



Oracle Fusion Technical

Outbound Integration

OTBI



Oracle Transactional Business Intelligence OTBI

It is a business intelligence tool provided by Oracle. OTBI is a platform that integrates with Oracle's cloud-based application suites, allowing users to analyze business data, create reports, and develop business intelligence solutions.

OTBI is used to visualize, understand, and report on the business data obtained from these application suites. Users can create customizable reports, perform data analysis, and develop business intelligence solutions through OTBI.

Oracle Transactional Business Intelligence helps you

- quickly uncover business insights and make more informed business decisions.
- query your business data and create analyses to answer your business questions. You can present data in easy-to-understand formats (such as tables and graphs), create dashboards, and share the results of analyses.

You use analyses, projects, and dashboards to find the answers that you need from key business data displayed in graphical formats.

What is

An analysis is a query against your organization's data that provides you with answers to business questions. Analyses enable you to explore and interact with information visually in tables, graphs, pivot tables, and other data views. You can also save, organize, and share the results of analyses with others.

A project enables you to dynamically explore multiple datasets in graphical way, all within a single interface. You can upload data from many commonly used data sources to create robust sets of information within project visualizations.

Dashboards can include multiple analyses to give you a complete and consistent view of your company's information across all departments and operational data sources. Dashboards provide you with personalized views of information in the form of one or more pages, with each page identified with a tab at the top. Dashboard pages display anything that you have access to or that you can open with a web browser including analyses results, images, text, links to websites and documents, and embedded content such as web pages or documents.

Scoping Analyses

Scoping Analyses in Oracle Transactional Business Intelligence (OTBI) refers to the process of determining the scope of specific analyses within the system. This process enables users to define the filters and conditions needed to analyze a particular dataset or generate a report.

Definition of Analysis Scope:

OTBI Scoping Analyses allow users to define the scope of their analysis. This involves users deciding which dataset, time range, or business unit data they want to focus on.

Filtering and Conditions:

Users can add filters and conditions to focus on specific datasets. Filters ensure that the analysis includes only specific data segments, enabling more customized and focused results.

Setting Time Range:

Analysis scope allows users to focus on a specific time range. Users can analyze or generate reports based on data within a specific date range.

Custom Segmentation and Grouping:

OTBI enables users to perform custom segmentation and grouping in their analyses. It allows for a more in-depth analysis by grouping or segmenting data in a specific analysis based on certain criteria.

Analysis Parameters:

Users can specify the necessary parameters to execute specific analyses.

Parameters allow users to customize how the analysis operates and which datasets it includes.

Create Analyses Steps

Create an analysis

Select and arrange columns that you want to use in analysis.

- On the Classic Home page, in the **Create** pane, click **Analysis**.

The screenshot shows the Oracle Classic Home page. At the top, there is a navigation bar with tabs: My Enterprise, Tools (which is highlighted with a red box), Configuration, My Reporting, Partner Management, and Health and Safety Tasks. Below the navigation bar is a section titled 'QUICK ACTIONS' with three items: 'Manage Collaboration Messaging History', 'AI Apps Administration', and 'Set Preferences'. To the right of these are three 'APPS' cards: 'Developer Connect', 'Approvals', and 'Reports and Analytics' (which is also highlighted with a red box). Below this is a banner titled 'Reports and Analytics' with a 'Browse Catalog' button. The main content area is titled 'Catalog' and shows a list of folders under 'Folders': 'My Folders', 'Temp', 'Anfal' (which is selected and highlighted with a blue box), and 'Drafts'. On the right side of the catalog, there is a sidebar titled 'Analysis and Interactive Reporting' with options: 'Analysis' (highlighted with a red box), 'Dashboard', 'Filter', 'Dashboard Prompt', and 'Condition'. The URL in the browser is 'Location /My Folders/Anfal'.

- Use the Select Subject Area dialog to search for and select a subject area.

The screenshot shows the Oracle Catalog page. The left sidebar shows 'Folders' with 'Anfal' selected. The main content area displays a report titled 'Purchase Order Details Report' with details: Last Modified 9/27/2024 8:21:42 AM, Owner Sachin. On the right, a 'Select Subject Area' dialog is open, listing several subject areas with small icons: 'Absence Management - Leave Donations Real Time', 'Benefits - Action Items Real Time', and 'Benefits - Billing Real Time'. The URL in the browser is 'Location /My Folders/Anfal'.

- Add the columns that you want to include in the analysis by dragging and dropping them from the Subject Areas pane to any position within the Selected Columns pane. You can select multiple non-contiguous columns by using the Ctrl key, selecting each column to include, and then dragging the columns to the Selected Columns pane.

The screenshot shows the Oracle Analysis page. At the top, there are tabs: Criteria (which is selected), Results, Prompts, and Advanced. Below the tabs are two panes: 'Subject Areas' on the left and 'Selected Columns' on the right. The 'Subject Areas' pane lists several categories: 'Employee Wellness - Competitions Real', 'Assignment Manager', 'Assignment Manager (Unsecured)', 'Assignment Manager List', 'Assignment Manager List Unsecured', 'Business Unit', and 'Business Unit Active Status'. The 'Selected Columns' pane contains a single item: 'Business Unit Name'. The URL in the browser is 'Home Catalog Favorites Dashboards Create Open'.

- To change the column order, use the crosshairs on the column to drag and drop the column to a different position.

This screenshot shows the SAP BusinessObjects interface for managing columns. In the top navigation bar, there are tabs for Home, Catalog, Favorites, Dashboards, Create, and Open. Below the navigation, there's a toolbar with icons for search, sort, and refresh. The main area is divided into two panes: 'Subject Areas' on the left and 'Selected Columns' on the right. The 'Subject Areas' pane lists various assignment-related fields like Assignment Status Type Code, Assignment Status Type Identifier, etc. The 'Selected Columns' pane displays four columns: Worker, Business Unit, Department, and Worker. Each column has a gear icon next to its name, indicating options. The 'Business Unit' column is currently selected, as shown by a blue border around its header.

- To save a column to the catalog, in the Selected Columns pane, click **Options** beside the column name, and click **Save Column As**.

This screenshot shows the same interface as the previous one, but with a red box highlighting the 'Save Column As' option in the context menu for the 'Name' column. The context menu also includes options for Sort, Edit formula, Column Properties, Filter, Delete, and Save Column As. The 'Name' column is still selected, indicated by a blue border around its header.

- In the Save As dialog, specify the folder, name, and description for the column and click **OK**.

This screenshot shows the 'Save As' dialog box. It has a 'Folders' tree on the left containing various SAP objects and custom folders. The 'Save In' field is set to '/My Folders/Subject Area Contents/Employee View'. The 'Name' field is filled with 'Employee Name', and the 'Description' field is empty. At the bottom of the dialog, there is a note about saving special objects and buttons for OK and Cancel.

- To remove a column, in the Selected Columns pane, click **Options** beside the column name, and click **Delete**.

The screenshot shows the SAP Analytics Cloud interface with the 'Criteria' tab selected. On the left, the 'Subject Areas' pane lists various dimensions like 'Hire Date (Enterprise Hire Date)', 'Job Name', etc. The 'Selected Columns' pane contains five columns: 'Worker', 'Business Unit', 'Department', 'Worker', and 'Manager'. Each column has a gear icon next to it. In the bottom right corner of the 'Selected Columns' pane, there is a red box highlighting the 'Delete' button, which has a crossed-out 'X' icon.

To remove all columns, click **Remove all columns from criteria**. Note that there is no undo action available for this option. Instead of removing columns, you can hide the columns whose appearance adds no value to the analysis.

This screenshot is similar to the previous one, showing the SAP Analytics Cloud interface with the 'Criteria' tab selected. The 'Selected Columns' pane is visible with five columns. In the top right corner of the pane, there is a red box highlighting a large 'X' icon, which likely represents a 'Remove All' or 'Clear' function.

- Click the Results tab to see the results of the analysis in a table or pivot table.

The screenshot shows the SAP Analytics Cloud interface with the 'Results' tab selected. The top navigation bar has a red box around the 'Results' tab. Below the navigation bar, the 'Views' section has a red box around the 'Table' icon. The main workspace displays a 'Compound Layout' with a table view showing data for various employees across different business units and departments. The table has columns for 'Name', 'Business Unit Name', 'Department Name', 'Assignment Type', and 'Name'. The data includes entries like 'Aberasturi, Pedro' (Spain Business Unit, Human Resources ES, Employee), 'Abner , Erica' (US1 Business Unit, Total Rewards US, Employee), and many others.

- Click **Save Analysis** to display the dialog to save the analysis.

The screenshot shows the Analysis workspace interface. On the left, there's a sidebar with 'Subject Areas' expanded, showing categories like Department, Fact - Wellness Competition, Grade, Job, and Legal Employer. The main area displays a 'Compound Layout' with a table. The table has columns for Name, Business Unit Name, Department Name, Assignment Type, and Name. A single row is populated with 'Aberasturi, Pedro', 'Spain Business Unit', 'Human Resources ES', 'Employee', and 'Employee'. The top navigation bar includes tabs for Criteria, Results (which is selected), Prompts, Advanced, and various system links like Home, Catalog, Favorites, Dashboards, Create, and Open.

- In the Save As dialog, select a folder, and specify a name, and optional description for the analysis.

This screenshot is identical to the one above, showing the Analysis workspace with a Compound Layout and a table displaying employee data. The interface includes the same sidebar with Subject Areas and the same table structure in the main workspace.

If you want others to be able to view the analysis, then save it in the shared folder area. If your analysis contains other objects, then you'll be prompted to assign access permissions to those objects.

If you don't want anyone else but yourself to be able to view the analysis, then save it in My Folders.

The screenshot shows the 'Save As' dialog box. In the 'Folders' section, two categories are highlighted with red boxes: 'My Folders' and 'Shared Folders'. The 'Save In' section shows a path '/My Folders/Anfal' with a list of items: 'Purchase Order Details Report', 'Untitled', 'Anfal', and 'Drafts'. Below the dialog, the Analysis workspace interface is visible, showing the same Compound Layout and sidebar.

- Click **Refresh** at the bottom of the pane to double-check that the analysis is listed under the folder in which you saved it.

The screenshot shows the Analysis workspace after saving. The 'Employee Dats' table is now listed under the 'Anfal' folder in the sidebar's 'Subject Areas' list. A red box highlights the 'Refresh' button at the bottom of the workspace pane.

Set properties for columns

Specify **properties** such as

- heading
 - value formats
 - display of data
 - conditional formatting.
- In the Selected Columns pane, click **Options** beside the column name, and then select **Column Properties**.

The screenshot shows the SAP BusinessObjects interface for 'Employee Details'. On the left, there's a 'Subject Areas' tree view. In the center, the 'Selected Columns' pane displays several columns: Worker, Business Unit, Department, Worker, and Manager. A context menu is open over the first 'Worker' column, with the 'Column Properties' option highlighted by a red box. Other options in the menu include 'Edit formula', 'Sort', 'Filter', 'Delete', and 'Save Column As'.

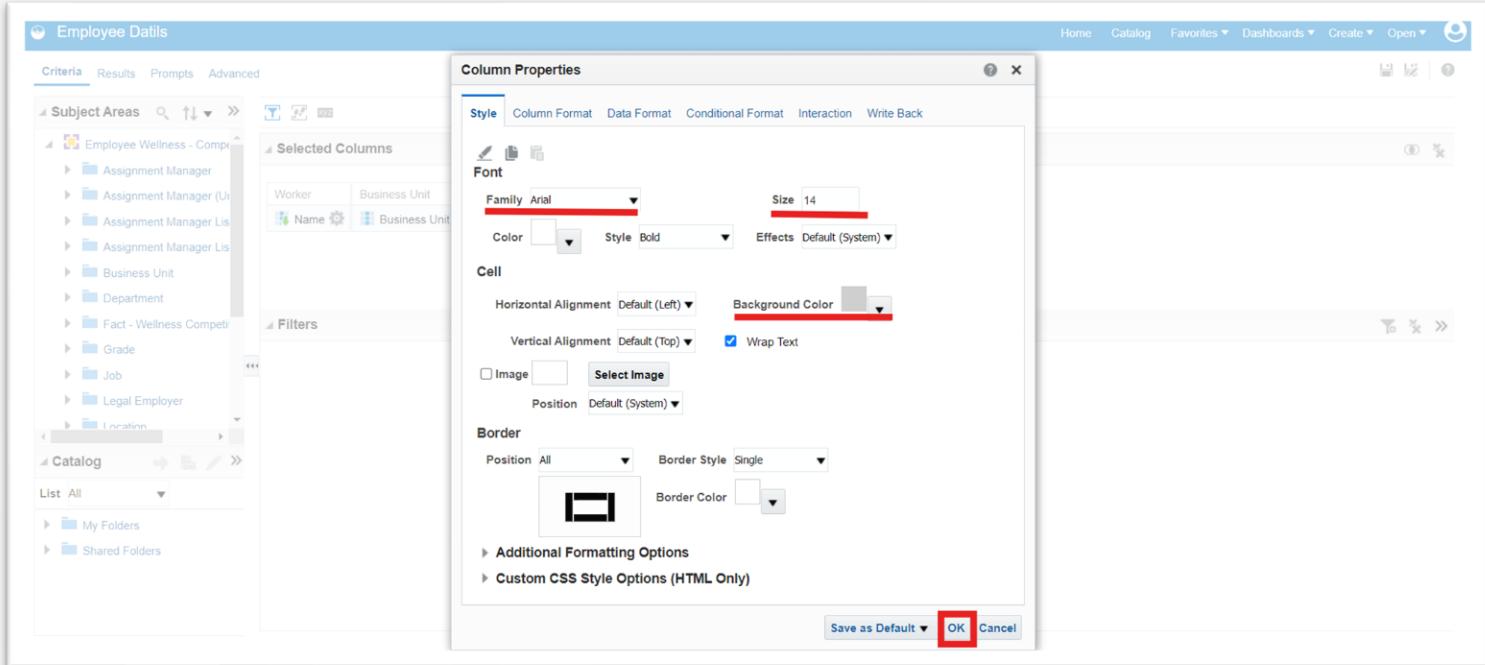
- Specify how you want column values to be displayed.
- Format column headings and custom text, and add data display conditions.
- Specify what action you want to happen when a user clicks a column heading or value.
- Set default column formatting.
- Click **OK**.

