

Conditional Formatting Feature in OTBI Analysis in ERP Cloud Application - Use Case Example

By: Ashish Harbhajanka

Introduction

In this article, we will try to learn how to apply conditional formatting on a specific data-field of an OTBI Analysis. We would make this a little more exciting by adding images and colors also to make the report more eye-catching and attractive.

We would create a very simple OTBI Analysis, which will have details like

- 1) Legal Employer Name
- 2) Country
- 3) Location Name
- 4) Head Count
- 5) Full-Time Equivalent
- 6) Assignment Count
- 7) Resource Utilization Factor

Note: Resource Utilization Factor is a derived column calculated as Full-Time Equivalent / Head Count

In this example, we would use a conditional formatting feature on Resource Utilization Factor such that:

- 1) If Resource Utilization Factor is less than 1 (we would highlight the value on the field in Red Color and Add an image representing some sort of Danger / Error
- 2) If Resource Utilization Factor is equal to 1 (we would highlight the value on the field in Blue and Add an image representing Warning)
- 3) If Resource Utilization Factor is greater than 1 (we would highlight the value on the field in Green and Add an image of a tick-mark.

So let's get started then.

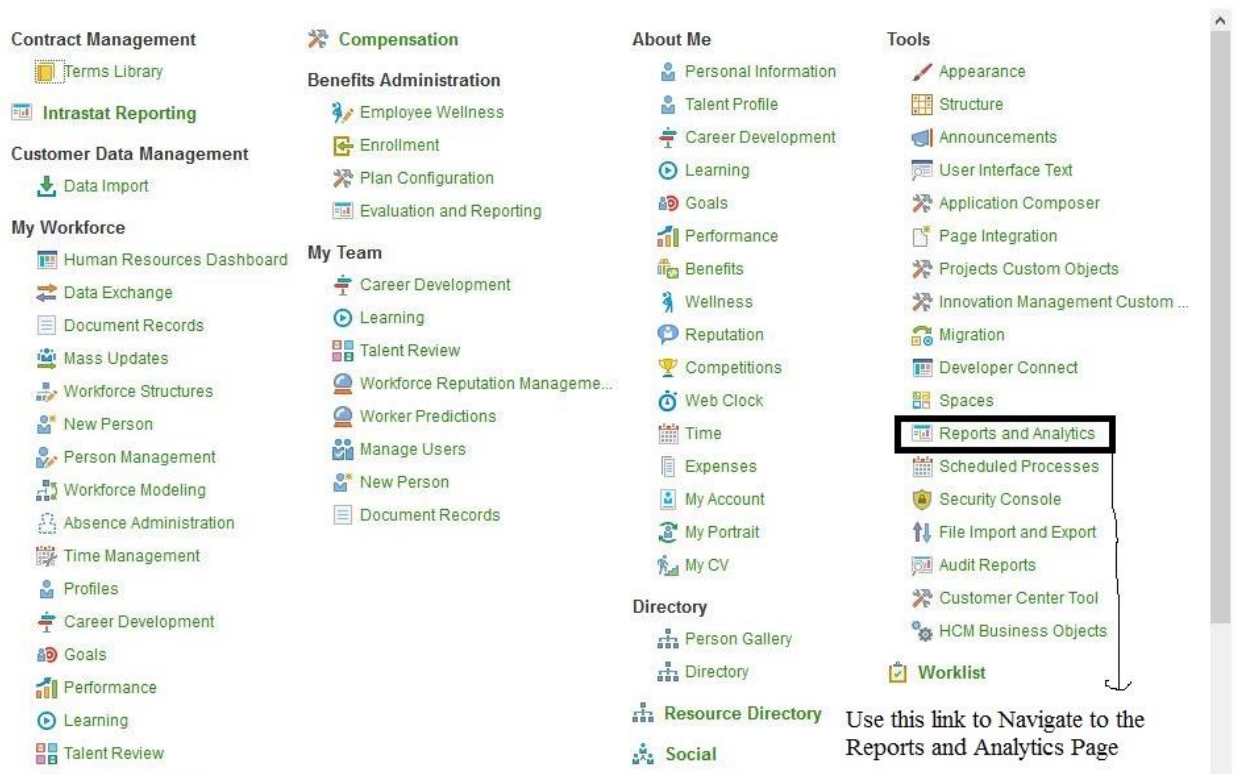
Creating OTBI Analysis

As a first step, we would need to login into application with appropriate login credentials and navigate to the 'Reports and Analytics' region as shown below:

