

OBI 11g Data Visualization Best Practices

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Dan Vlamis and Vlamis Software Solutions

- Vlamis Software founded in 1992 in Kansas City, Missouri
- Developed more than 200 Oracle BI systems
- Specializes in ORACLE-based:
 - Data Warehousing
 - Business Intelligence
 - Design and integrated BI and DW solutions
 - Training and mentoring
- Expert presenter at major Oracle conferences
- www.vlamis.com (blog, papers, newsletters, services)
- Developer for IRI (former owners of Oracle OLAP)
- Co-author of book "Oracle Essbase & Oracle OLAP"
- Beta tester for OBIEE 11g
- Reseller for Simba and NAVTEQ map data for OBIEE
- HOL Coordinator for 2012 Collaborate Conference







Tim Vlamis' Bio

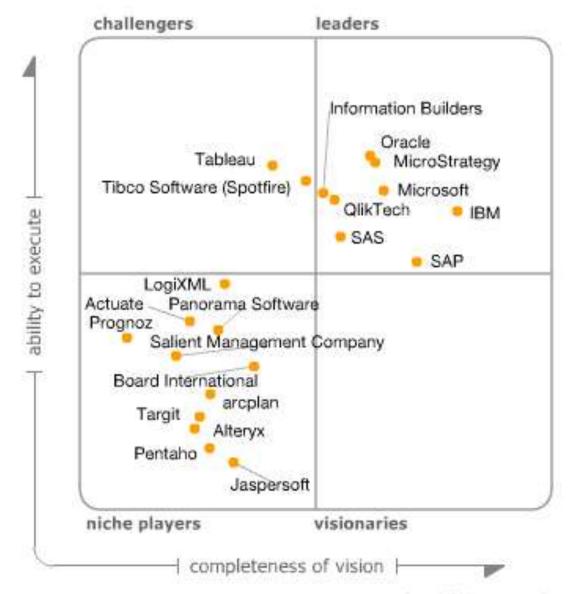
- 20+ years experience in business modeling and valuation, forecasting, and scenario analyses
- Expert in principles and elements of design
- Expert in curriculum development and pedagogical theory
- Professional Certified Marketer (PCM) from AMA
- Active Member of NICO (Northwestern Institute on Complex Systems)
- Adjunct Professor of Business Benedictine College
- MBA Kellogg School of Management (Northwestern)
- BA Economics Yale University

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Gartner Magic Quadrant for BI Feb 2012





Highlights from Gartner's BI Magic Quadrant Report 2012

- BI and Analytics named as "Top Priority" for 2012
- "Organizations continue to turn to BI as a vital tool for smarter, more agile, and efficient business."
- ❖OBI has highest aggregate "Ability to Execute" score.
- Broadest global deployment score
- Average user population nearly 3000
- Average data volumes nearly 5 Terabytes
- Below average complexity scores (mostly used for static reporting)
- ★Below average ease of use scores
- **XOBI** has low "data discovery" score



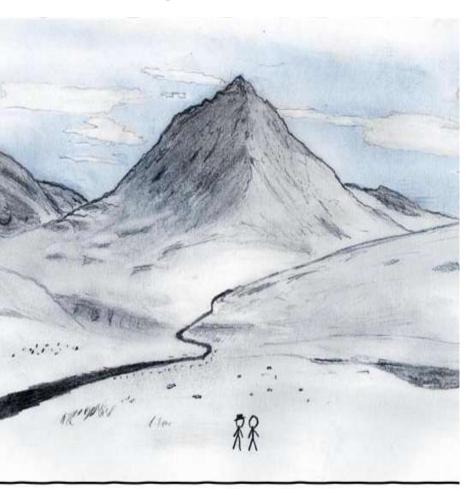




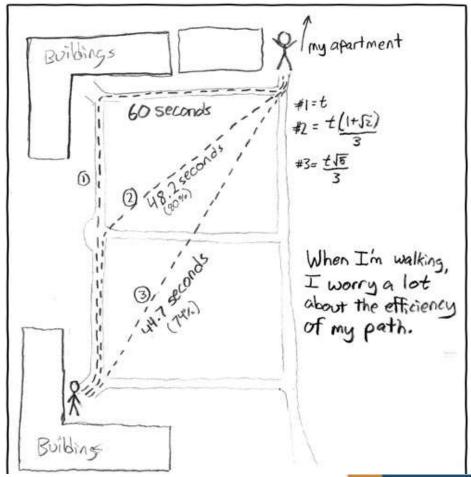


Main Uses of BI Reports & Dashboards

Exploration



Explanation



The Principles of Human Cognition Should Guide BI Dashboard Design





Catalog Favorites v 0.1 General Index OBI EE 11.1.1.5 Samples Application - General Index

- 0.1 General Index
- General Index

0. Overview

- 0.2 Configuration

1. Quick Demos

Brand Analysis,

☐ 1.1 Simple De 10 \ 1shboard

■ 1.2 Financials Demo(Essbase)

- User Credentials, Session Variables, Product Hier. Diagram.
- Diagram

Diagram, Office Hier. Diagram, Main Databas

■ 3.10 Query Building

3. Analysis and Dashboards

- Hierarchical Columns, Multiple SA, Selection Steps, Selection Steps on Hierarchies, Relative Filtering Direct DB SQL, Filter
- Function Metrics, RPD Presentation Aliases

■ 3.20 Report Views

- Overflow, Text Aggregation, MS Office

- Metrics Custom Geo Aggregation
- □ 3.40 Dashboard Design

 - Page Help

2.10 Descriptive Stats

- Distribution, Distribution Breadown, Comparative Dist, Correlation, Regression, 8020, StdDev, Variability, Scatter,
- Percentiles, N-tiling, SPC Control Chart, Deviants

Expense Structure PSL, Structure Analysis

2.11 Comparative Analysis

- TopN, TopN Breakdown & History, Tiering, Index To Avg,
- Indexing, Benchmark, Lift, Ages Pyramid
- 2.12 Trending
- History, Seasonality, Trending, Trend Lines Chart,
- Asynchronous Time Report
- 2.20 Financials
- P&L
- 2.40 BPM Analytics
- Process Analytics, Completed User Tasks, In-Flight Tasks

