

Oracle BI 12c: Create Analyses and Dashboards Ed 2 LVC

Oracle Database

DURATION

5 Days

MODULES

20 Lectures

COURSE CODE

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Course Overview

Learn How To: Build analyses and dashboards Build and use views and graphs in analyses Create and work with KPIs and scorecards Create and modify Oracle BI dashboards Use Oracle Business Intelligence Mobile to access BI content Create mobile applications with Oracle Business Intelligence Mobile App Designer Integrate BI content into MS Office applications using Oracle Hyperion Smart View for Office Administer objects in the Presentation Services Catalog

What You Will Learn

Course Introduction

- Course Goal
- Course Objectives
- Audience

Introduction to Oracle Business Intelligence Enterprise Edition

- Objectives
- What Is Business Intelligence?
- Oracle Business Intelligence Enterprise Edition
- Oracle BI 12c Highlights
- Many More Usability Improvements
- New Advanced Analytics Capabilities
- Prebuilt Functions
- Oracle Mobile BI
- More Data Sources Supported Now
- OBIEE 12c In-Memory Analytics
- Visual Exploration for Everyone
- Rich Data Mashup
- Oracle BI 12c Architecture
- Oracle BI Components
- BI System Components

- BI Presentation Services
- Oracle BI Presentation Server and Catalog
- BI Server
- Oracle BI Repository
- Data Sources
- Sample Analysis Processing
- Oracle BI EE Dashboard
- Oracle BI EE Terminology
- Signing In to Presentation Services
- Oracle BI Enterprise Edition Home Page
- Global Header
- Administering Objects in the Presentation Catalog
- Essbase: Overview
- Essbase: Key Features
- Quiz
- Summary
- Practice 2: Overview

Working with Oracle Business Intelligence Analyses

- Objectives
- Oracle Business Intelligence Analysis Editor
- Key Terms
- Subject Areas
- Columns
- Hierarchies
- Oracle Business Intelligence Analysis
- Creating and Editing Analyses
- Analysis Editor
- Subject Areas and Catalog Panes
- Analysis Editor Tabs
- Working with Analyses in Oracle Business Intelligence
- 1. Construct an Analysis
- 1. Construct an Analysis using Multiple Subject Areas
- 2. Modify Analysis Criteria
- 2. Modify Analysis Criteria (Sorting Columns)
- 2. Modify Analysis Criteria (Formulas)
- 2. Modify Analysis Criteria (Style)
- 2. Modify Analysis Criteria (Column Format)
- 2. Modify Analysis Criteria (Data Format)
- 2. Modify Analysis Criteria (Conditional Format)
- 2. Modify Analysis Criteria (Interaction)
- 2. Modify Analysis Criteria (Write Back)
- 3. Change Column Order
- 4. Display Analysis Results
- 5. Save an Analysis

- Setting Analysis Properties
- Analysis Properties: Results Display Tab
- Analysis Properties: Interactions Tab
- Analysis Properties: Data Tab
- Adding Basic Formatting to Table Views
- Formatting Containers
- Formatting Column Headers and Values
- Setting Table Properties
- Data Viewing Properties
- Other Style Properties
- Advanced Formatting
- Saving Column Settings as Systemwide Defaults
- Copying and Pasting Formatting Attributes
- Using a Saved Analysis as a Style Template
- Customized Date and Time Format Strings
- Applying a Customized Format String to a Column
- Quiz
- Summary
- Practice 3: Overview

Filtering Data for Analyses

- Objectives
- Filters
- Applying Filters to Attribute Columns to Affect Hierarchical Columns
- Inline Objects vs. Named Objects?
- EVALUATE_PREDICATE Function with a Filter
- Using Filters to Limit Data in Analyses
- Creating and Editing Filters
- Grouping Filters
- Dynamic Filtering
- Using a Saved Analysis as a Filter
- Editing SQL for a Column Filter
- Drilling and Filters
- Analysis Prompts
- Adding an Inline Prompt to an Analysis
- Defining Prompt Properties
- Multiple Column Filter Prompts
- Quiz
- Summary
- Practice 4: Overview

Selecting and Grouping Data for Analysis

- Objectives
- Using Selections to Limit Data in Analysis
- Creating Selection Steps