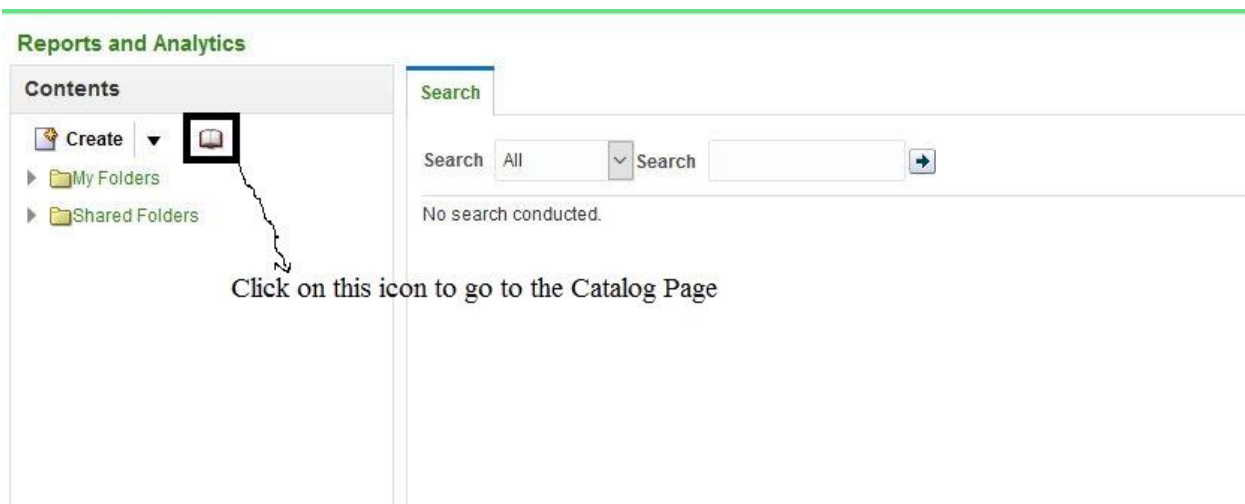
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Navigator



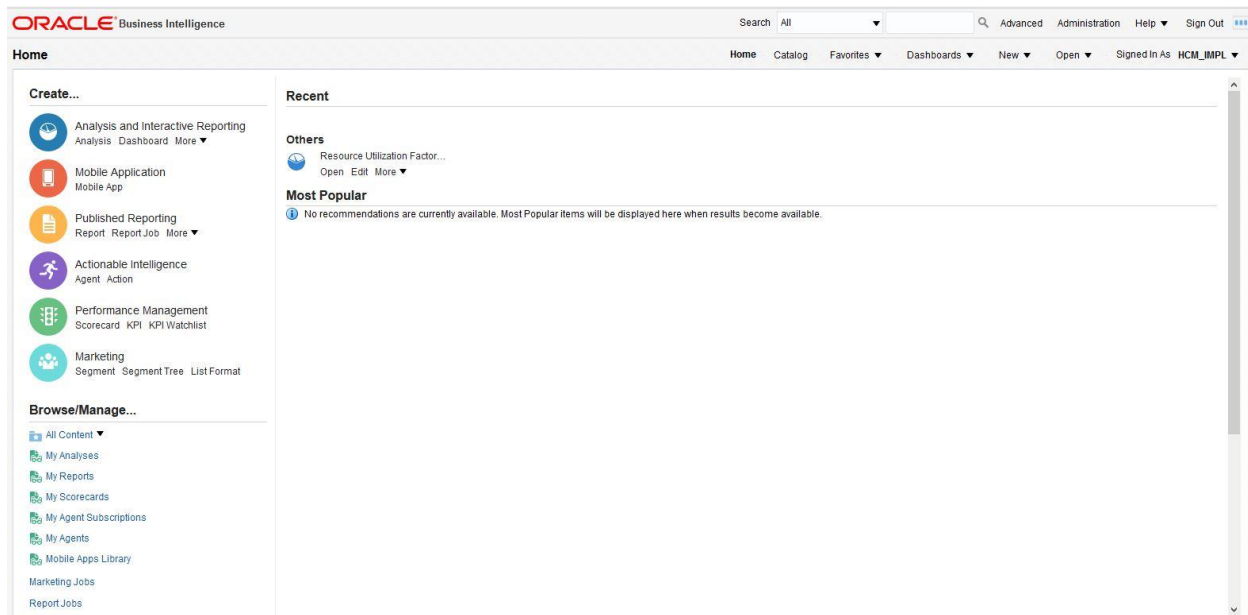
Once you click on this, you would reach the following page:



