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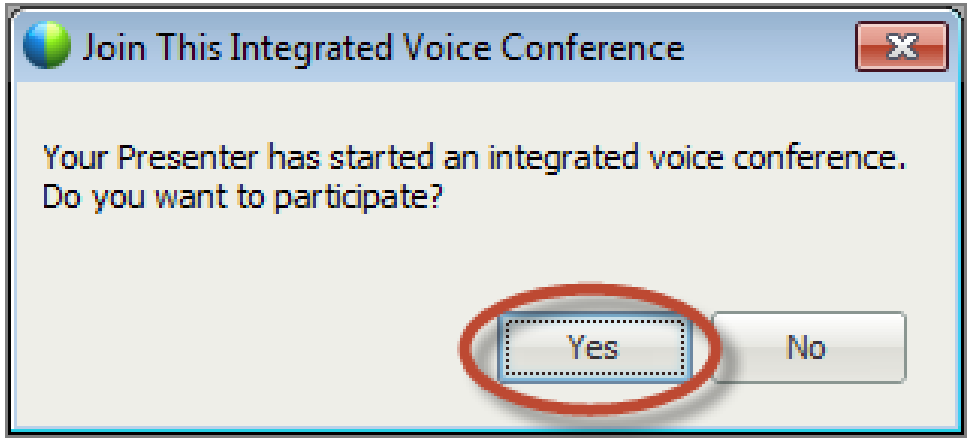
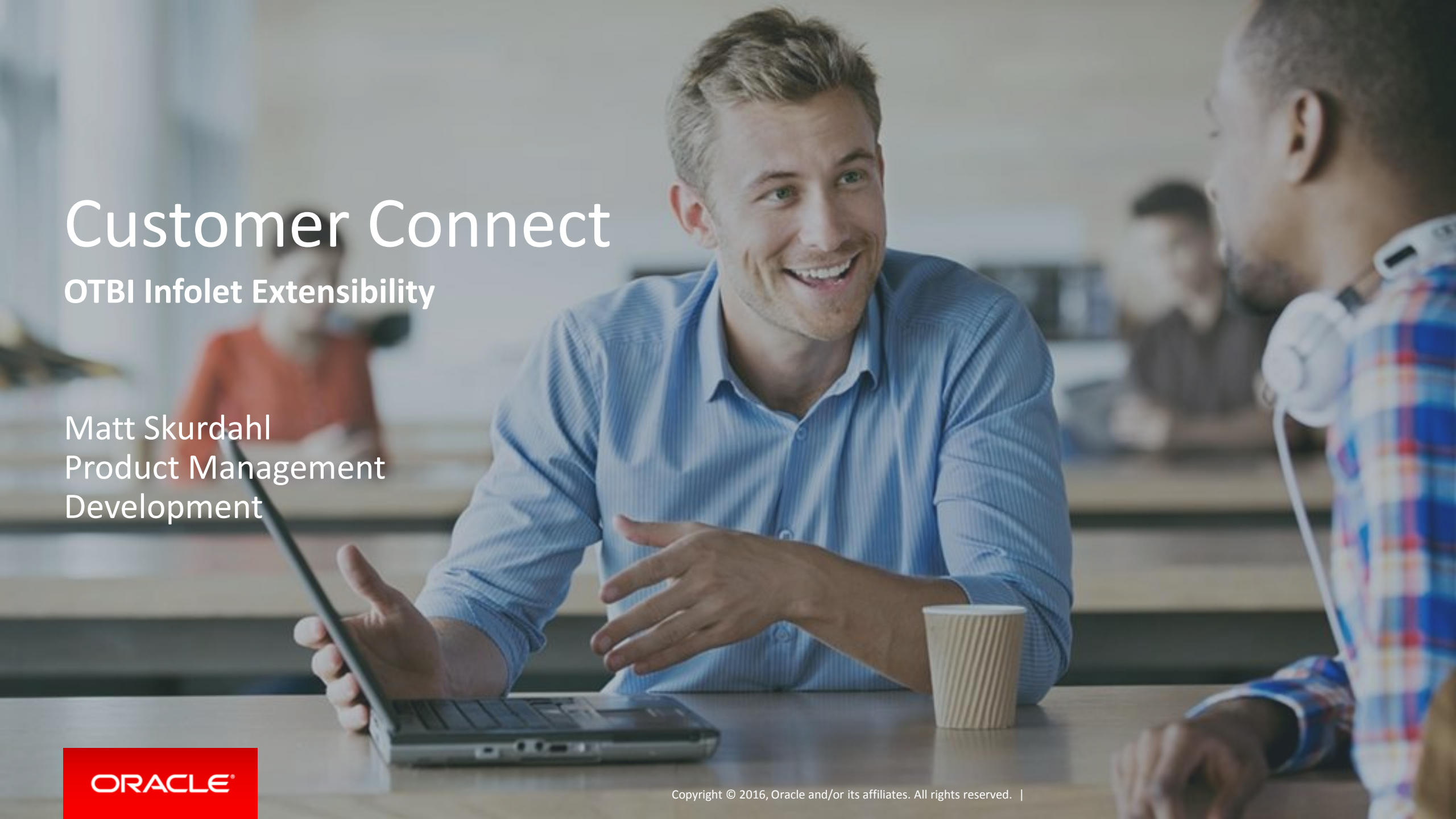
Please select Yes to join the integrated voice conference when prompted:




You will be on music hold until the session starts.



# Customer Connect

## OTBI Infolet Extensibility

Matt Skurdahl
Product Management
Development

# Safe Harbor Statement

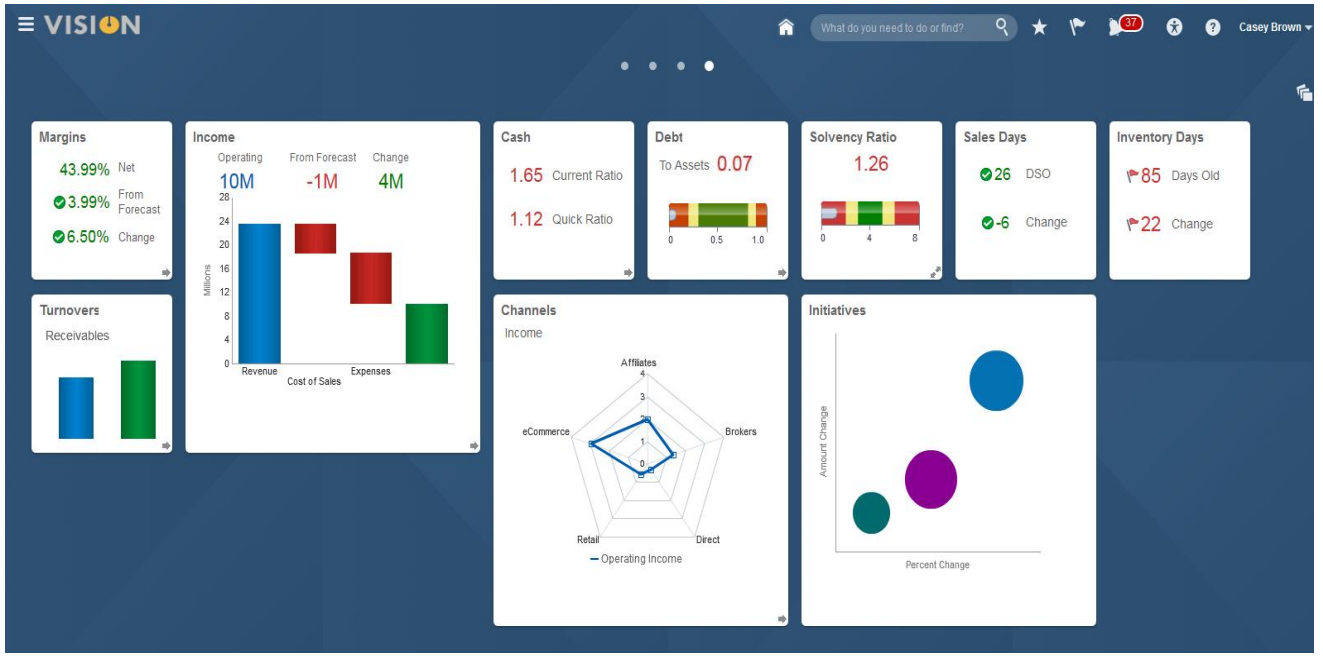
The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