- 1. Create a New Step
- 2. Select the Step Type
- Step Types: Selecting Members
- Step Types: Adding Groups and Calculated Items
- Step Types: Applying Conditions
- Step Types: Selecting Members Based on Hierarchy
- Step Types: Selecting Members Based on Family Relationship
- Saving Selection Steps as a Group
- How Do Filters and Selection Steps Differ?
- Groups
- Creating Groups
- 1. Create a New Member Group
- 2. Define the Group Properties
- 3. Apply Formatting
- 4. Verify the Results
- Calculated Items
- Creating Calculated Items
- 1. Create a New Calculated Item
- 2. Define the Calculated Item Properties
- 3. Verify the Results
- Quiz
- Summary
- Practice 5: Overview

Advanced Visualization in Analyses

- Objectives
- Oracle Business Intelligence Views
- Descriptions of Views
- View Editors
- Compound Layout Pane
- Working with Views in Compound Layouts
- Directly Editing Table and Pivot Table Views in Compound Layouts
- Recommended Visualizations
- Creating and Copying Compound Layouts
- Views Pane
- Descriptions of Graph Views
- Graph Editor
- Graph Slider
- Graph Properties: General
- Graph Properties: Style
- Graph Properties: Scale
- Graph Properties: Titles and Labels
- Formatting Graphs by Position
- Formatting Graphs Conditionally
- Performing Common Tasks in Views

- Specifying Totals
- Managing Aggregation
- Combining Values into Bins
- Creating Bins: Add Bins
- Quiz
- Summary
- Practice 6: Overview

Showing Results with Pivot Tables

- Objectives
- Pivot Table Views
- Analyzing and Displaying Data in Table and Pivot Table Views
- Pivot Table
- Creating a Pivot Table
- 1. Select Columns on the Criteria Tab
- 2. Click the Results Tab and Select the Pivot Table View
- 3. Open the Pivot Table Editor
- 4. Rearrange Elements as Necessary
- Showing Results in Pivot Tables
- Sorting Data
- Sorting Data in Views
- Using Hierarchical Columns
- Hierarchical Columns
- Overriding Default Aggregation Rules
- Using Totals
- Adding Formatting: Overall Appearance
- Adding Formatting: Pivot Table Positions
- Adding Formatting: Section Options
- Showing an Item's Relative Value
- Using Calculations in Pivot Tables
- Building Calculations by Using Functions
- Building Calculations by Using Formulas
- Displaying Running Sums in Pivot Tables
- Pivot Table with a Graph
- Quiz
- Summary
- Practice 7: Overview

Working with Additional Views in Analyses

- Objectives
- Trellis View
- Creating a Simple Trellis View
- 1. Select Columns on the Criteria Tab
- 2. Click the Results Tab and Add a Simple Trellis View
- 3. Open the Trellis Editor

- 4. Rearrange Elements as Necessary
- Advanced Trellis View
- Creating an Advanced Trellis View
- 1. Select Columns on the Criteria Tab
- 2. Click the Results Tab and Add an Advanced Trellis View
- 3. Open the Trellis Editor
- 4. Rearrange Elements as Necessary
- Performance Tile View
- Creating a Performance Tile
- 1. Select Columns on the Criteria Tab
- 2. Click the Results Tab and Add a Performance Tile
- 3. Open the Performance Tile Editor
- 4. Make the Formatting Changes
- Treemap View
- Creating a Treemap
- 1. Select Columns on the Criteria Tab
- 2. Click the Results Tab and Add a Treemap
- 3. Open the Treemap Editor
- 4. Rearrange Elements as Necessary
- Heat Matrix View
- Creating a Heat Matrix
- 1. Select Columns on the Criteria Tab
- 2. Click the Results Tab and Add a Heat Matrix
- 3. Open the Heat Matrix Editor
- 4. Rearrange Elements as Necessary
- Linking Master-Detail Views
- Defining the Master View
- Defining the Detail View
- Master-Detail Linking of Views
- Quiz
- Summary
- Practice 8: Overview