The screenshot shows the 'Column Properties' dialog box. It has tabs for 'Style', 'Column Format', 'Data Format', 'Conditional Format', 'Interaction', and 'Write Back'. The 'Style' tab is active, showing sections for 'Font' (Family: Default (System), Size: 14pt, Color: black, Style: Default (System), Effects: Default (System)), 'Cell' (Horizontal Alignment: Default (Left), Vertical Alignment: Default (Top), Background Color: white, Wrap Text checked), and 'Border' (Position: Default (System), Border Style: Default (System), Border Color: black). At the bottom, there are buttons for 'Save as Default', 'OK' (highlighted with a red box), and 'Cancel'.

Apply Formatting to Content

You can apply basic formatting to values in many types of content including columns, views, and dashboard page sections.

- Specify the style characteristics of the column such as font, cell alignment, and border.



- Click OK.

The screenshot shows the 'Employee Datal' view with the applied column formatting. The entire table has a red background color. The 'OK' button from the previous dialog is visible at the bottom right of the view area.

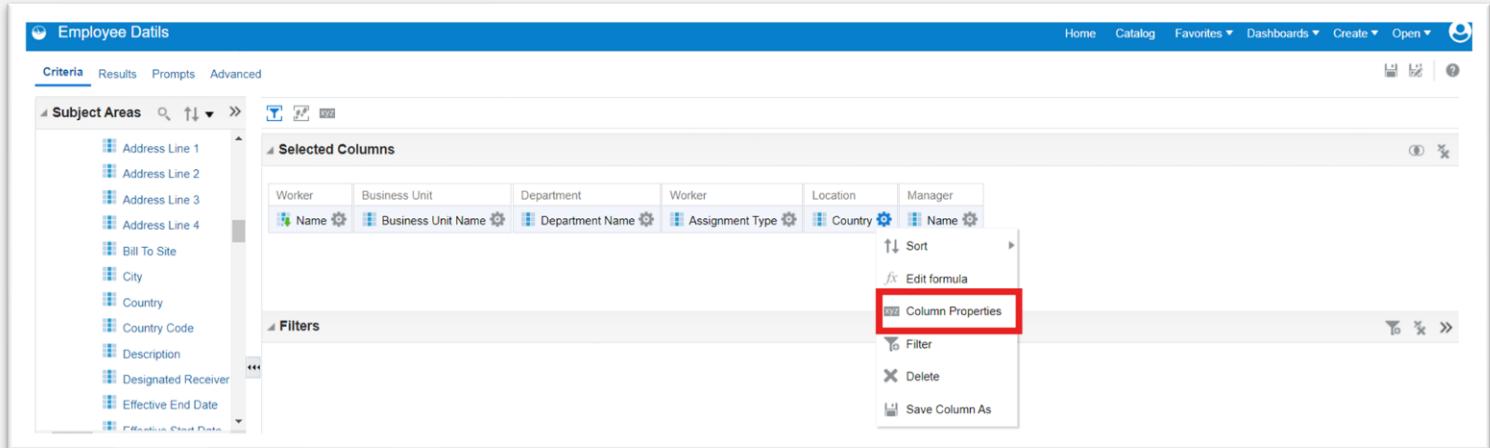
Name	Business Unit Name	Department Name	Assignment Type	Name
Aberasturi, Pedro	Spain Business Unit	Human Resources ES	Employee	
Abner , Erica	US1 Business Unit	Total Rewards US	Employee	Britton, Cheryl
Aebischer, Renate	Switzerland Business Unit	Applications and Services	Employee	Kalin, Susanne
Agrawal, Adra	US1 Business Unit	Total Rewards US	Employee	Britton, Cheryl
Ahrens, Rainer	US1 Business Unit	Total Rewards US	Employee	Mitra, Gopi
Aira, Anssi	Finland Business Unit	HCM FI	Employee	Girard, Brigitte
Alvarez, Mateo	US1 Business Unit	Total Rewards US	Employee	Martin, Ingrid
Anderson, Betty	US1 Business Unit	Organizational Development US	Employee	Joseph, maxte
Andrade, Ricardo	Brazil Business Unit	HCM BR	Employee	Fernandes, Roberto
Anzola, Pilar	Spain Business Unit	HCM ES	Employee	Gomez, Luis
Aparicio, Rocio	Spain Business Unit	Remuneration ES	Employee	Rodriguez, German

Format Columns

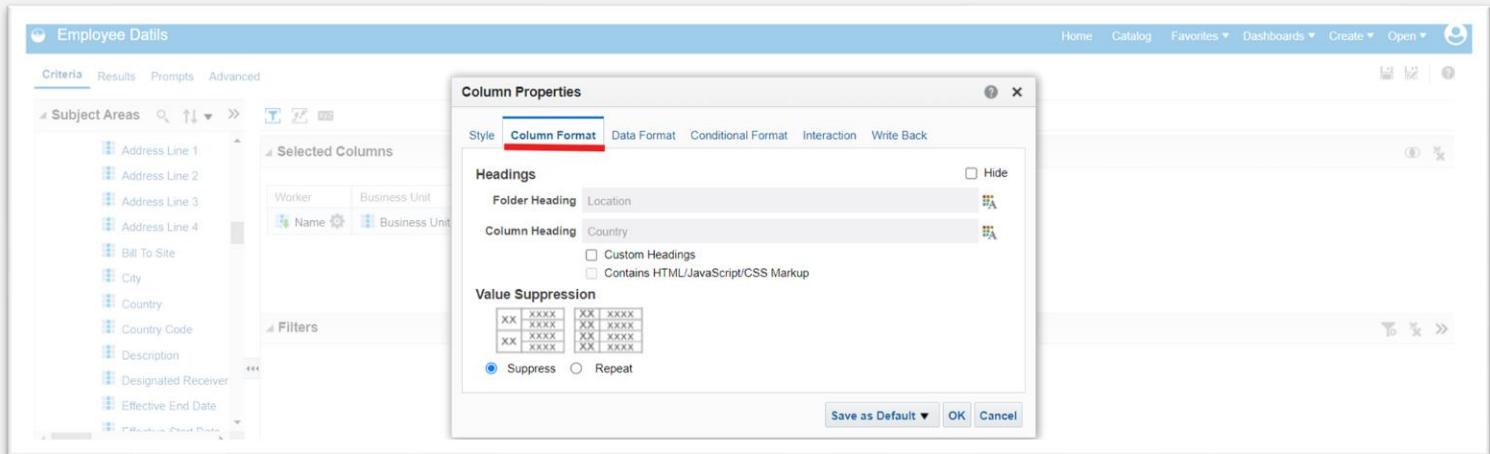
you can edit properties for columns to control their appearance and layout. You can also specify formatting to apply only if the contents of the column meet certain conditions.

For example, you can specify that value that United States in the country column displayed with a green background.

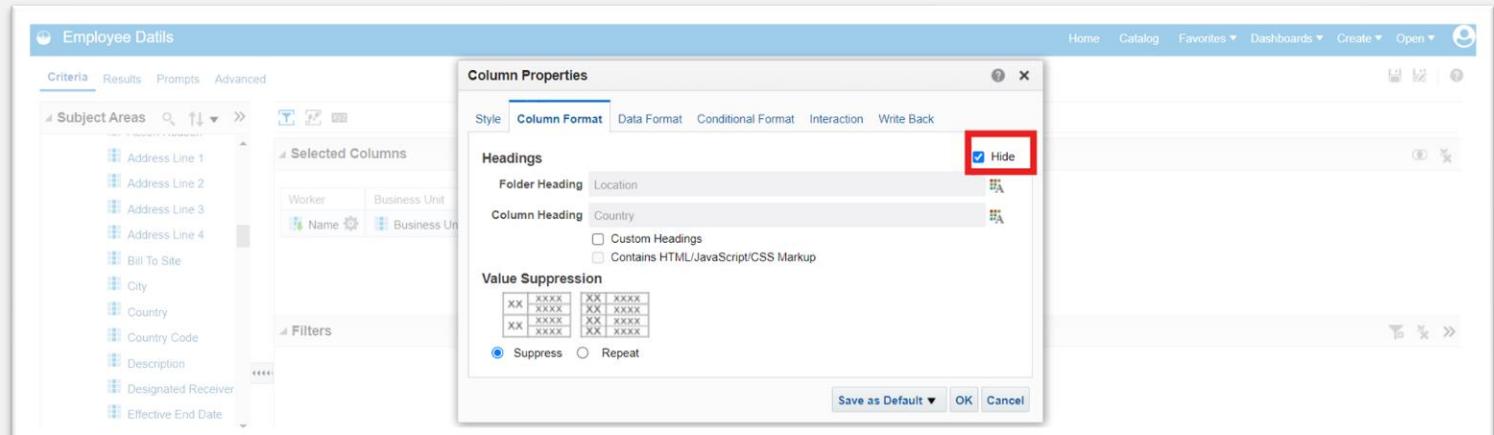
- In the Selected Columns pane, click **Options** beside the column name, and then select **Column Properties**.



- In the Column Properties dialog, click the Column Format tab.



- To hide the column in the analyses without affecting value aggregation, select the **Hide** check box.



The screenshot shows a report titled "Employee Details". On the left, there's a sidebar with "Subject Areas" and "Catalog" sections. The main area displays a table with the following data:

Name	Business Unit Name	Department Name	Assignment Type	Name
Aberasturi, Pedro	Spain Business Unit	Human Resources ES	Employee	
Abner , Erica	US1 Business Unit	Total Rewards US	Employee	Britton, Cheryl
Aebischer, Renate	Switzerland Business Unit	Applications and Services	Employee	Kalin, Susanne
Agrawal, Adra	US1 Business Unit	Total Rewards US	Employee	Britton, Cheryl
Ahrens, Rainer	US1 Business Unit	Total Rewards US	Employee	Mitra, Gopi
Aira, Anssi	Finland Business Unit	HCM FI	Employee	Girard, Brigitte
Alvarez, Mateo	US1 Business Unit	Total Rewards US	Employee	Martin, Ingrid
Anderson, Betty	US1 Business Unit	Organizational Development US	Employee	Joseph, maxtern
Andrade, Ricardo	Brazil Business Unit	HCM BR	Employee	Fernandes, Rob
Anzola, Pilar	Spain Business Unit	HCM ES	Employee	Gomez, Luis

- To enter your own values in the **Folder Heading** and **Column Heading** fields, select **Custom Headings**. You can use these fields to reference variables and format the heading values. These values identify the column in the analysis.

