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A Case Study

"Building Financial Report and Dashboard Using OBIEE"

This document briefs you the step by step approach to build financial reports and Dashboards using Oracle BI Answers and Dashboards. The document details all the steps required to build the Answer and Dashboard taking Essbase as Data Source. We are trying to help people who want to learn OBIEE and explore its features. There is a separate guide available for Logical modeling, RPD building and business requirement document. Refer the RPD building, business requirement guide along with this to have clear understanding.
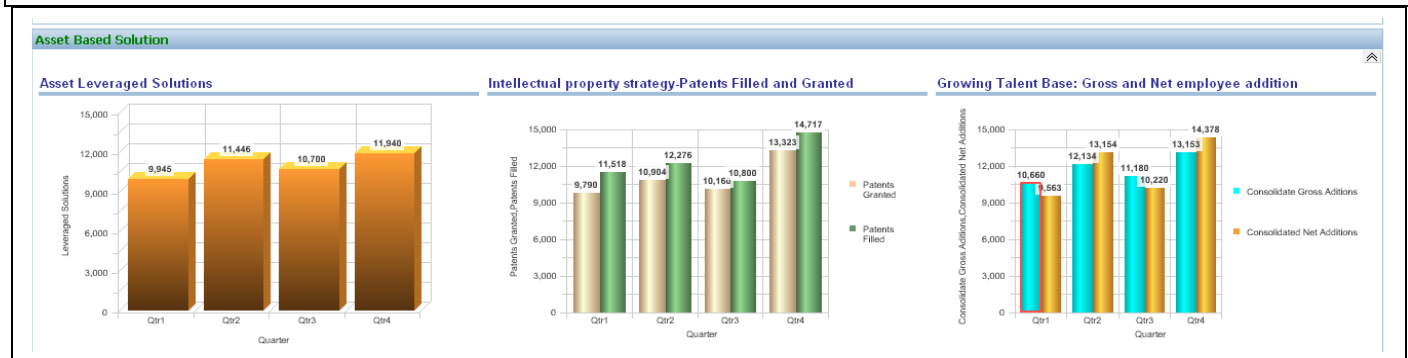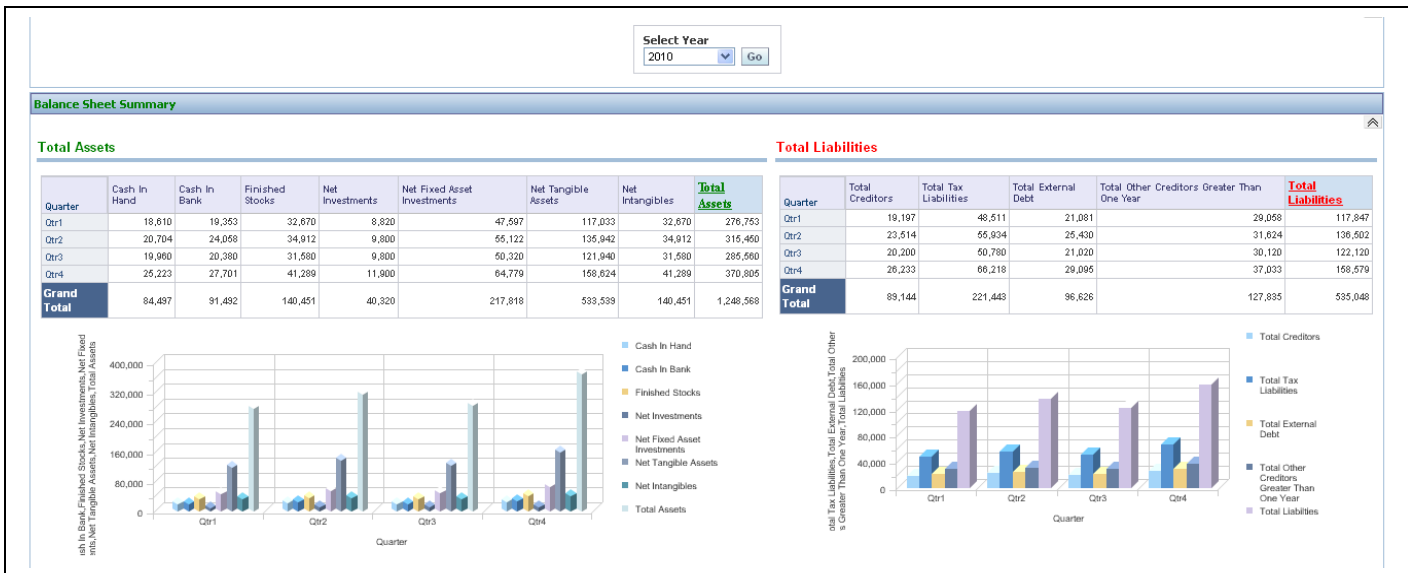
History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Hitesh Mankar	24th -Apr-2011
0.1	1st Review	Amit Sharma	26th Apr 2011

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Dashboard No.1:- Create a Balance Sheet report for the specific year.
Below is the dash board look of the report.

Step 1):- Requirements to create Balance Sheet dashboard.

Step 2):- Create a new dashboard prompt Year.

To create dashboard prompt login into Answers and go to left pane select new dashboard prompt [icon] and select a catalog.
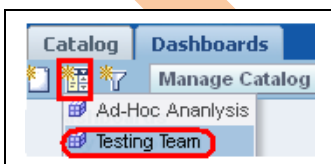
Step 3) Select Scope of the prompt as page and select a column from left pane which you want to use as prompt. (Here year column is selected to use year values as prompt values)
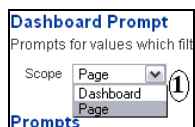
Set all the properties of prompt as shown in below screen shot and save it.

Group	Column	Operator	Control	Show	Default to	Set Variable	Label
	Year	f_x is equal to / is in	Drop-down List	All Values ☑ (All Choices) ☑ Constrain	Report Defaults	Presentation Variable / year	Select Year

Step4) Below request need to create first to build the dashboard.

A) Total Assets,

B) Total Liabilities,

C) Assets Based Solution

   C.1) Asset Leveraged Solutions
   C.2) Intellectual Property Strategy
   C.3) Global Talent Base

Step 5):- Columns and calculations required from different tables to create requests.

A) Create **Total Assets** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name	
Year/Year	
Quarter/Year	
Cash IN Hand/ CCoA	
Cash IN Bank/CCoA	
Finished Stocks/CCoA	
Net Investments/CCoA	
Net Fixed Assets Investments/CCoA	
Net Tangible Assets/CCoA	
Net Intangible Assets/CCoA	
Total Assets (Computed Column)	Cash IN Hand +Cash IN Bank +Finished Stocks +Net Investments +Net Fixed Assets Investments + Net Tangible Assets + Net Intangible Assets

A.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

(Here total Assets is not available in any table, it's a computed column and need to create)

A.2) Now add one more column from left pane (can be added from any table) to calculate and create Total Assets column.
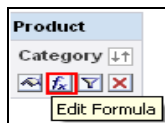
Click on **Edit Formula** button of newly added column and select **Custom Headings.**
Change the **Table Heading** as Total, **Column Heading as** Total Assets and delete the **Column Formula**.

A.3) Now click on **Column** button in **Edit Column Formula** tab to add column to create computed column Total Assets.

When you click on the Column button you will get the list of all the columns which are exists with this request.
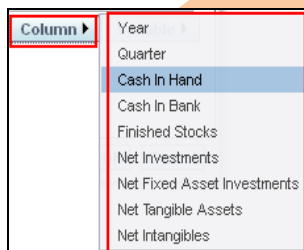
Now click on the columns one by one and place a plus sign in between them as given in below screen shot and click ok.

In the criteria tab the column will appear like this after editing column formula.

A.4) Now add a filter using presentation variable with this request. Click add filter button on Year column

And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)
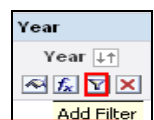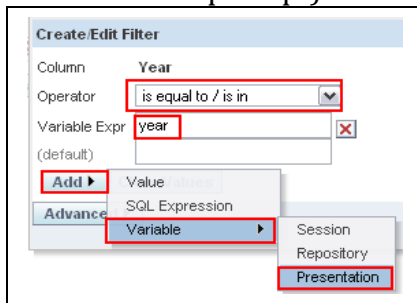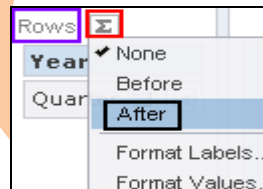
A.5) Now click on the result tab,

Remove the default table view and click on add view button [Add View] to add a Pivot Table view to the result. Now arrange the columns

A.5.1) Drag Year column from Rows and put it into Excluded.

A.5.2) Click on the summation button in the row panel → Select over the Quarter column to calculate Grand Total below all the measures.

A.5.3) Select the Chart Pivoted Results to   add a chart view with result and change all other properties as shown in below   screen shot of chart pivoted view.
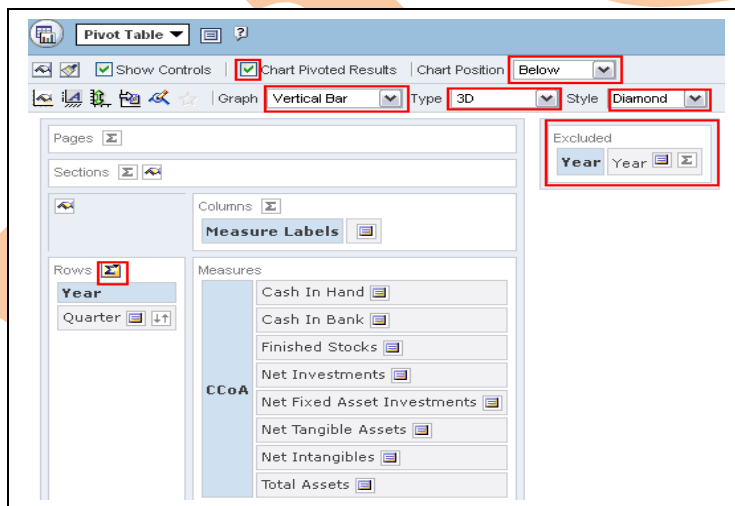
A.5.4) Click on the more options button beside every column to format headings and values, other than for measure and computed columns some different and additional options are available over other sections like columns, pages, sections rows and excluded. (Properties you can find like below screen shots)
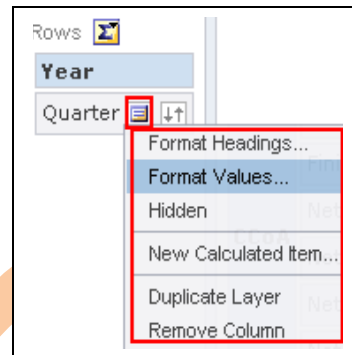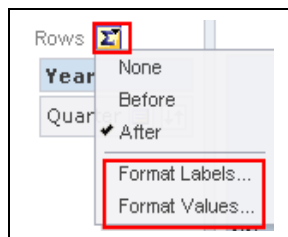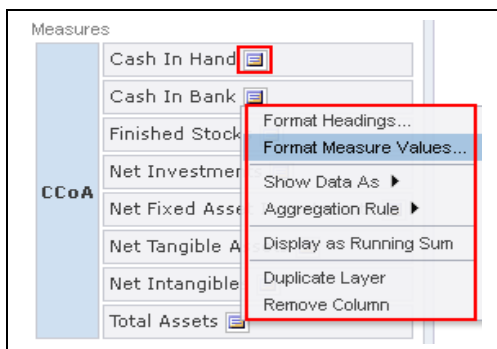
A.5.5) Click on General Properties ⬚ , select custom title and use change format button ⬚ to change its format and set height (650) and width (220).

