

Oracle® Financial Services Performance Analytics Data Visualization Analytics User Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Preface

This section provides information about the Oracle Financial Services Performance Analytics (OFS PA) Application User Guide. OFS PA Applications are packaged as part of the OFS PFT Applications Pack.

Topics:

- [Audience](#)
- [Access to Oracle Support](#)
- [Related Information Sources](#)
- [Additional Documents to Read](#)
- [Conventions](#)
- [Abbreviations](#)

1.1 Audience

This user guide is intended for the users of the Oracle Financial Services Performance Analytics (OFS IPA) Application.

1.2 Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For more information, visit [My Oracle Support](#) or visit [Oracle Accessibility Learning and Support](#) if you are hearing impaired.

1.3 Related Information Sources

This section identifies additional documents related to the OFS IPA Application.

You can access the below documents online from the Oracle Help Center (OHC) [Documentation Library](#) for OFS PA Applications Pack:

- OFS Performance Analytics Application Pack Release Notes
- OFS Performance Analytics Applications Pack Installation and Configuration Guide
- OFS Performance Analytics Operational User Guide
- OFS Performance Analytics Business User Guide
- OFS Performance Analytics OBIEE Reports User Guide Release

[Performance Analytics Security Guides:](#)

- OFS Institutional Performance Analytics Security Guide Release 8.1.x
- OFS Retail Performance Analytics Security Guide Release 8.1.x

[Performance Analytics Cloning Reference Guides:](#)

- OFS Institutional Performance Analytics Cloning Reference Guide Release 8.1.x
- OFS Retail Performance Analytics Cloning Reference Guide Release 8.1.x

[Data Protection Guide](#):

- OFS Performane Analytics Data Protection Guide Release 8.1.x

1.4 Additional Documents to Read

Oracle Financial Services Profitability Analytics Applications Pack is built on the Oracle Financial Services Advanced Analytical Applications Infrastructure (OFS AAI).

See the following [OFS AAI Documents](#) as no separate documents are required at the pack or application level for Oracle Financial Services Profitability Analytics Applications Pack:

- OFS Analytical Applications Infrastructure (OFS AAI) Application Pack Installation and Configuration Guide Release 8.1.2.0.0
- OFS Analytical Applications Infrastructure Administration Guide Release 8.1.x
- OFS Analytical Applications Infrastructure User Guide Release 8.1.2.0.0
- OFS Analytical Applications Infrastructure Cloning Reference Guide Release 8.1.x
- OFS Analytical Applications Infrastructure Security Guide Release 8.1.x

You can access the common document from the OHC Documentation Library:

- [OFSAA Licensing Information User Manual](#)
- [OFS Analytical Applications 8.1.2.0.0 Technology Matrix](#)

1.5 Conventions

The following text conventions are used in this document:

Table 1-1 Conventions Used in this Guide

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, file names, text that appears on the screen, or text that you enter.
Hyperlink	Hyperlink type indicates the links to external websites, internal document links to sections.

1.6 Abbreviations

The following table lists the abbreviations used in this document:

Abbreviation	Meaning
BDP	Big Data Processing
DBA	Database Administrator
DDL	Data Definition Language
DEFQ	Data Entry Forms and Queries
DML	Data Manipulation Language
EAR	Enterprise Archive
EJB	Enterprise JavaBean
ERM	Enterprise Resource Management
FTP	File Transfer Protocol
HDFS	Hadoop Distributed File System
HTTPS	Hypertext Transfer Protocol Secure
J2C	J2EE Connector
J2EE	Java 2 Enterprise Edition
JCE	Java Cryptography Extension
JDBC	Java Database Connectivity
JDK	Java Development Kit
JNDI	Java Naming and Directory Interface
JRE	Java Runtime Environment
JVM	Java Virtual Machine
LDAP	Lightweight Directory Access Protocol
LHS	Left Hand Side
MFA	Multi-Factor Authentication
MOS	My Oracle Support
OFSA	Oracle Financial Services Analytical Applications
OFSAI	Oracle Financial Services Analytical Application Infrastructure
OFSAAI	Oracle Financial Services Advanced Analytical Applications Infrastructure Application Pack
OHC	Oracle Help Center
OLAP	On-Line Analytical Processing
OLH	Oracle Loader for Hadoop
ORAAH	Oracle R Advanced Analytics for Hadoop
OS	Operating System
RAM	Random Access Memory
RDBMS	Relational Database Management System
RHEL	Red Hat Enterprise Linux
SFTP	Secure File Transfer Protocol
SID	System Identifier
SSL	Secure Sockets Layer
TNS	Transparent Network Substrate
URL	Uniform Resource Locator
VM	Virtual Machine
WAR	Web Archive
XML	Extensible Markup Language

2

Data Visualization Project

Data Visualization provides a quick and effective way to communicate information in a universal manner using visual information. The practice help as follows:

- Businesses to identify which factors affect Customer Behavior.
- Pinpoint areas that need to be improved or need more attention.
- Make data more memorable for stakeholders.
- Understand when and where to place specific products, and predict sales volumes.