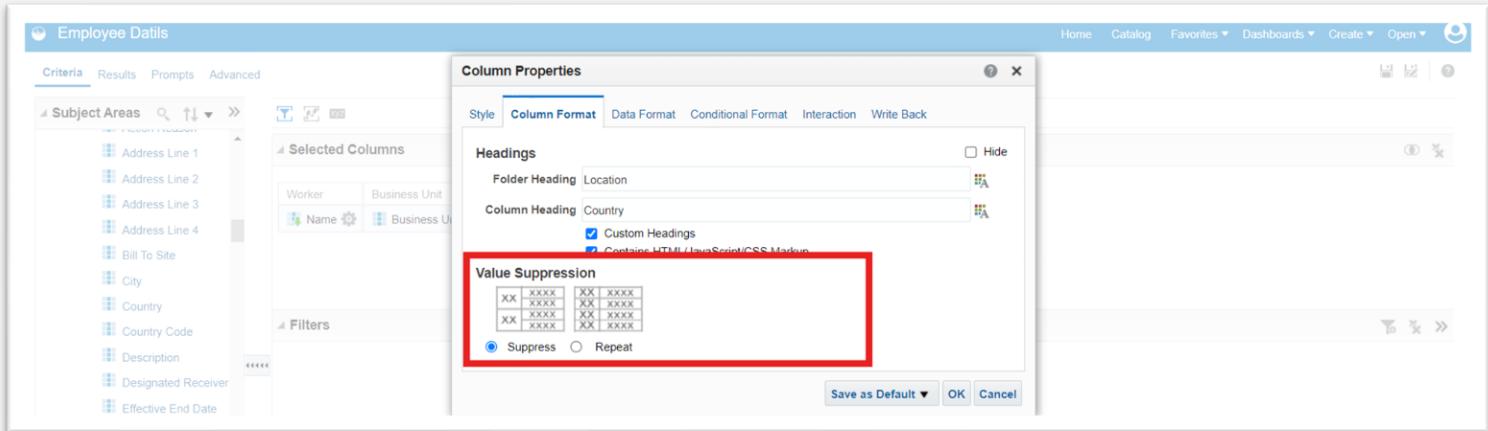
The screenshot shows the "Column Properties" dialog box. In the "Heads" tab, the "Custom Headings" checkbox is checked. The dialog also includes sections for "Value Suppression" and buttons for "Save as Default", "OK", and "Cancel".

- If you have administrator privileges and want to customize headings with HTML markup, including JavaScript, select **Custom Heading**, then select **Contains HTML Markup**, and then enter the HTML markup you want to apply.

The screenshot shows the "Column Properties" dialog box. Both the "Custom Headings" and "Contains HTML/CSS Markup" checkboxes are checked in the "Heads" tab. The dialog also includes sections for "Value Suppression" and buttons for "Save as Default", "OK", and "Cancel".

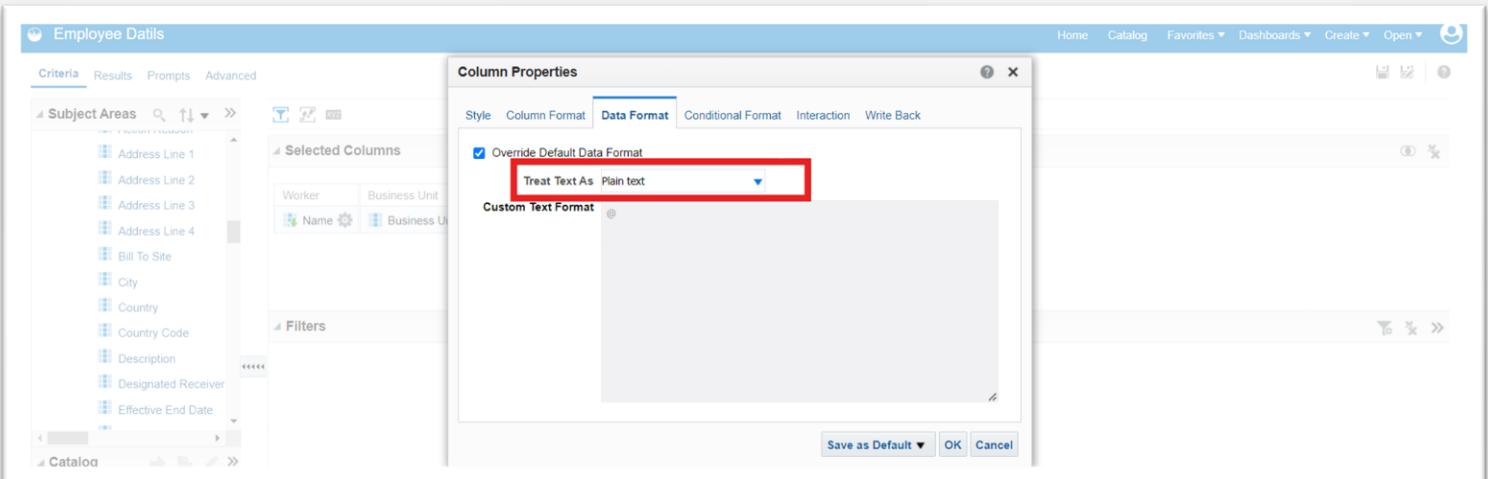
- To affect the display of repeating data values for the column, select one of the **Value Suppression** options.

When the same value occurs in multiple consecutive rows, you can specify to show that value only once.

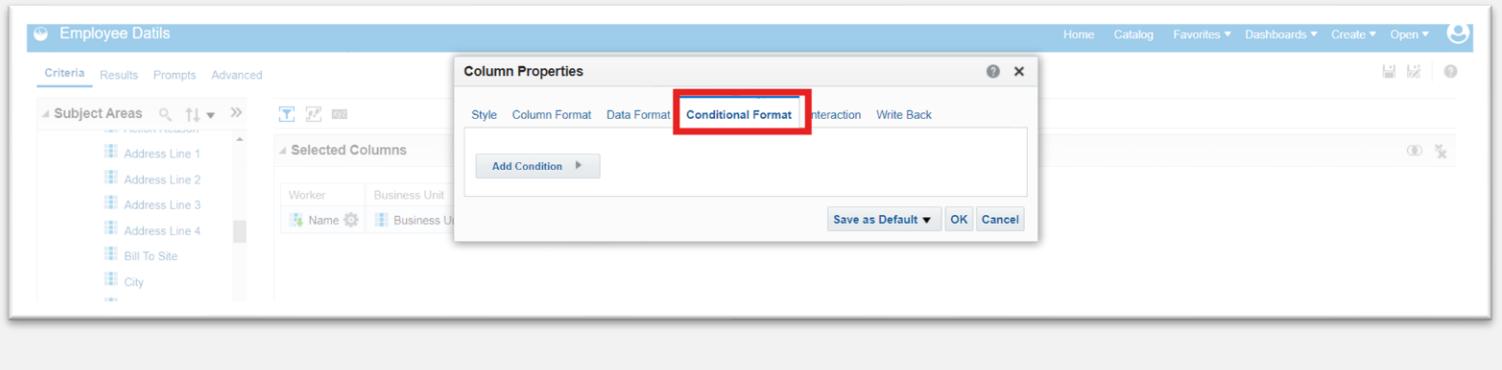


- To override the default display of data for the column, click the Data Format tab.

The options on the tab differ depending on the data type.



- To specify if column values are displayed in a certain way based on certain criteria, click the Conditional Format tab. Conditional formats can include colors, fonts, images, and so on, for the data and for the cell that contains the data. You can't apply conditional formatting to the data cell background or font color in a heat matrix.



- Click **Add Condition**, and then select a column.

The screenshot shows the Oracle BI interface with the 'Employee Details' report selected. In the center, the 'Column Properties' dialog is open, specifically the 'Conditional Format' tab. A sub-menu titled 'Add Condition' is displayed, with the 'Country' option highlighted. Other options like 'Name', 'Business Unit Name', 'Department Name', 'Assignment Type', and 'Name' are also listed. At the bottom right of the dialog are 'Save as Default', 'OK', and 'Cancel' buttons.

- Select an operator such as **is equal to / is in** or **is greater than**.

The screenshot shows the 'New Condition' dialog box from the previous step. It specifies a condition for the 'Country' column. The 'Operator' dropdown is set to 'is equal to / is in', and the 'Value' dropdown is set to 'United States'. Below these fields, there are two checkboxes: 'Select by Country Code' (unchecked) and 'Filter by Country Code' (checked). At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- Specify a value for the operator by either entering a value directly (such as US) or by selecting a value from the list.
- Optional:** Click **Add More Options** to add a variable to the condition.
- Specify the formatting to apply when the condition is true.
- Click **OK**.

The screenshot shows the 'Edit Format' dialog box. It includes tabs for 'Style' and 'Data Format'. Under the 'Font' section, there are dropdowns for 'Family', 'Color', 'Style', and 'Effects'. The 'Background Color' button, located under the 'Color' dropdown, is highlighted with a red box. Other sections include 'Cell' (with 'Horizontal Alignment' and 'Vertical Alignment' dropdowns), 'Border' (with 'Position', 'Border Style', and 'Border Color' dropdowns), and links for 'Additional Formatting Options' and 'Custom CSS Style Options (HTML Only)'. At the bottom are 'OK' and 'Cancel' buttons.

General Custom Format Strings

You can use general custom format strings to create custom time or date formats.

The table shows the general custom format strings and the results that they display. These allow the display of date and time fields in the user's locale.

For example, convert from dd/MM/yy to dd/MM/yyyy

The screenshots illustrate the use of general custom format strings to change date display formats in SAP Fiori applications.

Screenshot 1: A screenshot of the "Employee Details" application showing the "Column Properties" dialog for a date column. The "Custom Date Format" field is set to "dd/MM/yy".

Business Unit	Department Name	Assignment Type	Name	Country	Location Name	Postal Code	Employee Date Of Birth
Business	Human Resources ES	Employee		Spain	Malaga	29590	22/08/78
Business	Total Rewards US	Employee	Britton, Cheryl	United States	Redwood City	94065	09/01/1982
Germany Business Unit	Applications and Services	Employee	Kalin, Susanne	Switzerland	Bern	3014	29/04/1990
Business	Total Rewards US	Employee	Britton, Cheryl	United States	Redwood City	94065	19/06/1987
Business	Total Rewards US	Employee	Mitra, Gopi	United States	Redwood City	94065	29/01/1991

Screenshot 2: A screenshot of the "Employee Details" application showing the "Column Properties" dialog with the "Override Default Data Format" checkbox selected. The "Data Format" dropdown is set to "Custom" and the "Custom Date Format" field is also set to "dd/MM/yy".

Business Unit	Department Name	Assignment Type	Name	Country	Location Name	Postal Code	Employee Date Of Birth
Business	Human Resources ES	Employee		Spain	Malaga	29590	22/08/1978
Business	Total Rewards US	Employee	Britton, Cheryl	United States	Redwood City	94065	09/01/1982
Germany Business Unit	Applications and Services	Employee	Kalin, Susanne	Switzerland	Bern	3014	29/04/1990
Business	Total Rewards US	Employee	Britton, Cheryl	United States	Redwood City	94065	19/06/1987
Business	Total Rewards US	Employee	Mitra, Gopi	United States	Redwood City	94065	29/01/1991

Screenshot 3: A screenshot of the "Employee Details" application showing the "Column Properties" dialog with the "Override Default Data Format" checkbox selected. The "Data Format" dropdown is set to "Custom" and the "Custom Date Format" field is set to "dd/MM/yyyy".

Business Unit	Department Name	Assignment Type	Name	Country	Location Name	Postal Code	Employee Date Of Birth
Business	Human Resources ES	Employee		Spain	Malaga	29590	22/08/1978
Business	Total Rewards US	Employee	Britton, Cheryl	United States	Redwood City	94065	09/01/1982
Germany Business Unit	Applications and Services	Employee	Kalin, Susanne	Switzerland	Bern	3014	29/04/1990
Business	Total Rewards US	Employee	Britton, Cheryl	United States	Redwood City	94065	19/06/1987
Business	Total Rewards US	Employee	Mitra, Gopi	United States	Redwood City	94065	29/01/1991

General Format String	Result
[FMT:dateShort]	Formats the date in the locale's short date format. You can also type [FMT:date].
[FMT:dateLong]	Formats the date in the locale's long date format.
[FMT:dateInput]	Formats the date in a format acceptable for input back into the system.
[FMT:time]	Formats the time in the locale's time format.
[FMT:timeHourMin]	Formats the time in the locale's time format but omits the seconds.
[FMT:timeInput]	Formats the time in a format acceptable for input back into the system.
[FMT:timeInputHourMin]	Formats the time in a format acceptable for input back into the system, but omits the seconds.
[FMT:timeStampShort]	Equivalent to typing [FMT:dateShort] [FMT:time]. Formats the date in the locale's short date format and the time in the locale's time format. You can also type [FMT:timeStamp].
[FMT:timeStampLong]	Equivalent to typing [FMT:dateLong] [FMT:time]. Formats the date in the locale's long date format and the time in the locale's time format.
[FMT:timeStampInput]	Equivalent to [FMT:dateInput] [FMT:timeInput]. Formats the date and the time in a format acceptable for input back into the system.
[FMT:timeHour]	Formats the hour field only in the locale's format, such as 8 PM.

