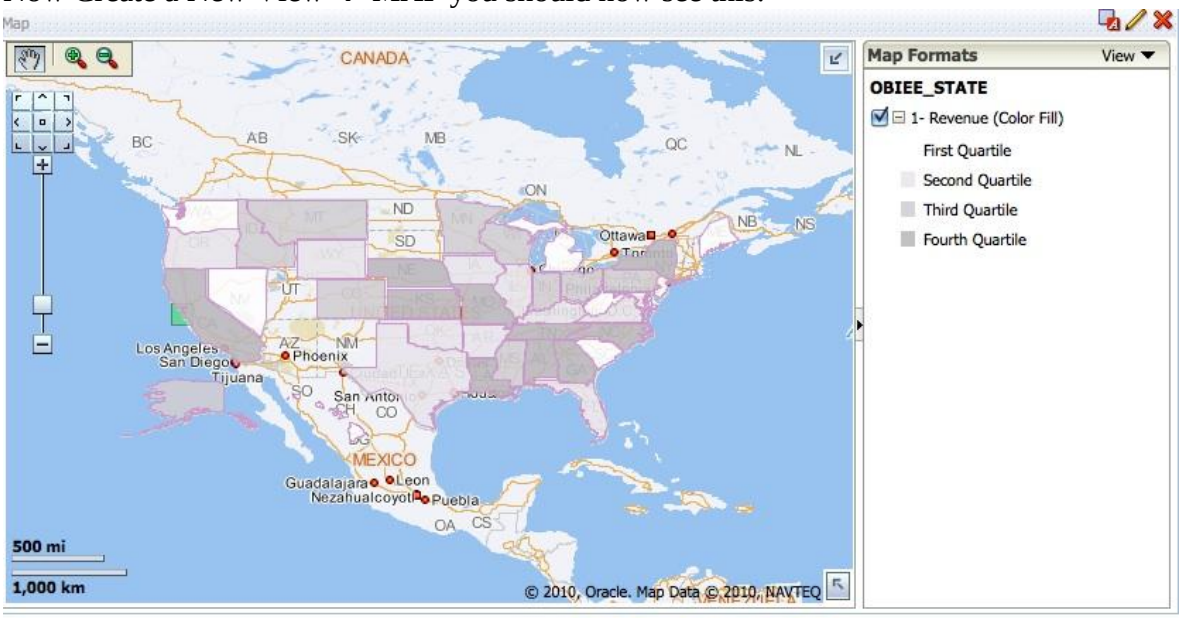


3. Edit the Table with the following settings:

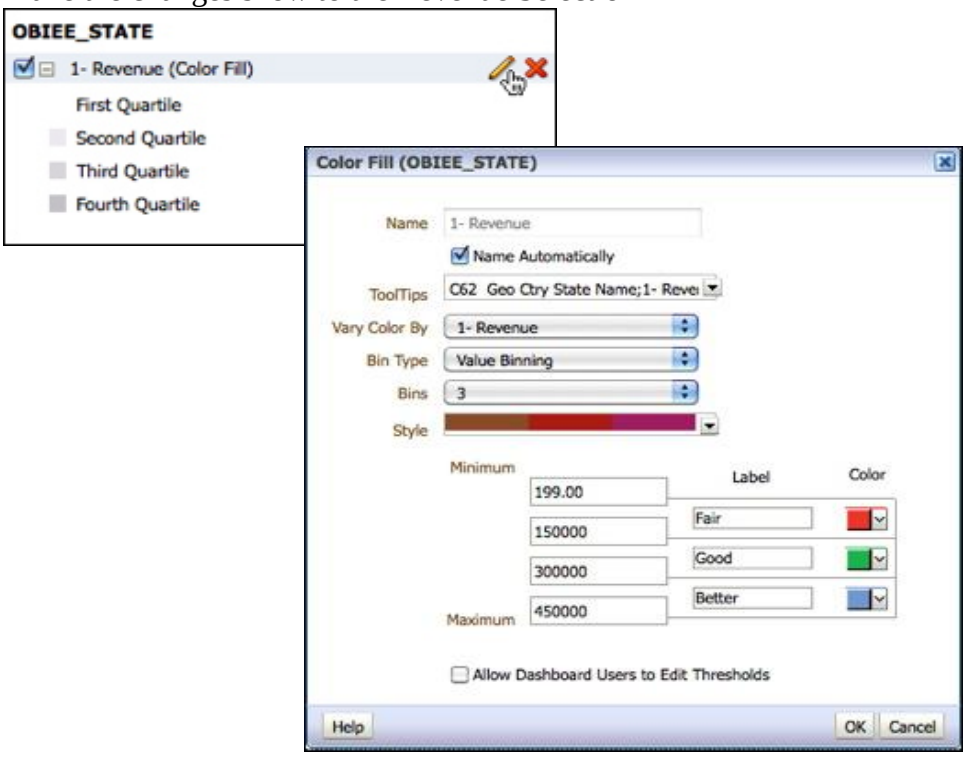
D4 Company	1- Revenue
Genmind Corp	1,829,536
Stockplus Inc.	1,570,278
Tescare Ltd.	1,504,166