# Program Agenda

1. Infolets Overview
2. How to Create an Infolet

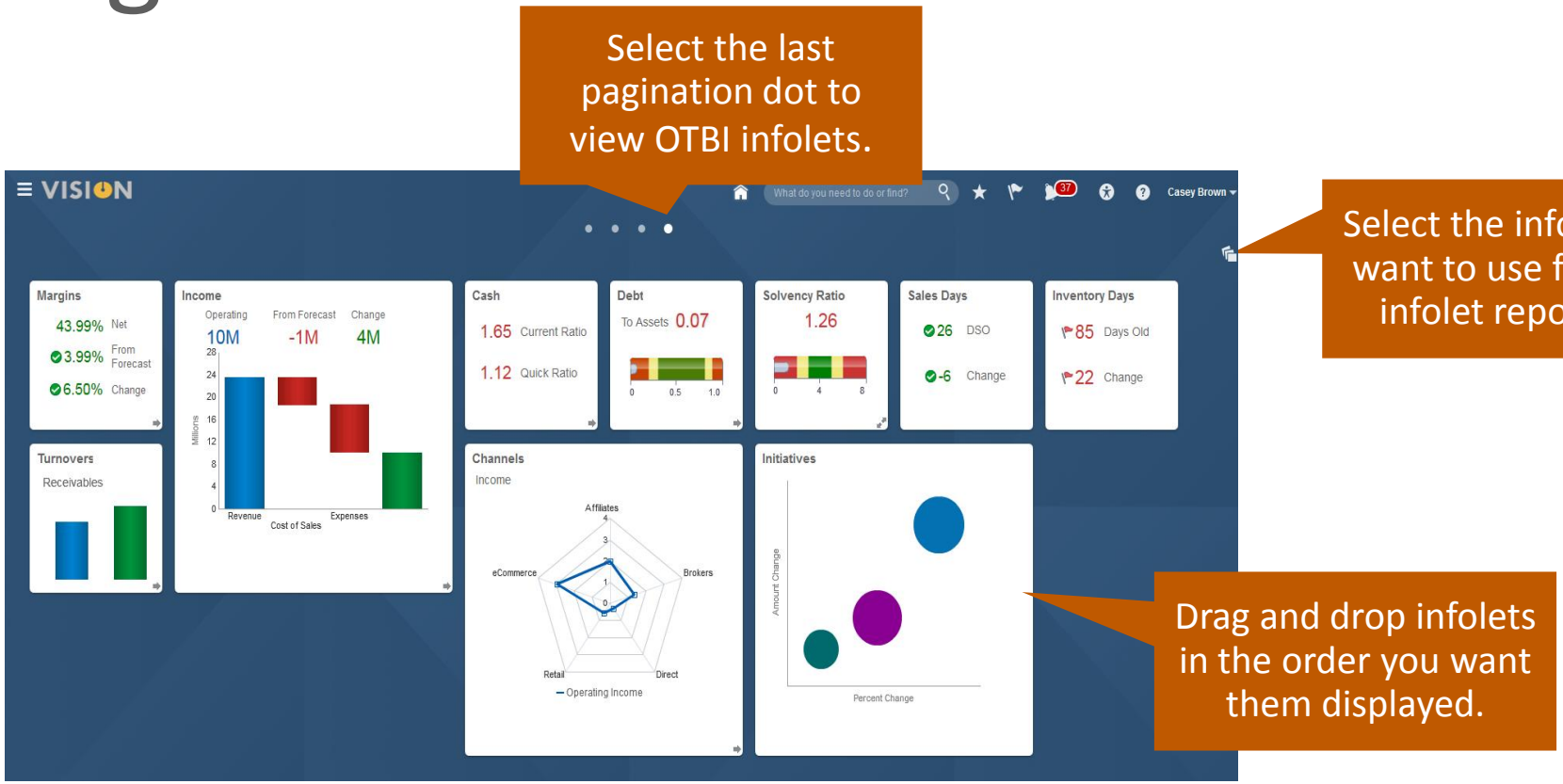
# Infolets Overview

- Assesses business activities in real-time
- Highlights potential issues to prioritize work
- Facilitates corrective action by linking to transactions, reports, and application functions
- Two Types
  - Provided by Oracle
  - Created by Customers




OTBI Infolet Examples

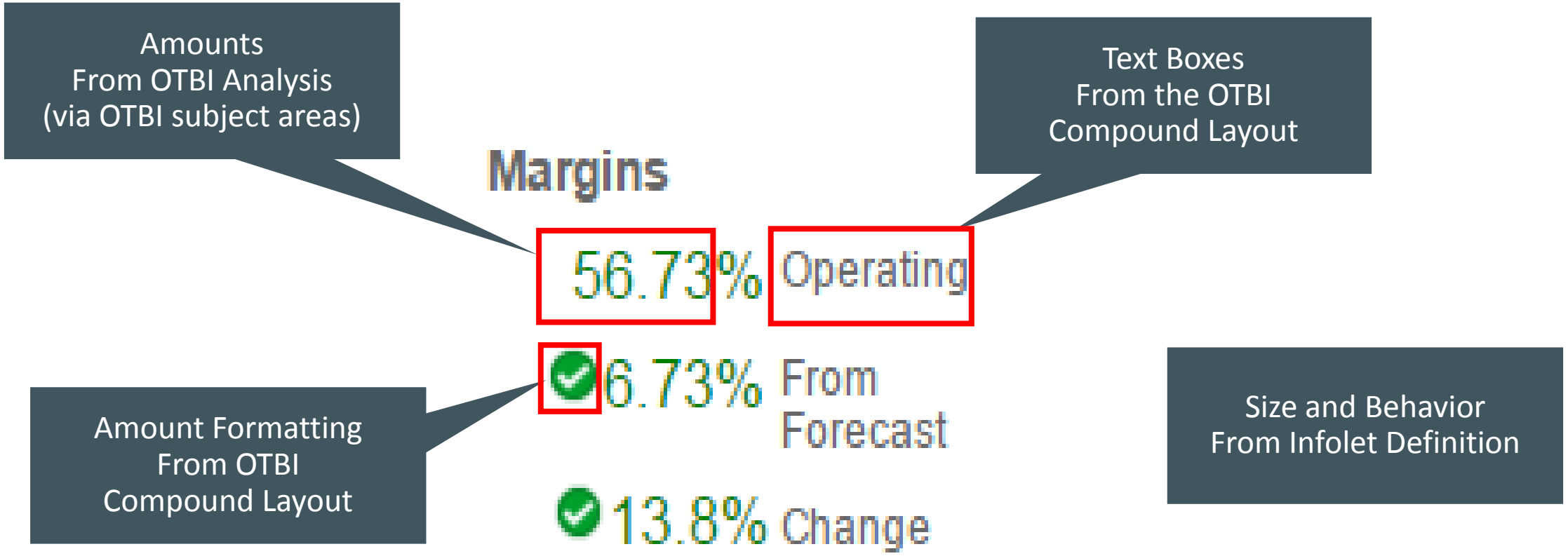
# Using Infolets



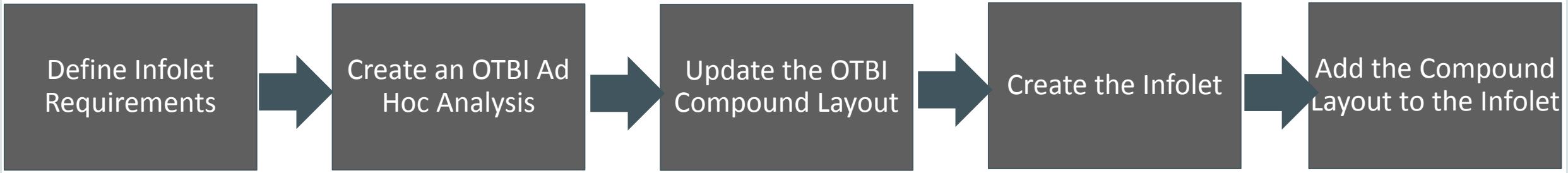
# Program Agenda

1. Infolets Overview
2. **How to Create an Infolet**

# Infolet Components



# Create Infolet Process




How much information should display?

Where is the information (ie in what subject area)?

What visualizations should be used?

Indicate what information to include in the infolet

Filter and calculate results

Specify formatting options

(e.g. text styles, visualizations)

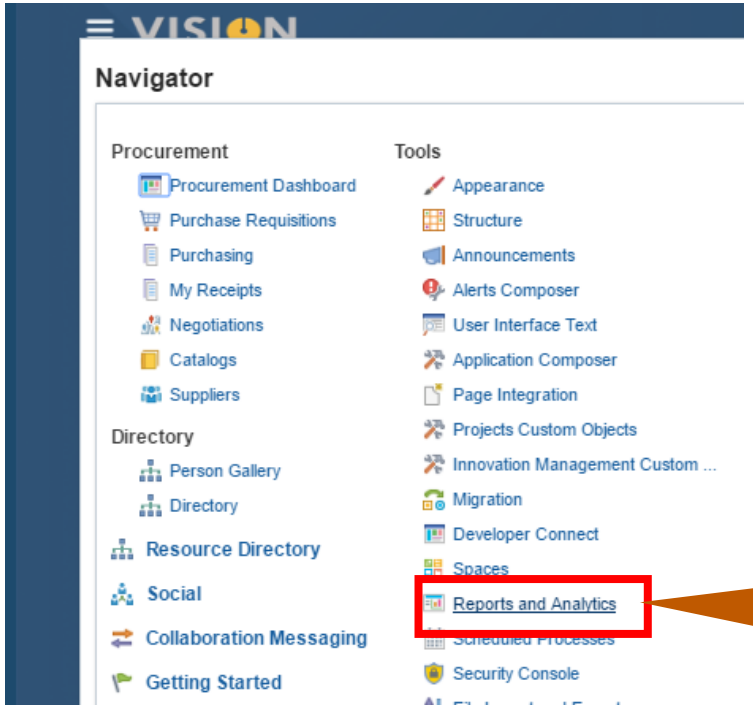
Specify infolet size

Specify infolet behavior (front only, front and back, expanded view)

Specify “drill to” OTBI report

Link the compound layout to the infolet so results appear

# Create an OTBI Ad Hoc Analysis
# Open OTBI




Select Reports and Analytics.