General Format String	Result
YY or yy	Displays the last two digits of the year, for example 11 for 2011.
YYY oryyy	Displays the last three digits of the year, for example, 011 for 2011.
YYYY or yyyy	Displays the four-digit year, for example, 2011.
M	Displays the numeric month, for example, 2 for February.
MM	Displays the numeric month, padded to the left with zero for single-digit months, for example, 02 for February.
MMM	Displays the abbreviated name of the month in the user's locale, for example, Feb.
MMMM	Displays the full name of the month in the user's locale, for example, February.
D or d	Displays the day of the month, for example, 1.
DD or dd	Displays the day of the month, padded to the left with zero for single-digit days, for example, 01.
DDD or ddd	Displays the abbreviated name of the day of the week in the user's locale, for example, Thu for Thursday.
DDDD or dddd	Displays the full name of the day of the week in the user's locale, for example, Thursday.
DDDDD or ddddd	Displays the first letter of the name of the day of the week in the user's locale, for example, T for Thursday.

General Format String	Result
r	Displays the day of year, for example, 1.
rr	Displays the day of year, padded to the left with zero for single-digit day of year, for example, 01.
rrr	Displays the day of year, padded to the left with zero for single-digit day of year, for example, 001.
w	Displays the week of year, for example, 1.
ww	Displays the week of year, padded to the left with zero for single-digit weeks, for example, 01.
q	Displays the quarter of year, for example, 4.
h	Displays the hour in 12-hour time, for example 2.
H	Displays the hour in 24-hour time, for example, 23.
hh	Displays the hour in 12-hour time, padded to the left with zero for single-digit hours, for example, 01.
HH	Displays the hour in 24-hour time, padded to the left with zero for single digit hours, for example, 23.
m	Displays the minute, for example, 7.
mm	Displays the minute, padded to the left with zero for single-digit minutes, for example, 07.
s	Displays the second, for example, 2.

General Format String	Result
	You can also include decimals in the string, such as s.# or s.00 (where # means an optional digit, and 0 means a required digit).
ss	<p>Displays the second, padded to the left with zero for single-digit seconds, for example, 02.</p> <p>You can also include decimals in the string, such as ss.# or ss.00 (where # means an optional digit, and 0 means a required digit).</p>
S	Displays the millisecond, for example, 2.
SS	Displays the millisecond, padded to the left with zero for single-digit milliseconds, for example, 02.
SSS	Displays the millisecond, padded to the left with zero for single-digit milliseconds, for example, 002.
tt	Displays the abbreviation for ante meridiem or post meridiem in the user's locale, for example, pm.
gg	Displays the era in the user's locale.

Make Your Analyses Dynamic

You can specify what you want to happen when a user clicks a column heading or value in an analysis. **For example**, you could specify that when a user clicks the Product column value, it drills down into the data that was summed to create the column value.

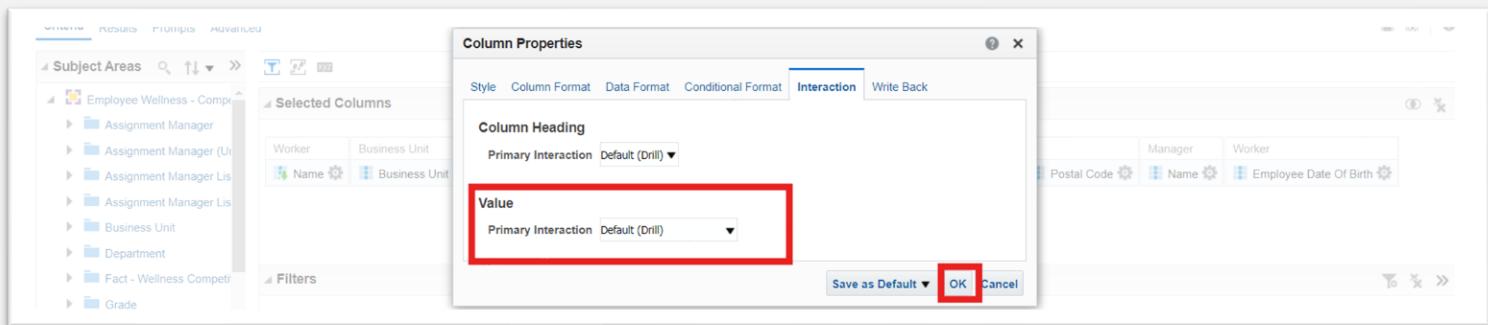
Add Interactivity to Analyses

You can make views more interactive by adding interactions that are available to users who left-click in a view or right-click to display a popup menu.

For example, you might specify the default primary interaction (the left-click action) for a geographical region column as **Drill**. This enables users to drill down to sub-regions.

For hierarchical data, the default left-click interaction is to drill down to detail in the data. You can add right-click options that display a web page or link to a view.

- In the Selected Columns pane, click **Options** beside the column name, and then select **Column Properties**.
- In the Column Properties dialog, click the Interaction tab.



You can specify interactions for the column heading and data values.

- Click **Primary Interaction** next to **Column Heading** or **Value** and select the behavior you want. For example, select None to disable the action or select Drill to display more detail.
 - Use None to disable all interactions on the column.
 - Use **Drill** to display a deeper level of detailed content if the data is hierarchical. If no hierarchy is configured for the column, then drilling isn't enabled.
 - Use **Action Links** to open a web page or navigates to supporting BI content.
 - Use **Send Master-Detail Events** to connect views so that one view drives changes in one or more other views.
 - Click **OK**.

You can specify the interactions that are available at runtime when you right-click a dashboard column or data cell. Here's an example of the available interactions when you right-click a product name in the Products column. This column is in a Top Product Performers Based on Revenue table.

Of the selections shown, you can set **Drill**, **Create Group**, and **Create Calculated Item**.

Top Product Performers Based on Revenue					
Product	Revenue	Profit Ratio %	# of Orders		
PocketFun ES	\$106,020,505	6.72%	159,170		
MicroPod 60Gb	\$100,544,007	1.47%	74,422	Drill	
MPEG4 Camcorde		5.19%	92,061	Keep Only	
CompCell RX3		8.83%	91,421	Remove	
7 Megapixel Digit.		5.48%	75,124	Create Group...	
Touch-Screen T5		5.00%	60,939	Create Calculated Item...	
Plasma HD Televi:		5.33%	15,352	Product	
LCD HD Televisor		8.09%	13,727		
Tungsten E Plasmr	\$28,699,248	7.97%	10,279		
LCD 36X Standard		7.05%	18,160		
Total	\$641,265,653	5.79%	610,655		

Make Interactions Available

When you add interactions to analyses, you then make those interactions available to others in popup menus.

- Open the analysis for editing.
- Click either the Criteria tab or the Results tab.
- Click **Edit Analysis Properties** on the toolbar.

The screenshot shows the 'Employee Details' analysis in the BI tool. The 'Results' tab is selected. On the toolbar, the 'Interactions' icon (a red square with a white 'i') is highlighted. The analysis title is 'Employee Details' and it contains a table with columns: Name, Business Unit Name, Department Name, Assignment Type, Name, Country, and Location Name. A data row is visible for 'Aberasturi, Pedro'.

- Click the Interactions tab.

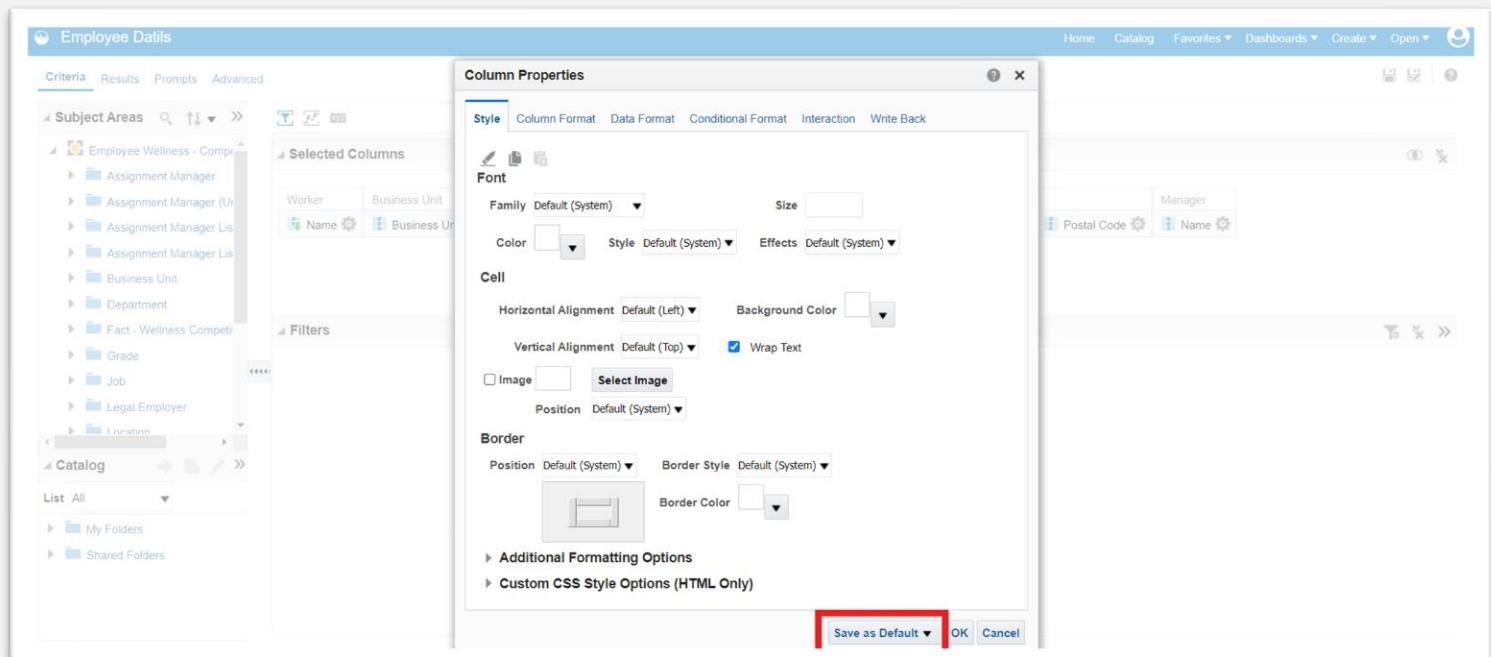
The screenshot shows the 'Analysis Properties' dialog box with the 'Interactions' tab selected. Under 'Views Run-time Options', several checkboxes are listed, with 'Drill (when not a primary interaction)' and 'Include/Exclude Columns' checked. Other options like 'Move Columns' and 'Sort Columns' are also present. The background shows the 'Employee Details' analysis interface with a table of employee data.

- Select the interactions that you want to make available for that analysis.
- Click **OK**.

Set Default Formats for Your System

If you have the appropriate privileges, then you can save the formatting of a column as default formatting. When you set a system-wide default, it can provide users with a more consistent experience and save them time when working with analyses.

- In the Selected Columns pane, click **Options** beside the column name, and then select **Column Properties**.
- In the Column Properties dialog, specify how you want columns to be formatted by default.
- Click **Save as Default**.
- Click **OK**.



Work with the data in the analysis*

Add formulas and calculated measures to the analysis.

You can fine-tune the columns in an analysis by editing the formulas of columns or editing calculated measures.

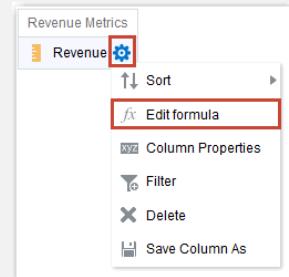
Edit the Formula for a Column

https://www.youtube.com/watch?v=_RGEFAL4VSk

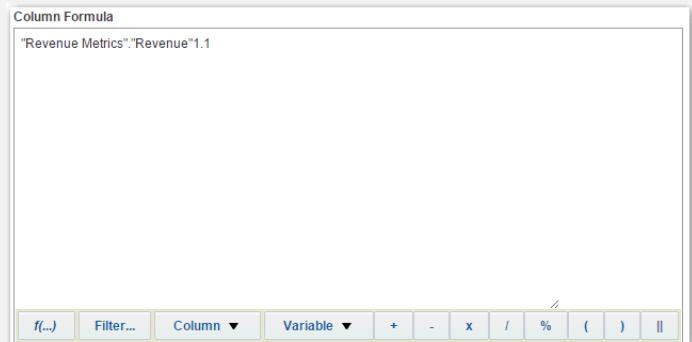
You can edit the formulas for attribute columns and measure columns when you specify the criteria for an analysis. This editing affects the column only in the context of the analysis and doesn't modify the formula of the original column in the subject area.