A.5.6) Now click ok from the top right. Check the result.
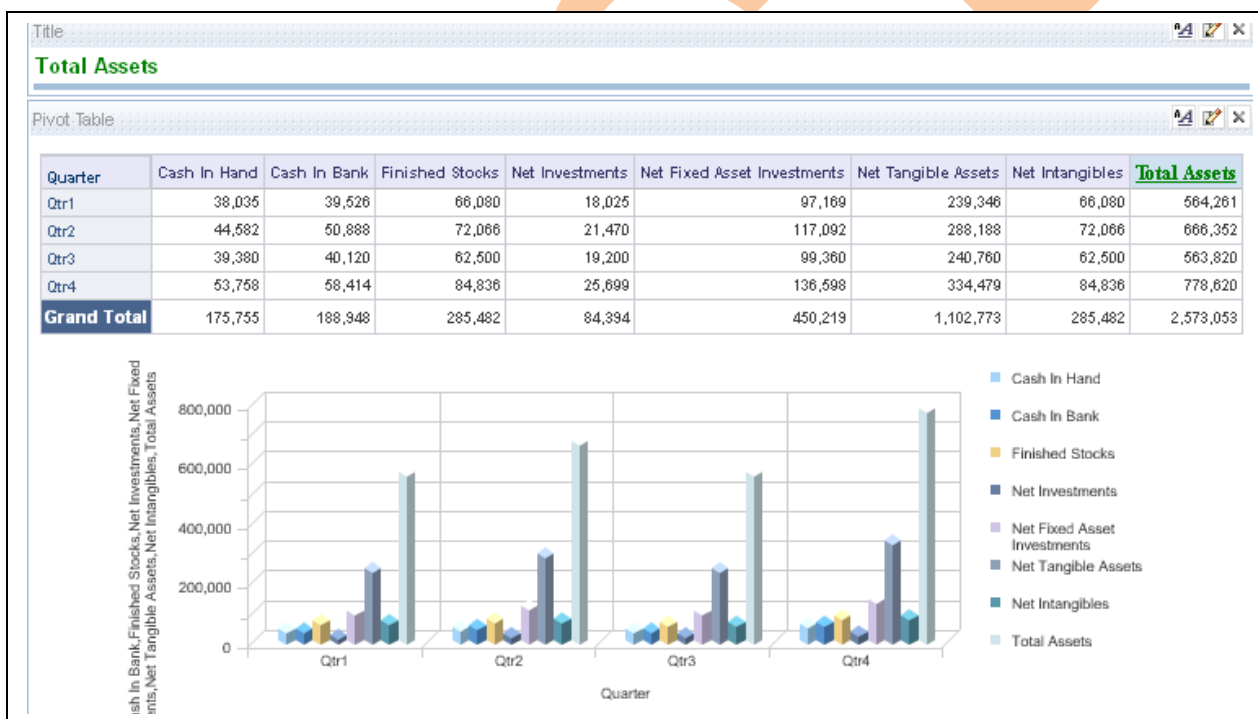
A.5.7) Go to criteria and save the request.

B) Total Liabilities,

Create **Total Liabilities** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name	
Year/Year	
Quarter/Year	
(blank)	
Total Creditors/ CCoA	
Total Tax Liabilities/CCoA	
Total External Debt/CCoA	
Total Other Creditors/CCoA	
Total Liabilities (Computed Column)	Total Creditors +Total Tax Liabilities + Total External Debt + Total Other Creditors

B.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.
(Here total Liabilities is not available in any table, it's a computed column and need to create)

B.2) Now add one more column from left pane (can be added from any table) to calculate and create Total Assets column.
Click on **Edit Formula** button of newly added column and select **Custom Headings.**
Change the **Table Heading** as Total, **Column Heading as** Total Liabilities and delete the **Column Formula.**

B.3) Now click on **Column** button in **Edit Column Formula** tab to add column to create computed column Total Liabilities. When you click on the Column button you will get the list of all the columns which are exists with this request.

Now click on the columns one by one and place a plus sign in between them as given in below screen shot and click ok.
In the criteria tab the column will appear like this after editing column formula.

B.4) Now add a filter using presentation variable with this request. Click add filter button on Year column. And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)

B.5.1) Drag Year column from Rows and put it into Excluded.

B.5.2) Click on the summation button in the row panel → Select over the Quarter column to calculate Grand Total below all the measures.
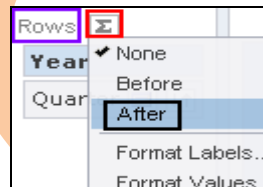
B.5.3) Select the Chart Pivoted Results to add a chart view with result and change all other properties as shown in below screen shot of chart pivoted view.
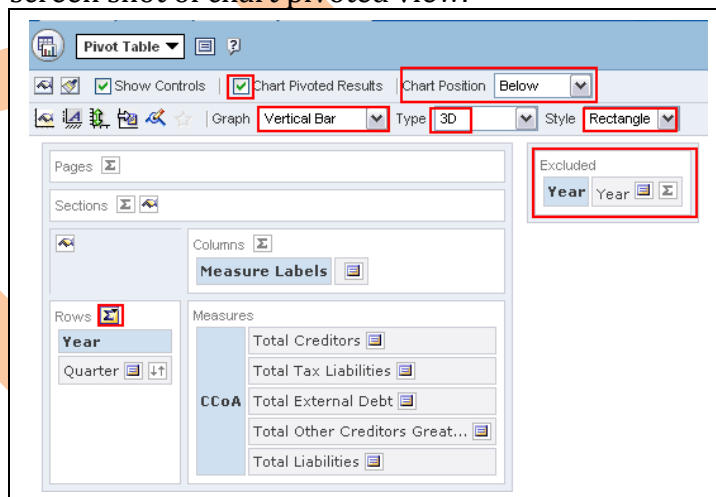
B.5.4) Click on the more options button beside every column to format headings and values, other than for measure and computed columns some different and additional options are available over other sections like columns, pages, sections rows and excluded.

B.5.5) Click on General Properties ▯ , select custom title and use change format button ▯ to change its format and set height (500) and width (200).

B.5.6) Now click ok from the top right. Check the result.
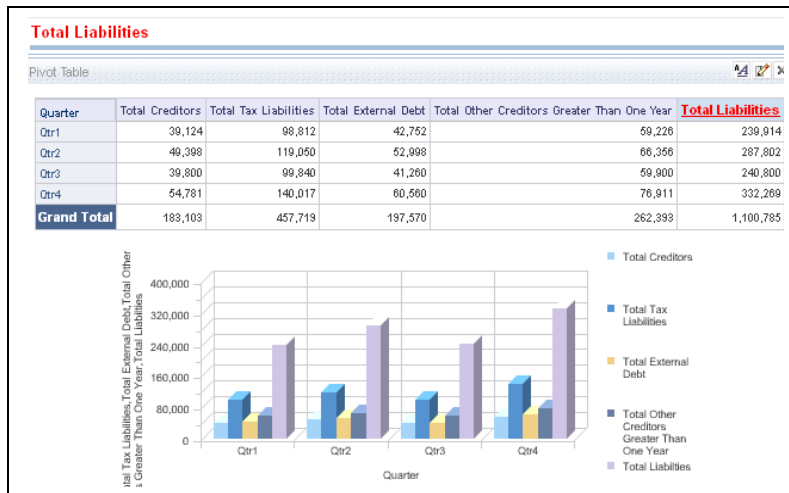
B.5.7) Go to criteria and save the request.

C) Assets Based Solution.

Create **Assets Leveraged Solutions** request, below are the list of columns which are required to create this request with their table name.

C.1) Asset Leveraged Solutions.

Column Name/ Table Name
Year/Year
Quarter/Year
Leveraged Solution/ CCoA

C.1.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

C.1.2) Now add a filter using presentation variable with this request. Click add filter button on Year column.

And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt).


C.1.3) Now click on the result tab,

Remove the default table view and click on add view button [Add View] to add a chart view to the result. Now set properties as shown in screen shot.

C1.4) Click on general properties tab [ ]. Select custom title and use change format button [ ] to change its format and set height (400) and width (250).

Select Always for *Show data labels* and set colors using format chart data button [ ].

C.1.5) Now click ok from the top right. Check the result.
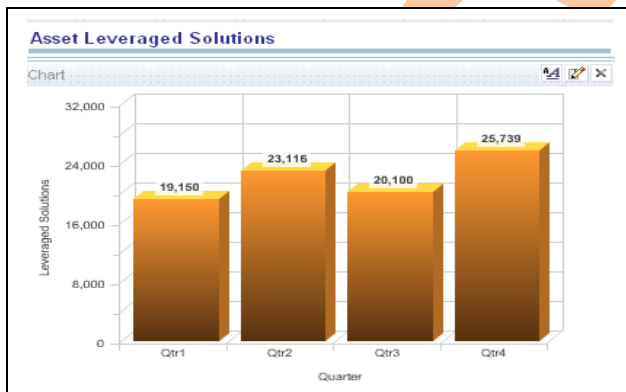
C.1.6) Go to criteria and save the request.

C.2) Intellectual Property Strategy.

C.2.1) Create **Intellectual Property Strategy** request, below are the list of columns which are required to create this request with their table name.

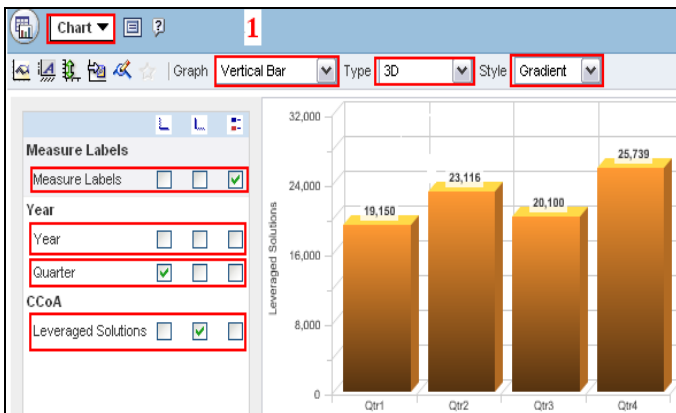| Column Name/ Table Name |
| --- |
| Year/Year |
| Quarter/Year |
| |
| Patents Filled/ CCoA |
| Patents Granted/CCoA |

C.2.2) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.
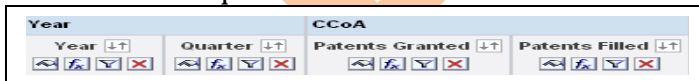
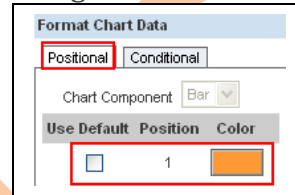C.2.3) Now add a filter using presentation variable with this request. Click add filter button on Year column
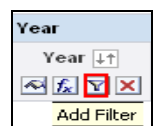
And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)
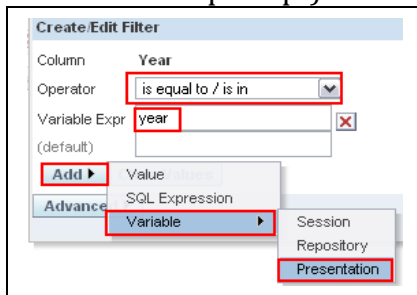
C.2.4) Now click on the result tab,
Remove the default table view and click on add view button [Add View] to add a chart view to the result. Now set properties as shown in screen shot.
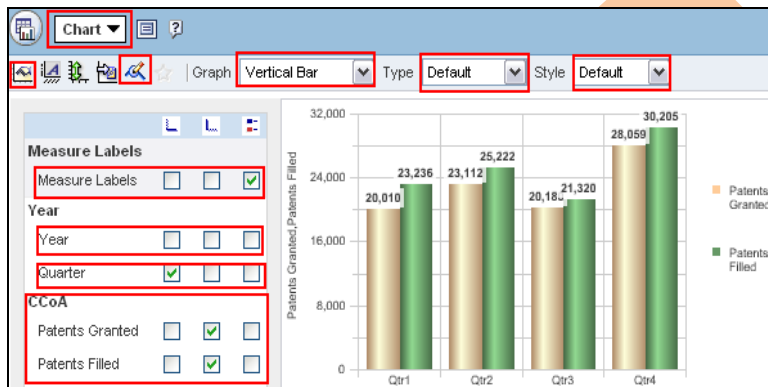
C.2.5) Click on general properties tab [ ]. Select custom title and use change format button [ ] to change its format and set height (400) and width (250).
Select Always for **Show data labels** and format chart data using format chart data button [ ], set colors.
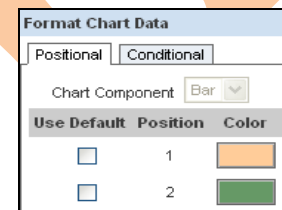
C.2.6) Now click ok from the top right. Check the result.
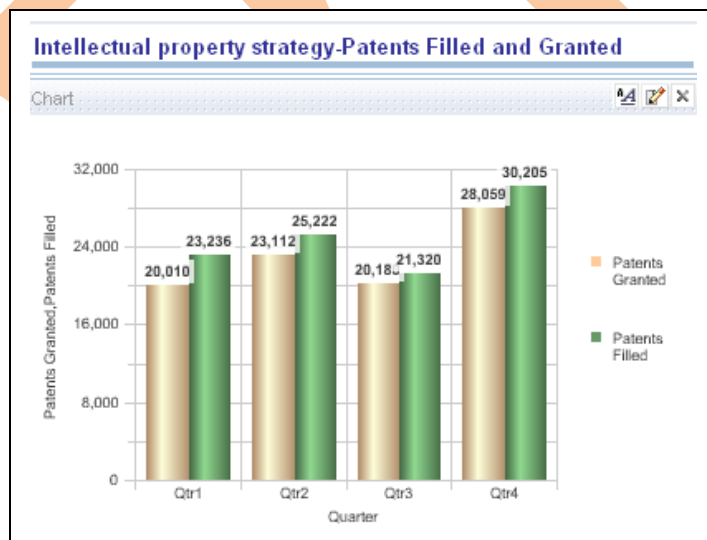
C.2.7) Go to criteria and save the request.