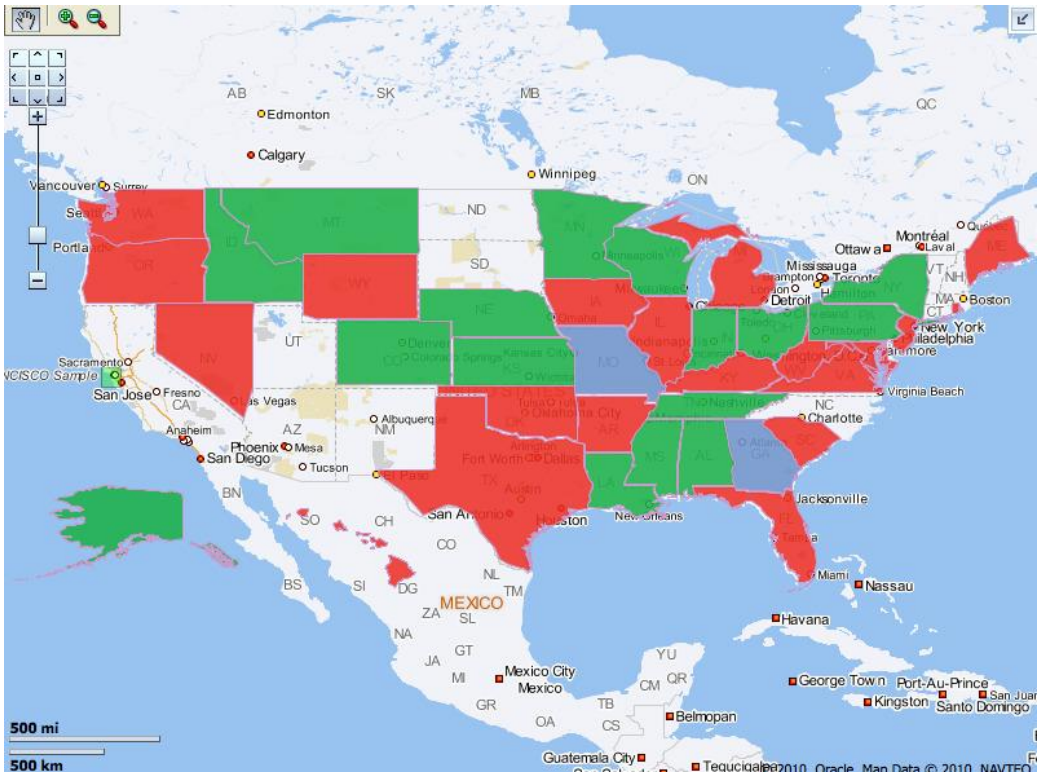
4. Now Create a New View → MAP you should now see this:



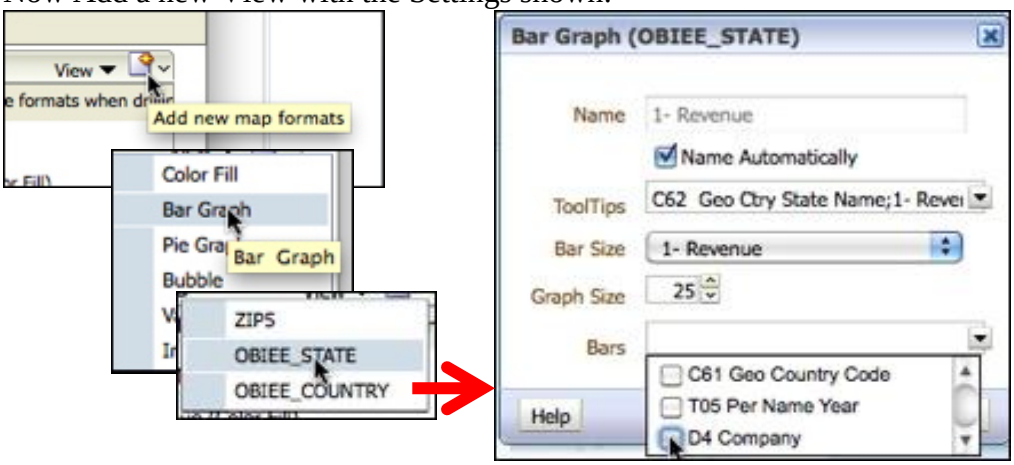
5. Click on the Edit (pencil icon)
6. Make the changes show to the Revenue Selection



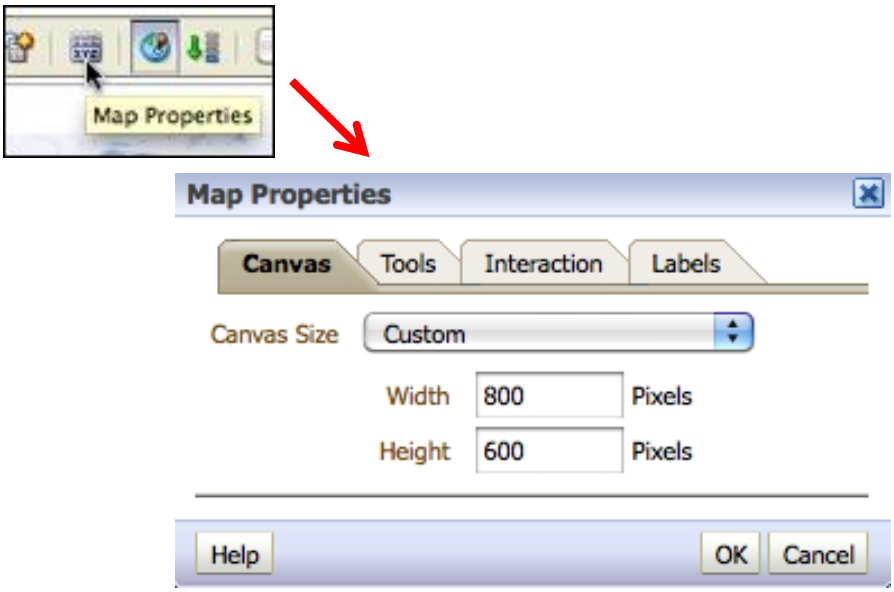
7. Click OK and your color Coding should be shown.