A **column formula** specifies what the column values represent. In its most basic form, such as "Revenue Metrics"."Revenue", a column takes the data from the data source as is. You can edit the formula to add functions, conditional expressions, and so on. This editing enables you to present analysis results in a variety of ways. For example, you can edit the formula of a Revenue column to display values after a 10% increase in revenue. You can do this by writing a formula that multiplies the Revenue column by 1.1.

- In the Selected Columns pane, click **Options** beside the column name, and then select **Edit Formula**.



- On the Column Formula tab of the Edit Column Formula dialog, enter a formula in the Column Formula pane.



By default, the name of the column on the Selected Columns pane is displayed in the Column Formula pane.

- Use the operator and character buttons on the bottom of the Column Formula pane to help build the formula.
- Use the **f(...)** button to display the Insert Function dialog that enables you to include a function in the column formula. For example, you can build a formula based on a SQL function, such as RANK("Sales Measures". "Dollars").

For more information about Expression Editor Reference.

<https://docs.oracle.com/en/cloud/saas/otbi/otbi-user/expression-editor-reference.html>

- Use the **Filter...** button to display the Insert Filter dialog that enables you to include a filter expression in the column formula. Start the filter expression with at least one measure column. Include a Boolean expression that contains no measure columns or nested queries.

For example, you can build a formula that uses the SQL FILTER function to filter the data, such as FILTER("Sales Measures". "Dollars" USING ("Markets". "Region" = 'EASTERN REGION').

- Reference a column name in the formula using the form *Folder-Name.Column.Name*. If either the folder name or the column name includes non-alphanumeric characters (such as spaces or underscores), then enclose each name in double quotes. You can enclose the names in double quotes even if they have all alphanumeric characters.
- Use single quotes to include literals or constants that have a data type of string. For example, you can include constants such as 'John Doe' or 'Best Selling Product' in a formula.
- Click **OK**. On the Results tab, the column displays its values with the formula applied.

Brand	Revenue	Revenue*1.10
BizTech	318,100,000	349,910,000
FunPod	322,000,000	354,200,000
HomeView	159,900,000	175,890,000

Affect the values of data in the analysis

Specify filters, selection steps, groups, and calculated items for the analysis.

Create a filter

Limit the results that are displayed when an analysis runs.

Create Inline and Named Filters

In most cases, you create and include a filter "inline" for use in only one analysis. You can also create a named filter to reuse the filter across all analyses and dashboards. Unless you want to reuse the filter, create an inline filter.

For example, as a sales consultant, you can analyze revenue for only those brands for which you're responsible.

Create an inline filter from the Selected Columns pane on the Criteria tab

- On the Selected Columns pane of the Criteria tab, click **Options** beside the column name and select **Filter**.

The screenshot shows the SAP BusinessObjects interface with the 'Employee Data' document open. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. The left sidebar lists 'Subject Areas' such as 'Employee Wellness - Comp', 'Assignment Manager', etc. The main area has a 'Selected Columns' pane containing columns for Business Unit, Worker, Department, Location, Manager, and Worker. Below this is a 'Filters' pane. A context menu is open over the 'Business Unit Name' column in the 'Selected Columns' pane, with the 'Filter' option highlighted and boxed in red. Other options in the menu include 'Edit formula', 'Column Properties', 'Delete', and 'Save Column As'.

Create an inline filter from the Filters pane on the Criteria tab

- On the Filters pane of the Criteria tab, click **Create a filter for the current Subject Area**.
- Select a column name from the menu.

The screenshot shows the SAP BusinessObjects interface with the 'Employee Data' document open. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. The left sidebar lists 'Subject Areas' such as 'Employee Wellness - Comp', 'Assignment Manager', etc. The main area has a 'Selected Columns' pane containing columns for Business Unit, Worker, Department, Location, Manager, and Worker. Below this is a 'Filters' pane. A context menu is open over the 'Business Unit Name' column in the 'Filters' pane, with the 'Business Unit Name' option highlighted and boxed in red. Other options in the menu include 'Name', 'Department Name', 'Assignment Type', and 'Country'.

Create a named filter from the Home page

- From the Home page, in the **Create** pane, click **More** under **Analysis and Interactive Reporting**, then click **Filter**.
- In the Select Subject Area dialog, select the data source that you want to filter. The New Filters dialog is displayed.

The screenshot shows the SAP BusinessObjects Home page. In the top right corner, the 'Create' button is highlighted with a red box. A sidebar on the right lists various reporting and analysis types, with 'Filter' also highlighted with a red box. The main workspace displays 'Employee Data' with sections for 'Criteria', 'Subject Areas', 'Selected Columns', and 'Filters'.

Specify Values for Filters

You can specify the values for a filter that displays in an analysis only those values in which you're interested.

For example, in the Brand Revenue analysis, a filter can limit the analysis results to only the first quarter values in three years. As a result, you can discover how revenue performed year-to-year in these quarters.

- In the New Filter dialog, select the appropriate operator such as **is equal to / is in**.

The screenshot shows the 'Employee Data' workspace with the 'Filters' section selected. A 'New Filter' dialog box is open in the foreground, centered over the workspace. The dialog has fields for 'Column' (Business Unit Name), 'Operator' (is equal to / is in), and 'Value'. The 'Value' field is currently empty. There are also checkboxes for 'Select by Business Unit Id' and 'Filter by Business Unit Id', with the latter checked. Buttons at the bottom include 'OK' and 'Cancel'.

- Select values from the list or click the **Search** icon to find more values from which to select.

- Optional:** Select **Protect Filter** to prevent prompts from overwriting the filter.
- Optional:** Select **Convert this Filter to SQL**.
- Click **OK**.

Name	Business Unit Name	Department Name	Assignment Type	Name	Country	Location Name	Postal Code
Abner, Erica	US1 Business Unit	Total Rewards US	Employee	Britton, Cheryl	United States	Redwood City	94065
Agrawal, Adra	US1 Business Unit	Total Rewards US	Employee	Britton, Cheryl	United States	Redwood City	94065
Ahrens, Rainier	US1 Business Unit	Total Rewards US	Employee	Mitra, Gopi	United States	Redwood City	94065
Alvarez, Mateo	US1 Business Unit	Total Rewards US	Employee	Martin, Ingrid	United States	Redwood City	94065
Anderson, Betty	US1 Business Unit	Organizational Development US	Employee	Joseph, maxtern	United States	Redwood City	94065
Assila, Sasha	US1 Business Unit	Total Rewards US	Employee	Bennett, Julie	United States	Redwood City	94065
Baro, Elena	US1 Business Unit	Total Rewards US	Employee	Bernard, Sue	United States	Redwood City	94065
Basak, Kabir	US1 Business Unit	Total Rewards US	Employee	Jensen, Mia	United States	Redwood City	94065
Bennett, Julie	US1 Business Unit	Total Rewards US	Employee	Britton, Chevl	United States	Redwood	94065

Combine and Group Filters

You can combine and group multiple inline filters to create complex filters without using SQL statements.

You group or combine filters to establish the precedence in which data in an analysis is filtered. When you add two or more inline filters to an analysis or named filters, by default, the inline filters are combined using the **AND** Boolean operator.

The **AND** operator indicates that the criteria specified in all the inline filters must be met to determine the results when an analysis is run.

You use the **OR** Boolean operator to indicate that the criteria specified in at least one of the filters must be met to determine the results of the analysis. The **OR** operator helps you to create a group of multiple filters using alternate criteria.

- Open for editing a named filter or an analysis that contains inline filters.
- On the Filters pane of the Criteria tab, confirm that the analysis contains two or more inline filters. Alternatively, on the Saved Filter pane, confirm that the named filter contains two or more inline filters.
- On the Saved Filter pane or in the Filters pane of the Criteria tab, notice how the inline filters are combined using **AND** or **OR** operators.
- Click the word **AND** before an inline filter to change an **AND** operator to an **OR** operator. You can toggle between the **AND** and **OR** operator in this way.
- Change the **AND** and **OR** operators for other inline filters to create the required filter combinations. Alternatively, create more inline filters and change the **AND** and **OR** operators.
- Click **Save Analysis** or **Save Filter** to save the filter combinations.

The screenshot shows the SAP BusinessObjects interface for an 'Employee Data' analysis. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', 'Open', and a search icon. The main area has tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. The 'Criteria' tab is selected, showing the 'Subject Areas' tree on the left with nodes like 'Employee Wellness - Competencies', 'Assignment Manager', etc. The 'Selected Columns' pane on the right lists columns: Business Unit, Worker, Department, Worker, Location, Manager, and Worker. Below these are 'Business Unit Name', 'Name', 'Department Name', 'Assignment Type', 'Country', 'Location Name', 'Postal Code', 'Name', and 'Employee Date Of Birth'. The 'Filters' pane at the bottom contains two filters: 'Business Unit Name is equal to / is in US1 Business Unit' and 'Business Unit Name is equal to / is in Info US BU - 300000246769174', separated by an 'OR' operator. A red box highlights this 'OR' condition.

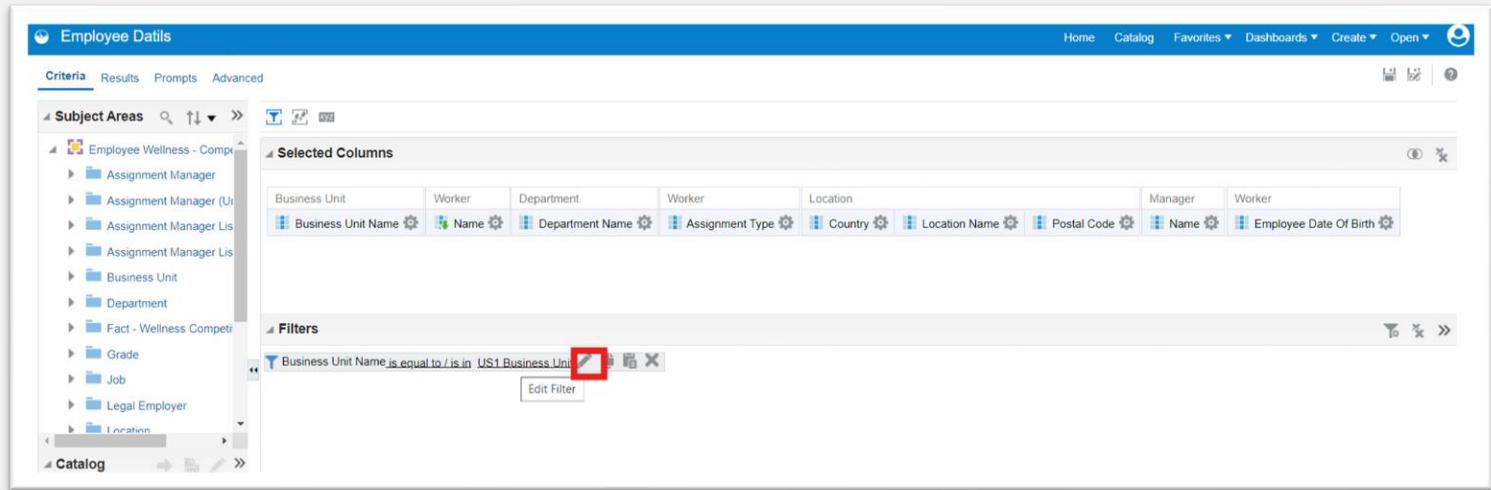
Edit a filter

Change the operator and values in a filter.

You can edit an inline filter when you need to make changes to it. When you edit and save a named filter, the changes that you make to the filter propagate to wherever the filter is used. For example, you can edit the filter for the Quarter column to include data for the "2010 Q1" quarter. This data is propagated to every analysis where the filter is applied.

- Display the Edit Filter dialog.

For example, on the Saved Filter pane or in the Filters pane of the Criteria tab, hover the cursor over the filter, then click **Edit Filter**.