- 3.50 Mobile Styles
- Product Line Analysis, Product Line Analysis (It)
- 3.60 Other Front Ends
- Segmentation Example, Bi Composer (Image Vb107 only)

4 Actionable Intelligence

- 4.1 Actions
- 🔓 Invoking Browser Script, Invoke Java Methods deployed in
- EJBs, Invoke Web Services, Navigate to a Web Page, Navigate to BI Content
- Insight into Action, Customer View, Investigate to Invest, Commentary
- 4.2 Agent Status

6. Published Reporting

6.1 Published Reporting

- Sales Performance, BI Publisher Activity Report

Executive, Financials, Huma

- - Balance Letter Report, Brand Revenue Details, Custome
- Employees by Department Report, Office Sales Report, Prod Listing, Revenue Budget Actual and Detail, Salary Report, Sa
- Hist v Rep rt, SH Passenger Analysis Report, W2 2010, A
- Resources, Marketing, PDF Optimization, RTF SubTemplate, Style Templates, Supply Chain Management, XSL SubTempla

7. Source Agnostic Server Features

7.1 Logical Modelling

- vel Hierarchy, Lookup Columns, Dime
- Y Format and Conversion, Aggregate Navigation, Fiscal Calendar, LTS Filtering, Canonical Time Mo

Metrics, Text Aggregation, Level Based Aggregation, Indexo

☐ 7.2 Logical Aggregations

- Hierarchical Measures, Hierarchical Functions, Value Bas
- Hierarchy Aggregations, Non Additive Aggregations, Dynami Series, Balnce Based and Time Span Aggregations, Allocated
- ☐ 7.3 Physical Layer Features
- Dynamic Source Name, Many to Many between Dimensi
- Physical Column Writeback, Fragmented Physical Sources, Snowflakes Attributes, Fact Attributes Table
- 7.4 Users and Security
- Users and Roles List Report, System Variables, Proxy Us

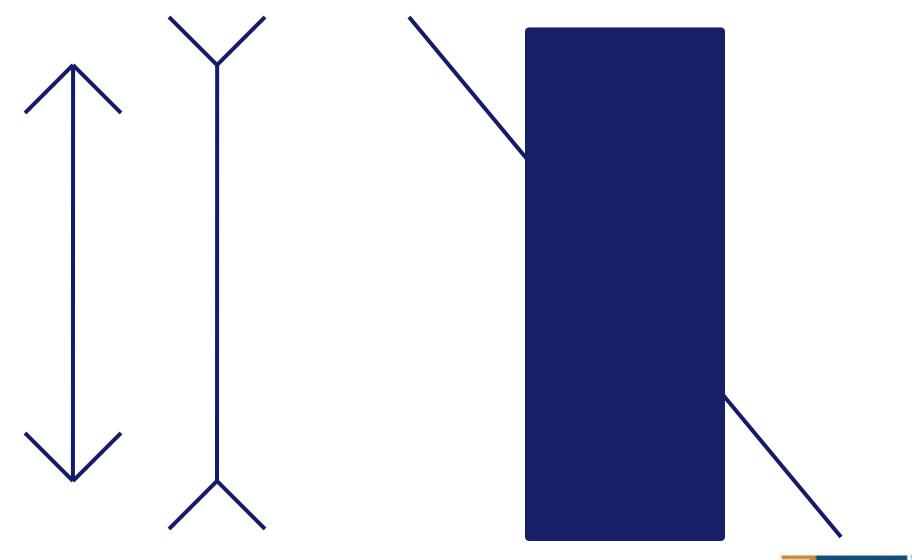
Function

Member Based Datasecurity, Hierarchical Data Security, Row Initiated Variable, WLST Scripts, Column Object Security, OI Security Provider

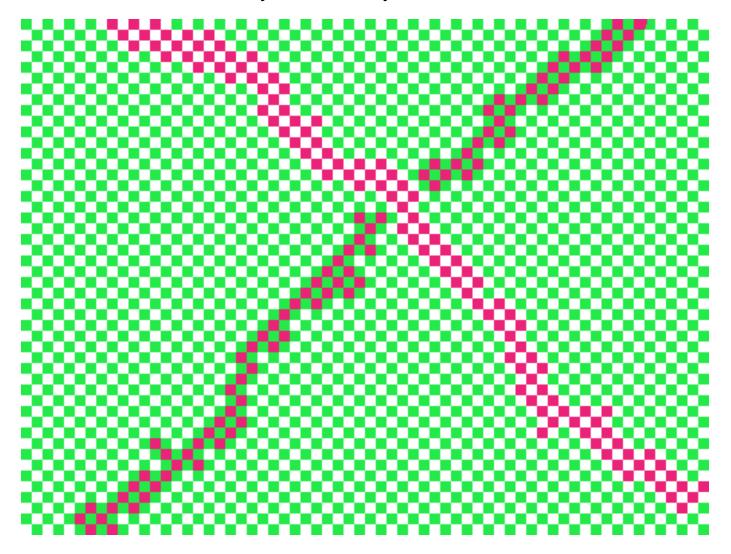




Classic Optical Illusions



How many colors do you see?

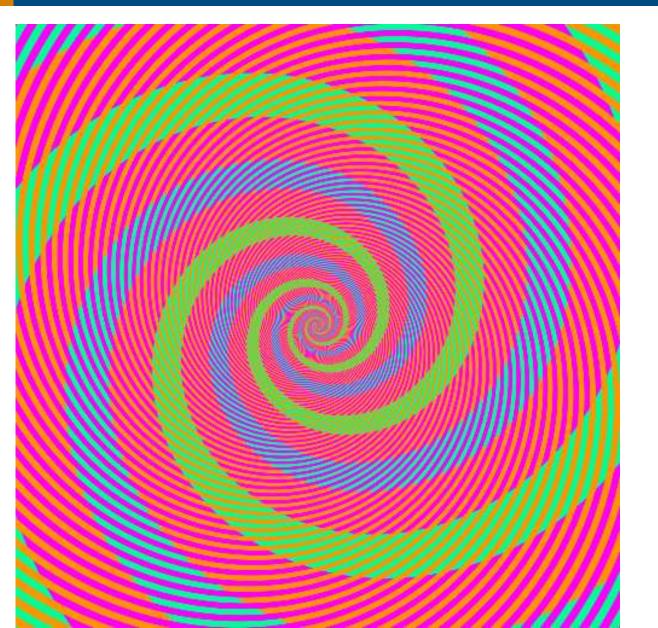


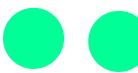
There are only 3 colors: White, green, and pink. There seem to be two different shades of pink, but there is only one pink.