This technology and its vision have been embraced by the Performance Analytics Reports to support the End-User journey.

2.1 Access PA BI Report

This section covers the description to access the IPA BI Reports.

2.1.1 IPA Dashboards and Reports Link from LHS

To access the PA BI Reports, do the following:

1. From the LHS Menu, select Dashboards and Reports after you log in with your User Credentials.

Figure 2-1 IPA BI Menu



2. Click Dashboard and Reports.

Figure 2-2 Dashboards and Reports Screen



2.1.2 RPA Dashboards and Reports Link from LHS

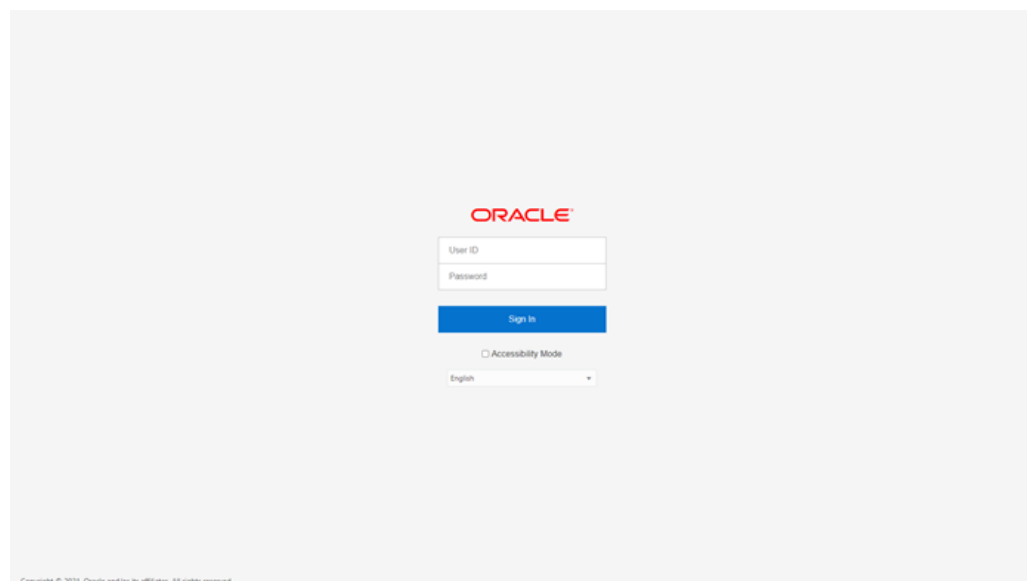
To access the PA BI Reports, do the following:

1. From the LHS Menu, select Dashboards and Reports after you log in with your User Credentials.
2. Click Dashboard and Reports.

2.2 Logging in to the PA BI Page

After you open the LHS link from the previous step, you will be redirected to login into the PA BI Report Page. Use your credentials to access the BI Reports.

Figure 2-3 PA BI Login Screen



2.3 Accessing DV in Visualization Mode

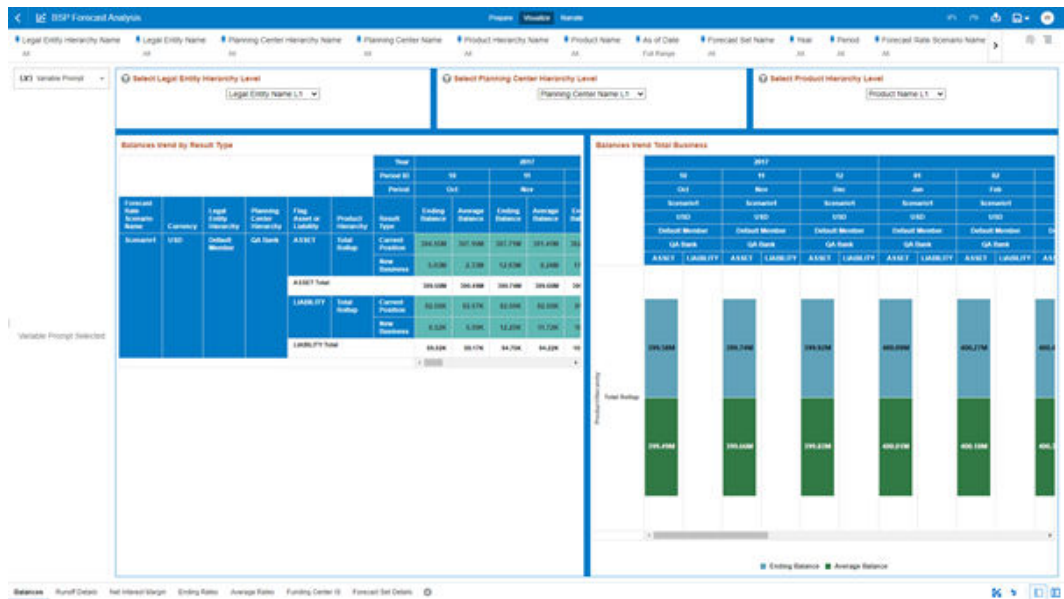
This section covers the procedure to disable the Editor Panel options.