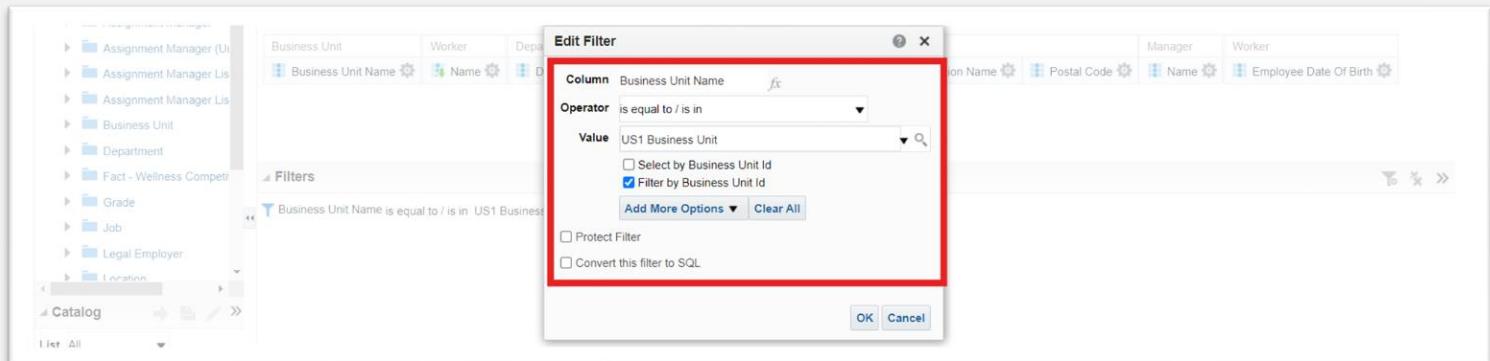


In the Edit Filter dialog, change the selection for any of the options that are described in the following table:

Option	Description
Operator	<p>Select an operator to apply to the values that are specified in the Value field. The Operator list is populated based on the function that you're performing (such as creating a filter or creating a dashboard prompt). It's also populated based on the type of column that you selected.</p> <p>For example, you can choose is greater than to use only values greater than the value that you select in the Value list. If you select 100,000 from the Value list, then the filter uses values from the column that are greater than 100,000. You can</p>

Option	Description
	use this information in an analysis to focus on products that are performing best.
Value	<p>Specify a value or values from the list that contains members of the column that you select. You can also enter the value into the field manually or search.</p> <p>For example, suppose that you want to edit a filter that you have created for the Products column of an analysis.</p> <p>The Value field contains a list of products from the column. Depending on the operator that you chose, you can select one or more products to include in the analysis.</p>
Protect Filter	Select this option to prevent prompts from overwriting the filter.
Convert this Filter to SQL	Select this option to convert the filter to a SQL WHERE clause that you can edit manually. After you convert a filter to SQL code, you can no longer view and edit the filter in the Edit Filter dialog.

- Click **OK**.



Save a filter

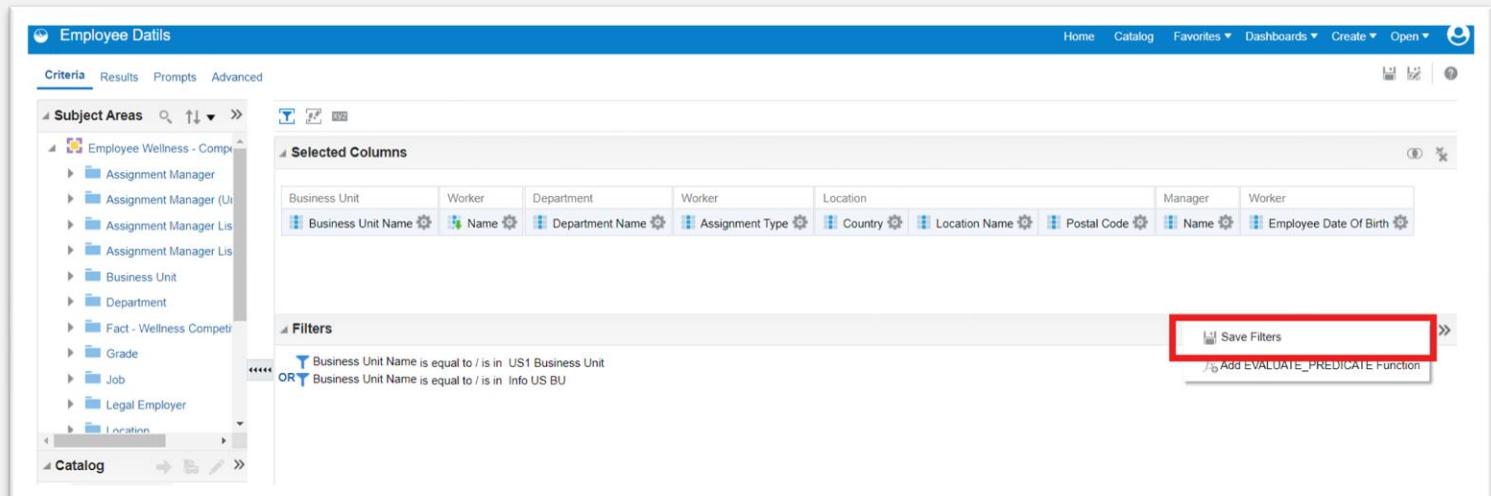
Save filters in the catalog or with the analysis.

When you create an inline filter in the Filters pane, you can optionally save the inline filter as a named filter. When you save an inline filter as a named filter, other people on your team can use this filter in a new analysis. You can also create a named filter as a standalone object from the global header.

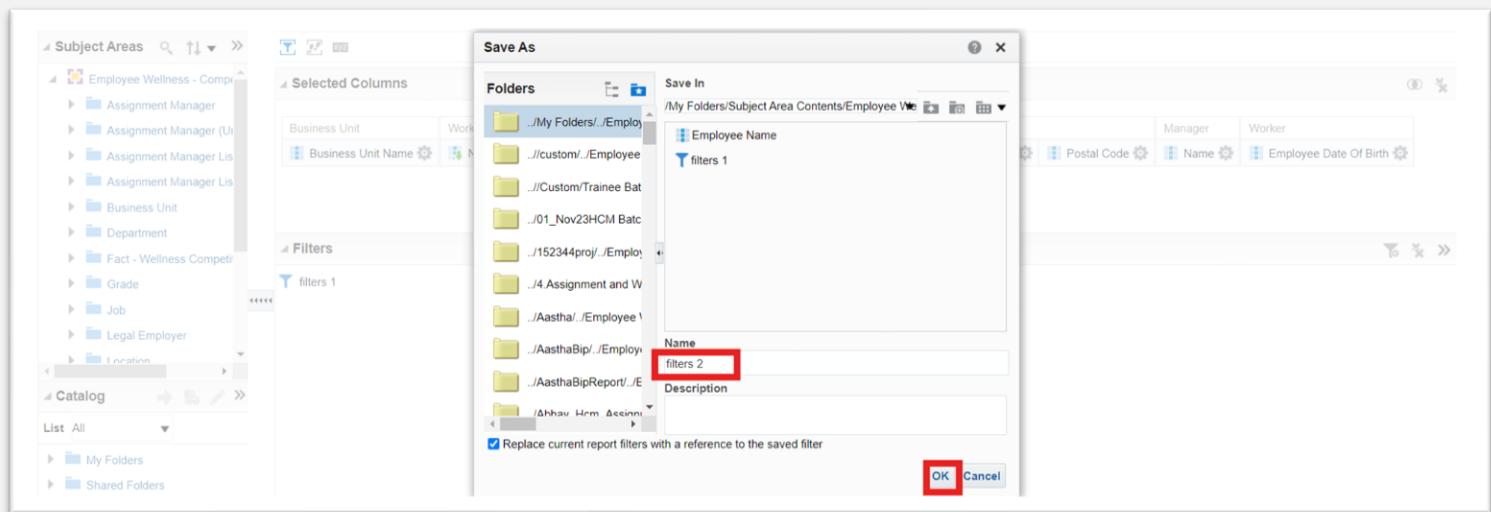
To save a named filter, simply click **Save As** on the toolbar, specify folder in the catalog, and click **OK**.

To save an inline filter as a named filter, do the following:

- On the Filters pane on the Criteria tab, click **More options** and select **Save Filters**.



- Specify a folder



- Click **OK**.

View Data in Different Ways

Add a view

Add views to an analysis to visualize data in different ways.

By default when you create an analysis, you see either a table or pivot table view, depending on the columns that you selected. You can add other views to the analysis that let you visualize the data in different ways.

For example, you can analyze trends for your Sales Forecast analysis by creating a new view and selecting **Recommended Visualization** and the **Analyzing Trends** option.

- On the Results tab, click **New View**, and select a view type.



The screenshot shows the SAP Analytics Cloud interface. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. The left sidebar has sections for 'Subject Areas' (Location, Matrix Manager, Organization, Position, Reporting Establishment, Seniority Date, Union, Worker, Worker Assignment, Marker Assignment Data), 'Catalog' (My Folders, Shared Folders), and 'Views'. The main area is titled 'Compound Layout' with a title '1'. A dropdown menu for 'Best Visualization' is open, showing various options like Bar, Line, Area, Pie, etc., with 'Pie' highlighted. Below this, a 'Business' section lists various business units: EXIDE BA, France Bu, Healthcare, Italy Busin, Progress I, Saudi Aral, UK Busin, US1 Busin, University, and University US Business Unit. A 'Graph' option is also listed under Business.

The screenshot shows the same SAP Analytics Cloud interface as above. The main area now displays a pie chart titled 'Head Count'. The legend lists the following segments and their colors: EXIDE BATTERY R&D BU (dark blue), France Business Unit (green), Healthcare US Business Unit (yellow), Italy Business Unit (red), Progress US Business Unit (purple), Saudi Arabia Business Unit (light blue), UK Business Unit (orange), US1 Business Unit (pink), and University US Business Unit (light green). Above the pie chart, a table titled 'Graph' shows data for three business units: UK BUSINESS UNIT (3100), US1 Business Unit (924), and University US Business Unit (124).

- To format the container for the views in the analysis, click **Format Container**.

The screenshot shows the Analysis workspace interface. On the left, there is a sidebar with 'Subject Areas' and 'Catalog' sections. The main area displays a 'Compound Layout' containing a table and a pie chart. The table has columns for 'BUSINESS UNIT' and 'STUDY'. The pie chart is titled 'Head Count' and has a legend below it listing various business units with their corresponding colors. In the top right corner of the pie chart's container, there is a small 'Format Container' button, which is highlighted with a red box.

- Complete the fields in the Format Container dialog to specify options such as alignment, colors, and borders.
- Click **OK**.

The screenshot shows the Analysis workspace with the 'Format Container' dialog box open. The dialog has two main sections: 'Cell' and 'Border'. Under 'Cell', there are dropdowns for 'Horizontal Alignment' (set to 'Center') and 'Vertical Alignment' (set to 'Center'), and buttons for 'Background Color' and 'Font'. Under 'Border', there are dropdowns for 'Position' (set to 'Default (System)'), 'Border Style' (set to 'Default (System)'), and 'Border Color' (set to a light gray). At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background shows the same Analysis workspace with the pie chart and table.

- Click **Save Analysis**.

The screenshot shows the Analysis workspace with the saved analysis. The pie chart now has a dark gray background color, which was specified in the 'Format Container' dialog. The rest of the workspace, including the sidebar and other views, remains the same.

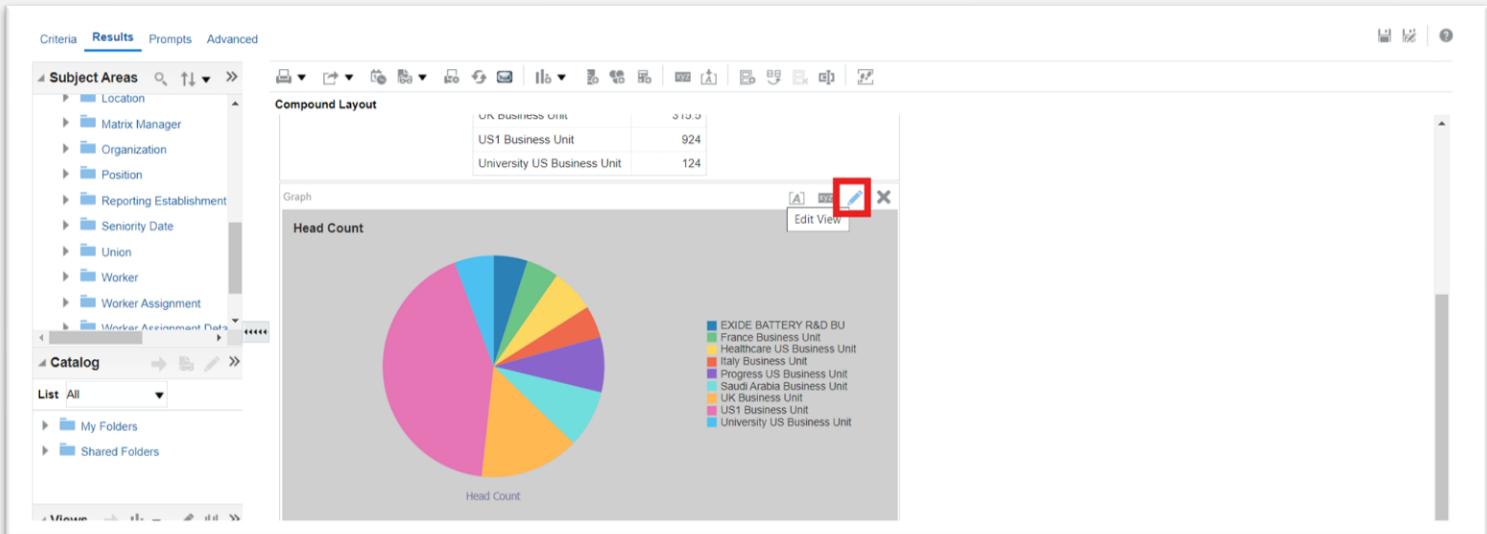
Edit a view

Use the editor that is available for each type of view to edit that view.