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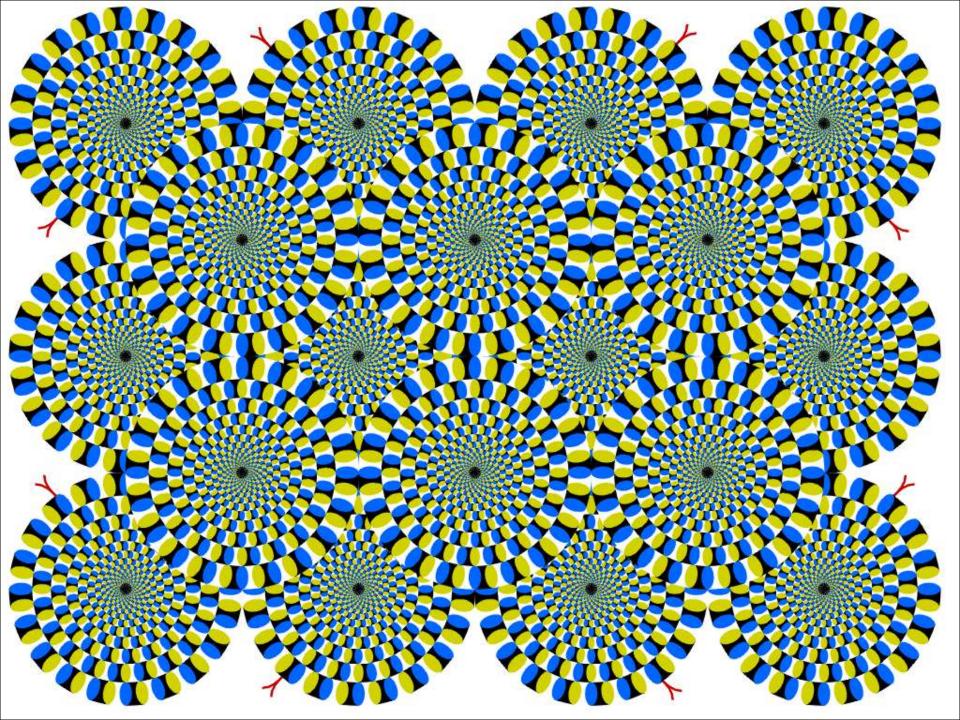


The Spirals are the Same Color



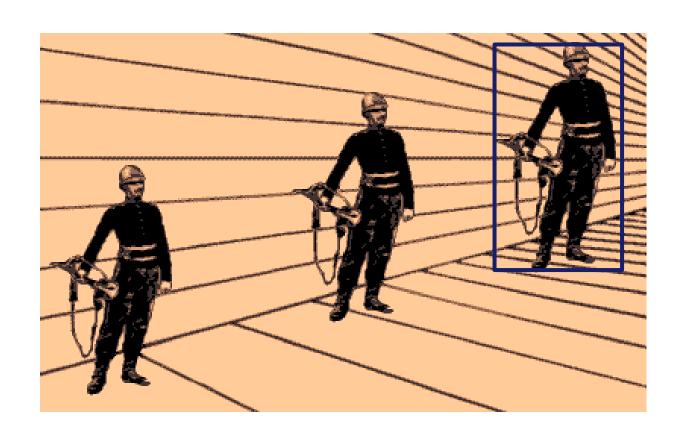








Which Soldier is tallest?







What Attracts Attention

1. Motion

2. Color

3. Size





OBIEE Intro Demo





Tufte's 5 Principles

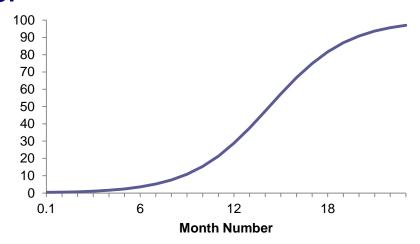
- Above all else show the data.
- Maximize the data to ink ratio.
- Erase non-data ink.
- Erase redundant data ink.
- Revise and edit.





Graphs and Tables

 Graphs and Charts depict visual representations and relationships.
 New Product Market Penetration



• Tables show data organized for lookup of specific, precise

values or items.

District	Month	Dollars	WB Forecast Dollars	%Forecast
ATLANTA DISTRICT	03/01/2008	595,232.0	53.5, 18.5.0	111.2
BOSTON DISTRICT	03/01/2008	1,882,036.0	1,954,736.7	96.3
CHARLOTTE DISTRICT	03/01/2008	215,380.0	20 4,59 2.0	105.3
CHICAGO DISTRICT	03/01/2008	1,381,552.0	1, 236,574.0	111.7
CINCINNATI DISTRICT	03/01/2008	827,162.0	742,869.0	111.3
DALLAS DISTRICT	03/01/2008	1,060,316.0	897,654.0	118.1
DENVER DISTRICT	03/01/2008	955,876.0	1,050,735.4	91.0
DETROIT DISTRICT	03/01/2008	961,026.0	1, 249,333.8	76.9
JACKSONVILLE DISTRICT	03/01/2008	1,827,434.0	1,892,779.4	96.5





Keys to Effective Tables

- Enable column and row sorting.
- Use appropriate number format.
- Avoid scrolling if possible.
- Lock titles if do use scrolling (BI Publisher)
- Display significant figures.
 - Don't imply precision that doesn't exist.
- Judiciously use conditional formatting for data exploration.
- Avoid putting text in color.
- Alignment, proximity, contrast.