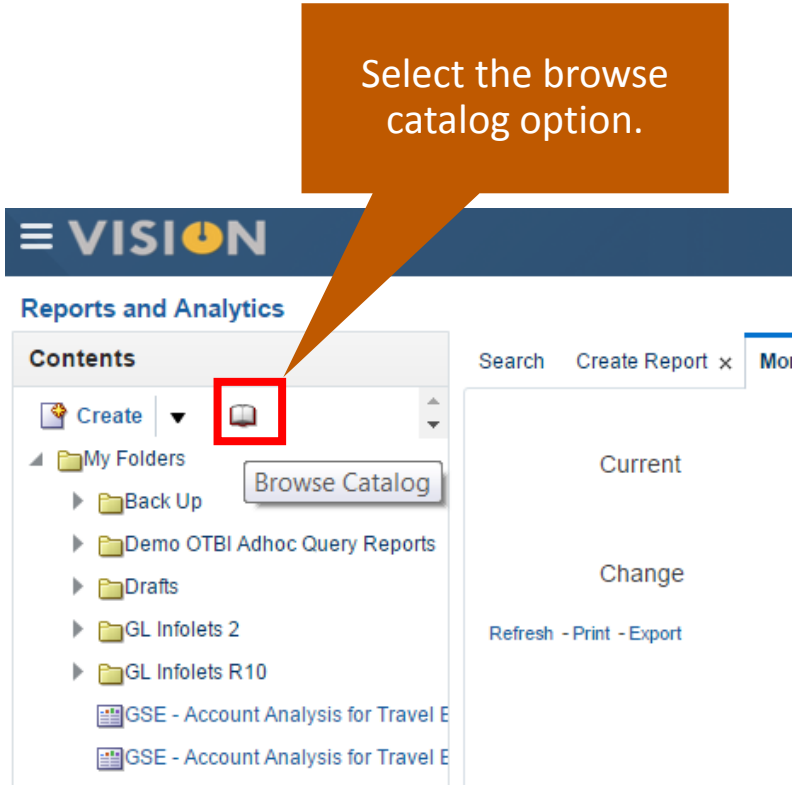
The features needed to build OTBI infolets are under the reports and analysis menu option.

You must have access to the reports and analytics menu option to use these features.

Access the Reports and Analytics menu option from the navigator: Tools → Reports and Analytics

# Create the Ad Hoc Analysis

Navigate to the BI Catalog

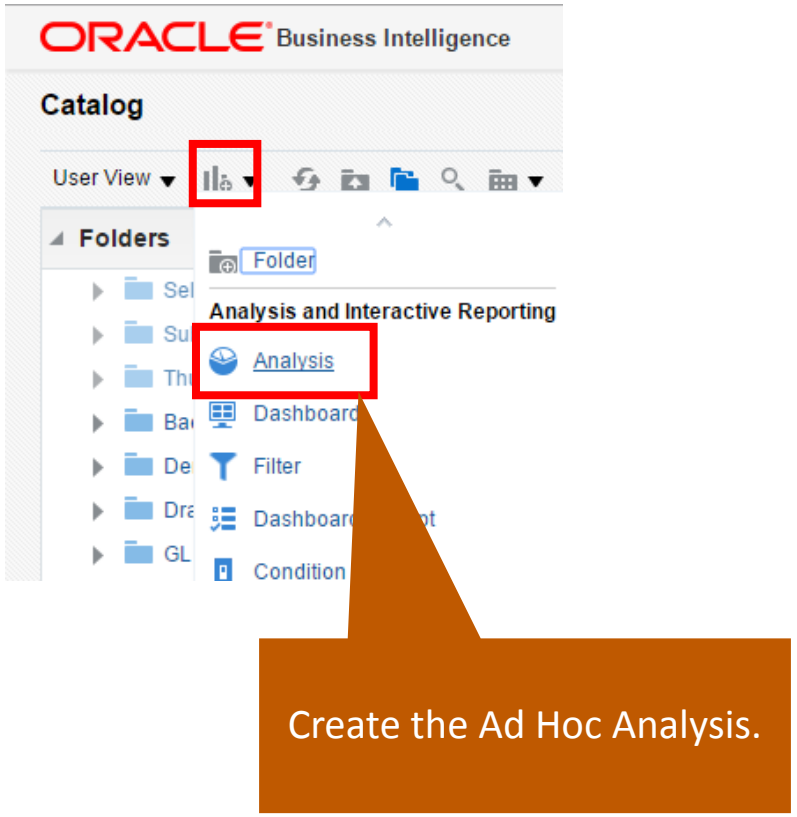



The BI Catalog is used to hold the Ad Hoc Analysis used by the infolet.

Tip: Navigate to the browse catalog page to create an ad hoc analysis (even though there is a create icon available from this page).

Reason: the create icon from this page will take you to BI composer, which may not have the desired visual components to build the infolet.

# Create the Ad Hoc Analysis



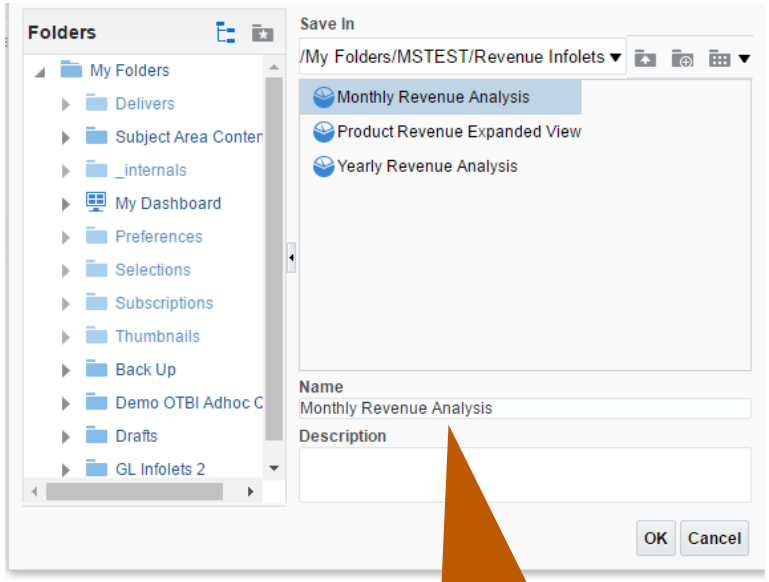

The analysis determines what information to capture with the infolet. This is done by adding fields from the subject area (covered later), and by creating filters to limit the results.

Example: The analysis defines that you would like to capture revenue amounts for the period of December, 2015 for an infolet.

The analysis will later be added to the infolet.

# Save the Ad Hoc Analysis

Save the analysis.

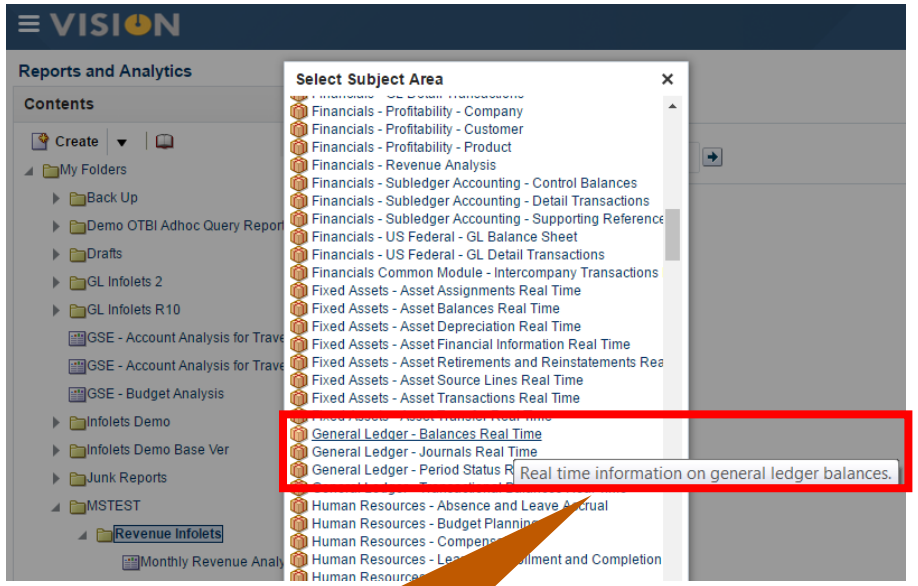



Save the Ad Hoc Analysis.