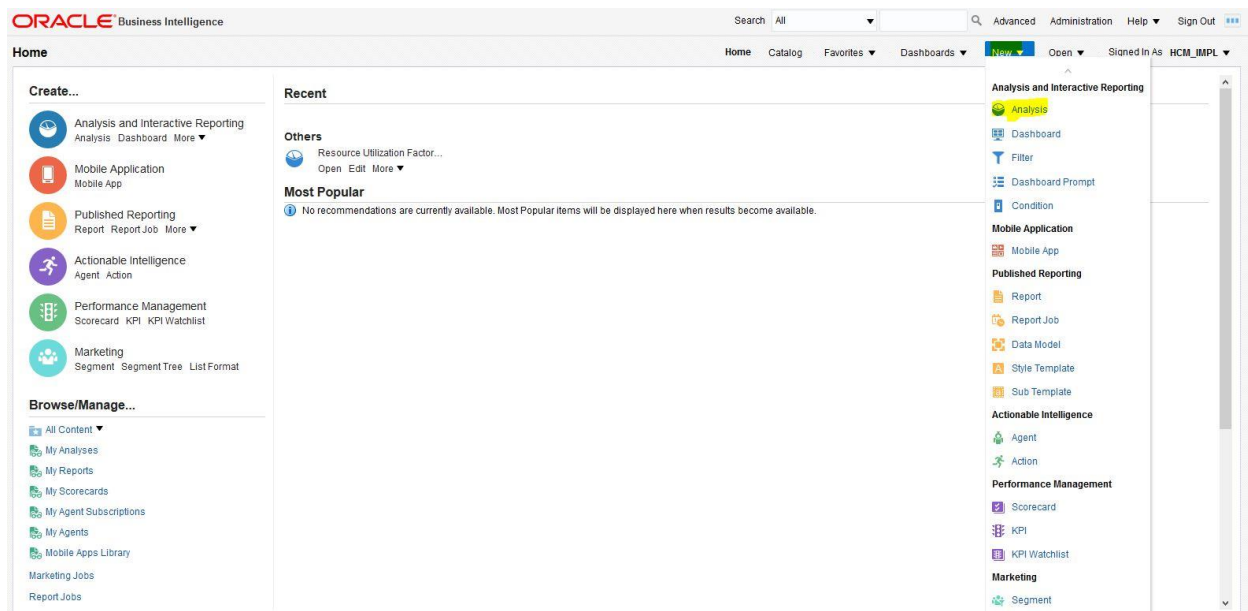
A Mouse Click on the icon (Open Book) as shown above would take you to the following screen:

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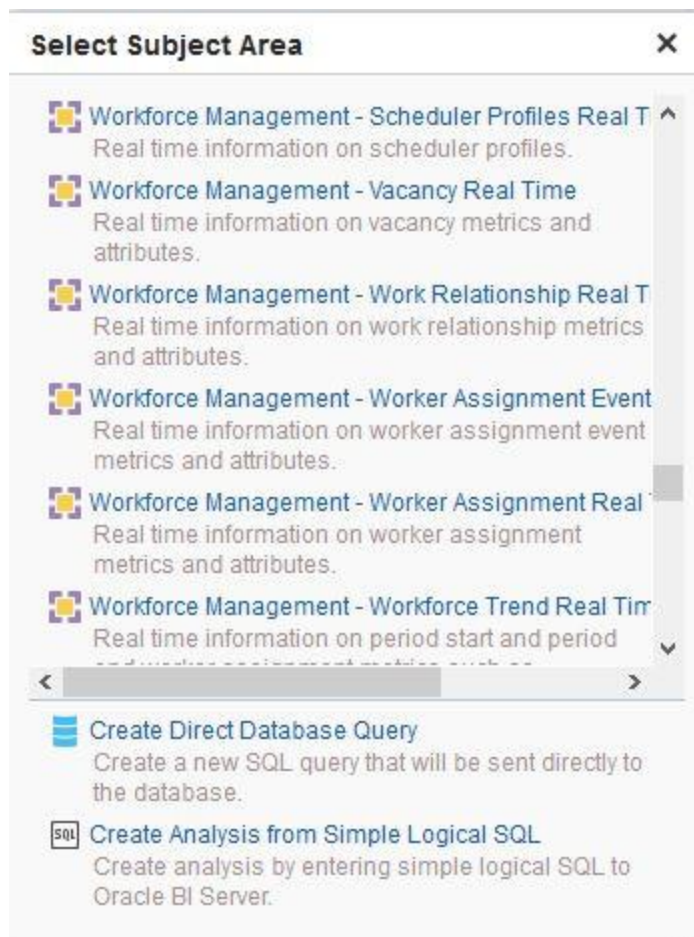


Next, we should create a new analysis by choosing the ‘*Analysis*’ option under the *New* menu.



This would open up a list of Subject Area wherefrom we need to choose the one we are interested in

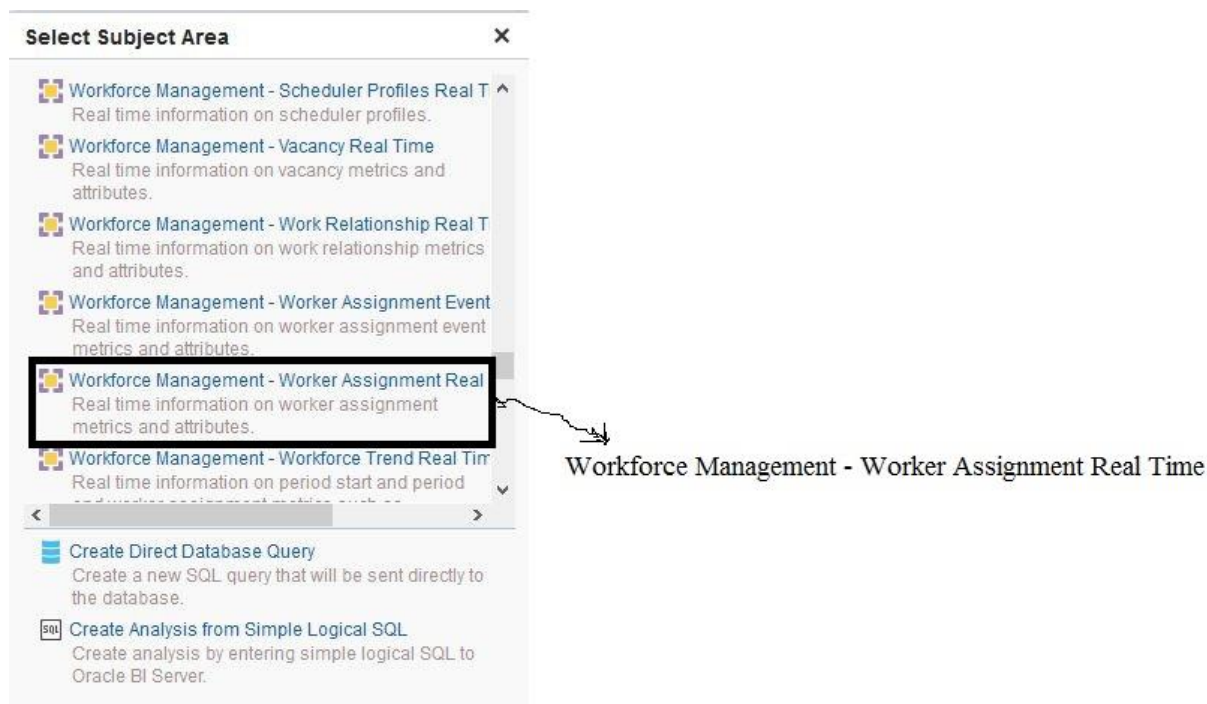
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For this example we would choose '*Workforce Management – Worker Assignment Real Time*' Subject Area