2.3.1 Disable Editor Panel Options

To disable the **Toggle Data Panel**, follow these steps:

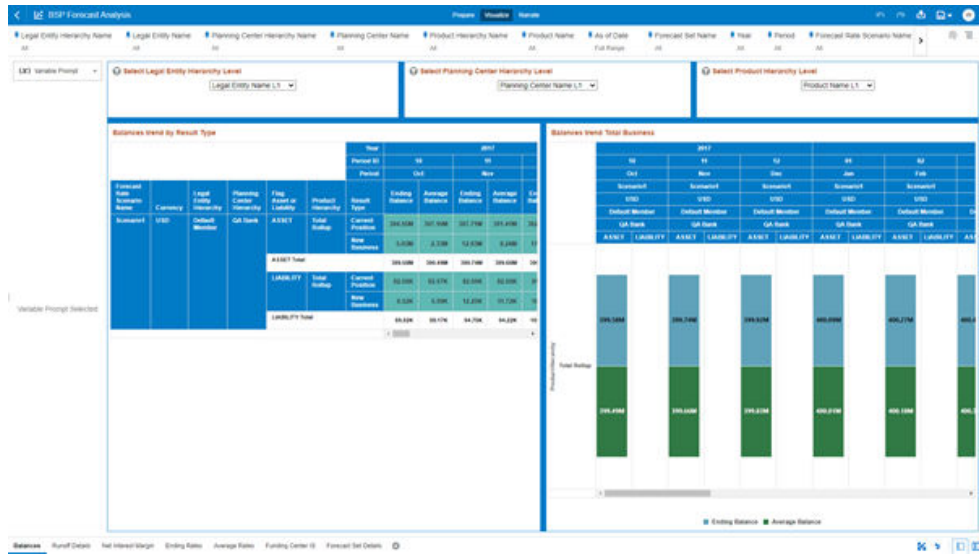
1. Click on the bottom right-hand side the **Toggle Data Panel** button as shown in the following screenshot.

Figure 2-4 Forecast Analysis Screen



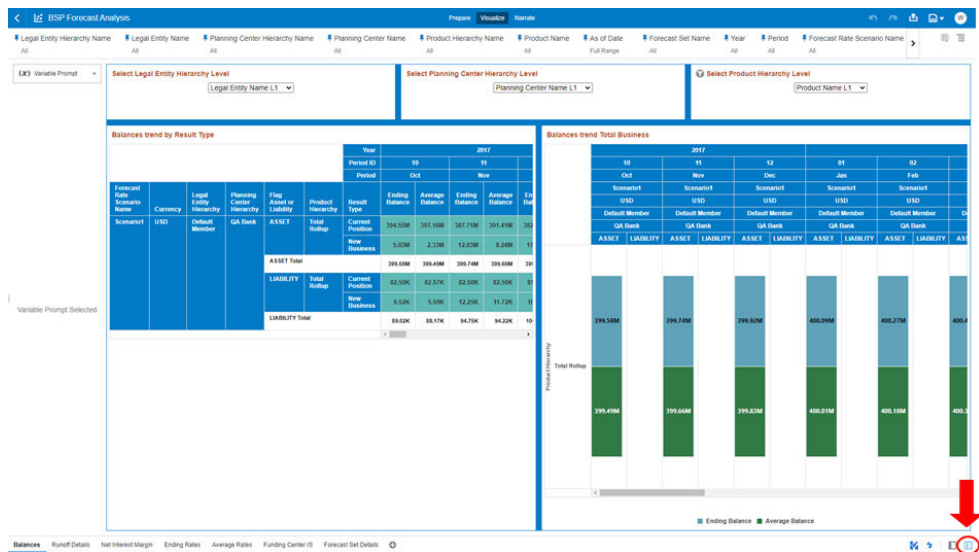
The following screenshot displays the result of Step 1.