8. Now Add a new View with the Settings shown:

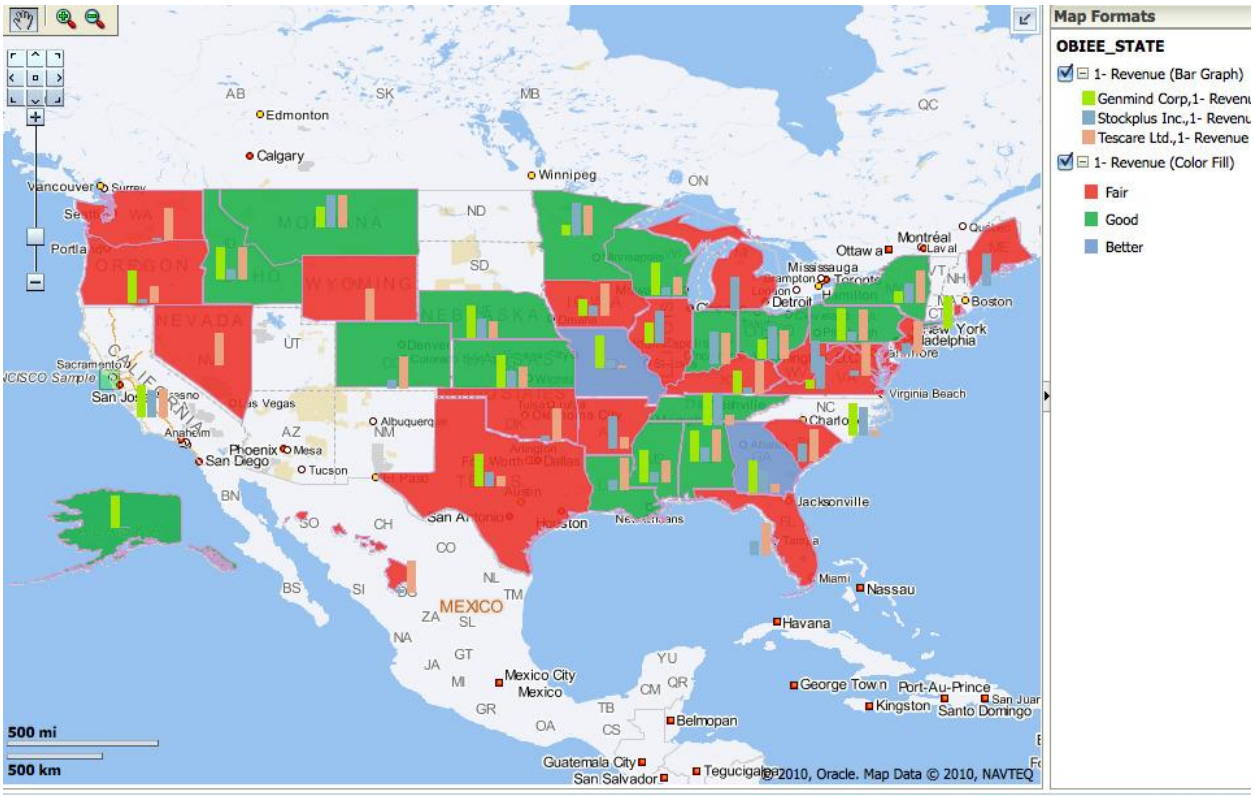


9. Now you will see Bar Charts on each of the States that have data. This represents the Revenue for Each Office within the State.
10. Last thing is to set the **Map Properties** to resize the Map



Hit OK and then you might want to zoom your map to better fill the page

11. Click **Done** to show your new Map

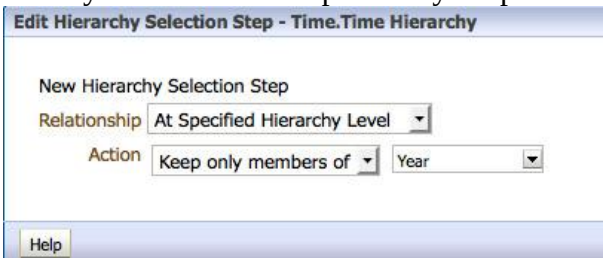


12. Save this as Lesson 3

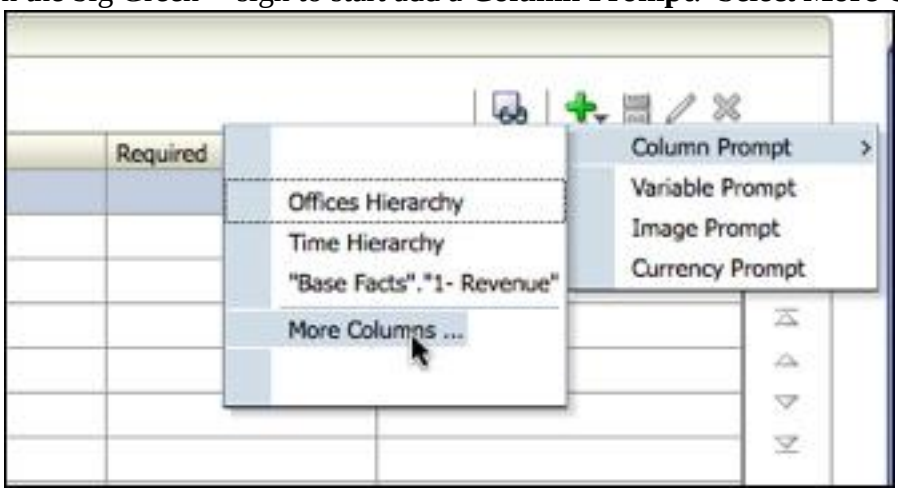
Lesson 4 – Prompts
Exercise 4a: Creating a Prompt

Prompts can be created for a particular Query or can be created as a standalone prompt for a Dashboard. First we will create a prompt tied to a query.

1. Go back into the **Home** page or **Catalog** and **Edit** the Lesson 1 Query
2. Modify the Selection Steps to only keep members of the YEAR level.