Bad Table

		WIDGETS TO GADGETS RATIO CALCULATED USING CHECK LEVEL DETAIL			. DETAIL		
		ELECTROMECHANICAL			PNEUMATIC		
	PERIOD	IN-STORE	WEBSITE	DISTRIBUTOR	IN-STORE	WEBSITE	DISTRIBUTOR
	PERIOD 1	22.36%	11.37%	83.00%	85.34%	20.90%	46.80%
	PERIOD 2	21.22%	15.25%	81.00%	81.31%	18.01%	35.39%
	PERIOD 3	21.64%	13.22%	82.00%	78.29%	29.94%	41.28%
INCLUDES ONLY DATES FROM JANUARY THRU OCT 2007	PERIOD 4	20.89%	13.44%	82.00%	47.82%	16.30%	39.46%
	PERIOD 5	21.90%	13.24%	81.00%	84.58%	17.19%	20.52%
	PERIOD 6	25.09%	14.78%	80.00%	59.93%	31.08%	35.14%
	PERIOD 7	26.23%	14.98%	79.00%	36.35%	32.85%	22.52%
	PERIOD 8	26.83%	13.08%	80.00%	82.10%	30.41%	36.10%
	PERIOD 9	23.79%	14.27%	81.00%	43.40%	25.17%	23.81%
	PERIOD 10	24.39%	12.61%	82.00%	38.21%	17.70%	40.30%



Better Table

Widgets to Gadgets Ratio

Electromechanical				Pneumatic			
Period	In-store	Website	Distributor	In-store	Website	Distributor	
1	22%	11%	83%	51%	21%	40%	
2	21%	15%	81%	74%	21%	32%	
3	22%	13%	82%	48%	22%	23%	
4	21%	13%	82%	58%	31%	30%	
5	22%	13%	81%	52%	19%	28%	
6	25%	15%	80%	87%	15%	22%	
7	26%	15%	79%	51%	23%	20%	
8	27%	13%	80%	44%	22%	45%	
9	24%	14%	81%	54%	17%	31%	
10	24%	13%	82%	75%	31%	29%	

Ratios calculated using check level detail.

Periods include Jan - Oct 2007





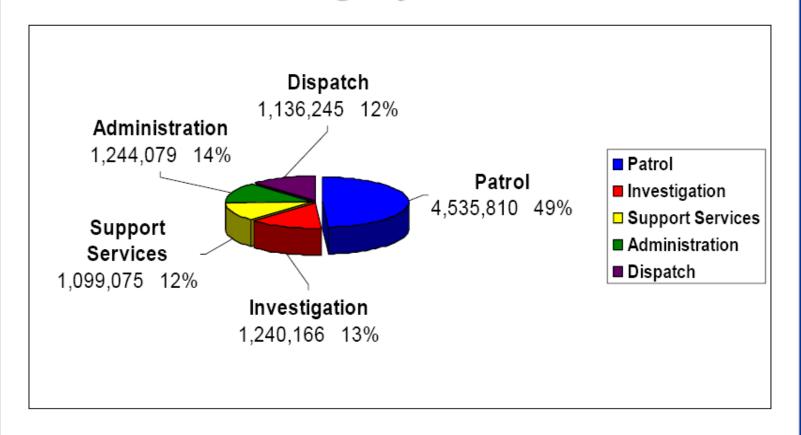
Keys to Effective Graphs

- Do not use 3-D effects.
- Avoid "stop light" color palette.
- Prefer pastel color palettes.
- Avoid bright colors.
- Do not use round gauges or dials.
- Eliminate gridlines, drop shadows, and other graphics.
- Enable interaction for "exploration" graphs
- Prioritize a single message for "explanation" graphs
- Alignment, proximity, contrast.