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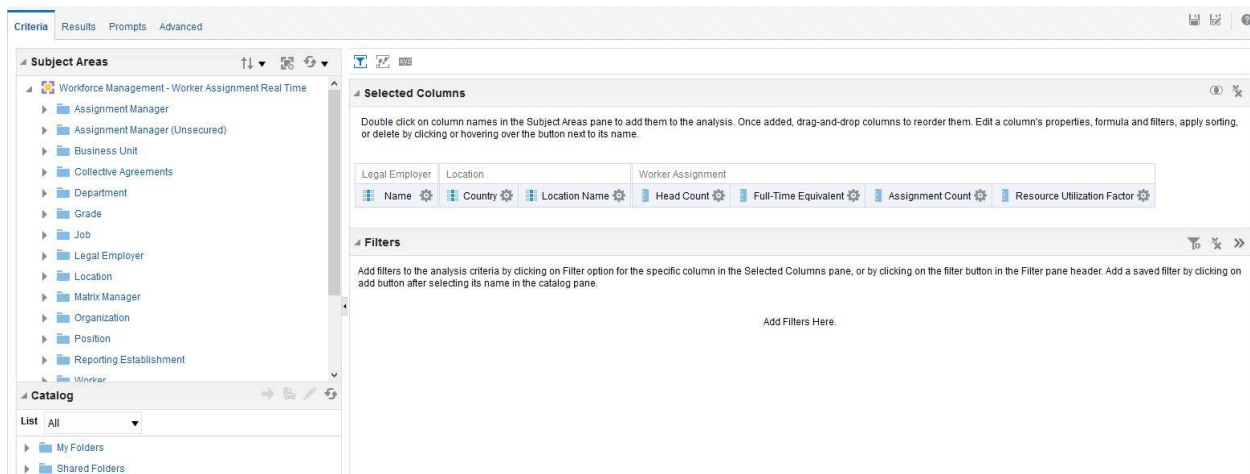
Next, we need to choose the Data-Fields from the subject area.

Prompt / Label	Data Source
Name	"Legal Employer"."Name"
Country	"Location"."Country"
Location Name	"Location"."Worker Location Name"
Head Count	"Worker Assignment"."Head Count"
Full-Time Equivalent	"Worker Assignment"."Full-Time Equivalent"
Assignment Count	"Worker Assignment"."Assignment Count"
Resource Utilization Factor	"Worker Assignment"."Full-Time Equivalent" / "Worker Assignment"."Assignment Count"

And, this is how the Application Screen should appear as below:

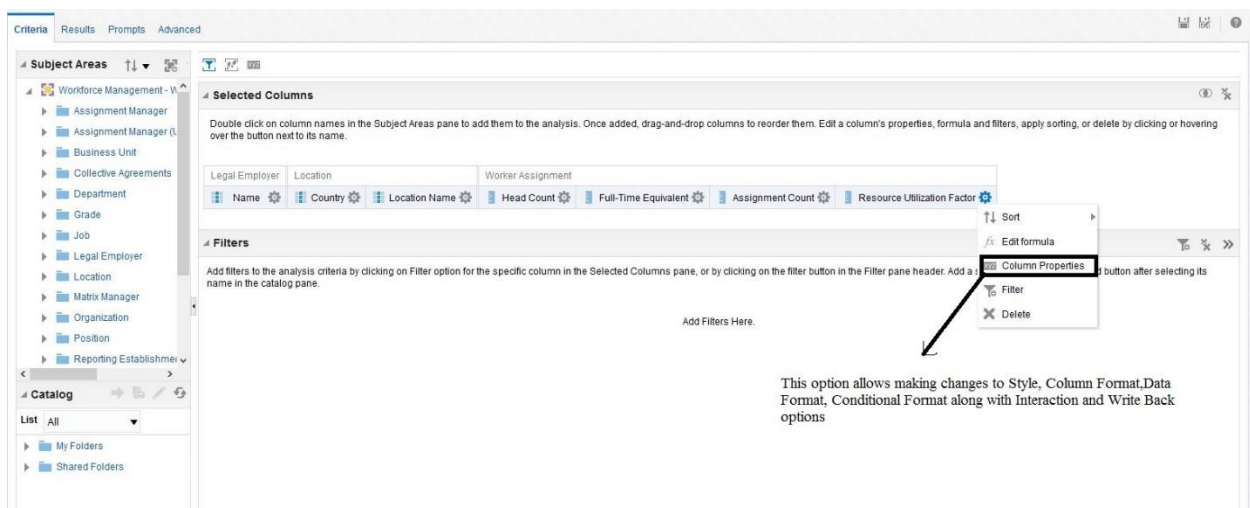
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Conditional Formatting