Figure 2-5 Forecast Analysis Result



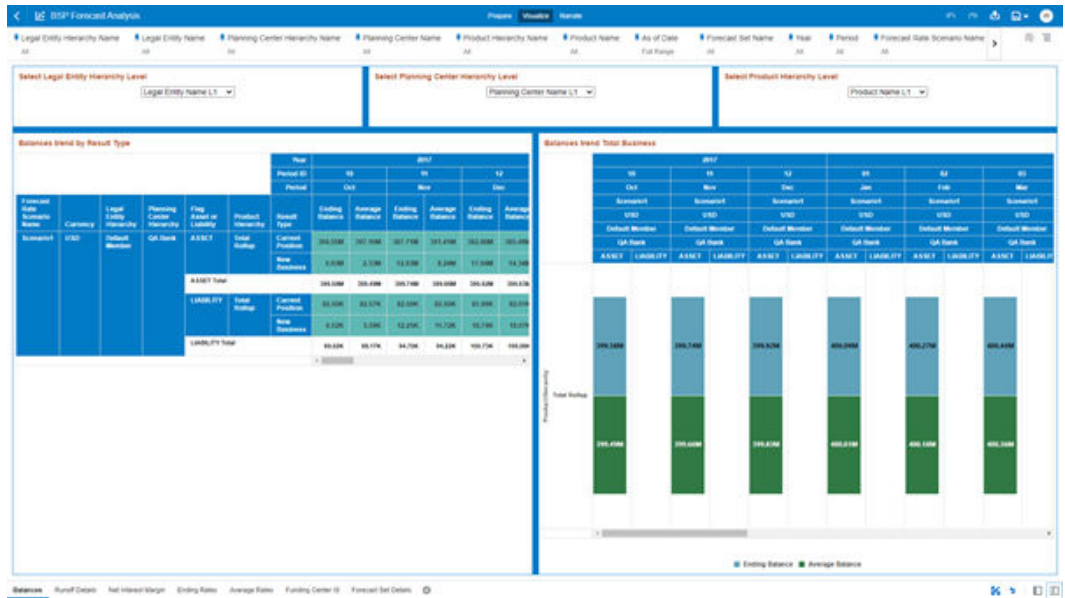
2. Disable the **Toggle Grammar Panel** as shown in the following screenshot:
3. Click on the bottom right-hand side the **Toggle Grammar Panel** button.

Figure 2-6 Disabling Toggle Grammar Panel



The following screenshot displays the result of Step 1.

Figure 2-7 Result



3

DV UI Management

(Required) <Enter a short description here.>

Topics:

- [Creating Custom Reports in OAS](#)
- [Reload Dataset's Data](#)

3.1 Creating Custom Reports in OAS

You use visualizations and analyses to find the answers that you need from Key Business Data displayed in graphical formats.

Visualizations enable you to dynamically explore multiple datasets graphically, all within a single interface. You can visualize data from many commonly used data sources. Workbooks enable you to organize and share your visualizations.

For more information about Creating Custom Reports in OAS, follow this link:

<https://docs.oracle.com/en/middleware/bi/analytics-server/build-reports-and-dashboards.html>

3.2 Reload Dataset's Data

This topic explains the relationship between reloading the data used in a dataset and refreshing the data used in a workbook. It also explains the different ways that you can reload a dataset's data.

You can reload a dataset that uses a file as its source, when one or more tables in the dataset are cached, or when the dataset is created from running a data flow.

Reloading data ensures that workbooks and visualizations contain current data. The most current data is displayed in workbooks and visualizations after the dataset reload is complete and you refresh the workbooks.

For more information about Reloading a Data Set's Data, follow this link:

<https://docs.oracle.com/en/cloud/paas/analytics-cloud/acubi/reload-datasets-data.html>

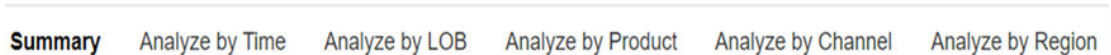
4

Canvases, Canvas Filters, and their Use

The Canvases available in a particular DV Story are visible in the bottom left part of the screen. For example, in the Business Performance Analyzer Story, there are the following Canvases:

- Summary
- Analyze by Time
- Analyze by LOB
- Analyze by Product
- Analyze by Channel
- Analyze by Region

Figure 4-1 Business Performance



A horizontal navigation bar with six tabs: Summary, Analyze by Time, Analyze by LOB, Analyze by Product, Analyze by Channel, and Analyze by Region. The 'Summary' tab is highlighted in a darker blue color.

The IPA and RPA DV Reports enable several filters at the canvas level for detailed analysis. The Canvas Level Filters allow the Business User to do detailed analysis by splitting the data across various dimensions.

The filters differ across canvases. The Sample Filters from the Business Performance Analyzer are as follows:

Figure 4-2 Summary Canvas



A screenshot of the 'Summary Canvas' interface. At the top, there is a blue header bar with a back arrow, a grid icon, and the text 'OFS Institutional Business Performance Analyzer'. Below the header, there are two filter sections. The first section is 'Display Legal Entity Name' with a dropdown menu currently set to 'All'. The second section is 'Calendar Year' with a dropdown menu currently set to 'Last 5 Years'.

