

# Catalogue of requirements for a frontend tool on Oracle Essbase

## The best approach for finding the right tool

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### Factors that may affect your choice

The huge variety of tools and specifications on offer can make it very difficult to choose the frontend tool that's right for you.

When choosing a frontend tool, there are many different approaches you can take. Several platforms provide information and overviews of frontend tools and individual requirements are often as varied as the search process itself.

Find out which approach can best help you to find a suitable frontend tool and which specifications you need to consider for using the tool in an Essbase environment.

In this white paper, you will find the answers to the following questions:

- What factors should influence the search for a suitable frontend tool?
- Which selection criteria are relevant to a successful search?
- What are the requirements for using a frontend tool in an Essbase environment?

The frontend tool market offers a wide range of different products. It can therefore be difficult to get an overview of the various advantages and disadvantages of each product. What's more, different frontend tools are more focused on different areas, such as dashboards or analysis, for example.

Two particularly important factors to bear in mind when choosing a tool are compatibility with individual requirements and areas of application.

Compare the different strengths and weaknesses of each tool and find out which features are the most important to you. It's also a good idea to find out the user or administrator's expectations of the tool. The customer and their requirements should be your focus when it comes to weighing up your options.

So who are your customers? In this case, a customer is anyone who will use the tool, as well as anyone who will be an administrator of the tool. This may lead to a conflict of interests. It may be that administrator and user tasks clash. In this case, it is important to ensure that the frontend tool also enables key users to administrate it.

## Selection criteria for a successful search

The first step in the selection process is to analyze your requirements.

This will help you to define tasks and areas of application, which can be categorized under planning, analysis, reporting, or general BI.

The more specific your approach when looking for a frontend tool, the more likely you are to find relevant results. It is therefore advisable to get to know your users' requirements in as much detail as possible. Defining a range of tasks and areas of application for your frontend tool should be the first step in the requirements analysis process.

Do you need to be able to retrieve data, rewrite data or comment on retrieved data for others users to see? Perhaps you need to do a combination of all the above? By answering these questions, you can determine whether your requirements fall under the category of planning, analysis, reporting or general BI. Online analytical processing (OLAP) cubes or multidimensional data repositories or analytical databases are often used for this type of analysis. The reasons for using OLAP cubes as well as their various advantages and disadvantages are laid out in another white paper that is available on the cubus website.

BI is a very comprehensive term that refers to many applications, focussing on analysis and presentation of data. We believe that planning is also important for successful business management. Planning comprises budgeting and forecasting, as well as short, medium and long-term planning. Rewriting and modification of data is a prerequisite for these tasks. In addition to these functions, a guided process and workflow functionality is a very important aspect of any planning system.

The following diagram illustrates the differences between individual disciplines in the field of evaluation and presentation of data.

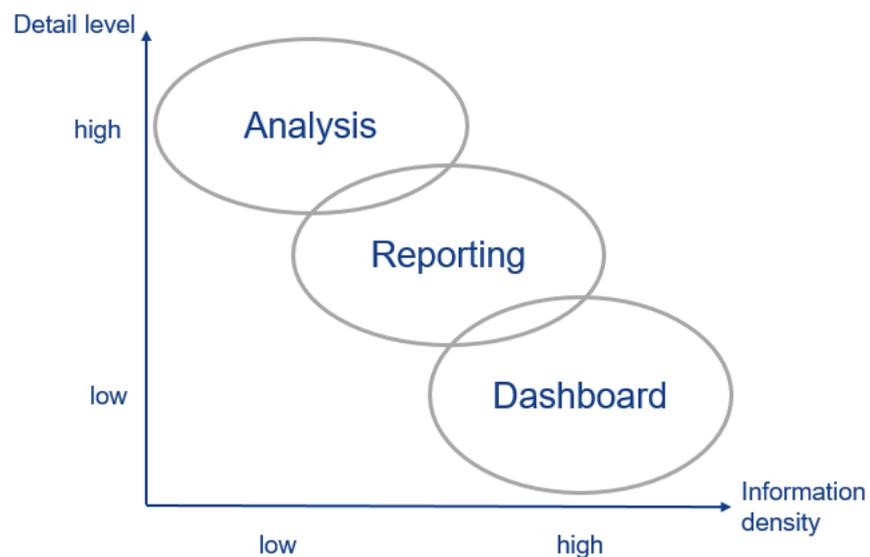


Fig. 1: Comparison of analysis, reporting and dashboard in terms of level of detail and information density

Dashboards provide an entry point for the evaluation of data. Information density for dashboards is very high and the level of detail very low. Presentation of data using clear graphics is the focus here. If, in your role as a manager, you are a consumer of data that is provided to you solely for informative purposes, a dashboard that simply provides you with an overview of this data may be sufficient for you. If you travel a lot, access to mobile devices is also an important selection criterion.

Depending on the different roles and responsibilities of employees within your company, a front end tool can help to achieve more efficient and effective results. gelangen.

If you are working in management and want to keep up to date by receiving short, clear updates on the current state of your figures, products with a focus on dashboards should be your priority. You may also need to add comments and explanations with a high level of information density to your data to facilitate information exchange within a system.