C.3) Growing Talent Base.

C.3.1) Create Growing Talent Base request, below are the list of columns which are required to create this request with their table name.

| Column Name/ Table Name |
|---|
| Year/Year |
| Quarter/Year |
| |
| Consolidated Gross Additions/ CCoA |
| Consolidated Net Additions/ CCoA |

C.3.2) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.


C.3.3) Now add a filter using presentation variable with this request. Click add filter button on Year column. And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)
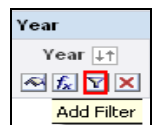
C.3.4) Now click on the result tab,
Remove the default table view and click on add view button [Add View] to add a chart view to the result. Now set properties as shown in screen shot.
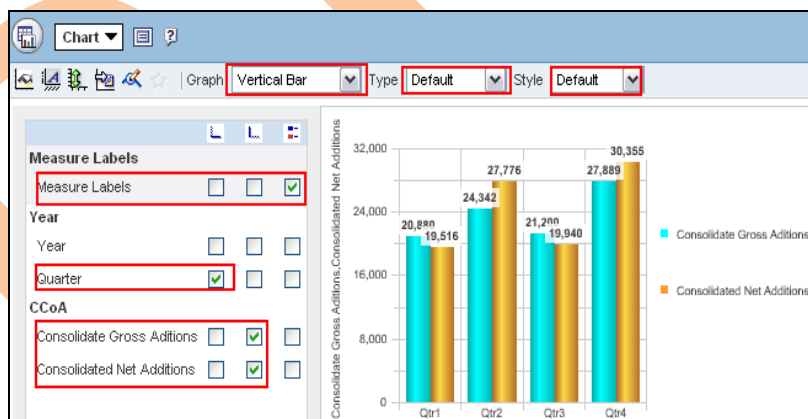
C.3.5) Click on general properties tab[ ]. Select custom title and use change format button [ ] to change its format and set height (400) and width (250).
Select Always for *Show data labels* and format chart data using format chart data button[ ], set colors.
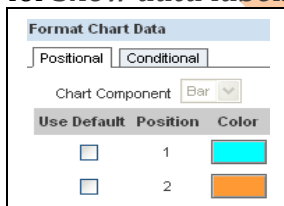
C.3.6) Now click ok from the top right. Check the result.
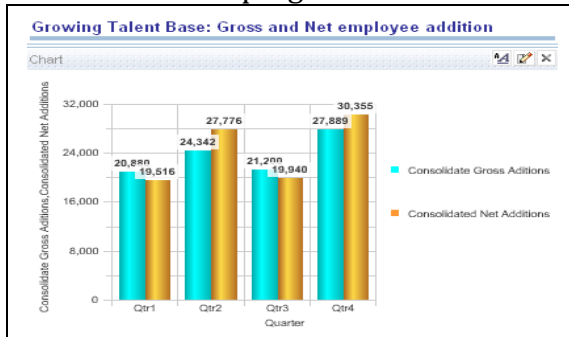
C.3.7) Go to criteria and save the request.

Step 6) **Creating Dashboard: -** Now create a new catalog group →Go to settings, select Administration.

6.1) Click on Manage Presentation Catalog Groups and Users

6.2) In the next window click on Create a new Catalog Group.

6.3) Enter a Group Name(Account), Dashboard Name (*Financial Analysis*) to create a empty dashboard automatically and dashboard builder name (Administrator) as shown in below screen shot(you can create a new dashboard manually also).

Step7) Click on Finish → again Finish and Close.
You will get an empty dashboard automatically.
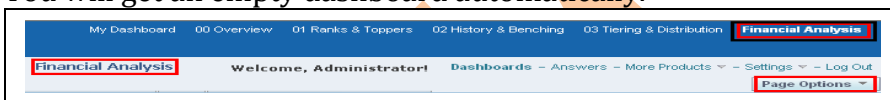
Step 8) Click on Page options and select Edit Dashboard.

Step9) Click on Add dashboard page button
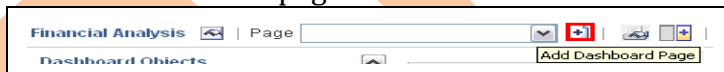
Step10) Enter a dashboard page name and press ok. A new dashboard page will create.

Step11) Now drag a section from left pane into column pane.
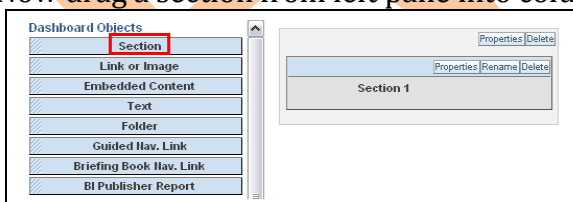
Step12) Select Year Prompt from left pane, open the folder where you have saved it , drag and drop it into the section1.
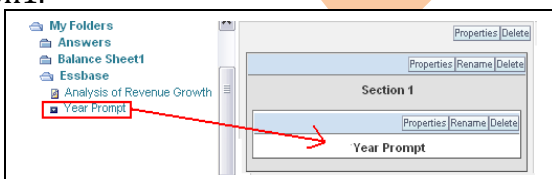
Step13) Drag two more sections from left pane and rename them as shown in screen shot.
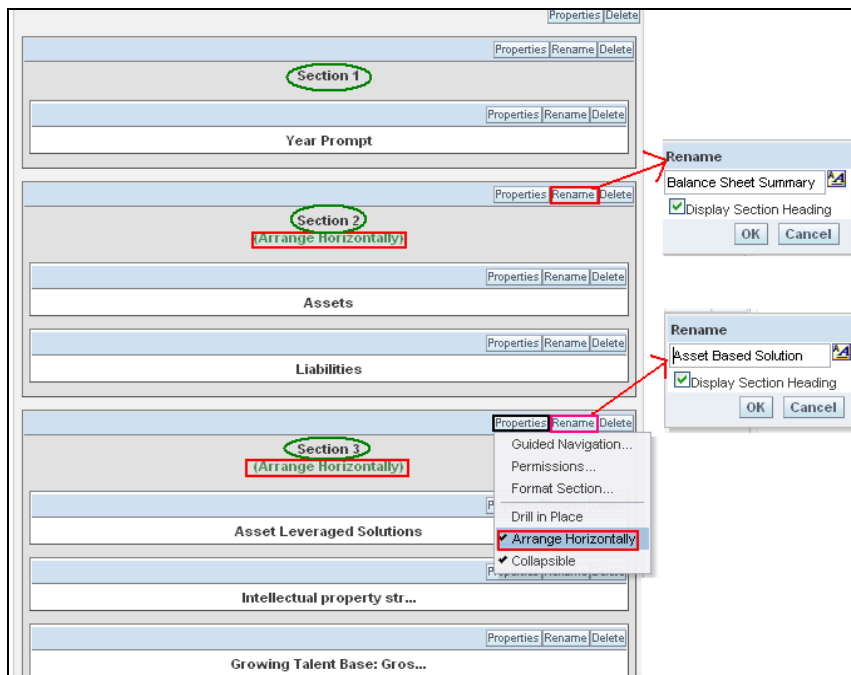
13.1)Now expand the folder where all the requests are saved.

13.2)Now drag and drop the Total Assests , Total Liabilities request into section 2 and Assets Leveraged Solutions, Intellectual Property Strategy and Growing Talent Base requests into section 3.

13.3) Click on section properties over section2 and section3 and select Arrange Horizontally as shown in screen shot.
13.4) Click on Save button from top right.

14). Now you will get a complete dashboard page created for Balance Sheet Report.
15). Go to Assed Based solution (Section three) in the dashboard page report and selection collapse mode it will change into expand mode to. (If you want to hide the reports at first sight to this way, you can set that what content you want to show and hide from end user).
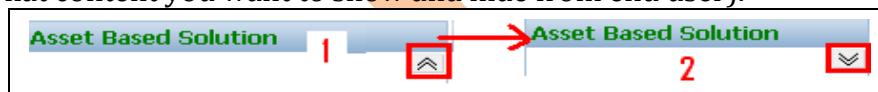
16). Go to page options select Save Current Selections→For Others/ For Me.
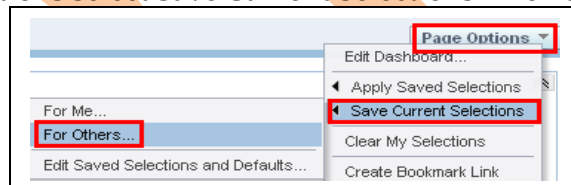
17). Specify a name for the selection and select the check box Make this my default for this page and press ok to save it.
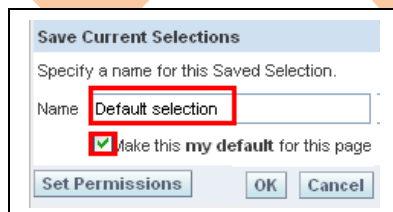
18). Now your dashboard report is ready make selectin using the dashboard prompt.
Select a year from dropdown and you will get changes in report as per your selection.

Dashboard No.2:- Create a Cash Flow report for the specific year.

Summary Cash Flow

Cash Flow Summary

	2010	2011	Difference
Net Cash Provided by Operating Activities	44,177	47,184	3,007
Consolidated Net Additions	47,315	50,272	2,957
Net Cash Used in Investing Activities	44,177	47,184	3,007
Net Cash used in financing Activities	47,315	50,272	2,957
Net increase/(decrease) in cash and cash equivalents	49,311	50,672	1,361
Exchange difference on translation of foreign currency cash and cash equivalents	49,311	50,672	1,361
Cash and Cash equivalents at end of the year	41,829	43,687	1,858

Cash Flow from Different Activities

Cash Flow from Operating Activities

	2010
Profit before Taxes and exceptional items	40,320
Add:Depreciation	47,315
Effect of Working Capital changes	40,320
Net Cash used in financing Activities	47,315
Cash generation from Operations	44,177
Others	44,177
Tax Payments Made	40,320
Net Cash Provided by Operating Activities	44,177

Cash Flow from Financing Activities

	2010
Proceed from the issue of shares by subsidiaries	41,829
Proceeds/(Repayments) from/of Borrowings (Net)	40,320
Interest paid	44,177
Net Cash used in financing Activities	47,315
Dividends paid to a minority shareholder of a subsidiary	44,177

Cash Flow from Investing Activities

	2010
Purchase of Fixed deposit with banks (net) having maturity over three Months	41,829
Acquisitions(Net of Cash acquired)	41,829
Purchase/Sale of other Investmets including Dividents reinvetment	49,311
Others	44,177
Net Cash Used in Investing Activities	44,177

Cash Flow

Total Cash In for all Quarters

Quarter	Operating Income	Interest Expense	Pre Tax Income	Net Income	Sales	COGS	Total Cash In
Qtr1	21,210	18,310	18,910	21,166	18,901	20,401	118,898
Qtr2	22,194	21,240	28,472	23,686	20,036	21,614	137,242
Qtr3	32,740	31,320	33,500	31,540	17,700	18,820	165,620
Qtr4	20,092	23,134	25,024	27,946	23,891	25,678	145,765
Grand Total	96,236	94,004	105,906	104,338	80,528	86,513	567,525