Note the relative time prompt highlighted above acts as a primary filter of the data. On clicking the filter prompt, the below menu is exposed. As seen, the prompt allows to change the relative time period into months, quarters, and years, and also to select the number of time periods to look up in the past.

Figure 4-3 OFS Institutional Business Performance Analyzer

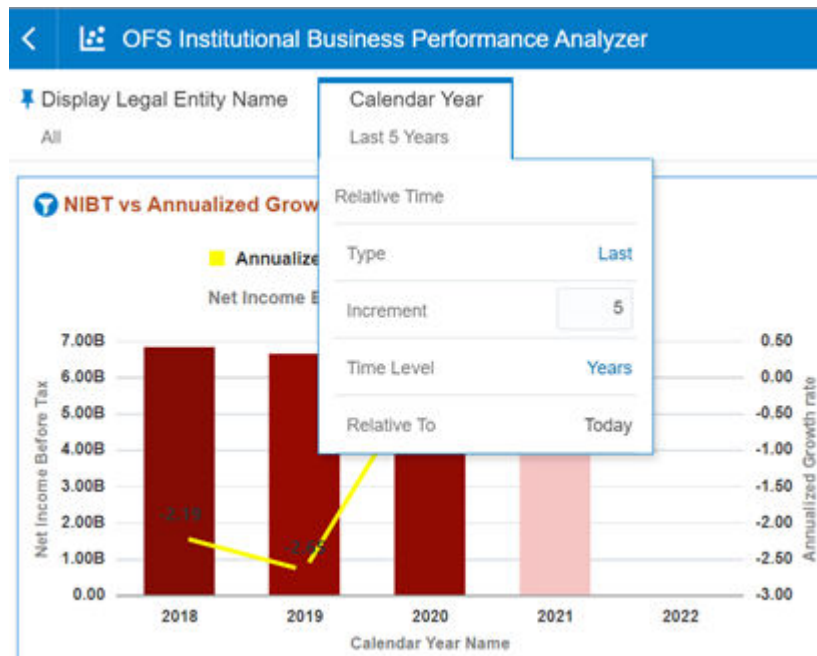
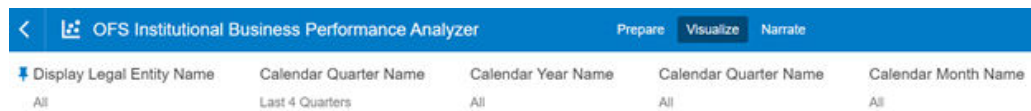


Figure 4-4 Time Canvas



Unlike the other canvases, the Time Canvas allows for splitting the data across different time reference points – Years, Months, and Quarters.