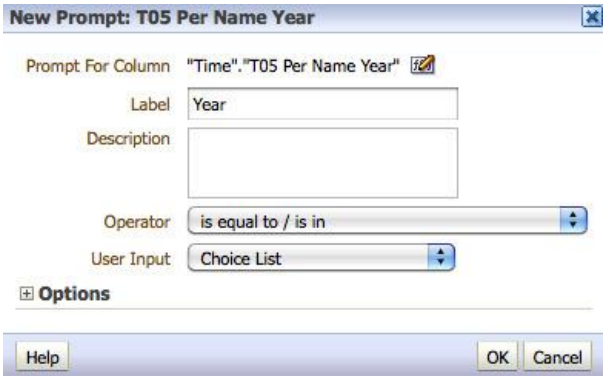


3. Now Click on the Prompts Tab. As you can see this screen is Different than OBIEE 10g.
4. Click on the big Green + sign to start add a **Column Prompt**. Select **More Columns**

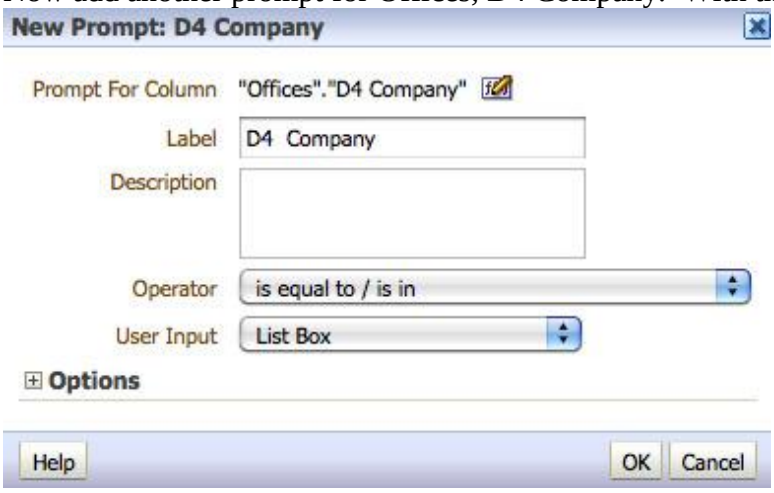


5. Expand the Time dimension and select T05 Per Name Year

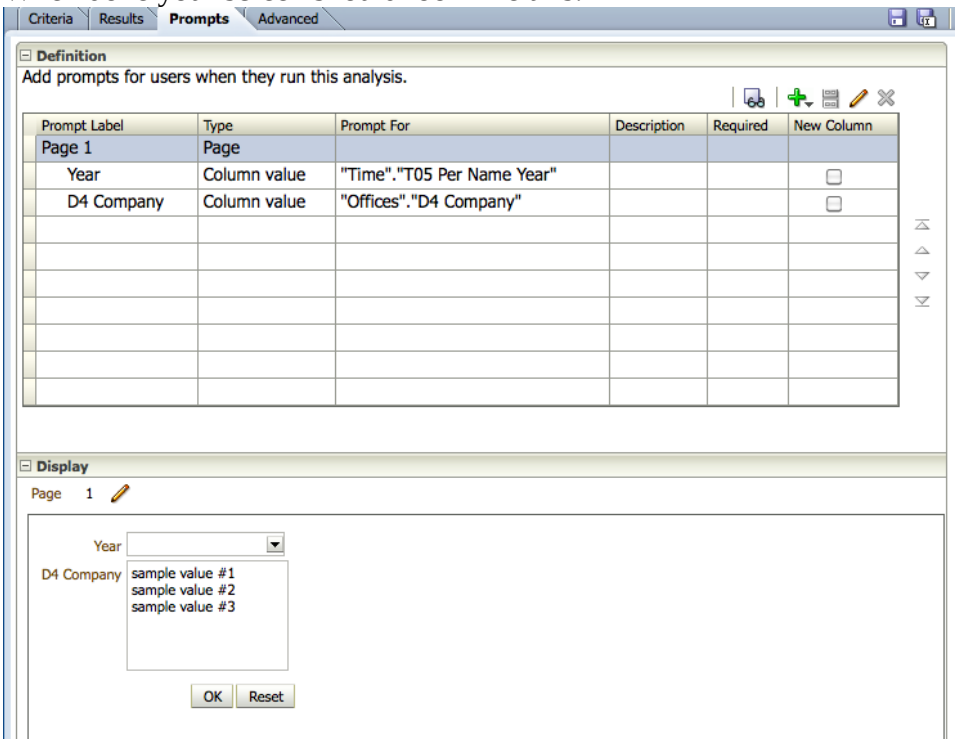
6. Click OK and the Prompt diagram will appear. Change the Label to "Year" and Click OK again.



7. Now add another prompt for Offices, D4 Company. With the User Input as a List Box.

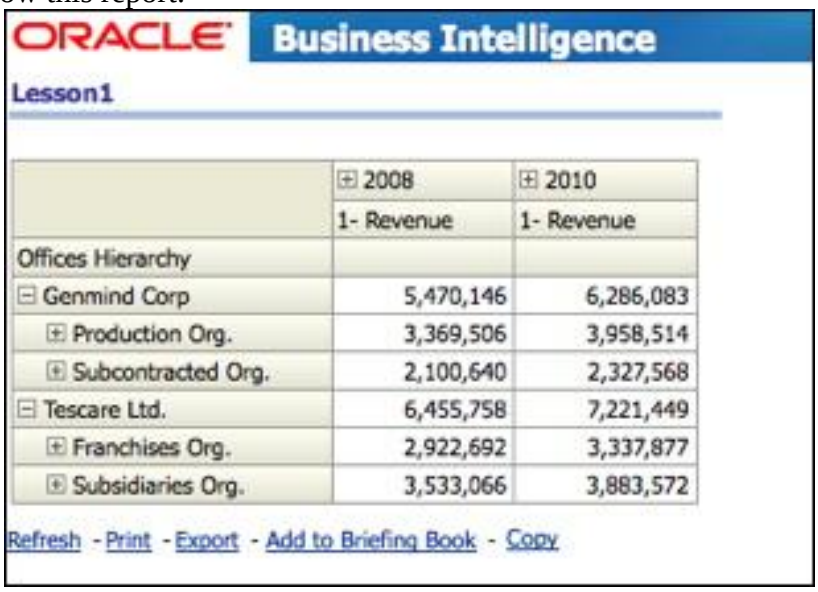


8. When done your screen should look like this:



Notice at the bottom of the screen you will see what the prompt will look like.