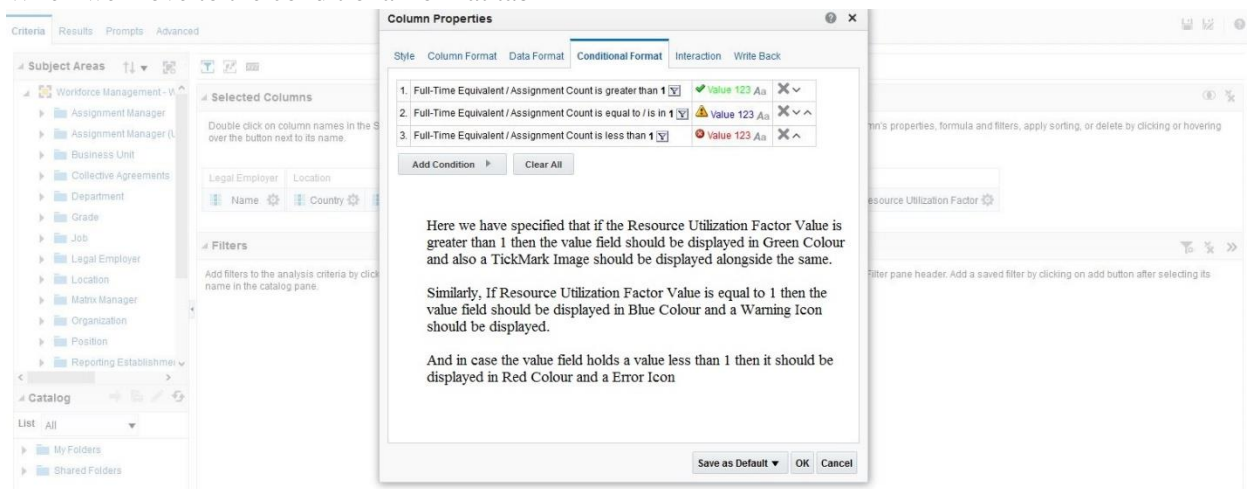
We would apply conditional formatting on 'Resource Utilization Factor'



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When we move to the conditional format tab



And now the results section

Table						
Name	Country	Location Name	Head Count	Full-Time Equivalent	Assignment Count	Resource Utilization Factor
Algeria Legal Entity	Algeria	Oran	4		4	
		Tizi-Ouzou	5		5	
Argentina Legal Entity	Argentina	Deloqui	4	4.2	4	1.05
		Los Molles	5	5.4	5	1.08
Australia Legal Entity	Australia	Melbourne	7	7	7	1
		Perth	7	7	7	1
		Sydney	16	16	16	1
Austria Legal Entity	Austria	Salzburg	4	3	4	0.75
		Vienna 02	5	2	5	0.4
Bahrain Legal Entity	Bahrain	Block 319 Road 1911	9	9	9	1
Belgium Legal Entity	Belgium	Antwerp	7	7	7	1
		Charleroi	7	7	7	1
		Evergem	7	7	7	1

Which is in perfect sync with our setup.

This is how we can use conditional formatting feature and make use of colors and images to make the reports more attractive, eye-catching and most important of all self-explanatory.

Hope this is useful.