Visualizing Data on Maps

- Objectives
- MapViewer
- Map Views
- Map View: Example 1
- Map View: Example 2
- Map View: Example 3
- Oracle Spatial Components
- Manage Map Data
- Import Layer
- Edit Layer
- Import Background Map

- Edit Background Map
- Images
- Creating and Editing Map Views
- 1. Add a Map View
- 2. Set Properties
- 3. Edit Formats: Format Options
- 3. Edit Formats: Define Formats
- Interacting with Map Views
- Drilling in Map Views
- Master-Detail Linking in Map Views
- Action Links in Map Views
- Other Applications for Map Views
- Other Points of Integration
- Quiz
- Summary
- Practice 9: Overview

Creating Oracle Business Intelligence Dashboards

- Objectives
- Dashboards
- Dashboard Pages
- Creating and Editing a Dashboard
- Creating a New Dashboard from Global Header
- Global Header: Setting Preferences for Your Default Dashboard View
- Using Dashboard Builder
- Using the Dashboard Builder Toolbar
- What Can I Add to a Dashboard?
- Adding Objects to a Dashboard Page
- Dashboard Builder Tools Toolbar: Layout
- Tools Toolbar: Dashboard Properties
- Dashboard Properties: Dashboard Report Links
- Dashboard Properties: Dashboard Page Controls
- Tools Toolbar: Print Options
- Tools Toolbar: Page Report Links
- Tools Toolbar: Prompts Buttons on Current Page
- Tools Toolbar: Allow Saving Personal Customizations
- Tools Toolbar: Publishing Dashboard Pages
- Tools Toolbar: Advanced Page Properties
- Exploring Dashboard Object Properties
- Exploring Column Properties
- Exploring Section Properties
- Exploring Section Properties: Arranging Sections Horizontally
- Exploring Section Properties: Controlling the Drill-Down Display
- Section Properties: Conditions
- Section Properties: Adding an Inline Condition for an Analysis

- Section Properties: Adding an Inline Condition for a KPI
- Section Properties: Adding a Named Condition
- Section Properties: Formatting and Renaming
- Miscellaneous Dashboard Page Functionality
- Page Options Toolbar: Creating Personal Customizations
- Page Options Toolbar: Creating Shared Customizations
- Page Options Toolbar: Creating Links to Dashboard Pages
- Page Options Toolbar: Adding Content to a Briefing Book
- Page Options Toolbar: Export to Excel
- Quiz
- Summary
- Practice 10: Overview

Configuring Oracle Business Intelligence Dashboards

- Objectives
- Dashboard Objects
- Alerts Section
- Action Link and Action Link Menu
- Link or Image
- Embedded Content
- Text
- Text: ActiveX
- Text: Scripts
- Text: Audio
- Folder
- Breadcrumbs
- Quiz
- Summary
- Practice 11: Overview

Creating Dashboard Prompts and Variables

- Objectives
- Variables
- Session Variables
- Repository Variables
- Presentation Variables
- Request Variables
- Referencing Variables
- Syntax for Referencing Variables
- Dashboard Prompts
- Dashboard Prompts: Column Prompts
- Dashboard Prompts: Other Prompts
- Adding a Named Column Prompt to a Dashboard
- 1. Create a New Named Column Prompt
- 2. Select the Prompt Type

- 3. Select the Subject Area and Column
- 4. Select the Operator and Other Options
- 5. Save the Prompt
- 6. Preview the Prompt
- 7. Add the Prompt to the Dashboard
- 8. Set the Scope for the Prompt
- 9. Test the Results
- Adding a Hidden Named Prompt to a Dashboard
- 1. Edit Dashboard Properties
- 2. Navigate the Catalog to Locate the Named Prompt
- 3. Test the Results
- Creating a Second Prompt Page
- 1. Add a New Prompt to an Existing Prompt Page
- 2. Insert a Page Break
- 3. Edit the Dashboard and Add the Prompt
- 4. Test the Results
- Setting Preferences for a Prompt Page
- Presentation Variables and Prompts
- Request Variables and Prompts
- Adding a Variable Prompt to a Dashboard
- 1. Add a Variable to an Existing Analysis
- 2. Create a New Variable Prompt
- 3. Select the Prompt Type
- 4. Define the Prompt Properties
- 5. Save the Prompt
- 6. Select the Dashboard
- 7. Add the Prompt to the Dashboard
- 8. Navigate the Catalog to Locate the Named Prompt
- 9. Test the Results
- Adding a Hierarchical Prompt
- Applying Prompts with Default Values
- Wiring Dashboard Prompts
- Auto-Complete for Prompts
- Optional Apply and Reset Buttons for Prompts
- Quiz
- Summary
- Practice 12: Overview