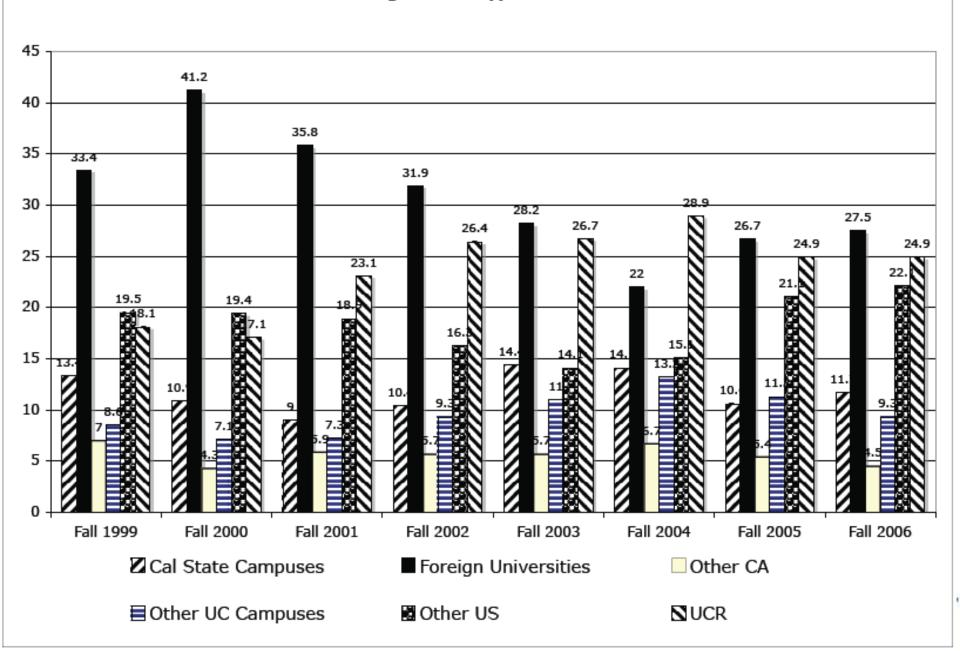


2004 - 2005 Budget

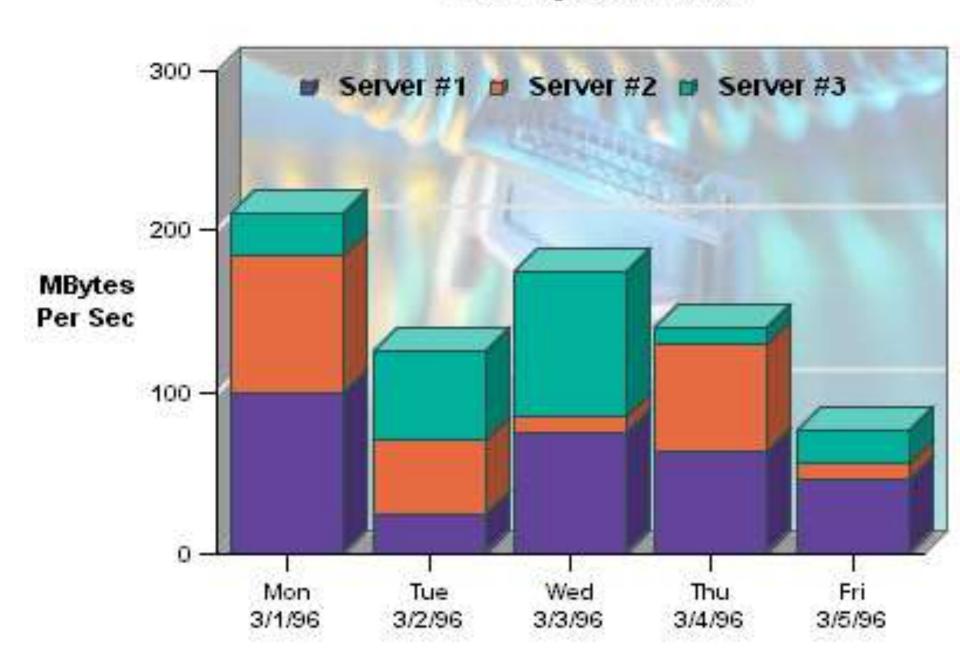
Budget By Division

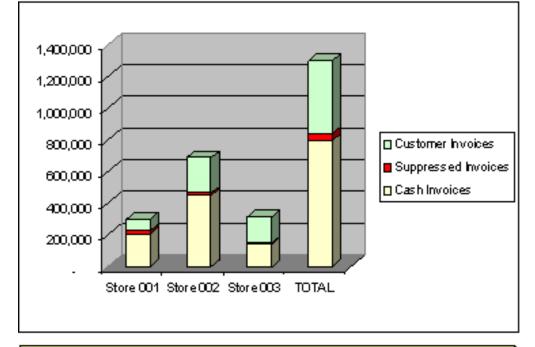


Baccalaureate Degree Institutions of New Graduate Students- Fall Quarters-Percentages from Type of Institution



Weekday Server Load





	Store 001		Store 003	TOTAL
Total Invoices	298,943	687,091	313,140	1,299,174
less				
Cash Invoices	207,256	449,064	141,305	797,625
leaves .				
Non-cash Invoices	91,687	238,027	171,835	501,549
consisting of				
Suppressed Invoices	18,888	15,527	6,501	40,916
and				
Customer Invoices	72,799	222,500	165,334	460,633
for purchases from				
Suppressed Customer Names	2,123	4,306	870	7,299
and				
Active Customer Names	2,103	14,747	8,342	25,192
which include				
Duplicate Customer Names	70	693	619	1,382
leaving .				
Unique Customer Names	2,033	14,054	7,723	23,810
which include				
Bad Addresses	1,055	5,759	2,406	9,220
leaving .				
Mailable Customer Names	978	8,295	5,317	14,590



Using Color Effectively

- Consciously choose a color palate.
- ColorBrewer2.org
 - Sequential schemes



- Designed for ordered data that progresses from low to high.
- Divergent schemes



- Place equal emphasis on mid-range values and extremes at both ends of the data range.
- Qualitative schemes

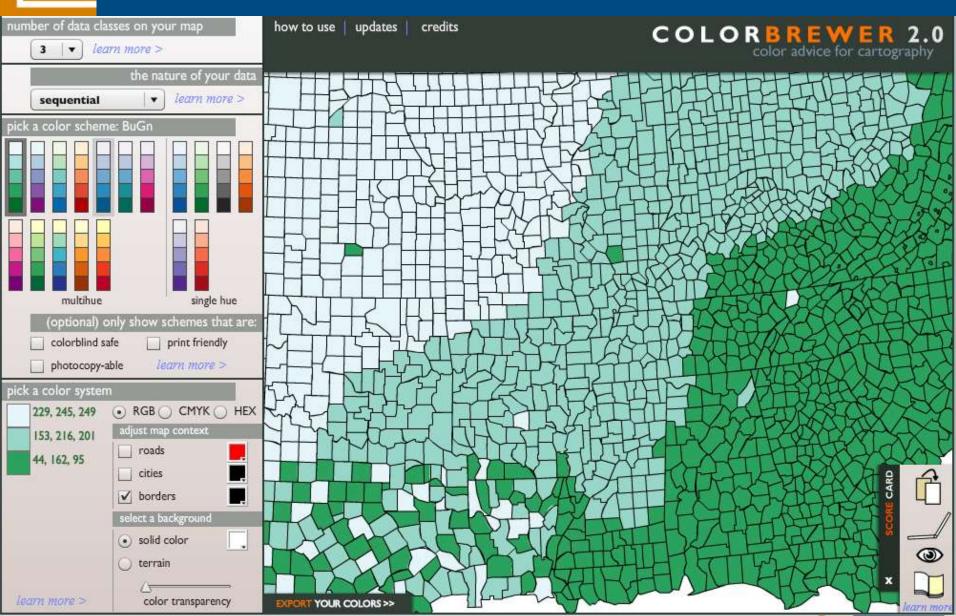


 Used for nominal and categorical data where magnitude differences between classes should not be emphasized.





Colorbrewer2.org





Dashboards Defined

"A dashboard is a visual display of the most important information needed to achieve one or more objectives, consolidated or arranged on a single screen so that the information can be monitored at a glance."

Stephen Few, Intelligent Enterprise





Dashboards Defined

A Dashboard is a visual presentation of current summary information needed to manage and guide an organization or activity.





OBIEE Dashboard Best Practices

- Dashboards should be customized to the needs of individual users and groups.
- Dashboards should maintain and reflect organizational standards so that they can be properly understood by others in the organization.
- Dashboards should reveal their selection and transformation of data in a transparent manner.
- Dashboards should be purposefully designed and optimized for effectiveness.





Dashboard Standards

- Determine what colors are used for which products.
- Know the organization's typical screen size so a standard number of section columns can be determined.
- Set a standard location for prompts.
- Visually indicate which prompts control which analyses.
- Standards help with:
 - Providing professional look and feel, which instill user confidence
 - Standards help reduce development time and improve productivity and consistency.