Save the analysis to a directory. You will use this directory to find the analysis when it is time to add it to the infolet.

Tip: Save similar analyses in the same folder to simplify their assignments to infolets.

# Select a Subject Area for the Ad Hoc Analysis




Select a subject area from the drop down list.

Subject areas hold the information displayed by the infolet. They are grouped by application.

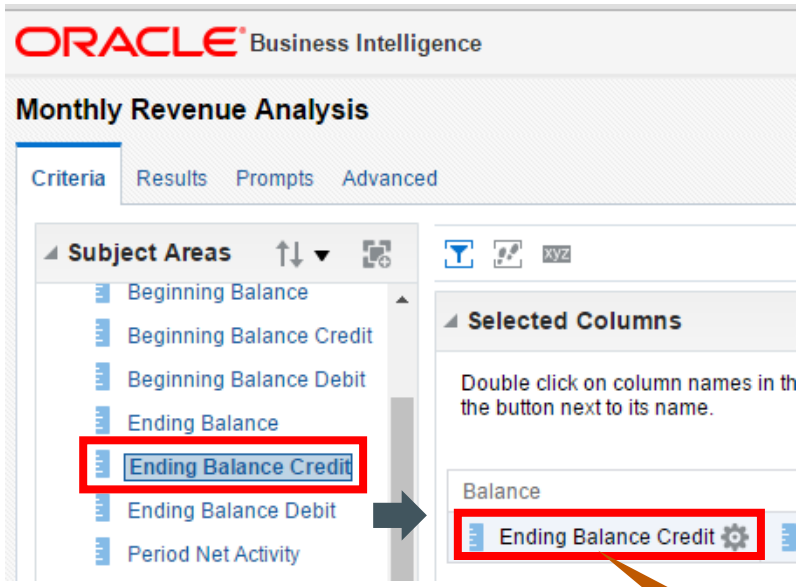
This pre-packaged content covers major processes and transaction attributes, plus prebuilt financial reporting metrics.

Fusion financial applications has a number of subject areas. They are typically organized by product, such as for General Ledger, or for Receivables.

Each infolet can use only one subject area. In contrast, OTBI reports can use multiple subject areas.

**Financials subject areas examples:**
General Ledger Balances
General Ledger Journals
Fixed Assets Balances

# Create the Ad Hoc Analysis



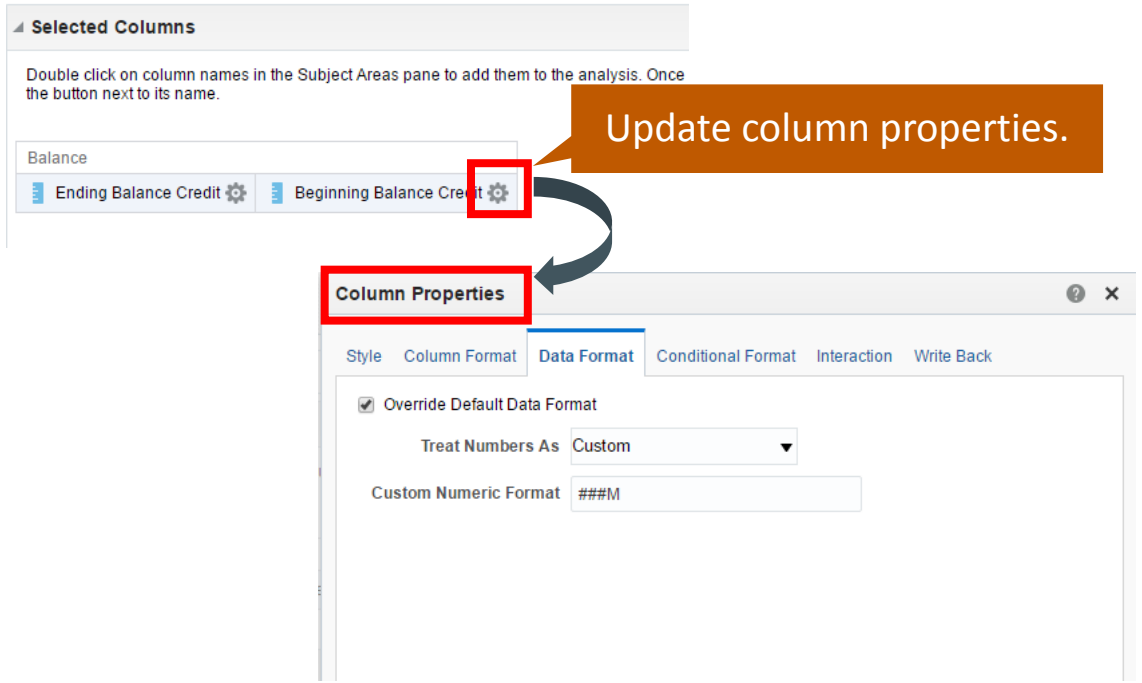

Select columns from the subject area for the analysis.

Select (drag and drop) information from the subject area to the analysis. Repeat this process until all the columns you would like to use are selected.

At a minimum, select the fields that you would like to display on the infolet.

You can also select additional columns to filter results and for calculations.

# Update Column Properties

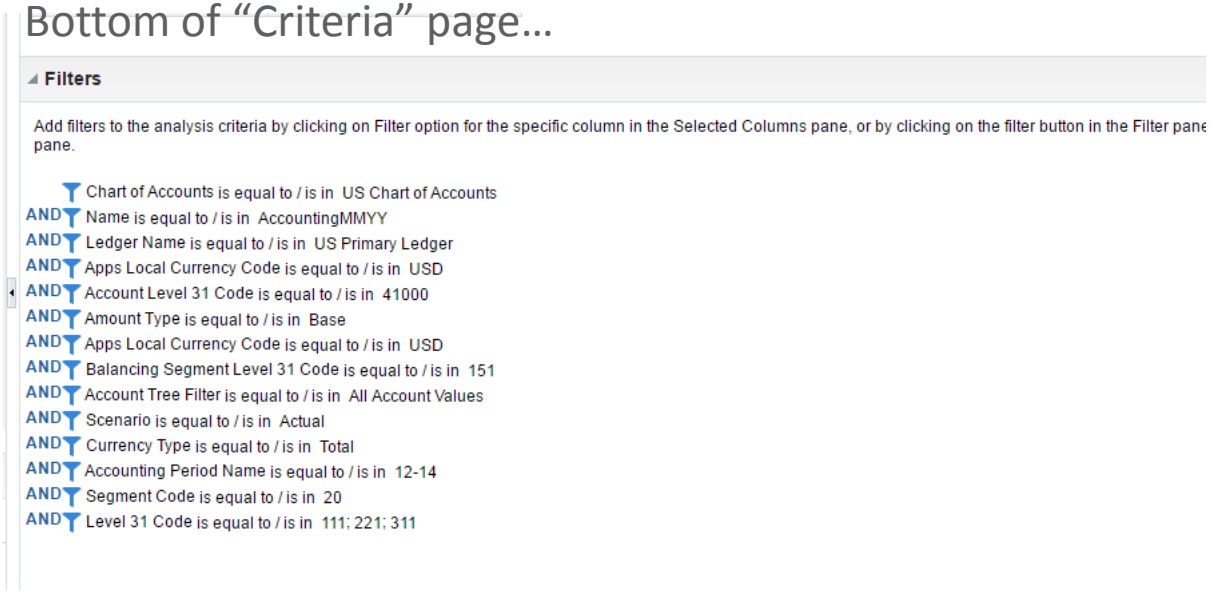



Use column properties to:

- Apply formulas
  **Example:** Divide a beginning GL account balance by the ending GL account balance to determine the percentage change
- Add filters
  **Example:** Show the ending balance for a specific GL account combination for a specific accounting period.
- Specify the data format
  **Example:** Round amounts to millions.