Scorecards and Key Performance Indicators

- Objectives
- Oracle Scorecard and Strategy Management
- Balanced Scorecard
- Scorecard Editor
- Scorecard Objects
- Scorecard Documents (Views)
- Strategy Tree: Strategy Tree Diagram

- Strategy Tree: Contribution Wheel Diagram
- Strategy Map
- Cause and Effect Map
- Creating a Scorecard
- 1. Create a New Scorecard
- 2. Create Perspectives
- 3. Create KPIs

3.1 Create a New KPI 13-19

3.2 Define General Properties 13-20

3.3 Set the Data Format and Enable Trending 13-21

3.4 Define the Dimensionality 13-22

3.5 Define States and Thresholds 13-23

3.6 Define Related Documents 13-25

3.7 Define Custom Attributes 13-26

- 4. Create KPI Watchlists
- 5. Create KPI Smart Watchlists
- 6. Create and Arrange Objectives
- 7. Create and Arrange Initiatives
- 8. Assign Weights to Individual Objectives and Initiatives
- 9. Set Assessment Mappings
- 10. Graphically Depict Relationships
- 11. Use Comments
- 12. Add Scorecard Views to Dashboards
- 13. Define Mission and Vision Statements
- 14. Set Up Point of View Controls
- Attach KPI Watchlist to Dashboard
- Working with Objects in the Scorecard Editor
- Quiz
- Summary
- Practice 13: Overview

Data Visualization, BI Ask, and Data Mashup

- Objectives
- Data Visualization
- Data Visualization Login Page
- Data Visualization Projects
- Creating Data Visualization Projects
- Select the Data Source
- Select Content
- Set Visualization Type

- Add More Visualizations
- Rearrange the Visualizations in a VA project
- Rearrange the Visualizations in a DV project
- Filter the Data in Data Visualization
- Create Calculations
- BI Ask
- Data Mashups
- Adding a New Data Source
- Subject Area in the Visual Analyzer
- Quiz
- Summary
- Practice 14: Overview

Working with BI Content in Smart View

- Objectives
- Setting Up Smart View
- Setting Up a Smart View Connection
- Working with Views in Smart View Clients
- Document Pane
- Working with Analysis Prompts
- Working with Page Prompts
- Refreshing Views
- Setting Refresh Preferences
- Masking Data in Views
- View Properties
- Customizing Data in Office
- Editing Microsoft Office Charts
- Changing Chart Layout and Style
- Changing PowerPoint Themes
- Copying and Pasting BI Objects
- Copying and Pasting BI Objects Between Smart View Clients
- Copying and Pasting Graph Views
- Copying and Pasting Table or Pivot Table Views
- Copying and Pasting Views from Oracle BI to Smart View
- Editing Analyses in Oracle BI EE
- Creating and Publishing Views Using the View Designer
- Creating a View Layout and Type Steps 1-3
- Creating a View Layout and Type Steps 4-5
- Creating a View Layout and Type Step 6 (Optional)
- Creating a View Layout and Type Step 7 (Optional)
- Defining Filter Expressions in the View Designer
- Publishing Views to the BI Catalog
- Guidelines for Publishing Ad Hoc Views
- Federating Data
- Quiz

- Summary
- Practice 15: Overview

Oracle Business Intelligence Mobile App Designer

- Objectives
- BI Mobile App Designer
- BI Mobile App Designer Trial Edition
- Creating Basic Mobile Apps
 - 1. Starting Oracle BI Mobile App Designer
 - 2. Exploring the Mobile App Designer Interface
 - 3. Optional: Add a Cover Page
 - 4. Adding Pages to the App
 - 5. Previewing the App
- Tile Pages
 - Designing Apps with Tile Pages
 - 1. Inserting Tile Pages
 - 2. Adding Spotlight Formatting
- Subpage
- Quiz
- Summary
- Practice 16: Overview