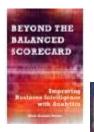


OBI Scorecard & Strategy Management

- Integrated toolset in OBIEE
- Follows "Balanced Scorecard" methodology
- Enables corporate goals and objectives to be monitored and managed

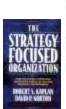
Includes strategy maps, strategy trees, KPI watch lists,

and cause and effect maps









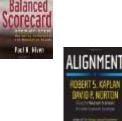


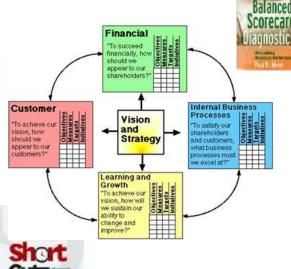


















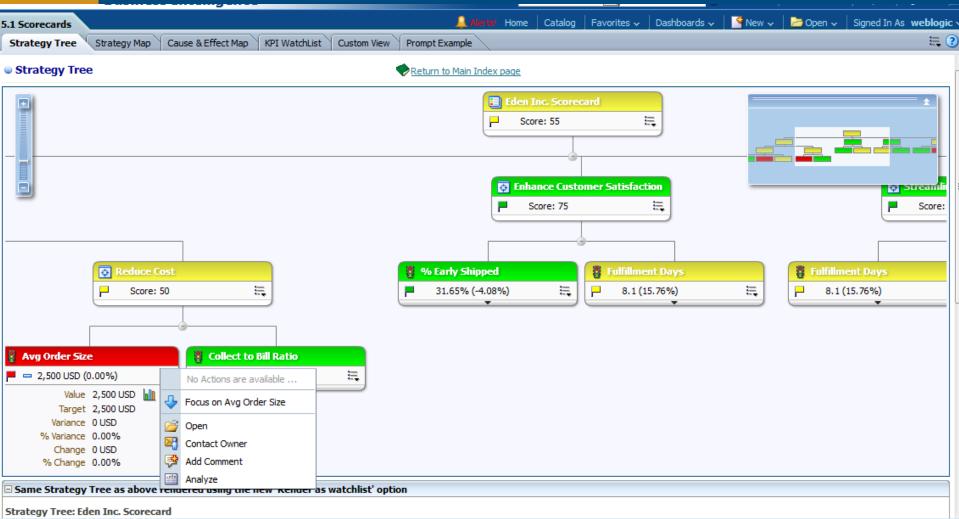


New Contribution Wheel Visualization



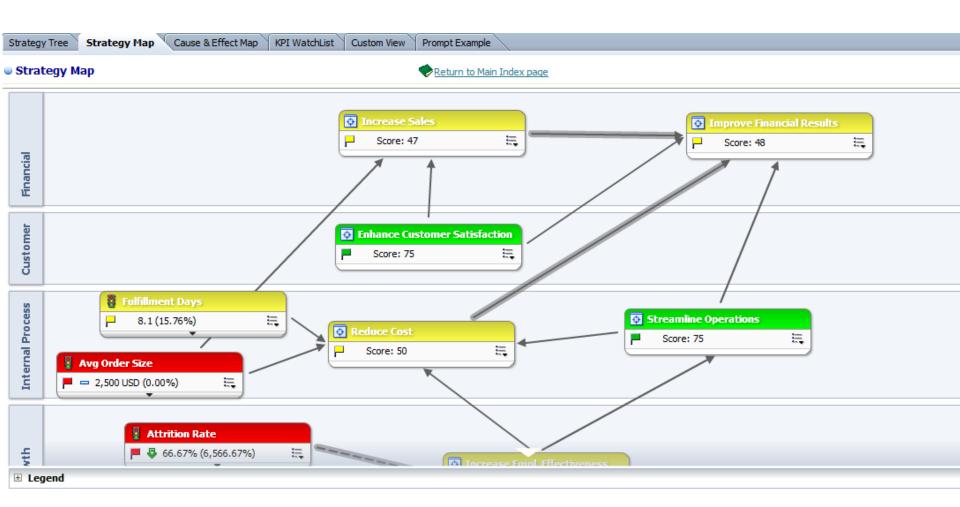


Strategy Tree View





Strategy Map View







Embedded "Trellis" Charts



Return to Main Index page



- F.Revenue
- F.Qty
- Calcs.UnitPrice

Apply Reset > Embedded OBIEE Charts
Time run: 5/15/2012 7:46:26 PM

							2008 Q1	2008 Q2	2008 Q3	2008 Q4	200 Q1
Communication	MM	L-7-2-7-1			***	677435.55; 1311983.52; 1354281.88; 937259.38; 623617.91; 1298523.51; 1489051.75; 896220.26;		1,311,984	1,354,282	937,259	
Digital		[~			**	401145.71; 822268.06; 738654.72; 540466.40; 359993.65; 791301.74; 789496.18; 454990.47;	401,146	822,268	738,655	540,466	359
Electronics	~~	1-1-1-1	~~		***	637085.14; 1261684.50; 1246109.26; 879931.23; 662522.02; 1265905.20; 1369656.29; 883015.40;	637,085	1,261,685	1,246,109	879,931	662
Games	~~~	1-1-1-1	~		. 4484	745734.28; 1521437.95; 1406565.31; 1068774.77; 715802.42; 1489518.90; 1527344.83; 1061246.95;	745,734	1,521,438	1,406,565	1,068,775	715
Services		1,7,771		AMMA	400	423414.32; 1118764.99; 932195.32; 695286.86; 603856.18; 985225.26; 917763.73; 385202.82;	423,414	1,118,765	932,195	695,287	603
TV	~~A	\	~~	4MM	are.	678636.40; 1548434.14; 1495702.28; 156748.03; 721122.98; 1403073.11; 1534590.56; 770957.88;	678,636	1,548,434	1,495,702	1,056,748	721

Edit -Refresh -Print -Export



111



Sparklines

This page is better rendered by using Firefox browser



Sparklines Types (JQuery)
Time run: 5/15/2012 7:43:22 PM

As Of: 2010 / 10

Dimension	1-Revenue	Line	Chart	Tristate	Discrete	Pie Charts	Box	Bullet
Assembled Dept.	92,556	\nearrow		111,111	1,101		H	-
Entertainment Dept.	189,100	A		"."	illini.	4	H	
Equipment Dept.	186,291	\sim	alla.		1/1/1	4	H	
Local Plants Dept.	193,843	\sim	allu.		p ^h p _h	4	H	-
Manufactured Dept.	190,268	\mathcal{N}_{\sim}			1,11	(Н	
Operations Dept.	190,225	λ_{\sim}			1/1/1	4	H	-
Surplus Dept.	92,343	\wedge			i din	4	H	
Technology Dept.	279,962	△			i din	4	Н	-
Test Programs Dept.	187,073	٨.,			i din	4	Н	
Translated Products Dept.	288,014	<u></u> ∧_	alla.		phys.	4	H	