Total Cash Out For All Quarters

Quarter	Marketing	Payroll	Misc	Total Cash Out
Qtr1	19,887	22,962	19,954	62,803
Qtr2	24,728	23,592	20,688	69,008
Qtr3	18,240	19,500	19,360	57,100
Qtr4	27,179	27,089	23,756	78,024
Grand Total	90,034	93,143	83,758	266,935

Cash Flow in different Markets

Total Cash In from different Market

State	Operating Income	Interest Expense	Pre Tax Income	Net Income	Sales	COGS	Total Cash In
Connecticut	18,152	15,242	26,704	21,594	15,806	13,580	110,878
Florida	22,596	23,548	21,996	29,394	19,172	26,500	143,206
Massachusetts	24,088	26,920	27,466	25,268	18,412	19,404	141,558
New York	31,400	28,294	29,740	28,082	27,338	27,029	171,883
Grand Total	96,236	94,004	105,906	104,338	80,528	86,513	567,525

Total Cash Out for Different Markets

State	Marketing	Payroll	Misc	Total Cash Out
Connecticut	21,730	18,785	18,330	58,845
Florida	19,172	28,398	21,827	69,397
Massachusetts	21,794	20,585	21,552	63,931
New York	27,338	25,375	22,049	74,762
Grand Total	90,034	93,143	83,758	266,935

Step 1):- Below request need to create first.
A) Cash Flow Summary
B) Cash Flow from operating activities
C) Cash Flow from Financing Activities
D) Cash Flow from Investing Activities
E) Total Cash In for all Quarters
F) Total Cash Out For All Quarters
G) Total Cash In from different Market
H) Total Cash Out from different Market

Step 2):- Columns and calculations required from different tables to create requests.
A) Cash Flow Summary.
Create **Cash Flow** Summary request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Year/Year
Quarter/Year
Net Cash Provided by Operating Activities/ CCoA
Consolidated Net Additions/CCoA
Net Cash Used in Investing Activities/CCoA
Net Cash used in financing Activities/CCoA
Net increase/(decrease) in cash and cash equivalents/CCoA
Exchange difference on translation of foreign currency cash and cash equivalents/CCoA
Cash and Cash equivalents at end of the year/CCoA

A.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

A.2) Now click on the result tab,
Remove the default table view and click on add view button [Add View] to add a Pivot Table view to the result. Now arrange the columns
A.3) Drag Measure Labels from Columns and put it into Rows.

A.4)Drag Year column from Rows and put it into Columns and click on [Columns Σ / Year Year ☐ ↓↑] more options button over year in columns section and select New Calculated Item.

In the Calculated Tab select values from right pane and put the formula in between to get the difference, enter a name for the column and do as shown in below screen shot.
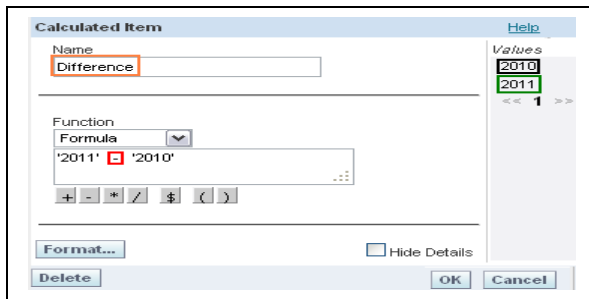
Click ok.

A.4) Select the Chart Pivoted Results to add a chart view with result and change all other properties as shown in below screen shot of chart pivoted view.
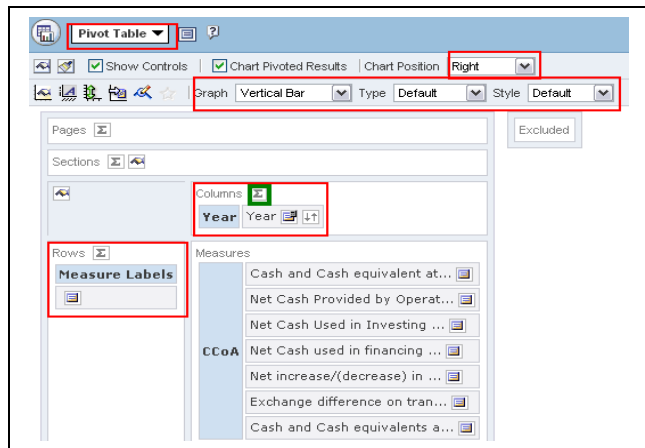
A.5) Select Always for **Show data labels** and format chart data using format chart data button☐.Format Headings and values.
A.6) Now click ok from the top right and check the result.
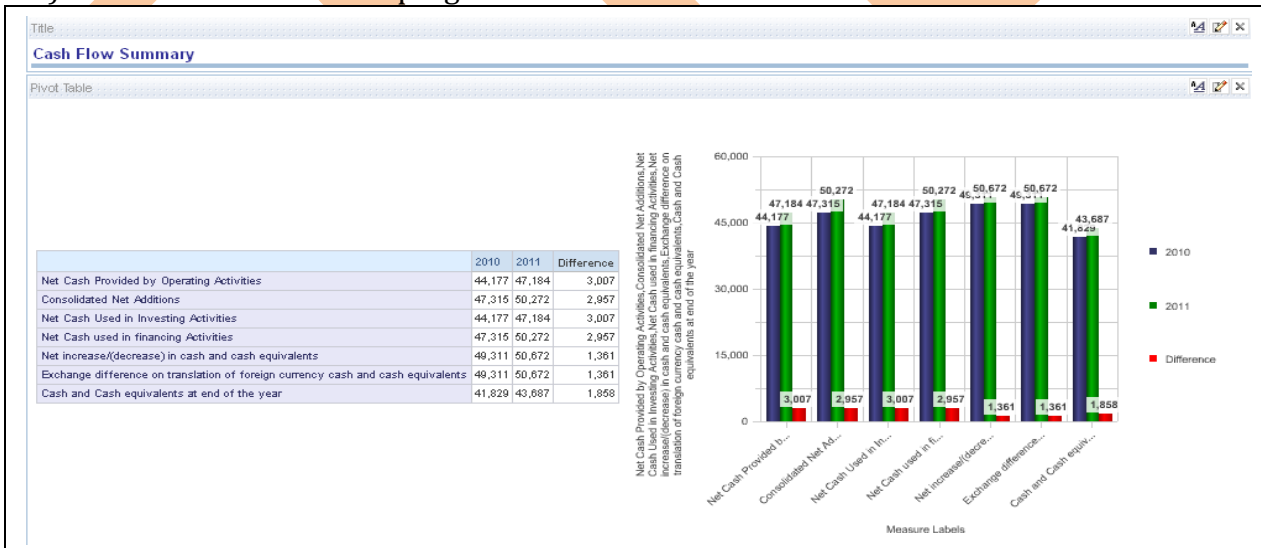
A.7) Go to criteria and save the request.

B) Cash Flow from operating activities

Create **Cash Flow** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Year/Year
Quarter/Year
Profit before Taxes and exceptional items/ CCoA
Add: Depreciation /CCoA
Effect of Working Capital changes/CCoA
Net Cash used in financing Activities/CCoA
Cash generation from Operations/CCoA
Others/CCoA
Tax Payments Made/CCoA
Net Cash Provided by Operating Activities/CCoA

B.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

Year	CCoA			
Year ↓↑	Profit before Taxes and exceptional items ↓↑	Add:Depreciation ↓↑	Operating Profit before working capital ... ↓↑	Effect of Working Capital changes ↓↑
⌧ fx ▽ ✕	⌧ fx ▽ ✕	⌧ fx ▽ ✕	⌧ fx ▽ ✕	⌧ fx ▽ ✕

Effect of Working Capital changes ↓↑	Cash generation from Operations ↓↑	Others ↓↑	Tax Payments Made ↓↑	Net Cash Provided by Operating Activities ↓↑
⌧ fx ▽ ✕	⌧ fx ▽ ✕	⌧ fx ▽ ✕	⌧ fx ▽ ✕	⌧ fx ▽ ✕

B.2) Now add a filter using presentation variable with this request. Click add filter button on Year column.
And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)

B.3) Now click on the result tab,Remove the default table view and click on add view button [Add View] to add a Pivot Table view to the result. Now arrange the columns.
B.3) Drag Measure Labels from Columns and put it into Rows.
B.4) Drag Year column from Rows and put it into Columns.
B.6) Now click ok from the top right and check the result.

Cash Flow from Operating Activities

Pivot Table

Profit before Taxes and exceptional items	84,394
Add:Depreciation	97,587
Effect of Working Capital changes	84,394
Net Cash used in financing Activities	97,587
Cash generation from Operations	91,361
Others	91,361
Tax Payments Made	84,394
Net Cash Provided by Operating Activities	91,361

B.7) Go to criteria and save the request.

#*#Now use the similar steps from step B.1 to B.7 to create Cash flow from Financing Activities and Cash flow from Investing Activities. Using the below listed columns.

C) Cash Flow from Financing Activities

Column Name/ Table Name
Year/Year
Quarter/Year
Proceed from the issue of shares by subsidiaries/ CCoA
Proceeds/(Repayments) from/of Borrowings (Net)/CCoA
Interest paid/CCoA
Dividends paid to a minority shareholder of a subsidiary/CCoA
Net Cash used in financing Activities/CCoA

Output is like this.

Cash Flow from Financing Activities

Pivot Table

Proceed from the issue of shares by subsidiaries	85,516
Proceeds/(Repayments) from/of Borrowings (Net)	84,394
Interest paid	91,361
Net Cash used in financing Activities	97,587
Dividends paid to a minority shareholder of a subsidiary	91,361

D) Cash Flow from Investing Activities

Column Name/ Table Name
Year/Year
Purchase of Fixed Assets/ CCoA
Acquisitions(Net of Cash acquired)/CCoA
Purchase/Sale of other Investmets including Dividents reinvetmentCCoA
Others/CCoA
Net Cash used in Investing Activities/CCoA

Output is like this.

Cash Flow from Investing Activities

Pivot Table

Purchase of Fixed deposit with banks (net) having maturity over three Months	85,516
Acquisitions(Net of Cash acquired)	85,516
Purchase/Sale of other Investmets including Dividents reinvetment	99,983
Others	91,361
Net Cash Used in Investing Activities	91,361

E) Total Cash In for all Quarters

Create **Total Cash in for all quarters** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name	
Year/Year	
Quarter/Quarter	
Operating Income/ CCOA	
Interest Expense/ CCOA	
Pre Tax Income/ CCOA	
Net Income/ CCOA	
Sales/ CCOA	
COGS/ CCOA	
Total Cash In	Operating Income + Interest Expense + Pre Tax Income + Net Income +Sales + COGS

E.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

(Here Total Cash In computed column and need to create)

E.2) Now add one more column from left pane (can be added from any table) to calculate and create Total Cash In column.
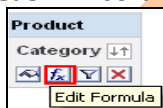
 Click on **Edit Formula** button of newly added column and select **Custom Headings.**
Change the **Table Heading and Column Heading as** and delete the **Column Formula**.

E.3) Now click on **Column** button in **Edit Column Formula** tab to add column to create computed column Total Assets.

When you click on the Column button you will get the list of all the columns which are exists with this request. Now click on the columns one by one and place a plus sign in between them as given in below screen shot and click ok.

In the criteria tab the column will appear like this after editing column formula.