9. To test this click on the Preview Icon to preview the results. Use the Drop Down to select 2008 and 2010. Notice the ability to support multi-select in a combo box. Then Select **Genmind Corp** in the company selector and click on OK. Your screen should now show this report.



10. Click save to Lesson 4

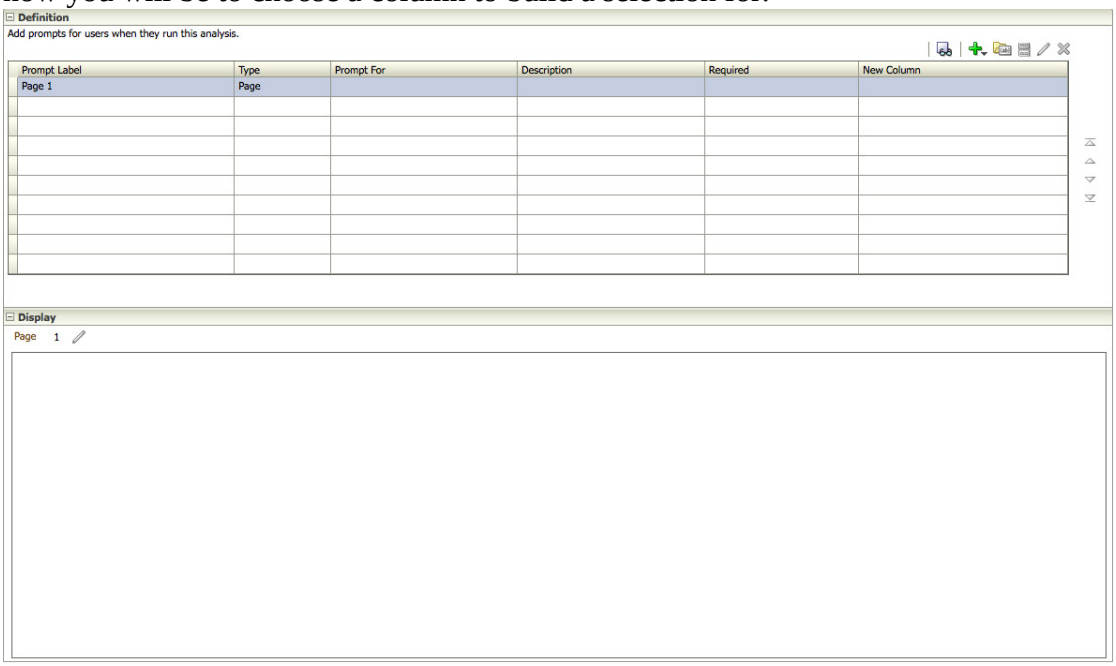
Exercise 4b: Creating a Dashboard Prompt

Now let's create a dashboard prompt.

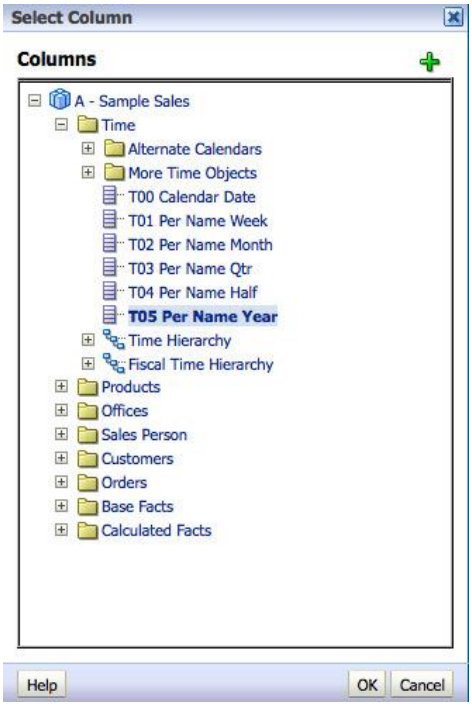
1. The steps involved in creating a Dashboard are the same as the query prompt it is just the starting place is different. For a Dashboard Prompt you first click on the New Link in the top menu and select Dashboard Prompt.

2. Unlike before will be asked to pick a Subject Area, Choose **A – Sample Sales**

3. Now you will see a blank Prompt Page. Just like before you click the Green Plus (+) and now you will be to choose a column to build a selection for.

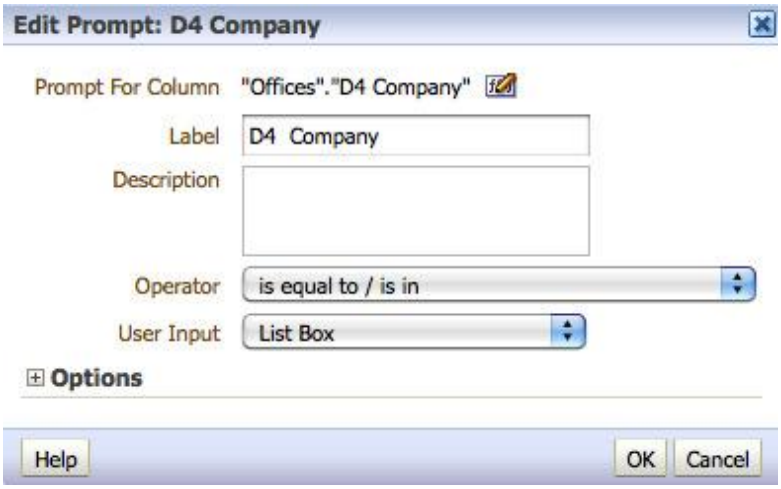


4. Expand time and Select T05 – Per Name Year



Click OK and OK on the next screen.