# Define Filters for the Analysis

Bottom of “Criteria” page…



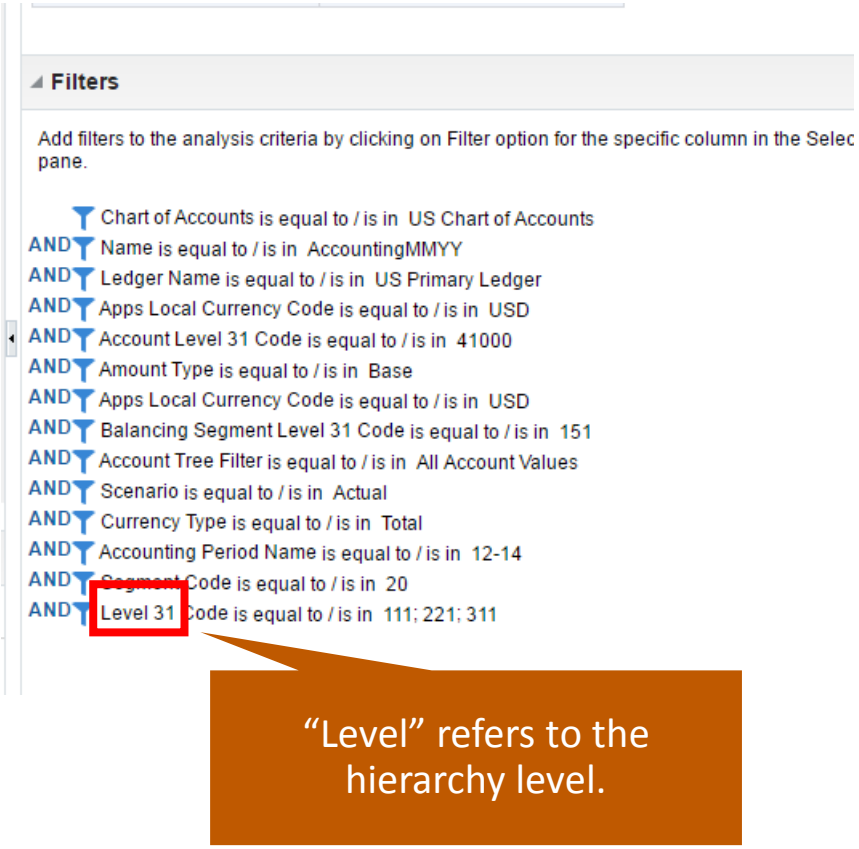

Use filters to restrict the infolet results. Filters vary based upon the subject area.

The example shown here is for a GL account balance. It specifies:

- Ledger
- Calendar
- Chart of Accounts
- Currency
- Account combination values
- Balance Type
- Currency Type

Tip: You can use GL account groups to verify the infolet results.

# Additional Filter Information
## General Ledger Balances




"Level" refers to the hierarchy level.

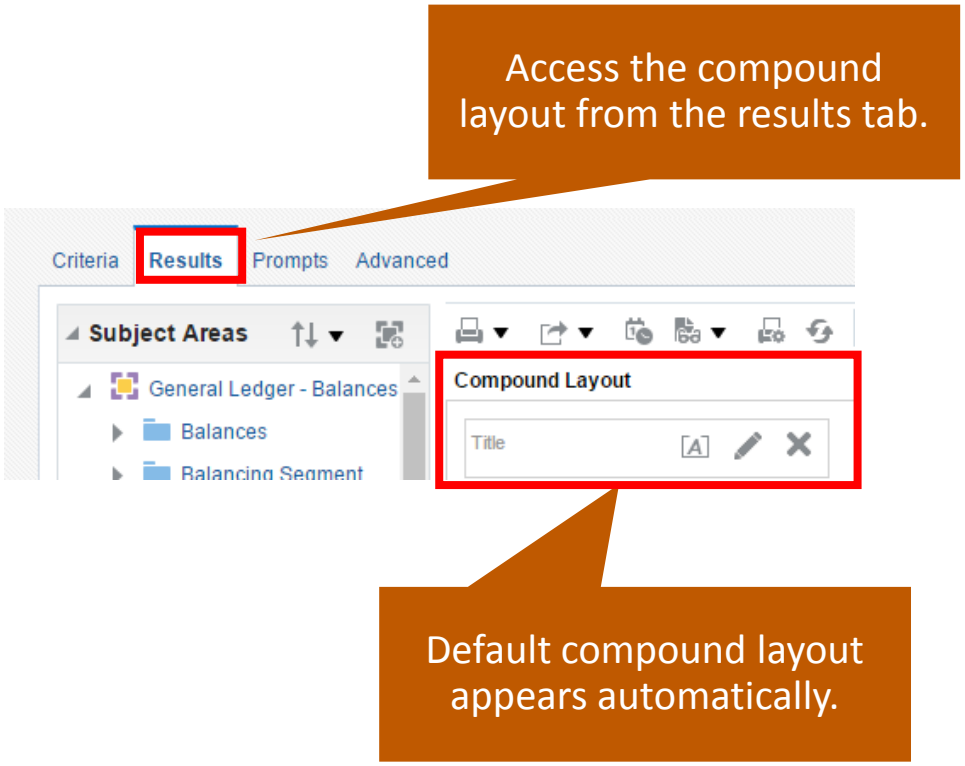
You can use GL hierarchies as part of the filter definition.

The level number (e.g. Level 31, Level 22) refers to the level in the hierarchy.

The higher the level number, the higher the position in the hierarchy.

Level 31 represents the top of the hierarchy.

# Compound Layout




The Compound Layout holds the infolet information and text. It is automatically created for the analysis.

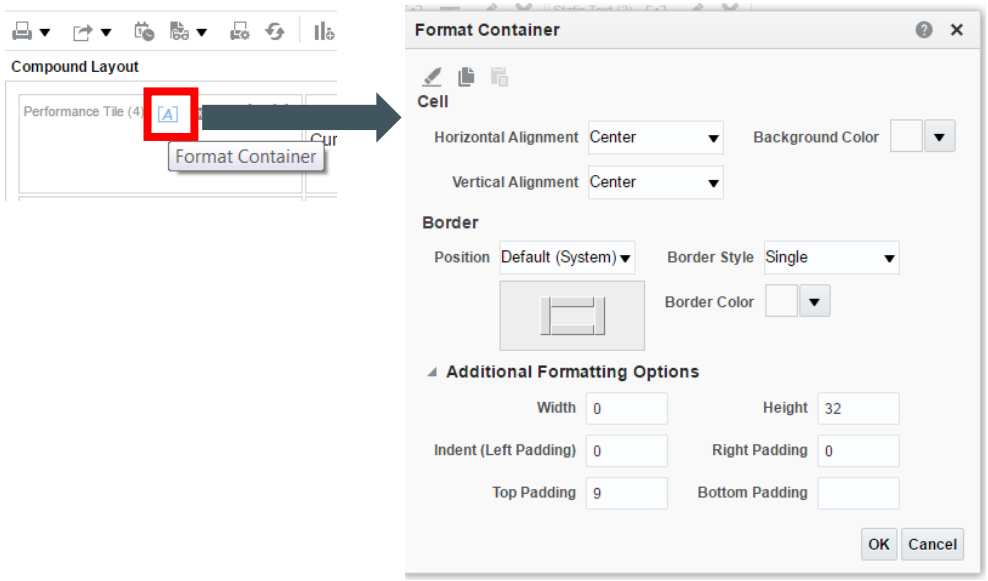
It can also hold one or more visualizations for the infolet.

The views that we will use (as examples) are a combination of performance tiles and static text boxes.

OTBI has a default compound layout that is created automatically when you create the analysis. Update this compound layout as needed.

# Creating Infolets

## Format the Infolet Container



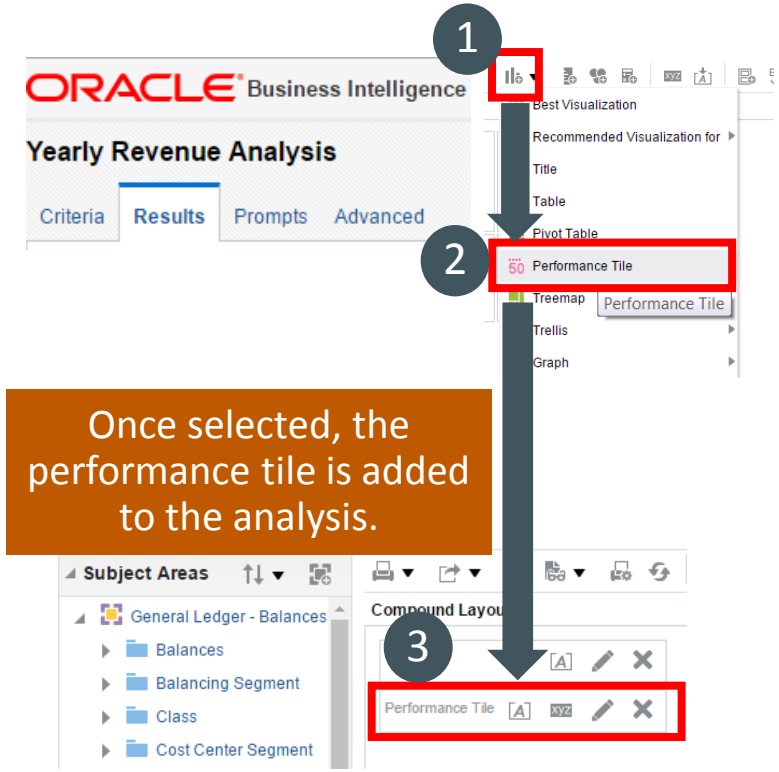

These options control the placement of the information in the infolet container so that we can put more than one performance tile, each with a different metric, on the same infolet.

You can determine where the results are displayed on the infolet. For our example, we use a horizontal and vertical option of Center.

Tip: Padding and alignment options are only available from the format container.