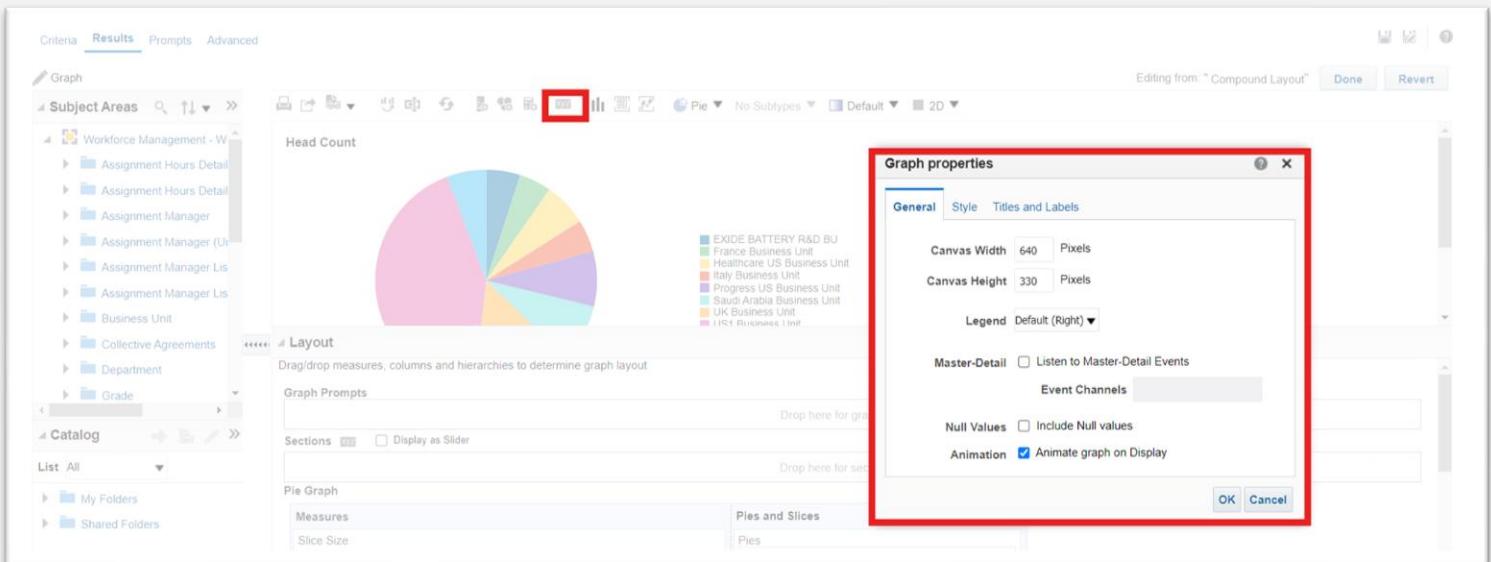
Each type of view has its own editor. The editors include both common functionality across views and view-specific functionality.

The following procedure provides general information on editing views.

- To edit the view, click **Edit View**.



- In the view editor (such as the Graph editor) make the appropriate edits, such as showing the legend.



- Click **Done**.
- Save the view. Click **Save Analysis** or **Save As** in the toolbar of the Results tab.

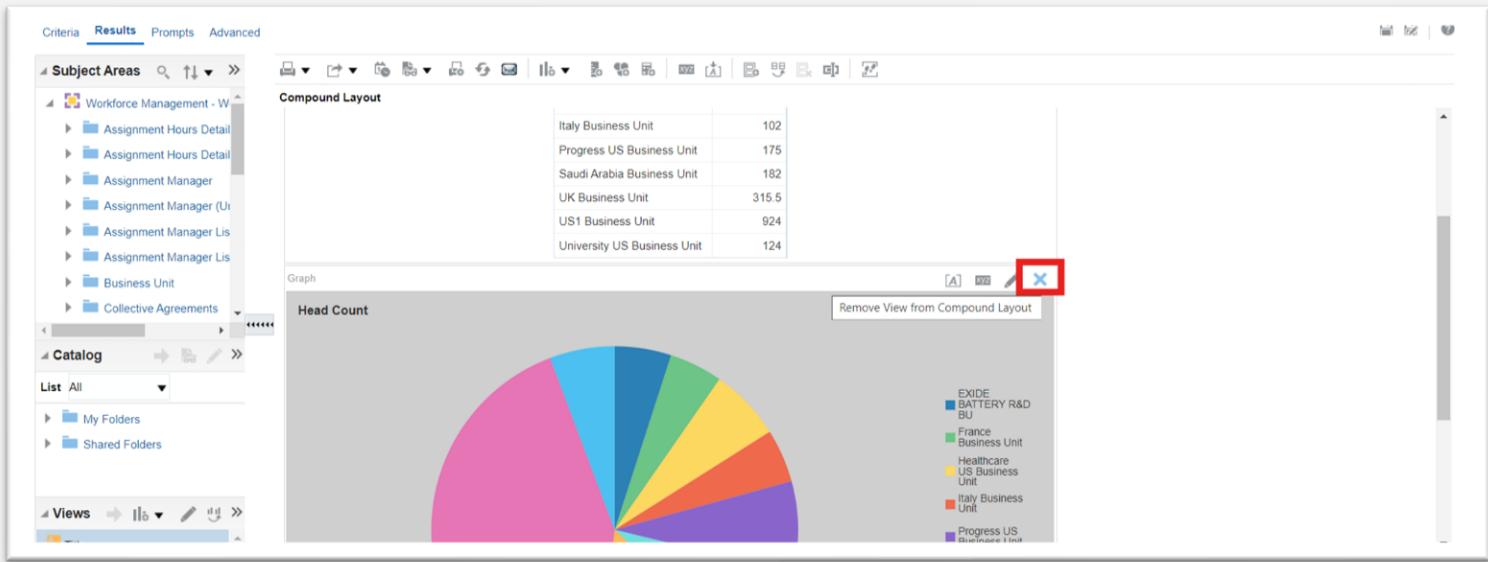
Remove a view

Delete a view from a compound layout or from an analysis.

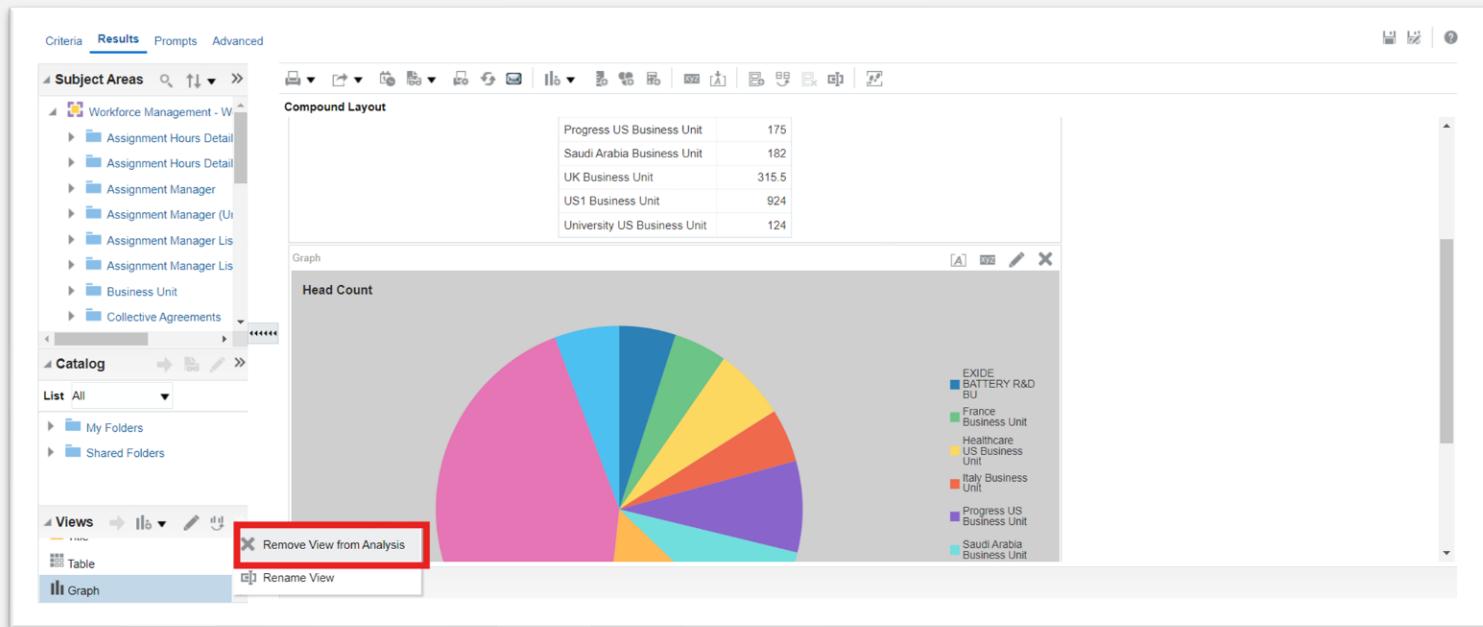
You can remove a view from a compound layout or analysis.

For example, you might find that the trellis view isn't the best way to show the results of the Brand Revenue analysis. You can remove that trellis view.

- To remove a view from a compound layout, click **Remove View from Compound Layout** on the view's toolbar. Removing a view from a compound layout doesn't remove it from the analysis.



- To remove a view from an analysis, select the view, then click **Remove View from Analysis** in the Views pane on the Results tab. Removing a view from an analysis removes it from the analysis and any compound layout to which it was added.



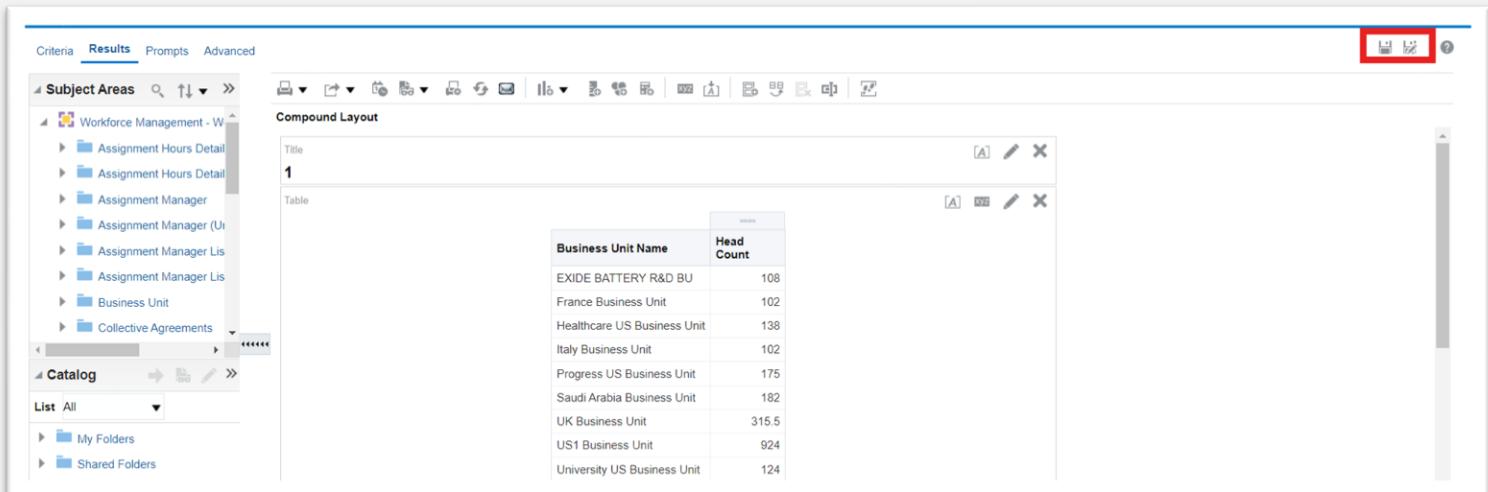
Save a view

Save a view by saving the analysis.

You can save a view that you're working with at any time.

To save a view, you must save the new or existing analysis. For example, you can create a Brand Revenue analysis, edit its table view, and decide to save it for the first time.