Analyze -Edit -Refresh -Print



Pivot Heat Map

	Grand Total	Games	TV	Communication	Electronics	Services	<u>Digital</u> △▽
Figueroa Office	3,842,927	914,978	729,734	681,729	701,586	407,924	406,975
Guadalupe Office	3,724,904	862,523	693,361	664,967	707,356	406,223	390,474
Madison Office	3,717,168	825,439	779,666	739,256	611,821	446,599	314,387
Spring Office	3,709,488	858,879	717,308	667,767	685,675	422,997	356,863
Eiffel Office	3,686,688	823,046	728,679	676,979	682,524	405,847	369,613
Morange Office	3,641,103	811,852	721,242	665,251	663,154	418,867	360,736
Perry Office	3,619,566	855,577	683,439	644,954	665,790	409,505	360,299
College Office	3,585,299	819,437	694,455	651,687	657,574	405,017	357,129
Copper Office	3,580,654	839,416	687,128	646,676	635,637	410,738	361,058
River Office	3,492,079	818,428	680,394	623,420	619,194	407,964	342,679
Montgomery Office	3,408,826	759,058	682,610	645,294	577,336	448,314	296,214
Mills Office	3,403,649	781,304	642,323	626,079	605,688	404,210	344,045
Sherman Office	3,402,840	755,860	664,127	657,163	600,825	418,788	306,077
Blue Bell Office	3,381,098	736,555	663,794	674,607	586,915	417,255	301,973
Casino Office	3,375,885	748,299	667,646	650,591	585,134	427,806	296,409
Eden Office	3,339,479	736,841	647,572	675,796	559,997	424,357	294,916
Foster Office	3,315,059	739,504	658,783	638,605	570,621	416,816	290,730
Tellaro Office	3,296,487	739,693	665,197	633,022	558,079	409,549	290,947
Merrimon Office	3,267,813	736,837	636,913	623,980	568,846	407,850	293,386
Glenn Office	3,208,987	722,666	626,456	611,952	556,473	412,547	278,894







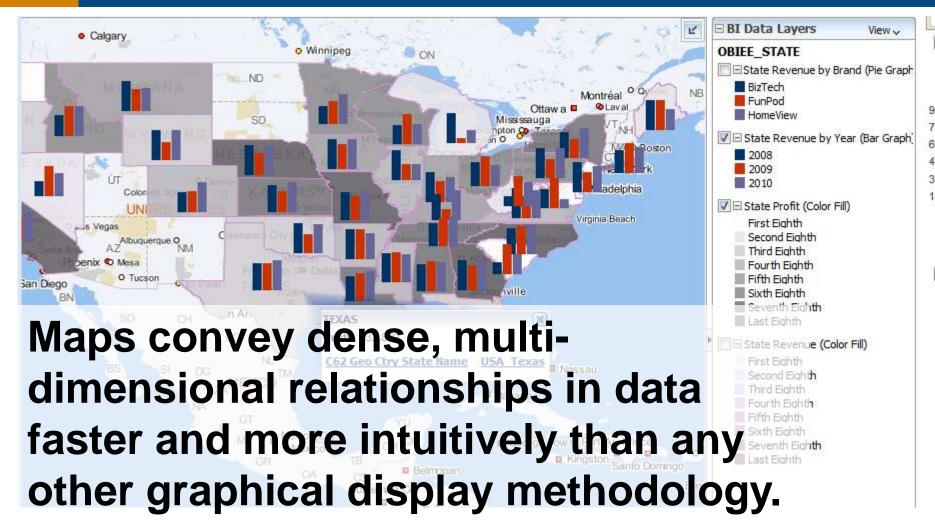


Humans Think Spatially





Why Maps are Powerful







What is Spatial Data?

- Business data that contains or describes location
 - Street and postal address (customers, stores, factory, etc.)
 - Sales data (sales territory, customer registration, etc.)
 - Assets (cell towers, pipe lines, electrical transformers, etc.)
 - Geographic features (roads, rivers, parks, etc.)
- Anything connected to a physical location





"Clutter is not an attribute of information, clutter is a failure of design... fix the design rather than stripping all the detail out of the map."

Edward Tufte

The Visualization of Quantitative Information





When Are Map Views Useful?

- Visualizing data related to geographic locations.
- Showing or detecting spatial relationships and patterns.
- Showing lots of data in a relatively small area.
- Drilling down from a (map) overview to a detailed report, chart, or graph.
- When is location important? Can the dimension be plotted on a map?





Map View Tips

- Think about what scale to use. Different map scales will reveal different patterns and insights.
- Use Variable marker to display two measures on a map at a point – size and color.
- Avoid overlapping shapes too much.
- Be aware of spatial distortions E.g. Texas is larger than Connecticut.
- Look at color palette. www.colorbrewer2.org





Map Definitions

FEATURE

- Provide a spatial context: cities, highways, rivers, etc...
- Features of Interest: store location, postal boundaries, pipelines, etc...

STYLE

- Define rendering properties for features
- Can control fill color, border color, line thickness, line style and more

THEME

- Collection of features
- Typically associated with a spatial geometry layer
- County/state boundaries, major highways, etc...