# Creating Infolets

## Add a Performance Tile



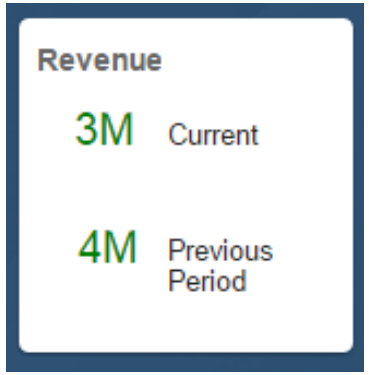

Once selected, the performance tile is added to the analysis.

A performance tile is one type of OTBI visualization.

In our example, individual performance tiles are used to hold the amounts and text.

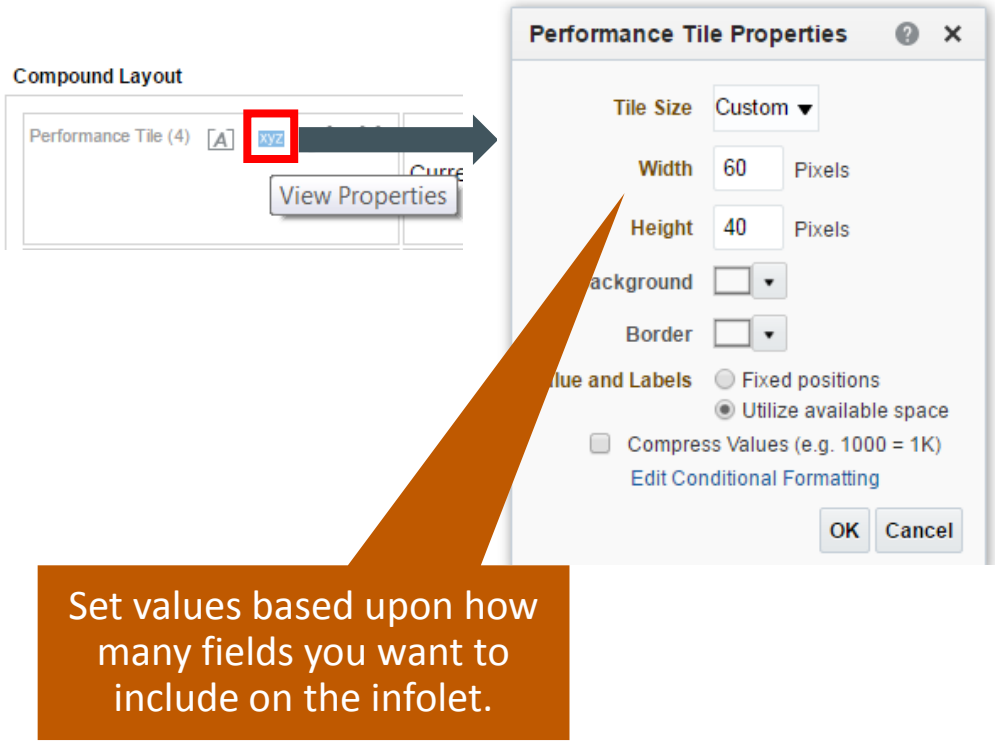
***Repeat this process*** until you have a performance tile to hold each piece of information for the infolet.

Example:




The Current and Previous Period values are each captured as separate performance tiles.

# Set Performance Tile Properties




These options are for the performance tile itself .

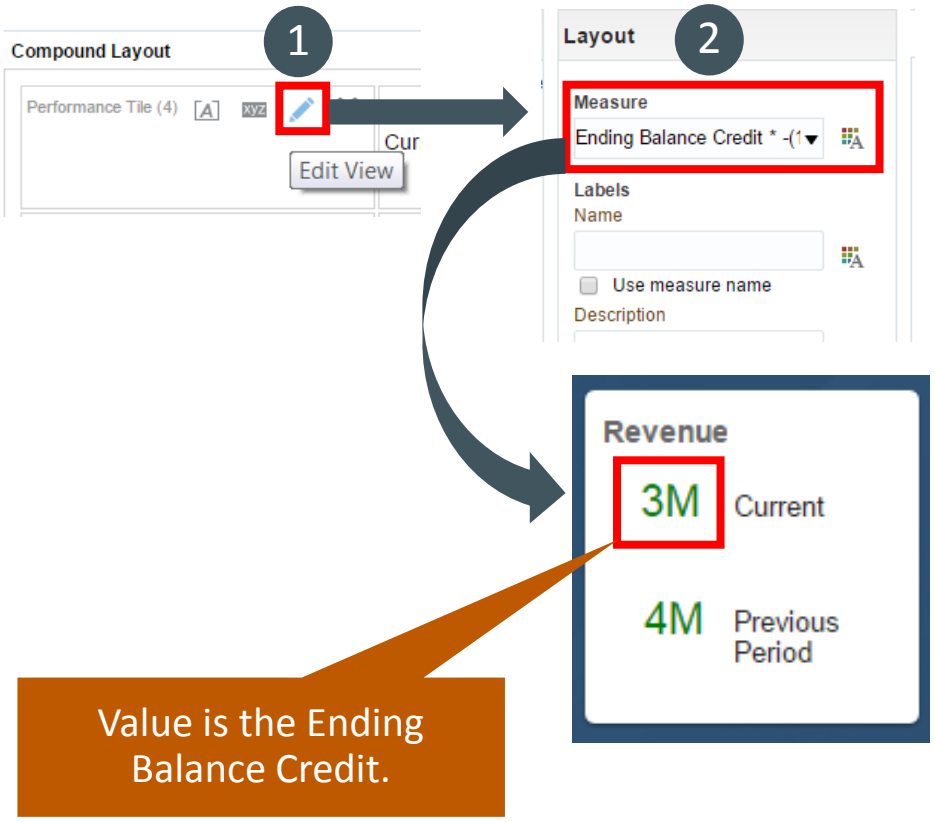
The size will vary based upon the amount and display size of the information you want to include in the infolet.

Manually update the width and height of the performance tile as needed.

Select “OK” to see how the updates to the performance tile properties affect the infolet layout.

# Select Information for the Performance Tile

Edit the performance tile view




Each of the columns you selected when creating the analysis is available as a measure for the infolet.

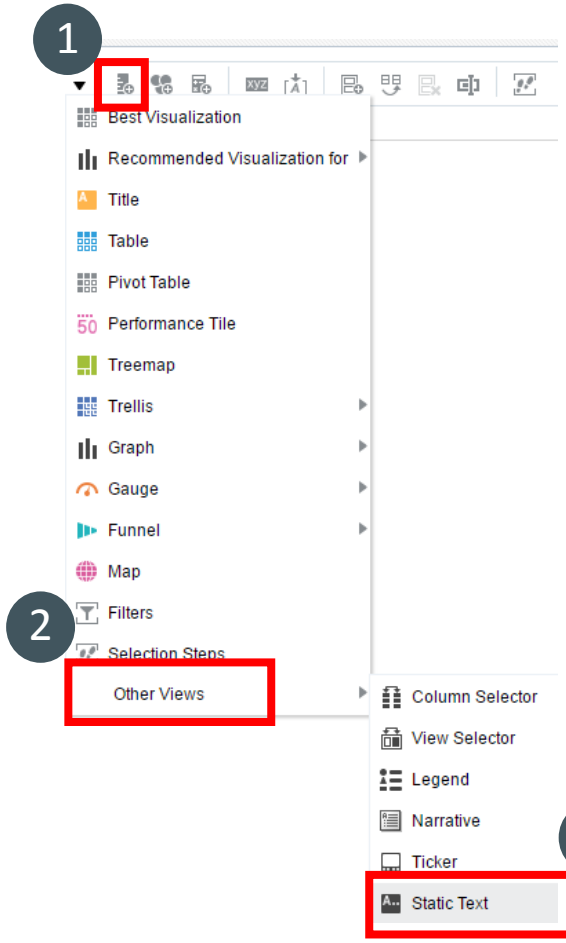
Select the measure you would like to use for the performance tile.

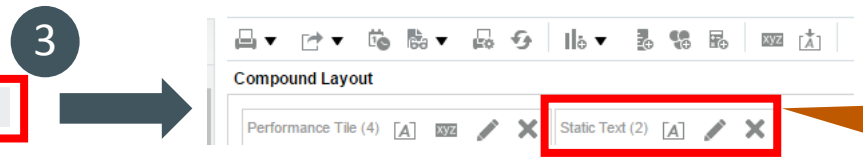
The measure value will be displayed when viewing the infolet.

In our example, we select the ending balance credit measure to show the revenue for the period.

Repeat this process for each performance measure.

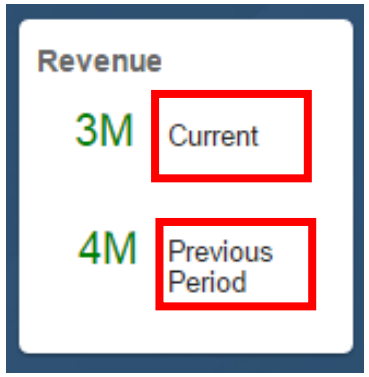
# Add a Static Text Box




Static text boxes are useful for labeling information on the infolet.