5. Now Create the Office Prompt just like the previous exercise (remember to set the User Input at List Box)



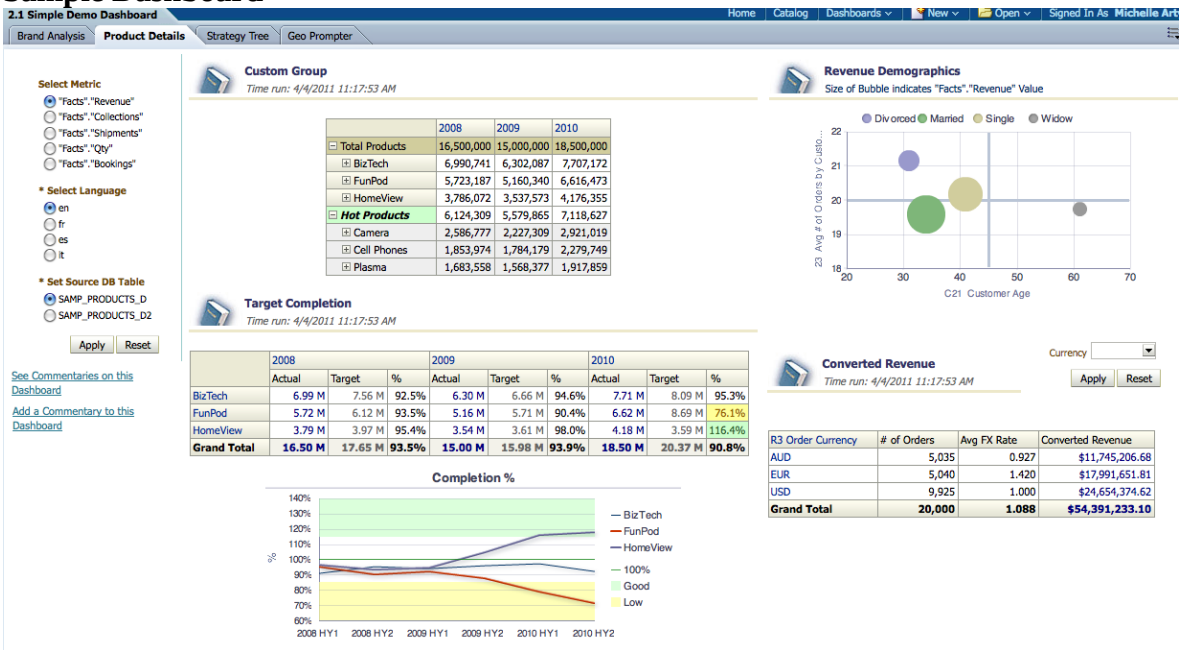
6. The prompt page should look just like the one from the previous exercise. Once you are sure it is correct Save the Prompt by Clicking on the Save Icon. Save as My Prompt.

7. That is all there is to creating a dashboard prompt.

Lesson 5 The Dashboard: Putting It All Together

Oracle BI EE dashboards allow you to combine many different types and sources of data in the same place, giving users snapshot views of whatever is important for running their business. The BI Answers queries that you built in this class are just one type of content that Oracle BI EE Dashboards can utilize. This screenshot shows an example of the many different content options available to you with Oracle BI EE Dashboards.