If you require further information beyond what a dashboard can provide you with, however, access to predefined reports can be very useful. Reporting refers to both the presentation of information and the provision and preparation of textual information. It enables you to provide insights, for example on the figures being presented. Reports can either be presented as tables or as graphics. If predefined standard reports do not provide sufficient information to answer any questions the user have, it may be necessary to navigate further into the report. The user might also need to carry out a drillthrough report at the order level. Any requirements on a deeper level, where columns and rows need to be interchanged, fall under the category of analysis.

Dashboards can also act as a display mode and be used as an entry point for accessing detailed information.

The focus of analysis is 'free movement' within the data room, which enables users to answer questions by following whatever pathway they choose. There should be no strict rules set for the user. Information can be searched, modified and completed as necessary in a targeted fashion. For tasks that fall under the category of analysis, the frontend tool must be easy to use and provide the option to evaluate data according to a range of requirements.

The term 'self-service BI' refers to independent data searches, evaluation and presentation of user data, without the need for intervention from an IT department. This includes presentation of information in the form of both tables and graphics, as these simplify data analysis. It should also be possible to add additional information that is not stored in the data source (Essbase) in the meaning of self-service BI. Some examples for this are additional aggregations or kpis.

In all of the above-mentioned areas, there are various functional specifications, which we have laid out for you in the table below. We have also listed functions specific to Essbase, which affect the requirements in these individual areas.

# Specific requirements for an ESSBASE environment

## Analysis

### General requirements (functional)

- Free analysis of data
- Users can independently navigate any data they have access to
- Graphic and tabular analysis
- Option to connect with other data sources
- Self-service, no IT support required
- Findings are available for other users/end users
- Access to data at any time from anywhere
- Good performance for queries
- Additional information can be generated during the analysis
- Minimal training requirement
- Minimal administrative overheads
- Secure communication (e.g. SSL)
- Starting point for DrillThroughs

### Essbase-specific support

- Displays defined hierarchies
- Displays information on elements such as consolidation signs and formulas
- Supports UDAs
- Supports dimension attributes and varying attributes
- Access rights and personalized outline (filter read and meta read, in general shared services)
- Supports BSO and ASO Cubes including Hybrid
- Supports smart lists
- Supports alias tables
- Supports substitution variables
- Supports dynamic time series

## Reporting

- Option to use or create standard reports (templates)
- Various formatting options
- Various presentation and visualization formats (tables and graphics)
- Option to provide additional information such as text and comments
- Providing insights for other users/end users
- Access to data at any time from anywhere
- Good performance for queries
- Option to create printable reports (e.g. PDF)
- Minimal training requirement
- Minimal administrative overheads
- Secure communication (SSL)

(See Analysis)

# Dashboarding

## General requirements (functional)

Access to different sources;  
in this case Essbase Cubes

Transfer of POVs (point of views) to  
various reports

See analysis and reporting

## Essbase-specific support

(See Analysis and Reporting)

# Planning

Option to rewrite data/enrich data with  
further information (such as comments)

Option to carry out simulations

Data versioning

Workflow support, approval process and  
authorization settings

Initiation of aggregation (if necessary),  
distribution and other similar processes

Access at anytime from anywhere

Good performance

(See Analysis and Reporting)

Launches calc scripts in BSO

Alongside functional requirements, there are other non-functional requirements to take into consideration when choosing a frontend tool

Alongside the functional requirements listed in the table, there are also some non-functional requirements to take into consideration when choosing a frontend tool. These include easy and intuitive using, appealing interface and state-of-the-art visualization.

Although these features are less objective, it is important to consider this when making a decision.

When looking for a frontend tool, however, technical requirements should be central to your search. Can you access your data via Excel add-ins, online and on mobile devices? Do you have the option to run a frontend tool from the Cloud? How can the tool be installed at your workstation?

By asking these questions, be sure to take the company's internal IT into consideration and clarify how to install the tool.

When accessing data over the internet, check whether any special add-ins are required and whether the company's standard browser, such as Internet Explorer, or other browsers can be used. If you need mobile access it's also important to find out which operating systems are supported and whether an additional app is necessary or if there is the option of access via a website.

The company's IT strategy should be taken into account during the selection process.

Then the company's IT strategy should be taken into account. If Microsoft Internet Explorer (or Edge) is used as the default browser and no other browsers are available, in certain circumstances some products can be ruled out immediately if they are not compatible with the company's chosen browser. The same applies to mobile platforms. If mobile access is required and the company uses Windows Mobile exclusively, then you already have certain basic conditions to work with. The same applies, of course, to fat clients. The company's IT set up in terms of on premise/cloud solutions also plays a role.

## Conclusion

To find the right frontend tool, it is important to take into account both functional and non-functional requirements. Full support of the functional requirements for an existing Essbase OLAP database are absolutely essential. Only once you have guaranteed this you can start to consider factors such as the price and manufacturer of the frontend tool.

Do you need more help to define the criteria for making your choice on which software tools are right for you? The experts at cubus are happy to help.

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