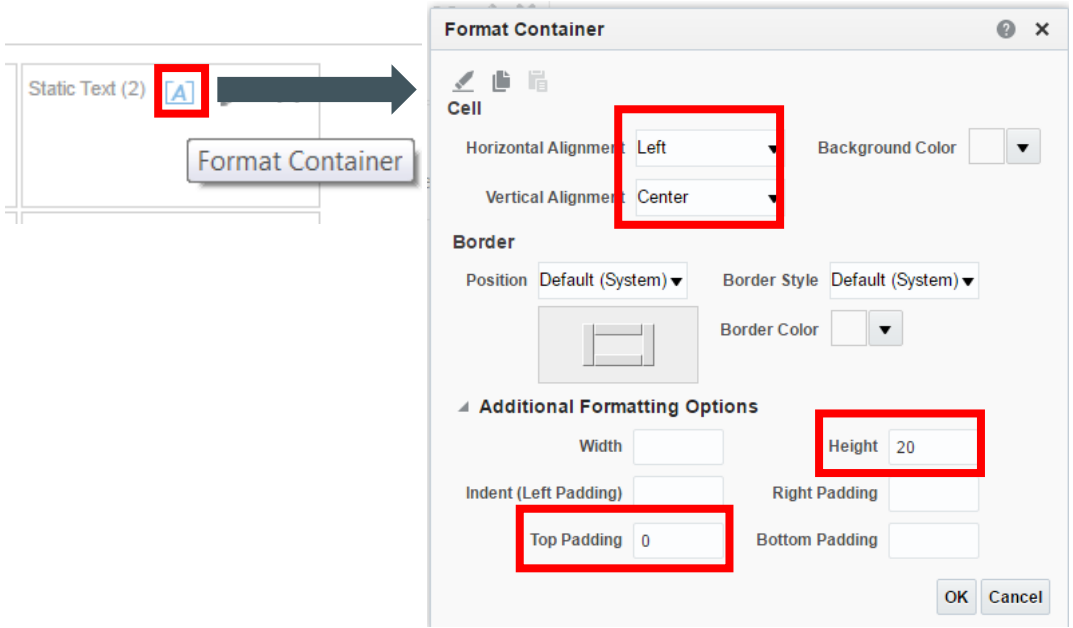
Examples:




Static text boxes are used for each of these labels.

Static text is added to the compound layout.

# Format the Static Text Box

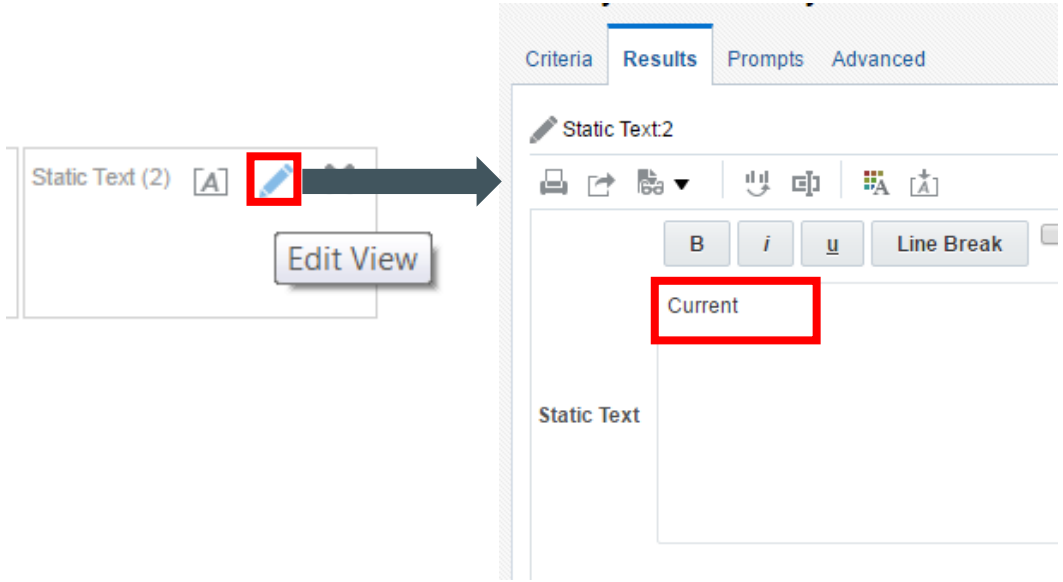



These options determine the placement of the static text in relationship to the performance tile.

In this example, we use a horizontal alignment of left so that the text appears next to the performance tile.

You will see the size of the text box change on the results tab once you save the formatting options.

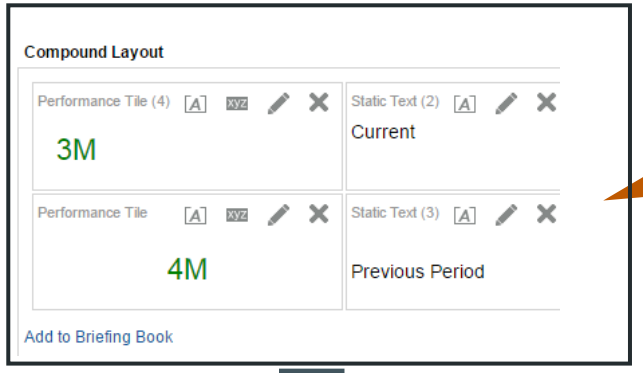
# Specify the Display Text



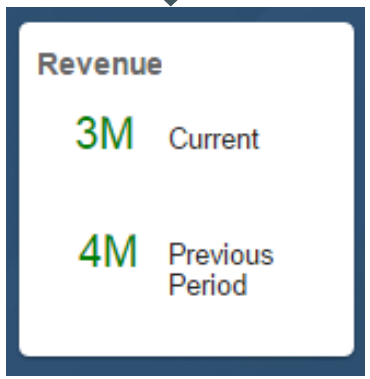

Enter the text as you would like it to appear on the infolet.

In our example, we want to display the word ‘Current’ next to the current revenue amount.

# Add more performance tiles and static text boxes




Completed compound layout



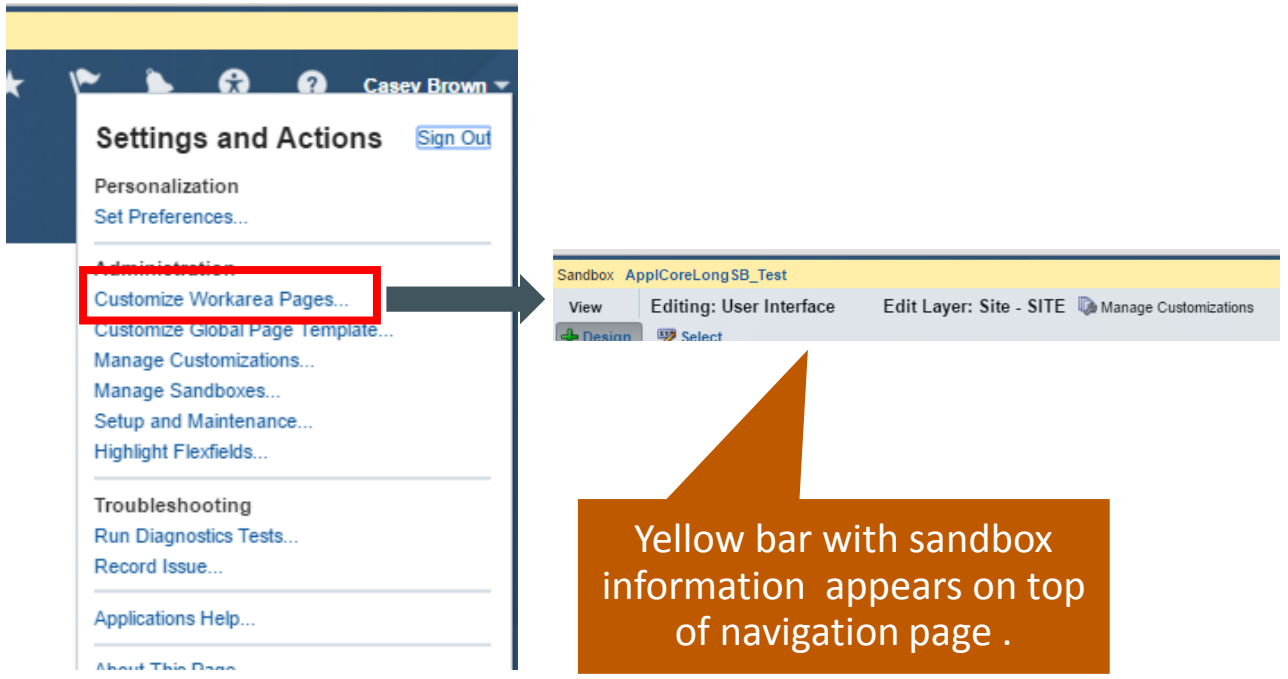

Resulting infolet

In this example, we display two different measures: ending and beginning revenue balance (aka last period revenue).