Sample Dashboard

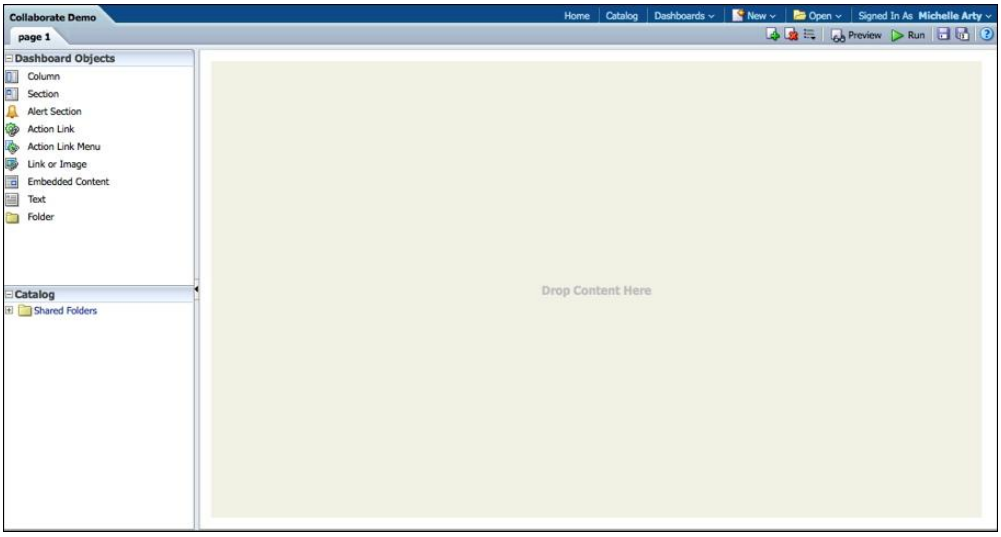


Exercise 5: Creating a Dashboard

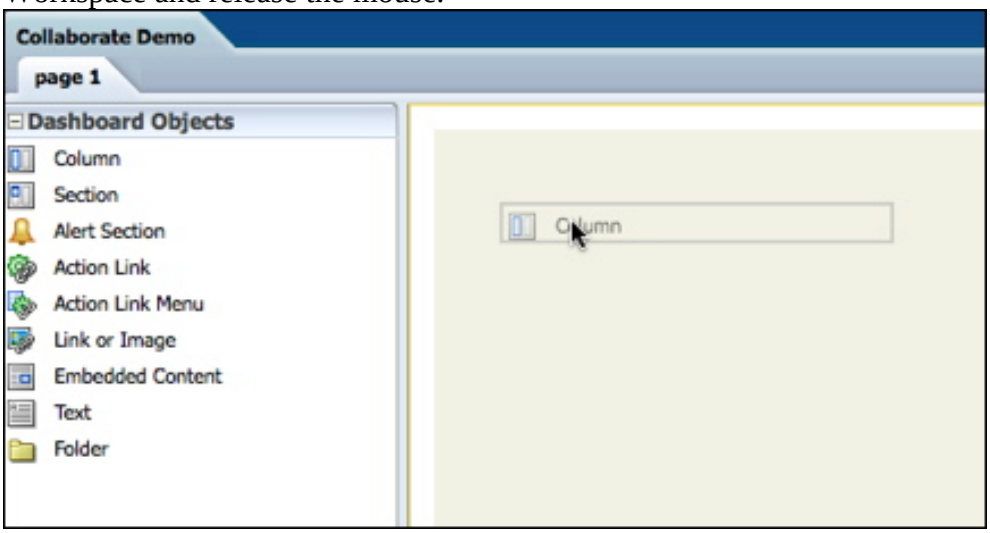
Now let's create a dashboard to store all the queries we just built.

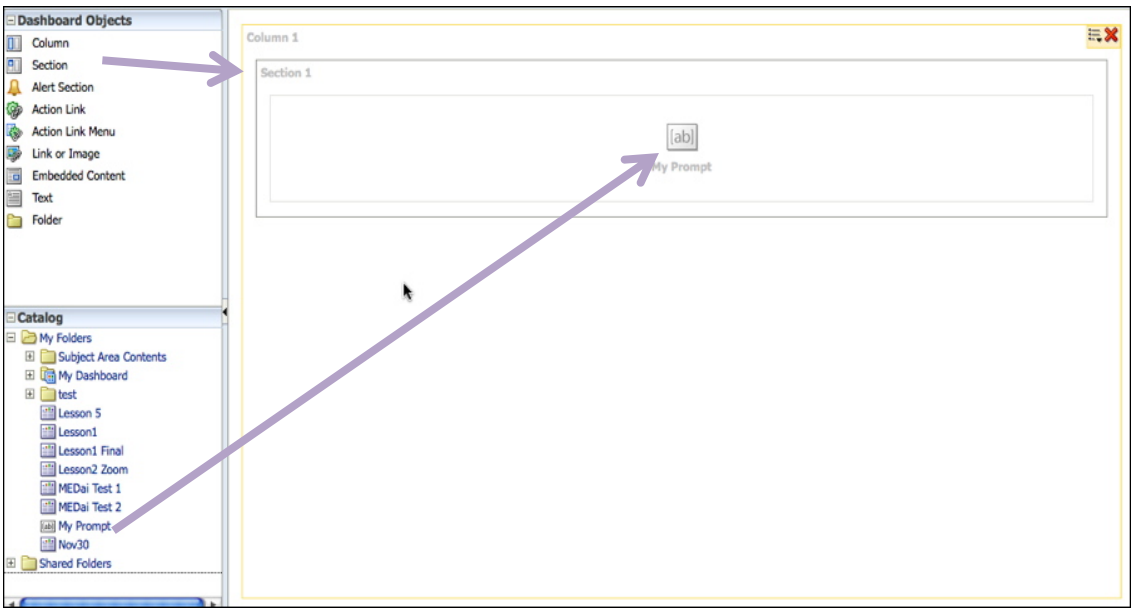
1. We can either create a new dashboard or edit the default Dashboard. For this exercise we will edit the default Dashboard. **Open My Dashboard**
2. The Blank Dashboard will show to Edit this Dashboard click on the Edit Link

3. You will now see the blank Dashboard Screen

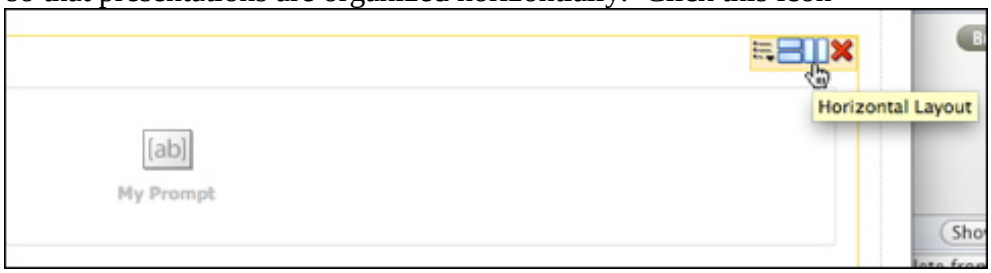


4. The next thing to do is to create a Column. On the left grab Column and drag it to the Workspace and release the mouse.

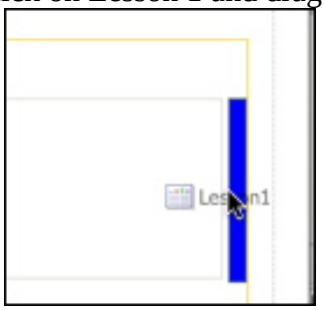




5. Do the same thing for Section, imbedded within the Column. (Top Arrow in Picture Above)
6. Drag and Drop My Prompt into the Section (2nd Arrow)
7. We want to add the Lesson 1 to the same section. To do this you must first set the section so that presentations are organized horizontially. Click this icon



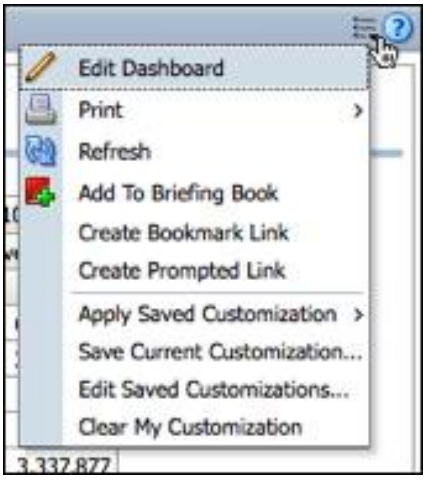
8. Now click on Lesson 1 and drag it to the Right of the My Prompt.