E.4) Add a filter using presentation variable with this request. Click add filter button on Year column

And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)
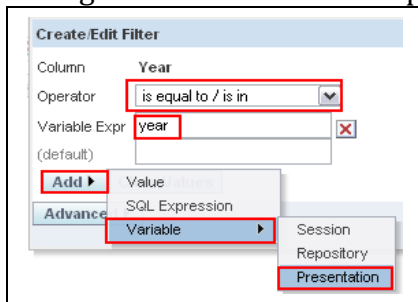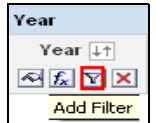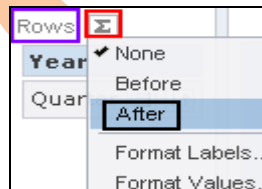

E.5) Now click on the result tab,
Remove the default table view and click on add view button [Add View] to add a Pivot Table view to the result. Arrange the columns
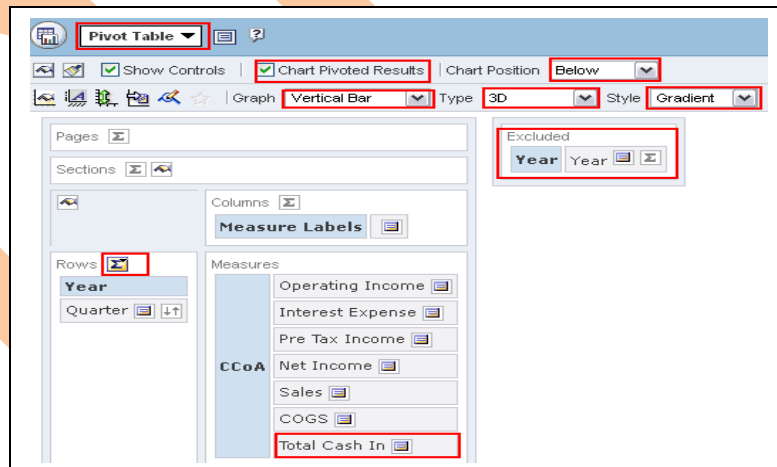
E.5.1) Drag Year column from Rows and put it into Excluded.

E.5.2) Click on the summation button in the row panel → Select over the Quarter column to calculate Grand Total below all the measures.

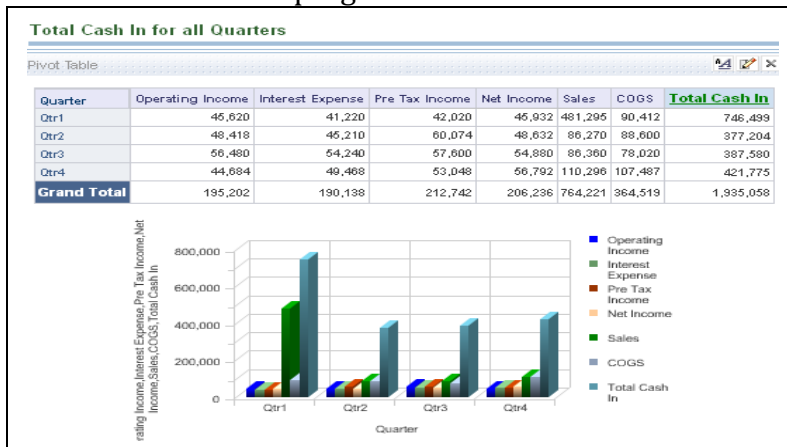E.5.3) Select the Chart Pivoted Results to   add a chart view with result and change all other properties as shown in below   screen shot of chart pivoted view.

E.5.4) Click on the more options button beside every column to format headings and values, other than for measure and computed columns some different and additional options are available over other sections like columns, pages, sections rows and excluded.

E.5.5) Click on General Properties⬜ , select custom title and use change format button ⬜ to change its format and set height (400) and width (210).

E.6) Now click ok from the top right and check the result.

Total Cash In for all Quarters

Quarter	Operating Income	Interest Expense	Pre Tax Income	Net Income	Sales	COGS	Total Cash In
Qtr1	45,620	41,220	42,020	45,932	481,295	90,412	746,499
Qtr2	48,418	45,210	60,074	48,632	86,270	88,600	377,204
Qtr3	56,480	54,240	57,600	54,880	86,360	78,020	387,580
Qtr4	44,684	49,468	53,048	56,792	110,296	107,487	421,775
Grand Total	195,202	190,138	212,742	206,236	764,221	364,519	1,935,058

E.7) Go to criteria and save the request.

*#*Follow all the above steps from *E1* to *E.7* to create request for F)Total Cash out for all Quarters,
G) Total Cash In from different Markets and H)Total Cash out from different markets.

F) Total Cash Out For All Quarters,

Create **Total Cash out for all quarters** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name	
Year/Year	
Quarter/Quarter	
Marketing/ CCOA	
Payroll/ CCOA	
Misc/ CCOA	
Total Cash Out	Marketing + Payroll +Misc

Output is like this.

Total Cash Out For All Quarters

Quarter	Marketing	Payroll	Misc	Total Cash Out
Qtr1	63,000	69,080	73,231	205,311
Qtr2	76,952	76,320	80,460	233,732
Qtr3	56,920	62,800	69,700	189,420
Qtr4	82,304	84,362	71,362	238,028
Grand Total	279,176	292,562	294,753	866,491

G) Total Cash In from different Market.

| Column Name/ Table Name	
Year/Year	
State/ Market	
Operating Income/ CCOA	
Interest Expense/ CCOA	
Pre Tax Income/ CCOA	
Net Income/ CCOA	
Sales/ CCOA	
COGS/ CCOA	
Total Cash In from different Market.	Operating Income + Interest Expense + Pre Tax Income + Net Income +Sales + COGS

Output is like this.
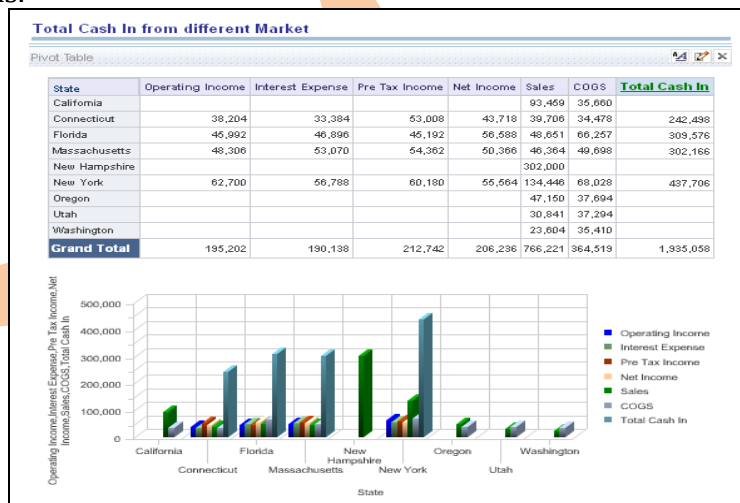
H) Total Cash Out from different Market

Column Name/ Table Name	
Year/Year	
State/ Market	
Marketing/ CCOA	
Payroll/ CCOA	
Misc/ CCOA	
Total Cash Out from different market	Marketing + Payroll + Misc

Output is like this.

Dashboard No.3:- Create Revenue from Operations report for a specific year and for all years.
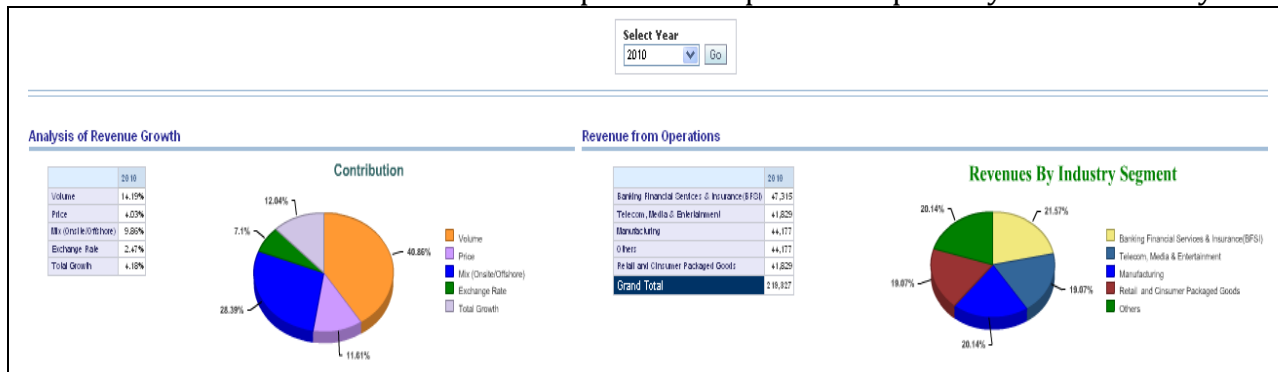
Step 1):- Requirements to create Revenue from Operations.
A) Analysis of Revenue Growth.
B) Revenue from Operations.
Step 2):- Columns and calculations required from different tables to create requests.
A) Analysis of Revenue Growth
Create Analysis of Revenue Growth request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Year/ Year
Volume/ CCOA
Price/ CCOA
Mix (Onsite/Offshore)/ CCOA
Exchange Rate/ CCOA
Total Growth/ CCOA

A.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

A.2) Now click on the result tab, Remove the default table view and click on add view button [Add View] to add a Pivot Table view to the result. Now arrange the columns.
A.3) Drag Measure Labels from Columns and put it into Rows.
A.4) Drag Year column from Rows and put it into Columns.
A.5) Again click on add view button [Add View] to add a simple Chart view to the result. Now arrange the columns.

A.6) Now click ok from the top right and check the result.

Analysis of Revenue Growth

Pivot Table		Chart
Volume	29.28%	
Price	8.44%	
Mix (Onsite/Offshore)	20.00%	
Exchange Rate	5.00%	
Total Growth	8.55%	
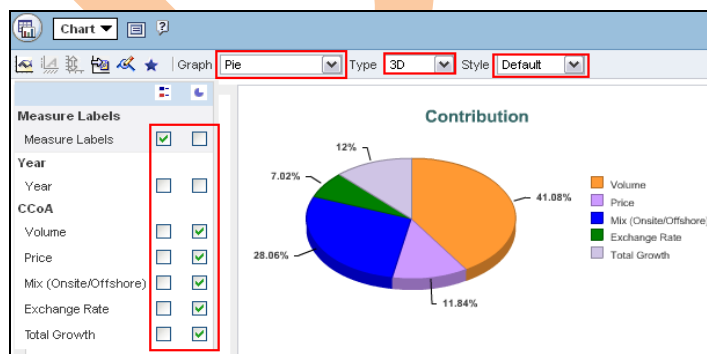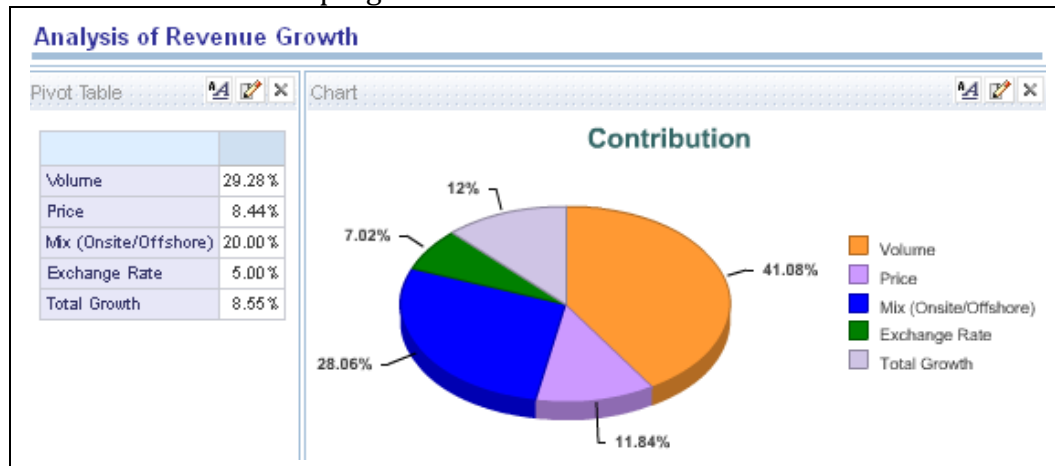
A.7) Go back to criteria and save the request.

B) Revenue from Operations.

Column Name/ Table Name
Year/Year
Banking Financial Services & Insurance(BFSI)/ CCOA
Telecom, Media & Entertainment/ CCOA
Manufacturing/ CCOA
Others/ CCOA
Retail and Consumer Packaged Goods/ CCOA

Follow all the steps as Analysis of Revenue growth and check the result.
Output is like this.