Figure 4-5 OFS Institutional Business Performance Analyzer

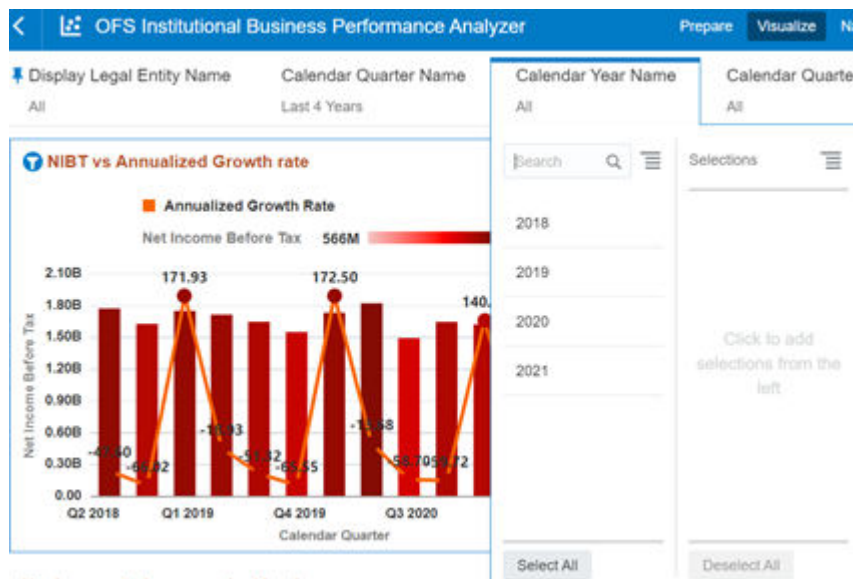


Figure 4-6 OFS Institutional Business Performance Analyzer – Visualize Tab

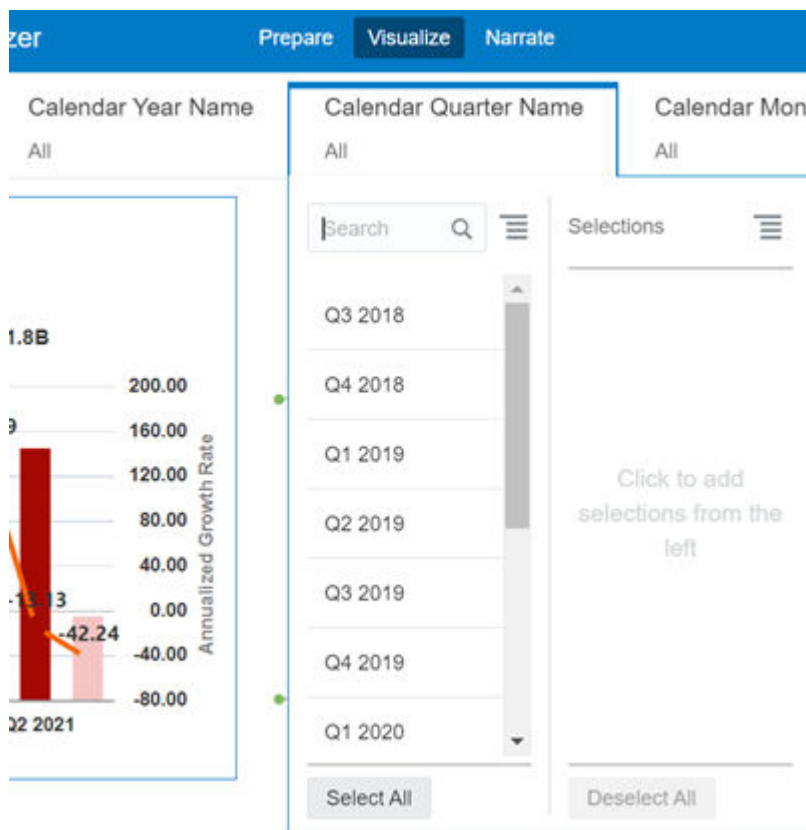


Figure 4-7 Calendar Month Name

The screenshot displays a user interface for selecting calendar months. On the left, there are two sections: 'Actual RAROC' with a value of 0.00 and 'Budgeted RAROC' with a value of 0.00. The main area is titled 'Calendar Month Name' and contains a search bar, a list of months from Jul-2018 to Jan-2019, and a 'Selections' box on the right. The 'Selections' box contains the text 'Click to add selections from the left'. Below the list of months are two buttons: 'Select All' and 'Deselect All'.

Respective time selections will be reflected on the Right-Hand Side Box. Multi-select is supported and values can easily be deselected for new analyses.

5

In-Report Filters

(Required) <Enter a short description here.>

Some reports support In-Report Filters for a better presentation of the analysis. The In-Report Filters appear in bold below the Report Title.

Samples are as follows:

Figure 5-1 In-Report Filters of Net Income Taxes Across Products

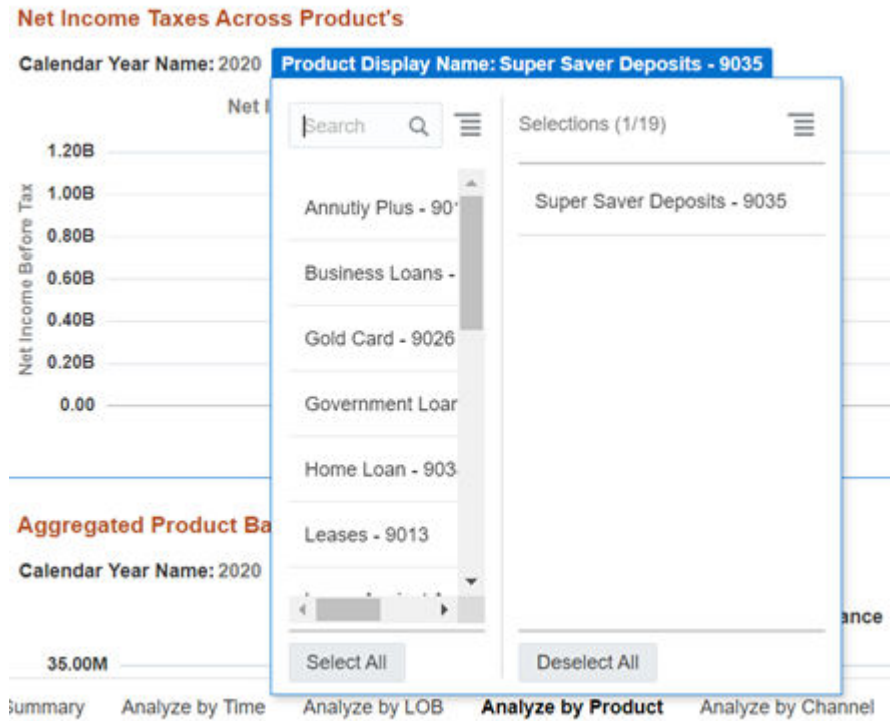


Figure 5-2 Balance & Revenue Comparison

Balance & Revenue Comparison

Country Name: India State Name: MAHARASHTRA City Name: >



6

Navigation and Region Selection

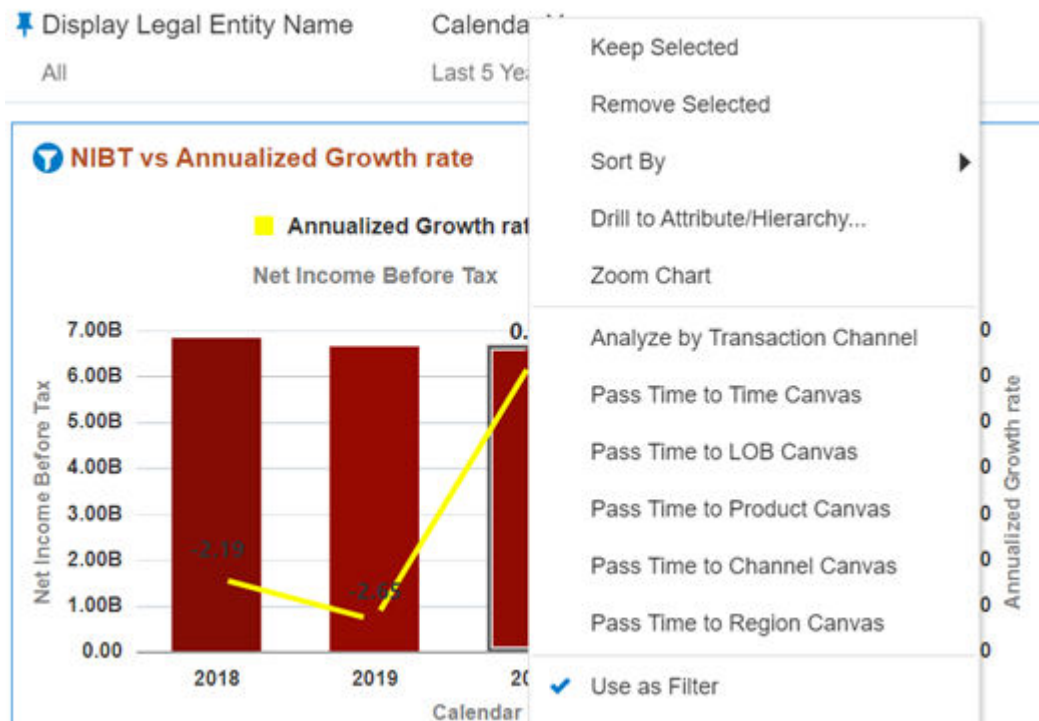
Topics:

- [Inter Canvas Navigation](#)
- [Region Navigation](#)

6.1 Inter Canvas Navigation

One of the key features of DV is the level of interactivity that is provided by the interface. DV helps the Business User to look at a particular canvas and pass the context of the current canvas to a different canvas to enable easy first and second level ad-hoc analysis. The context can be passed as seen in the following screenshots:

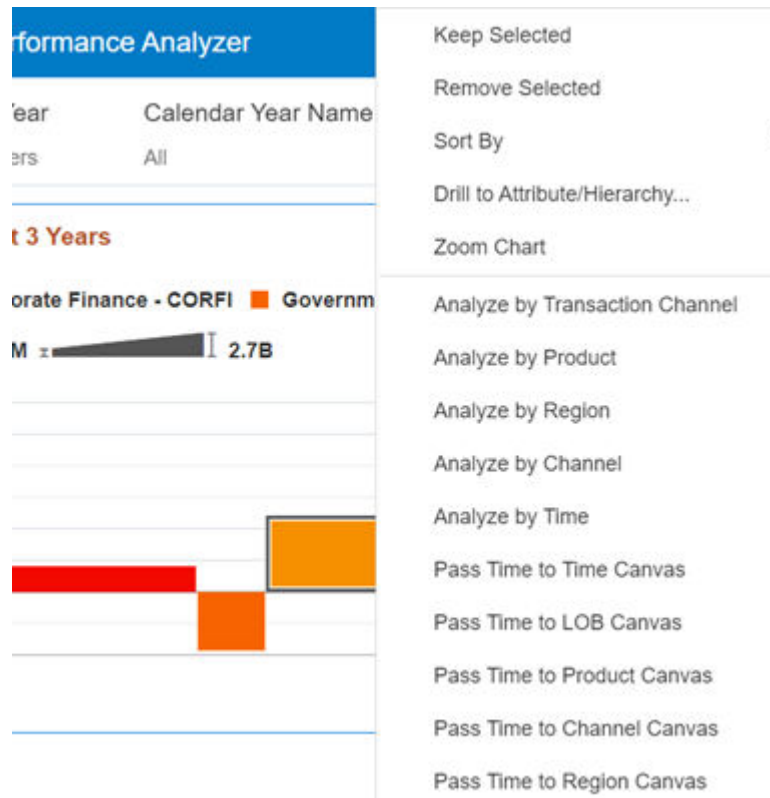
Figure 6-1 Inter Canvas Navigation



Note that in some cases, a new DV Story may open up with a new context. Select Analyze by Transaction Channel as shown in the screenshot.

In the above example, time is passed to the other canvases. However, in other cases, the existing Report Filters can be passed on to a different canvas for second-level analysis. This context is passed using – “Analyze By”.

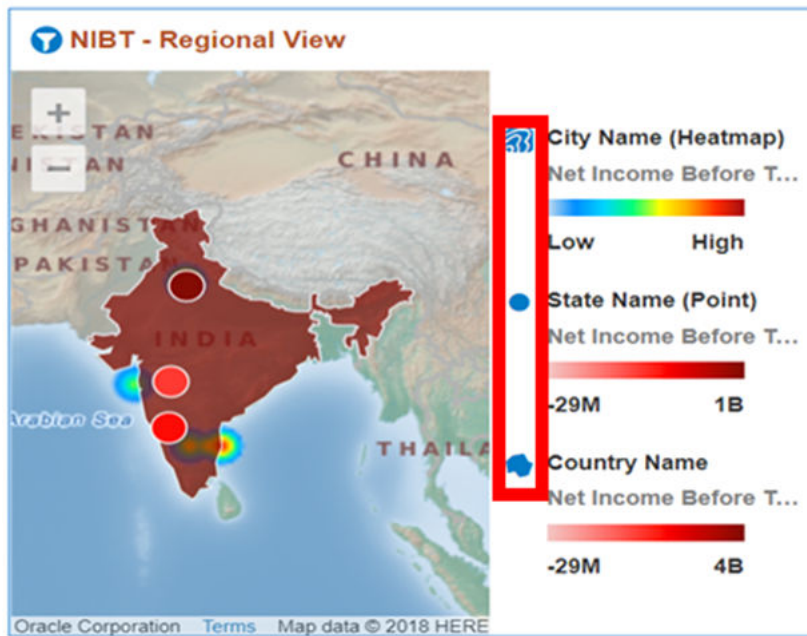
Figure 6-2 Example of Inter Canvas Navigation using Analyze by Context



6.2 Region Navigation

The Region Canvas opens with a map. The map has three layers – Country, State, and City. The user is expected to select the layer by clicking the icon next to Country, State, and City as indicated in the following illustration. The icons are highlighted in the red rectangle.

Figure 6-3 NIBT – Regional View




After the region is selected, the user can look at the reports for the selected geographical location and even navigate to other canvases, where the regional context is passed.

Figure 6-4 NIBT – Geographical Location View

City Name	State Name	LOB Display Name	Pro
All	All	All	All

NIBT - Regional View



Oracle Corporation Terms Map data

- Location Matches
- Keep Selected
- Remove Selected
- Drill to Attribute/Hierarchy...
- Zoom to Selected
- Analyze by Transaction Channel
- Analyze by Lob
- Analyze by Product
- Analyze by Channel
- Analyze by Time
- Use as Filter
- Add Statistics

7

DV Limitations

The following table lists the limitations of the DV Projects.

Table 7-1 DV Project Limitations

Serial Number	Comment
1	Dynamic Change of the Title header in the report as per the relative time prompt selection is not possible.
2	DV currently does not give the flexibility to change the filter prompt data dynamically as per the time-level selection for the relative prompt.
3	The axis and data labels on the charts are set in Auto Mode. Sometimes, this does not work as expected. In those cases, manual adjustments are necessary.
4	DV currently does not give the flexibility to change the Filter Prompt Data dynamically as per the data available. Prompts will be displayed even if the data is unavailable.
5	DV cannot switch the measure column aggregations as per the time levels. If non-default time levels are used, there may be double counting in such measures.
6	By default, Filter Prompts in DV pick the prompt values by doing random joins within the data time frame. Due to this, sometimes a value not present in a particular time period may be missed out.
7	In DV, the relative Time Prompt Selection has precedence over the time selection through other prompts.
8	When there is a Rank Function used in the Chart Level Filter, the data points in the last time period of the dataset take precedence.
9	When there is no data for a particular chart, the chart name is not displayed.
10	In the case of a Hierarchy Filter Prompt, one value in the prompt must be selected mandatorily.