Using Oracle Business Intelligence Delivers

- Objectives
- Oracle Business Intelligence Delivers
- Delivery Devices
- Delivery Profiles
- Creating a Delivery Device
- Creating a Delivery Profile
- Business Intelligence Alerts
 - Adding an Alert Section to a Dashboard
- Agents
 - How Agents Work: Simplified Format
 - Configuring an Agent
 - 1. Configure the General Tab
 - 2. Configure the Schedule Tab
 - 3. Configure the Condition Tab
 - 4. Configure the Delivery Content Tab
 - 5. Configure the Recipients Tab
 - 6. Configure the Destinations Tab
 - 7. Configure the Actions Tab
 - Subscribing to an Agent
 - Listing Your Agents
 - Using Agents to Deliver Content
 - Using Conditions to Deliver Content

- 1. Create a New Agent and Assign an Analysis for Its Condition
- 2. Define How the Condition Evaluates to “True”
- 3. Test the Results
- Using Agents to Proactively Respond to KPI Performance
- 1. Create a New Agent and Assign a KPI for Its Condition
- 2. Define How the Condition Evaluates to “True”
- 3. Test the Results
- Quiz
- Summary
- Practice 17: Overview

Administering the Presentation Catalog

- Objectives
- Security Goal: Access and Actions
- Oracle BI Security and Catalog Security
- Default BI Roles
- Presentation Catalog Folder and Object Permissions
- Permission Inheritance
- Default Application Role Hierarchy: Example
- Setting Object Permissions
- 1. Click Permissions
- 2. Add Roles
- 3. Set Permissions
- Recommendations for Setting Permissions
- Viewing and Setting Properties
- Setting System Privileges
- 1. Click the Administration and Manage Privileges Links
- 2. Pick Users and Roles
- Archiving Catalog Items
- Oracle BI Briefing Books
- Working with Oracle BI Briefing Books
- Add Content to a New or Existing Oracle BI Briefing Book
- Edit an Oracle BI Briefing Book
- Download an Oracle BI Briefing Book
- Working with Favorites
- Adding Objects to Favorites
- Accessing Favorite Objects
- Organizing Favorites
- Removing Favorites
- Quiz
- Summary
- Practice 18: Overview

Direct Database Analysis

- Objectives

- Direct Database Analysis Privileges
- Changing Direct Database Analysis Privileges
- Creating and Executing a Direct Database Analysis
- 1. Create a Direct Analysis
- 2. Construct a Direct Database Analysis
- Editing XML and SQL
- Using the Advanced Tab to Modify XML
- Using the Advanced Tab to Modify SQL
- Using the Advanced Tab to Include Advanced SQL Clauses
- Quiz
- Summary
- Practice 19: Overview

Expressions

- Objectives
- SQL Syntax and Semantics
- Aggregate Functions
- Running Aggregate Functions
- Time Series Functions
- Conversion Functions
- Database Functions
- Advance Analytics Internal Logical SQL Functions
- BIN Function
- WIDTH_BUCKET Function
- TRENDLINE Function
- Advance Analytics External Logical SQL Functions
- EVALUATE_SCRIPT
- FORECAST
- CLUSTER
- OUTLIER
- REGR
- Quiz
- Summary
- Practice 20: Overview
- A Oracle Business Intelligence Mobile
- Objectives A-2
- Oracle Business Intelligence Mobile A-3
- Getting BI Mobile A-5
- Launching the BI Mobile Application A-6
- Setting Up User Credentials A-7
- First Time Help Screen: Home Page A-8
- Oracle BI Mobile User Interface A-9
- First Time Help: Settings A-10
- Configuring Oracle BI Mobile A-11
- Navigating BI Mobile on Your Mobile Device A-12
- Navigating the Carousel, Tile, and List Subviews A-13

- Navigating to Dashboards A-14
- Working with Favorites A-15
- Working with Local Content A-16
- Performing Searches A-17
- Adjusting Search Settings A-18
- Working with BI Content A-19
- Working with Object Options A-21
- Oracle BI Mobile Security Toolkit A-22
- Quiz A-23
- Summary A-25