Revenue from Operations

Pivot Table		Chart — Revenues By Industry Segment
Banking Financial Services & Insurance(BFSI)	97,587	
Telecom, Media & Entertainment	85,516	
Manufacturing	91,361	
Others	91,361	
Retail and Cinsumer Packaged Goods	85,516	
Grand Total	451,341	
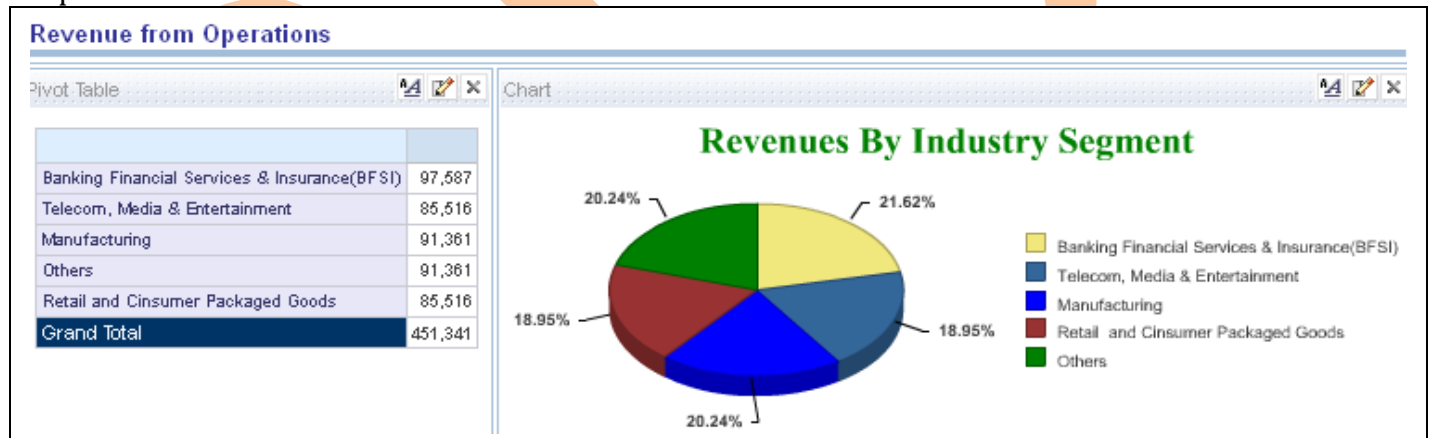
Dashboard No.4:- Create a TopN report for a specific year and all the years.

Step 1):- Create a new dashboard prompt TopN.

To create dashboard prompt login into Answers and go to left pane select new dashboard prompt and select a catalog.
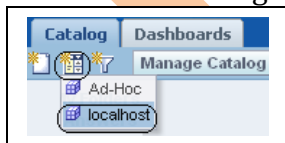
Step 2) Select Scope of the prompt as page and select a column from left pane which you want to use as prompt. (Here Rank_Sales column is selected to use Rank values as prompt values)
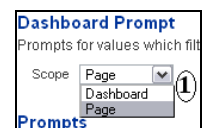
Set all the properties of prompt as shown in below screen shot and save it.

Step 3):- Requirements to create TopN.

A) Top Product
B) Top Markets
C) Top Industry Segments
D) Top Product based on Package Type Bottle
E) Top Product based on Package Type Can
F) Top Products Caffeinated
G) Top Products Non-Caffeinated

Step 2):- Columns and calculations required from different tables to create requests.

A) Top Product in a year
Create **Top Products** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Rank/CCoA
Category/Product
Sales/ CCOA

A.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.
Set order of Rank column as Order Ascending using order by button ☐ .

A.2) Now click on the result tab,
Remove the default table view and click on add view button ⬚Add View to add a Pivot Table view to the result.
A.3) Select the Chart Pivoted Results to add a chart view with result and change all other properties as shown in below screen shot of chart pivoted view.
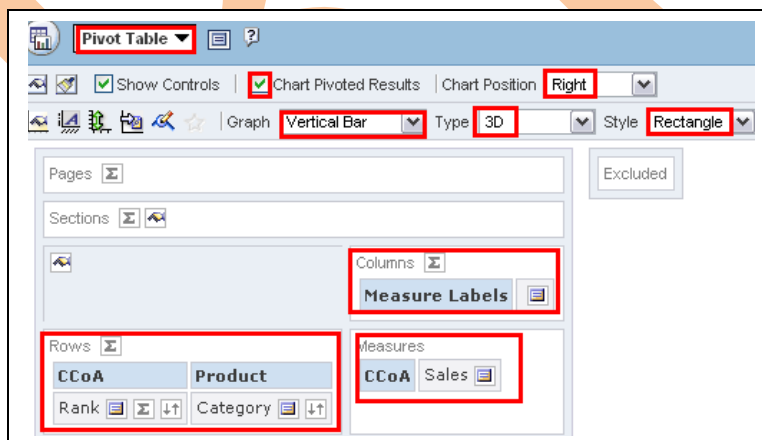
A.4) Now add a filter using presentation variable with this request. Click add filter button on Rank column and go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation

variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt).
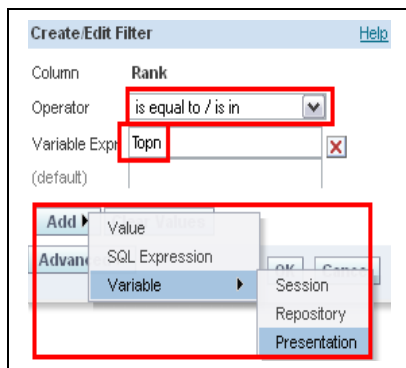
A.5) Click on General Properties⬚ , select custom title and use change format button ⬚ to change its format and set height (280) and width (120). Select Always for **Show data labels** and set colors using format chart data using format chart data button⬚ .
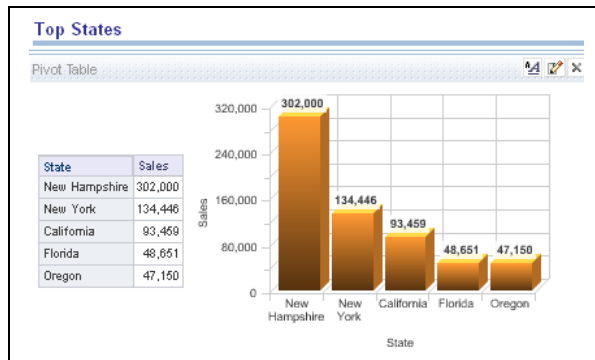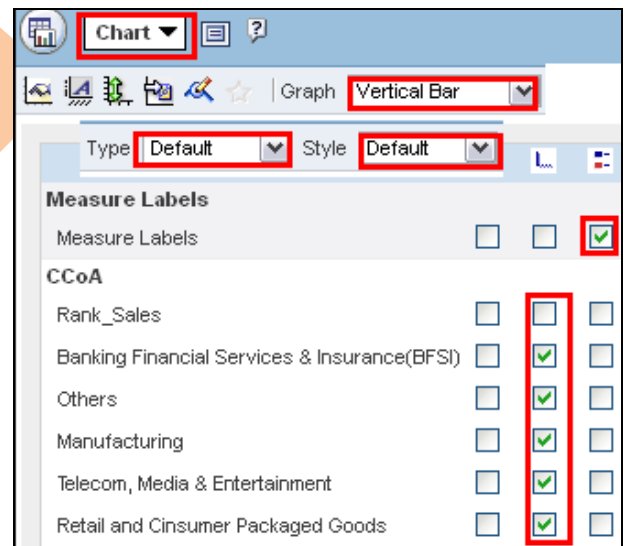
A.6) Now click ok from the top right and check the result.
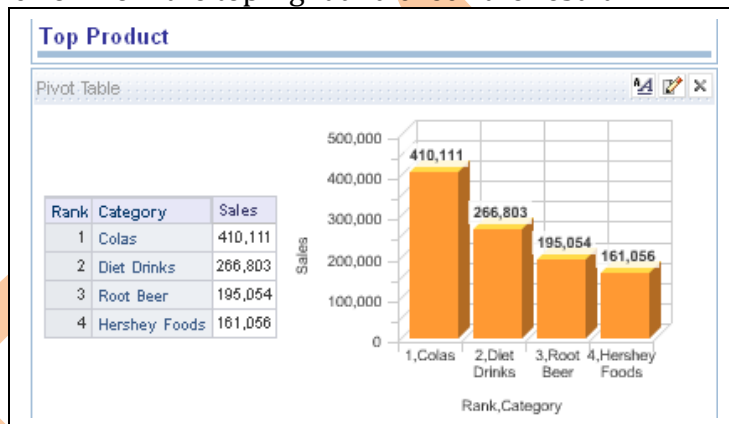
A.7) Go to criteria and save the request.

B) **Top Markets/ States**
Create **Top Markets** request, below are the list of columns which are required to create this request with their table name.

| Column Name/ Table Name |
|---|
| Rank/CCoA |
| State/Market |
| Sales/ CCOA |

Follow all the steps as Top Product.
Output is like this.

Top States

C) Top Industry Segments

C.1) Create **Top Industry Segments** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Rank/CCoA
State/Market
Banking Financial Services & Insurance(BFSI)/ CCOA
Telecom, Media & Entertainment/ CCOA
Manufacturing/ CCOA
Others/ CCOA
Retail and Consumer Packaged Goods/ CCOA

C.2) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request. (Do not add prompt with top industry segments).
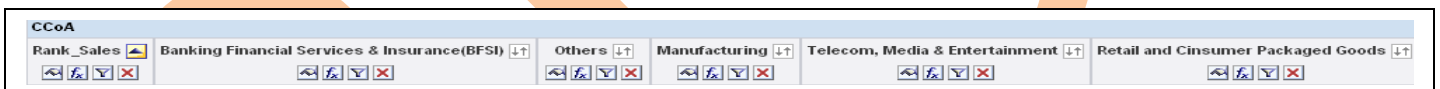
C.3) Now click on the result tab,
Remove the default table view and click on add view button [Add View] to add a chart view to the result. Now set properties as shown in screen shot.

C.4) Click on general properties tab☐. Select custom title and use change format button ☐ to change its format and set height (400) and width (180).
Select Always for **Show data labels** and set colors using format chart data button☐ .

C.5) Now click ok from the top right and check the result.

Top Industry Segments
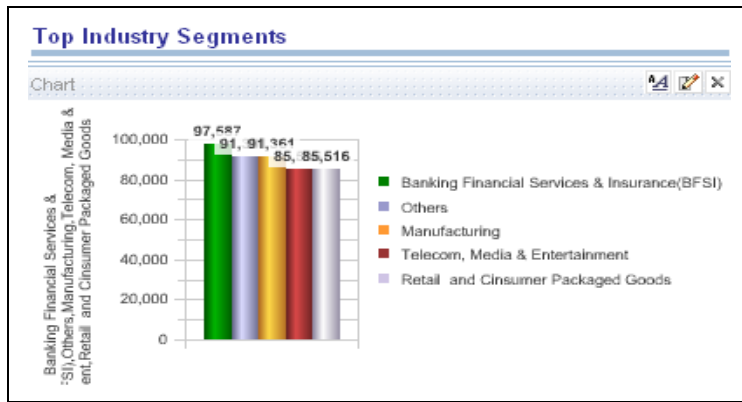
C.6) Go to criteria and save the request.

D) Top Product based on Package Type Bottle.

D.1) Create Top Product based on Package Type Bottle request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Rank/CCoA
Category/Product
...facturing
Sales/ CCOA

D.2) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

D.3) Now click on the result tab,
Remove the default table view and click on add view button [Add View] to add a Pivot Table view to the result. Now set properties as shown in screen shot.
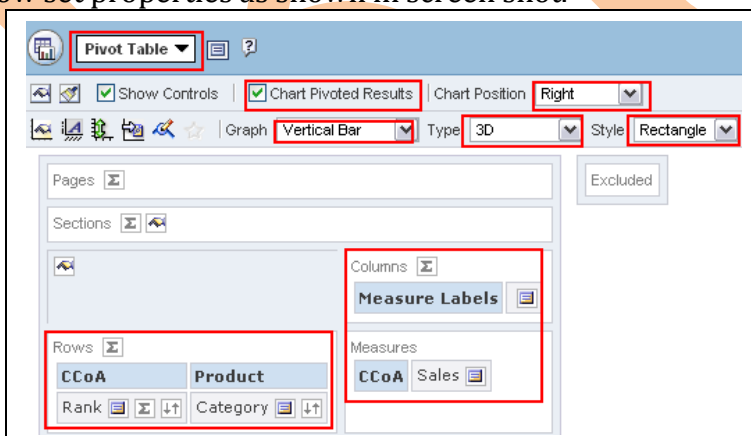
D.4) Click on general properties tab [ ]. Select custom title and use change format button [ ] to change its format and set height (400) and width (210).
Select Always for **Show data labels** and set colors using format chart data button[ ].