Each balance is captured in a separate performance tile, with an accompanying static text box that describes the information.

Each time you add a performance tile or text box go through the format container, view properties, and edit view as needed to control what information is displayed on the infolet (and how it looks).

# Customize the Workarea




Once the compound layout is satisfactory and the results are as desired, you can add the infolet to the page where it will be visible to users.

To do this, navigate out of reports and analytics and back to the main navigation window.

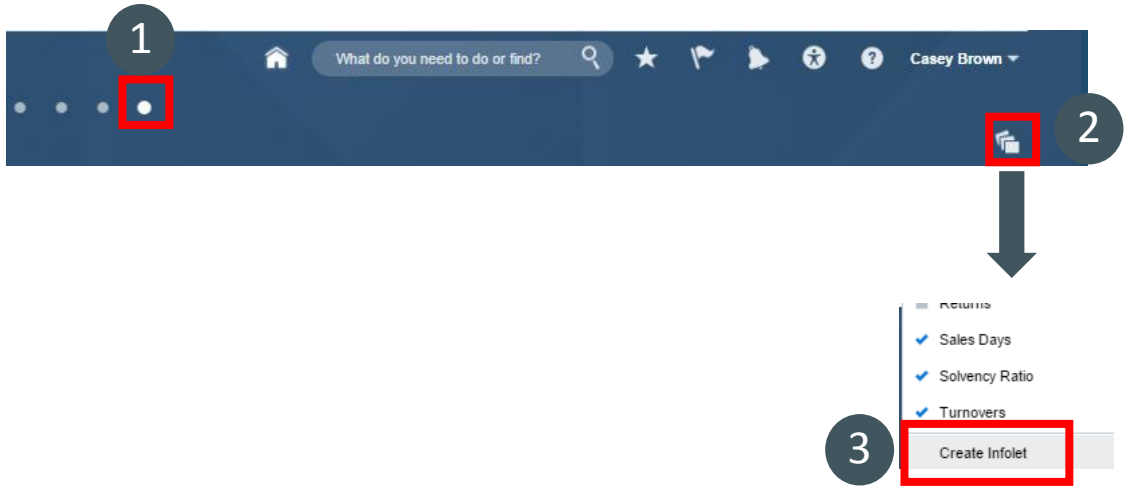
Select the Customize Workarea Pages option to enable the create infolet feature.

You will see a banner appear at the top of the page indicating that you are now in customize mode.

The name of the sandbox is defined by your system administrator.

The purpose of using a sandbox is to allow multiple people to create and test infolets without worrying about overwriting each other's work.

# Select the Create Infolet Option



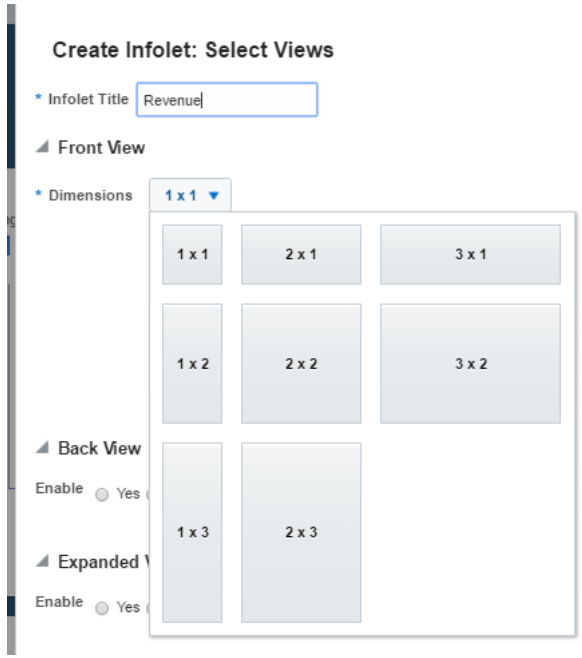

Select the ‘three card view’ option from the fourth pagination dot to open a choice list of infolets.

Select the Create Infolet option to add an infolet to the page. It is the last menu option from the three card view.

Tip: You can also remove infolets from the page display by deselecting their respective checkboxes (on the left of the infolet title).

# Creating Infolets

Select the size and views for the infolet




A window will open where you can provide a title for the infolet and specify its size.

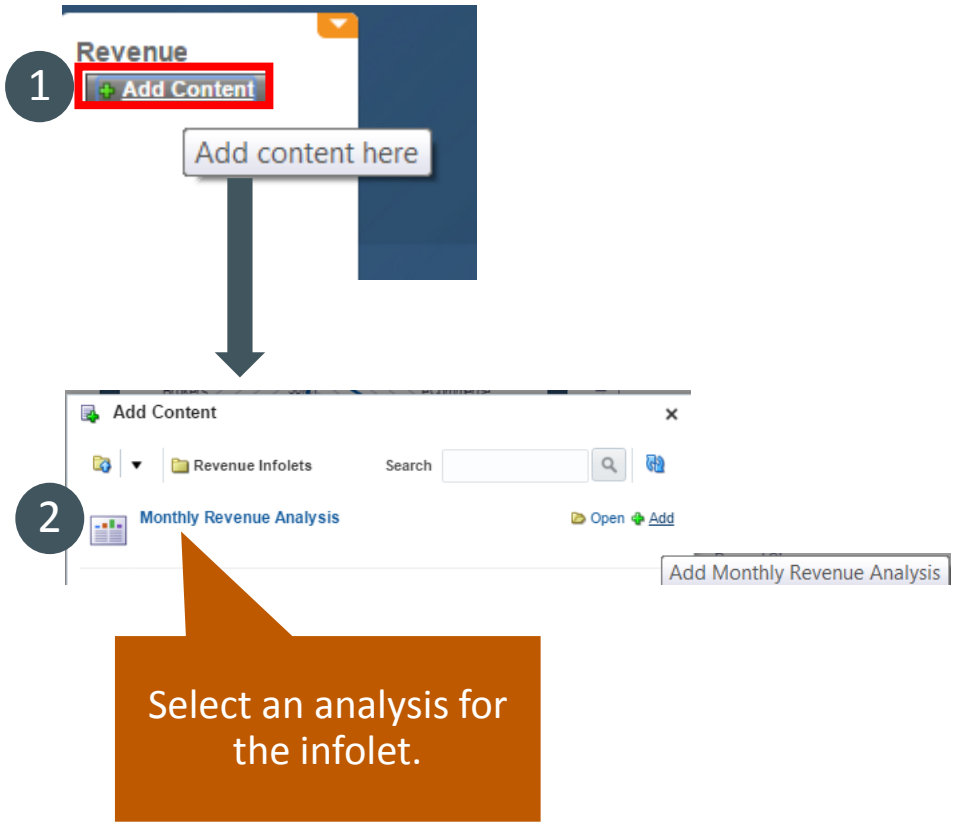
Only a front view is required, but you can also include a back and expanded view if you would like to include more information in the infolet.

Examples:

1x1 Infolet


2x2 Infolet

# Add Content to the Infolet

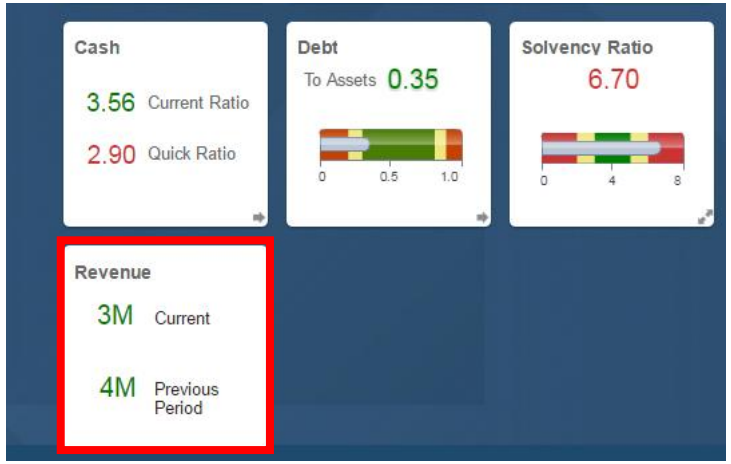



The infolet contents come from your OTBI ad hoc analysis.

The search facility is based upon the BI catalog. Search for the folder where you stored the analysis and expand it to find your desired selection.

# Creating Infolets

## View the infolet




The infolet will display on the page. You can move the infolet by dragging and dropping it.

If you hover over the infolet a yellow arrow will appear that allows you to update or hide the infolet.

# Resources

Developing with Infolets (Oracle Extensibility Blog)

How to Create Infolets (Youtube Video)

How to Edit Infolets (Youtube Video)

OTBI Cloud Documentation

# Hardware and Software
## Engineered to Work Together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