BASEMAP

- A grouping of themes to create a map
- Maps can share themes
- When associating a theme with a map, can specify min scale and max scale (sometimes known as zoom control)

MAP

Basemap with additional themes overlain





Map Interactivity in OBIEE 11g

- Display BI data on top of maps
 - Color fill
 - FOI point display
- Interact with other Dashboard Elements
 - Drive map content with dashboard prompts
 - Drive map content through drilling and navigation
 - Drive other dashboard elements through map interactions
- Reveal additional information on maps through mouseovers
- Drill to map detail





Map View Formats

- Color Fill (choropleth)
 - Percentile, Value,
 Continuous binning
 - Dashboard user run-time slider
- Graphs Bar, Pie
 - Adjustable graph size
 - Series by second dimension
- Bubble (variable sized)
 - Min-Max size specification
 - Color specification

- Variable Shape
 - Circle, Triangle, Diamond
 - Customizable
- Image
 - Imported via MapViewer
 - More can be added from MapBuilder
- Custom Point Layer
 - Uses Lat / Long
 - Does not require a Layer Def





NAVTEQ Data

- NAVTEQ is the leading global provider of digital map, traffic and location data that enables navigation and location-based platforms around the world.
- NAVTEQ data is licensed direct or through a reseller.
- Licenses are use specific.
- NAVTEQ data resides inside your own Oracle Database.
- NAVTEQ publishes an ODF (Oracle Data Format)
 version of its data designed specifically for use in an

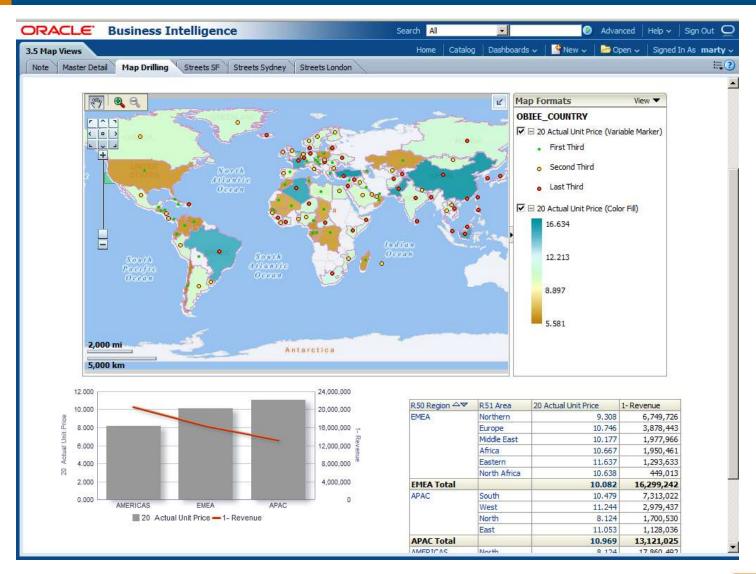
Oracle Database.





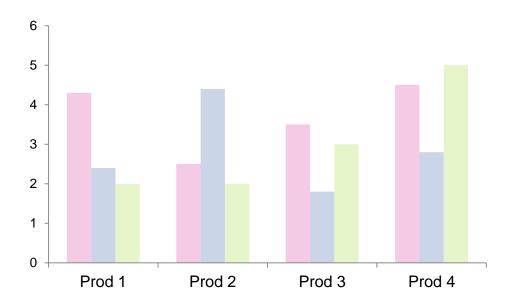


Demo of Oracle BI 11g Maps







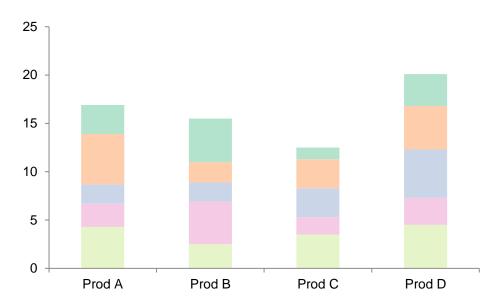


- Show nominal data values in comparison to one another.
- Start with zero.
- If use a logarithmic scale, clearly notate.





Stacked Bar Chart

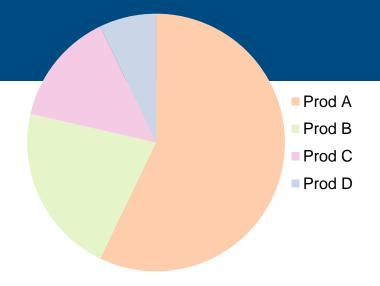


- Somewhat confusing, not great for representing change.
- Total is most clearly represented number.
- Typically stack with largest values on the bottom.
- Single scale can make for interesting intra-bar comparisons.



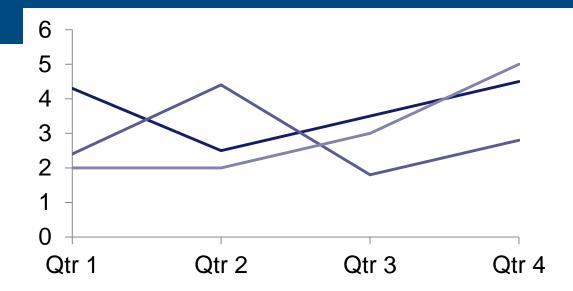


Pie Charts



- Typically used for showing parts of whole by percentage.
- Not great for piece to piece comparisons.
- Limit number of pieces.
- Can be interesting to show lots of pies together if significant differences exist.
- Stephen Few hates them.
- Do not use 3-D.



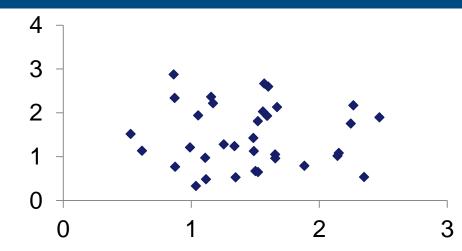


- Show a pattern or progression over a continuous range or period.
- Can be valued within a range to highlight a particular pattern (careful!).
- Maintain a rectangular shape close to golden proportion.



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Scatter Plot

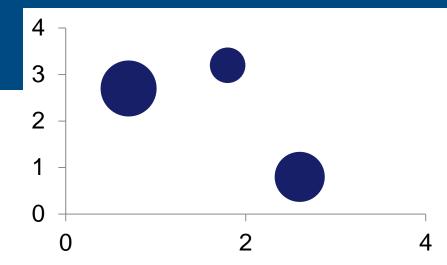


- Shows single data points at the intersection of two values.
- Often depict a large number of discrete data points (hundreds or thousands).
- Useful for seeing the patterns in comparisons of two variables.
- Trend lines are often added.
- Clearly notate if use logarithmic scale(s).





Bubble Chart



- Special type of scatter plot.
- Size of bubble is related to a third variable.
- Greatly reduces number of points that can be depicted.
- Best for depicting approximate values and comparisons.





Questions and Observations

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