D.5) Now click ok from the top right.

D.6) Go back to Criteria and add a filter based on **Package Type Bottle** with the request and check the result.
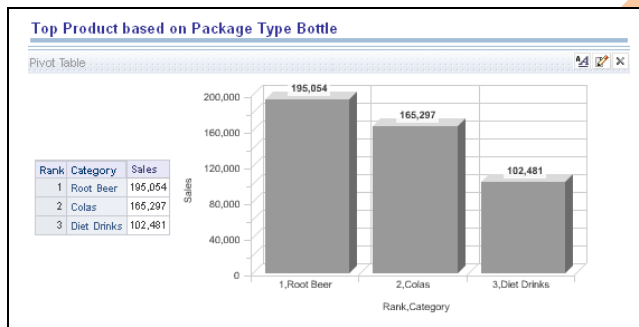
D.7) Save the request.

E) Top Product based on Package Type Can

Column Name/ Table Name
Rank/CCoA
Category/Product
ng
Sales/ CCOA

Follow all the steps as the request D) Top Product based on Package Type Bottle and change the filter value based on Package Type *is equal to / is in* **Can** in place of **bottle.**
The result is like this.
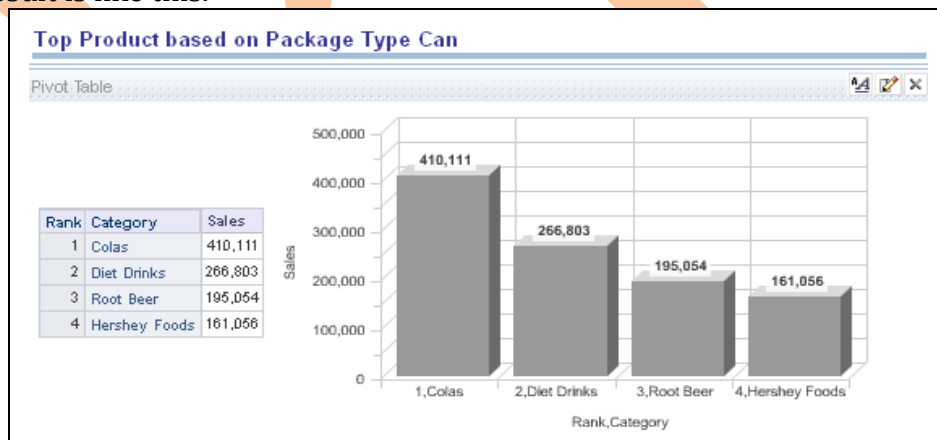
F) Top Products Caffeinated

Column Name/ Table Name
Rank/CCoA

Category/Product
Sales/ CCOA

##Follow all the steps as the request D) Top Product based on Package Type Bottle excluding the filter Package type and create a new filter based on Caffeinated like below screen shot.

Output is like this.
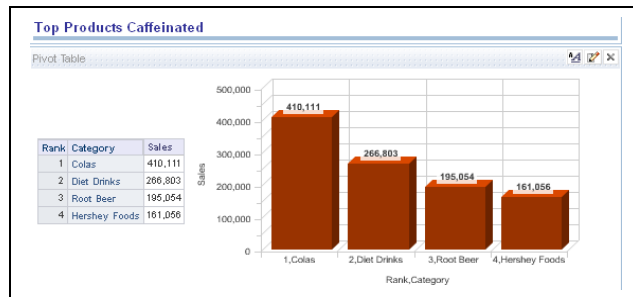
G) Top Products Non-Caffeinated

Column Name/ Table Name
Rank/CCoA
Category/Product
nfacturing
Sales/ CCOA

Follow all the steps as the request D) Top Product based on Package Type Bottle excluding the filter Package type and create a new filter based on Non-Caffeinated like below screen shot.

Output is like this.
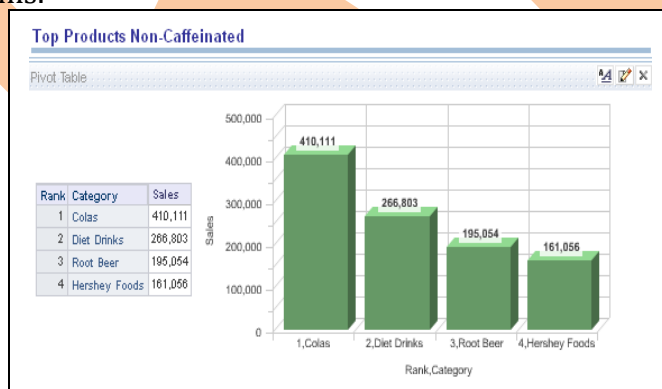
Dashboard No.5:- Create a **Company Performance Trend** report for a specific year and all the years.
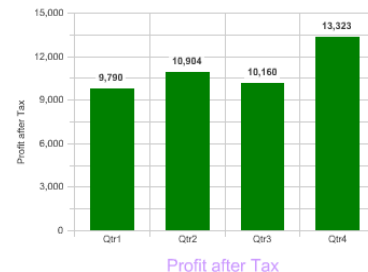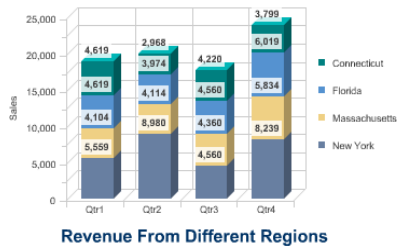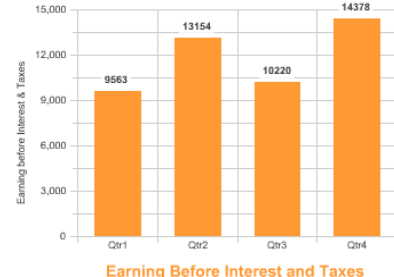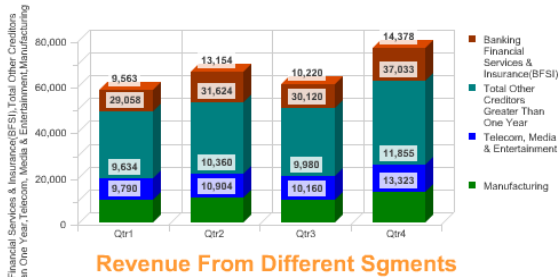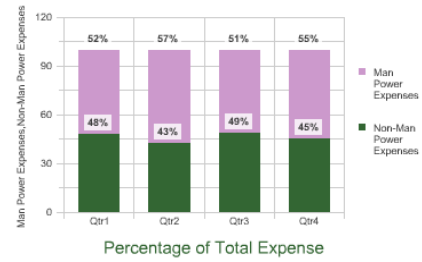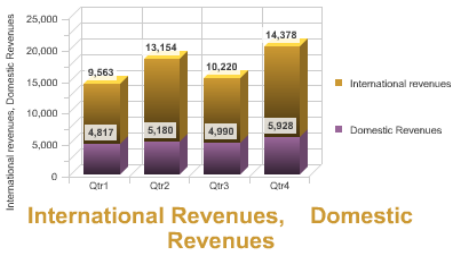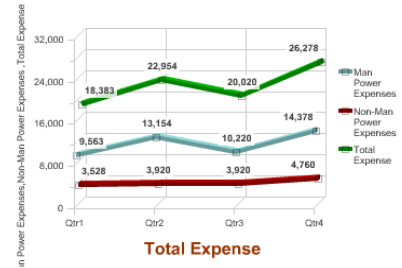
Step 1):- Requirements to create
A) Revenue

A.1) Total Revenue

A.2) International and Domestic Revenue

A.3) Revenue from different segments

A.4) Revenue in different Regions

B) Expenditure

B.1) Total Expenses

B.2) Expense Contribution

B.3) Earnings before Interest and Taxes

B.4) Profit after Tax

Step 2):- Columns and calculations required from different tables to create requests.

A.1) **Total Revenue**

Create Total **Revenue** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Year/Year
Quarter/Year
Revenue(Sales)/CCoA

A.1.1) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

A.1.2) Now add a filter using presentation variable with this request. Select year column from left pane and go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)

After adding filter with request remove the year column from request.
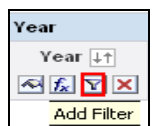

A.1.3) Now click on the result tab,

Remove the default table view and click on add view button to add a chart view to the result. Now set properties as shown in screen shot.
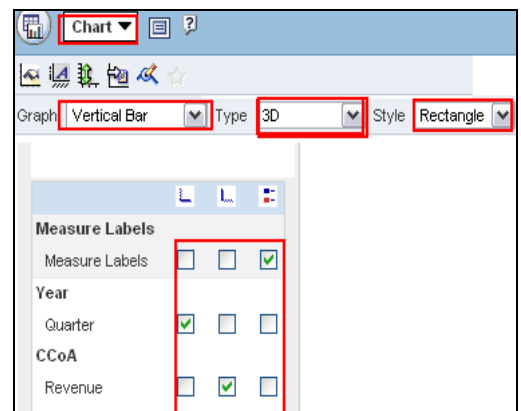
A.1.4) Click on general properties tab .

Select custom title and use change format button to change its format and set height (250) and width (400).

Select Always for *Show data labels* and set color using format chart data button .

C.2.6) Now click ok from the top right and check the result.
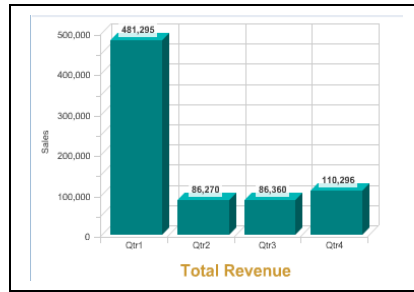
C.2.7) Go to criteria and save the request.

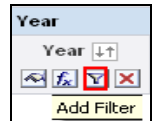**A.2) International and Domestic Revenue**

A.2.1) Create **International and Domestic Revenue** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Year/Year
Quarter/Year
International Revenue/CCoA
Domestic Revenue/CCoA

A.2.2) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

A.2.3) Now add a filter using presentation variable with this request. Click add filter button on Year column. And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)
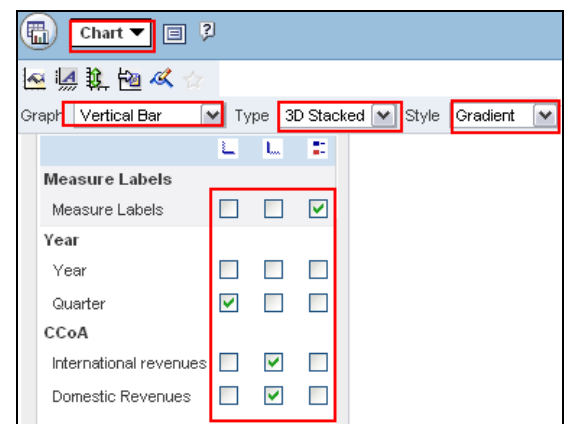

A.2.4) Now click on the result tab,
Remove the default table view and click on add view button [Add View] to add a chart view to the result. Now set properties as shown in screen shot.

A.2.5)Click on general properties tab [ ]. Select custom title and use change format button [ ] to change its format and set height (400) and width (250).

Select Always for *Show data labels* and set color using format chart data button [ ].

A.2.6) Now click ok from the top right and check the result.

International Revenues, Domestic Revenues
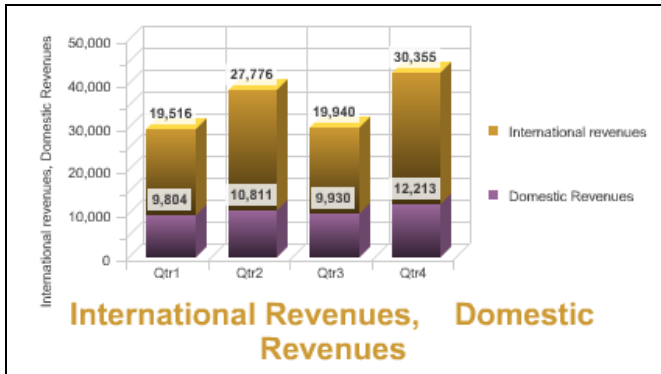
A.2.7) Go to criteria and save the request.