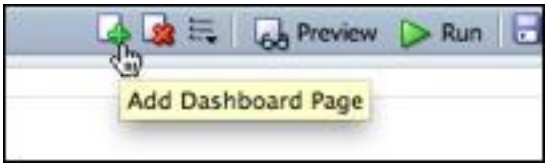
9. Now Save the Dashboard and Click on Run

10. Now you can Test how the Prompt works

11. Now lets add a new page for our graphs.
12. In the right hand corner of you dashboard the is an option button, select Edit Dashboard.

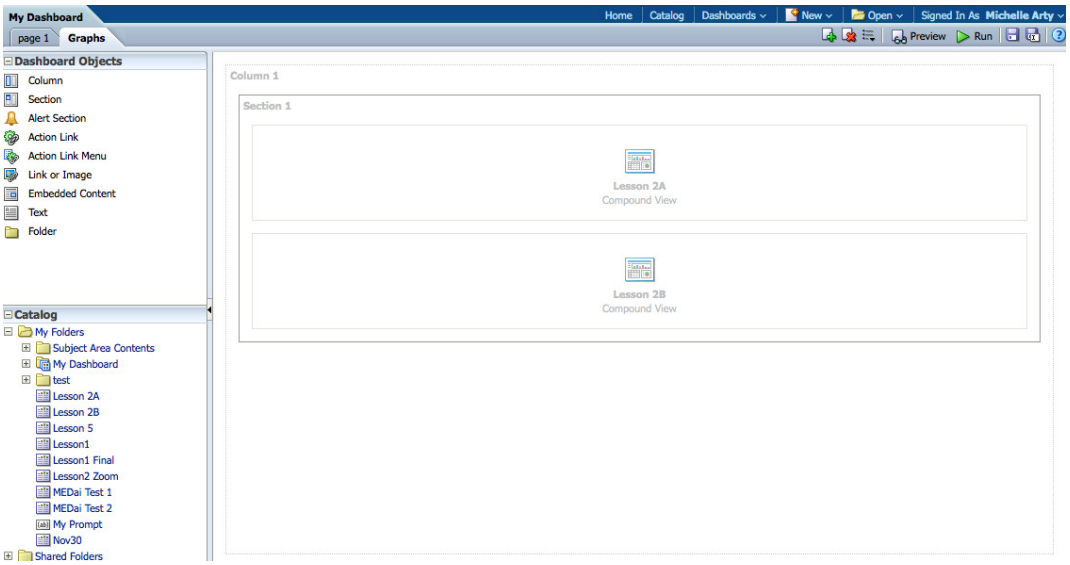


13. You will now see My Dashboard. To Add a new Page you go to the menu at the top and click on the Green Plus icon.



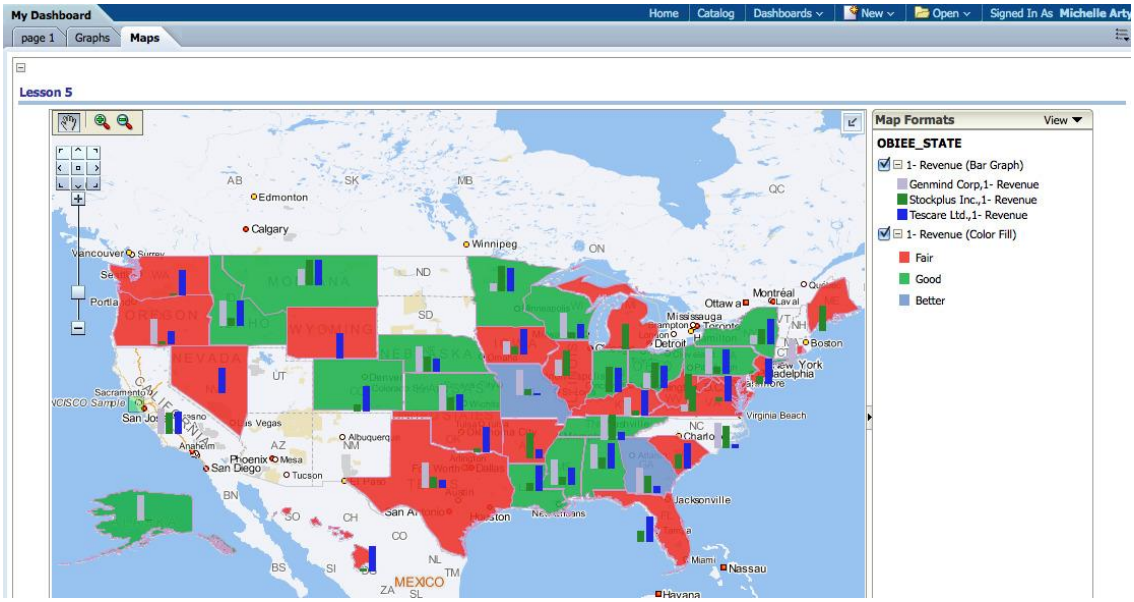
14. You will be asked for a Name – call it Graphs. And you will now see a new blank dashboard.

15. Now we want to add a new Column and 1 section. If you drag and Lesson 2A and then Lesson 2B. Your Screen should look like this:



16. Save and Run and you can see the two tabs.
17. Now we want a new page for Maps.
18. Just like you did before add a new page called Maps
19. Now add a column and section and put Lesson 4 (map) query into the section. When done it should look like this

HINT: Just drag the Lesson 4 query into the Blank Dashboard and it will automatically create the column and section!



20. Save and Log Out.

WE ARE DONE!