*##*Follow the above step from A.2.1 to A.2.7 and create the request A.3) Revenue from different segments and A.4) Revenue in different Regions.

A.3) Revenue from different segments

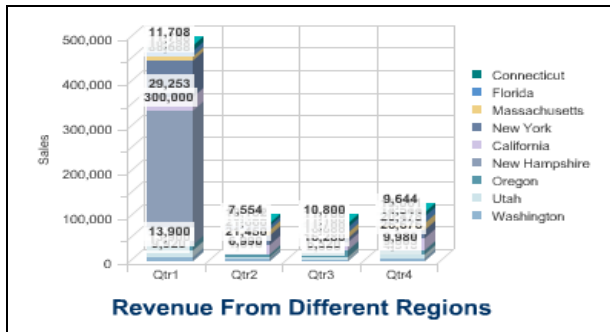| Column Name/ Table Name |
|---|
| Year/Year |
| Quarter/Year |
| |
| Banking Financial Services & Insurance(BFSI)/ CCOA |
| Telecom, Media & Entertainment/ CCOA |
| Total Other Creditors /CCOA |
| Manufacturing/ CCOA |

Output is like this.

Revenue From Different Sgments
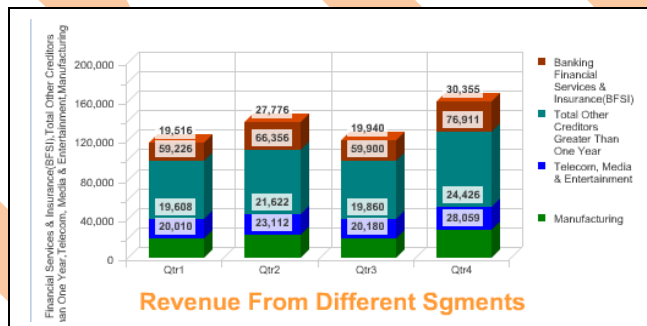
A.4) Revenue in different Regions

Column Name/ Table Name
Year/Year
Quarter/Year
State/ Market
Revenue(Sales)/ CCOA

Output is like this.

B) Expenditure
B.1.1) **Total Expenses**
Create **Total Expenses** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name	
Year/Year	
Quarter/Year	
Man Power Expenses/ CCOA	
Non Man Power Expenses/ CCOA	
Total Expense / CCOA	Man Power Expenses/ CCOA + Non Man Power Expenses/ CCOA

B.1.2) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.
(Here Total Expense is not available in any table, it's a computed column and need to create).

B.1.3) Now add one more column from left pane (can be added from any table) to calculate and create Total Expense column.
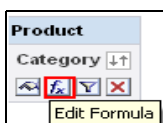
Click on **Edit Formula** button of newly added column and select **Custom Headings.**
Change the **Table Heading and Column Heading as** Total Assets and delete the **Column Formula**.
B.1.4) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.

B.1.5) Now click on **Column** button in **Edit Column Formula** tab to add column to create computed column Total Expense.

When you click on the Column button you will get the list of all the columns which are exists with this request →click on the columns one by one and place a plus sign in between them.

B.1.6) Now add a filter using presentation variable with this request. Click add filter button on Year column and go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)
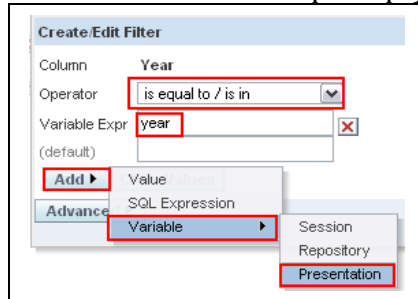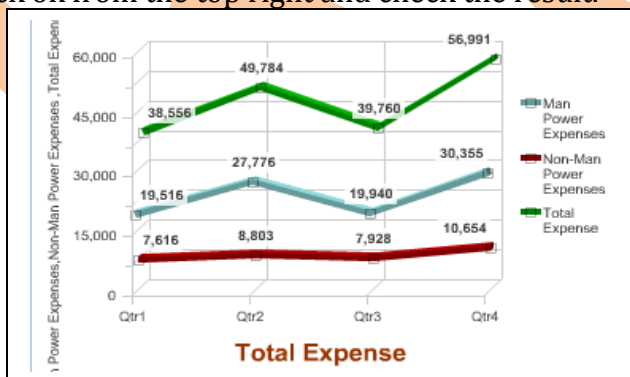

B.1.7) Now click on the result tab,

Remove the default table view and click on add view button [Add View] to add a chart view to the result. Now set properties as shown in screen shot.
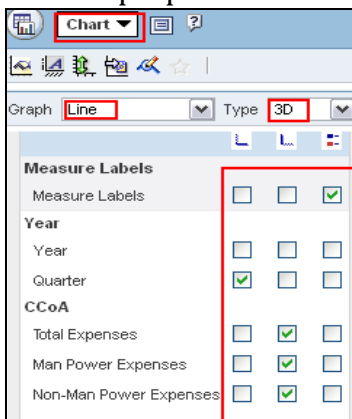
B.1.8) Click on general properties tab [ ] . Select custom title and use change format button [ ] to change its format and set height (370) and width (250).

B.1.9) Now click ok from the top right and check the result.

B.1.10) Go to criteria and save the request.

B.2) Expense Contribution.

B.2.1) Create **Expense Contribution** request, below are the list of columns which are required to create this request with their table name.

| Column Name/ Table Name |
|---|
| Year/Year |
| Quarter/Year |
| |
| Man Power Expenses/ CCOA |
| Non Man Power Expenses/ CCOA |

B.2.2) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.


B.2.3) Add a filter using presentation variable with this request. Click add filter button on Year column. And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)
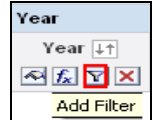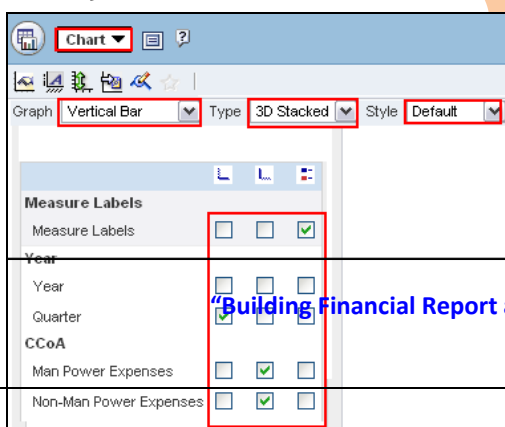
B.2.4) Edit formula to apply a formula on both columns like below screen shot.
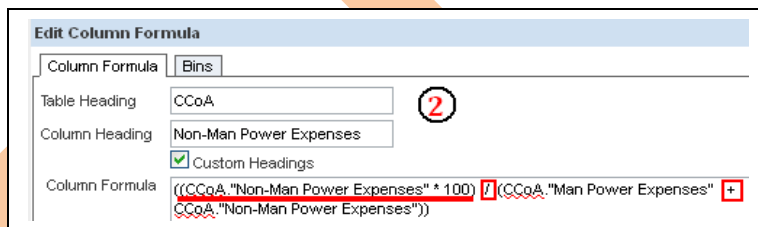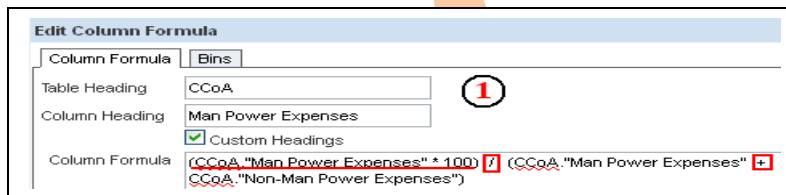
B.2.5) Open column properties ⬚ for both the column one by one → click on Data Format tab and set the properties like below screen shot.
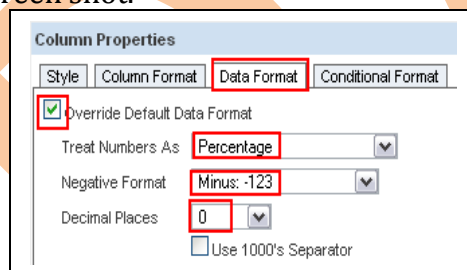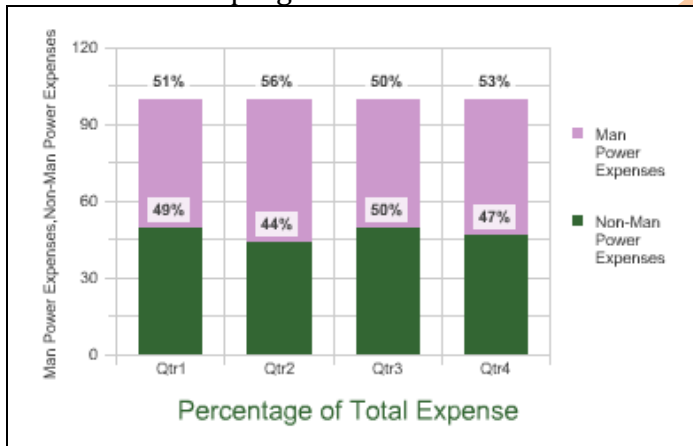

B.2.6) Now click on the result tab,

Remove the default table view and click on add view button ⬚ to add a chart view to the result. Now set properties as shown in screen shot.

B.2.7) Click on general properties tab ⬜. Select custom title and use change format button ⬜ to change its format and set height (370) and width (250).

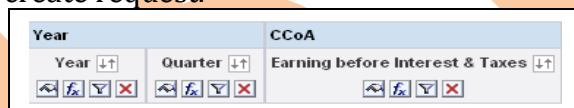B.2.8) Now click ok from the top right check the result.

B.2.9) Go to criteria and save the request.

B.3) Earnings before Interest and Taxes.
B.3.1) Create **Earnings before Interest and Taxes** request, below are the list of columns which are required to create this request with their table name.

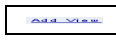| Column Name/ Table Name |
|---|
| Year/Year |
| Quarter/Year |
| |
| Earnings before Interest & Taxes/ CCOA |

B.3.2) Click on Answers and select a schema from subject area→in the next screen select listed columns from left pane to create request.
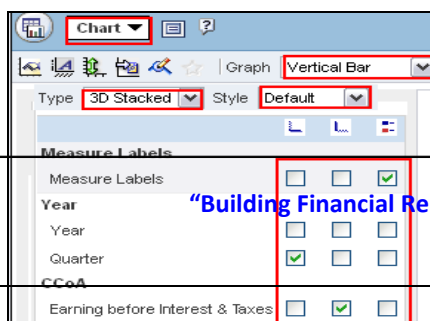

B.3.3) Now add a filter using presentation variable with this request. Click add filter button on Year column
And go to ADD button in Create/Edit Filter tab select variable→ Presentation then enter the presentation variable name in the Variable Expr box → click ok. (Mention the presentation variable name which created during creation of dashboard prompt)

B.3.4) Now click on the result tab,
Remove the default table view and click on add view button ⬜ to add a chart view to the result.
Now set properties as shown in screen shot.

B.3.5) Click on general properties tab ☐. Select custom title and use change format button ☐ to change its format and set height (460) and width (260).

Select Always for **Show data labels** and set colors using format chart data button ☐.

B.3.6) Now click ok from the top right and check the result.
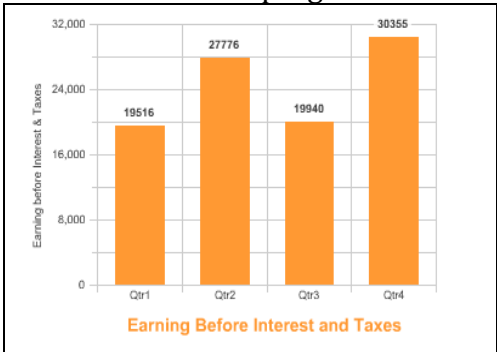
B.3.7) Go to criteria and save the request.
B.4) Profit after Tax.
B.4.1) Create **Profit after Tax** request, below are the list of columns which are required to create this request with their table name.

Column Name/ Table Name
Year/Year
Quarter/Year
Profit after Tax/ CCOA

##* Follow all the steps from B.3.2) to B.3.7) as **Earnings before Interest and Taxes request.
Output is like this.