Click **Save Analysis** or **Save As** in the toolbar of the Results tab of the analysis editor.



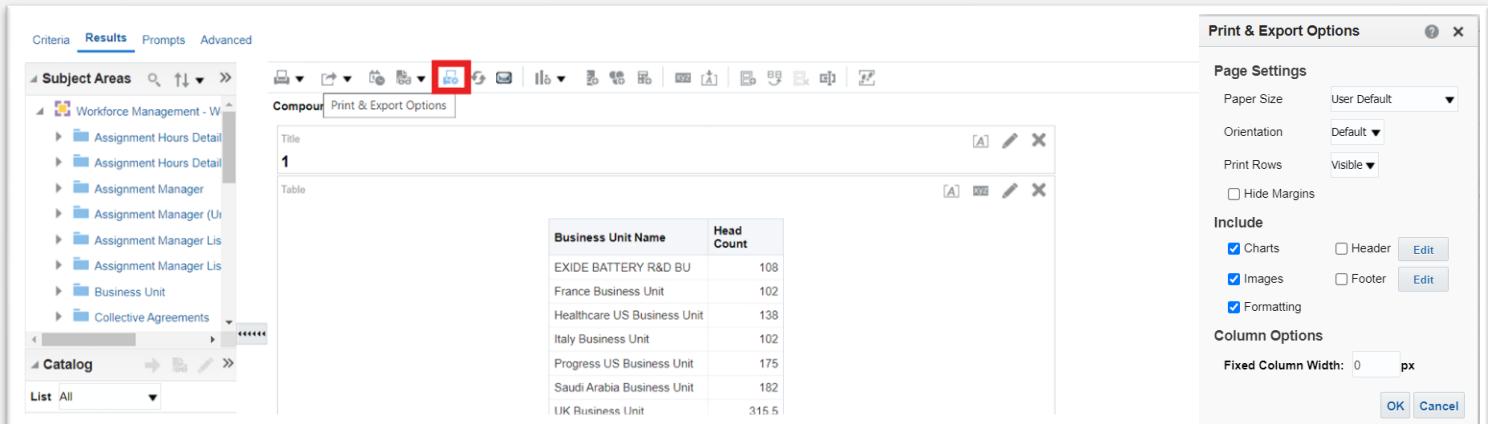
The screenshot shows the Analysis Editor interface. The top navigation bar includes 'Criteria', 'Results' (which is selected), 'Prompts', and 'Advanced'. The left sidebar contains 'Subject Areas' (Workforce Management - W) and a 'Catalog' section with 'My Folders' and 'Shared Folders'. The main area displays a 'Compound Layout' with a title '1'. Below the title is a table with two columns: 'Business Unit Name' and 'Head Count'. The table data is as follows:

Business Unit Name	Head Count
EXIDE BATTERY R&D BU	108
France Business Unit	102
Healthcare US Business Unit	138
Italy Business Unit	102
Progress US Business Unit	175
Saudi Arabia Business Unit	182
UK Business Unit	315.5
US1 Business Unit	924
University US Business Unit	124

Print a view

You can print views using HTML or Adobe PDF (Portable Document Format).

- Print one or more views.
 1. To print a single view, click **Print this analysis** on the toolbar of the view's editor.



The screenshot shows the Analysis Editor interface with a 'Print & Export Options' dialog box open on the right. The dialog box has sections for 'Page Settings' (Paper Size: User Default, Orientation: Default, Print Rows: Visible, Hide Margins checked), 'Include' (Charts, Images, Formatting all checked), and 'Column Options' (Fixed Column Width: 0 px). The main area shows a 'Compound' layout with a title '1' and a table view identical to the one in the previous screenshot.

2. To print a group of views that displayed in the Compound Layout, click **Print this analysis** on the toolbar of the Results tab.

The screenshot shows the Oracle BI interface with the 'Results' tab selected. On the left, there's a navigation pane with 'Subject Areas' expanded, showing categories like 'Workforce Management' and 'Assignment Manager'. Below it is a 'Catalog' section with 'List All' selected. In the center, there's a table titled '1' with columns 'Business Unit Name' and 'Head Count'. The table contains data for various business units. At the top of the page, there's a toolbar with a 'Print this analysis' button, which is highlighted with a red box.

- Select **Printable HTML** or **Printable PDF**.

This screenshot is similar to the one above, but the 'Print this analysis' dropdown menu is open, showing two options: 'Printable PDF' and 'Printable HTML'. Both options are highlighted with a red box.

1. For HTML, a new browser window displays the view or views to print.

From the File menu of the new browser window, select **Print**.

2. For PDF, an Adobe Acrobat window displays the view or views to print.

Select the options in the window to save or print the file.

Build Dashboards

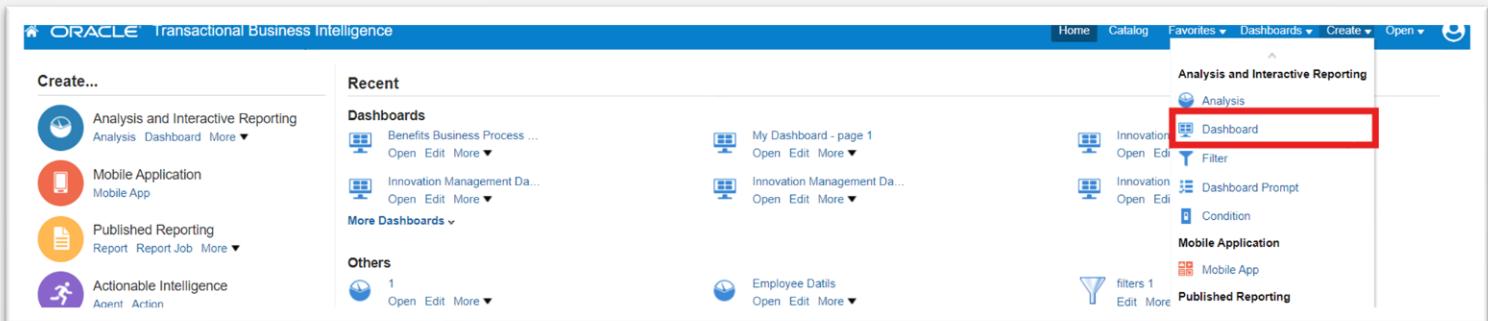
Create multiple analyses

Build analyses on which you can create views that you display on a dashboard.

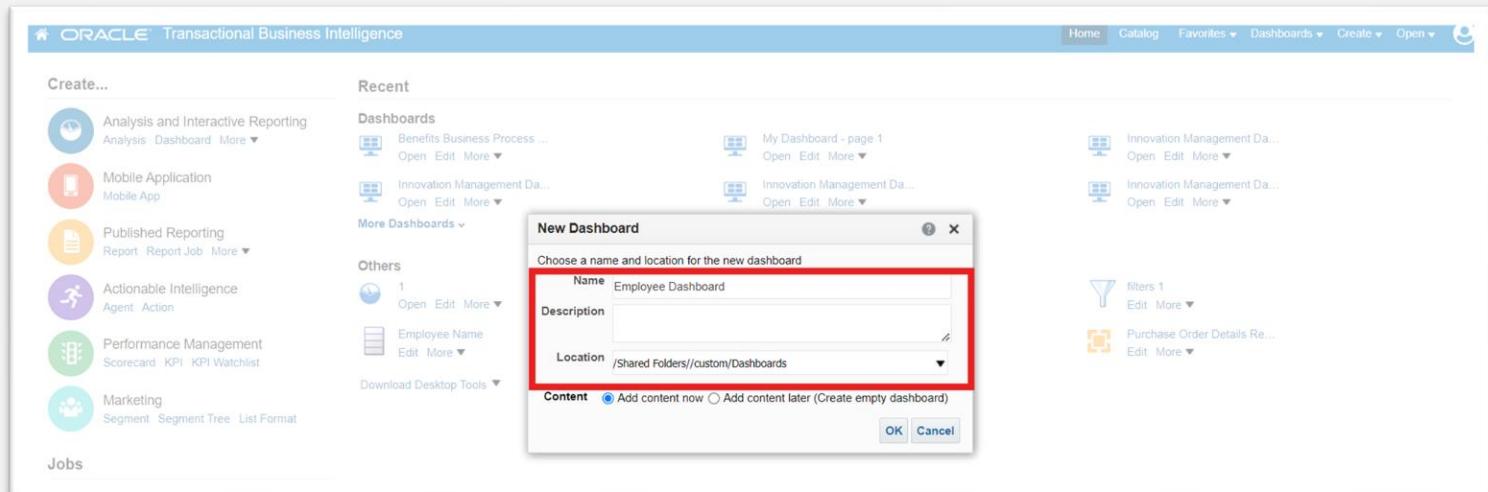
Create a dashboard

Create a dashboard to display data from analysis.

- On the Home page, in the **Create** pane, click **Dashboard**.

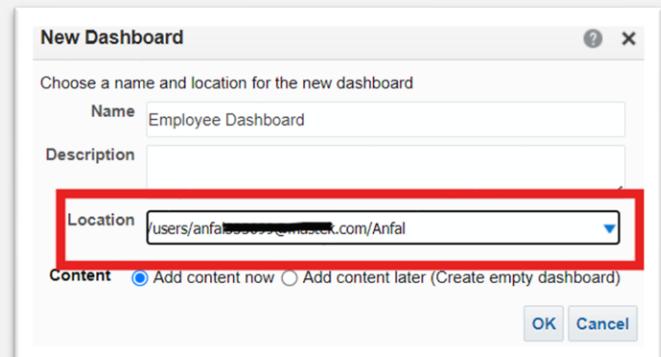


- In the New Dashboard dialog, enter a short name and description for the dashboard.

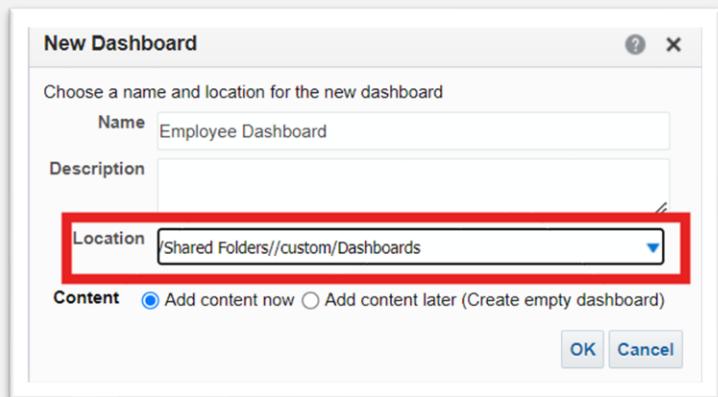


- Under **Location**, select where to save the dashboard. Where you save a dashboard determines whether the dashboard is private to you or shared with others.

- To save for your personal use and private to you, save the dashboard in /MyFolders.



- To share with others, save the dashboard in /Shared Folders.



To share a dashboard with others and to list the dashboard in the **Dashboard** menu in the global header, save the dashboard in the */shared/first level subfolder*.

If you specify a shared folder in which no dashboards have been saved, then a new Dashboards sub-folder is created automatically in the folder.

For example, if you select a folder named /Shared Folders/Company/Sales in which no dashboards have been saved, a new Dashboards folder is created. The Location entry changes to /shared/Sales/Dashboards. (A new Dashboards folder isn't automatically created if you choose a folder at any other level.)

- Specify that you want to add content to the new dashboard now.
- Click **OK**.

The new dashboard, which contains one blank page, is displayed in the Dashboard builder for editing.

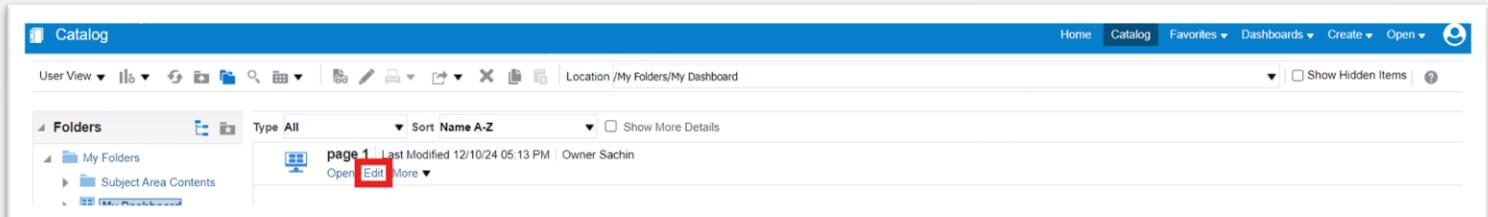
Add pages to a dashboard

Optionally add one or more pages to the dashboard to display the data in various ways.

You can add new pages to organize content of a dashboard.

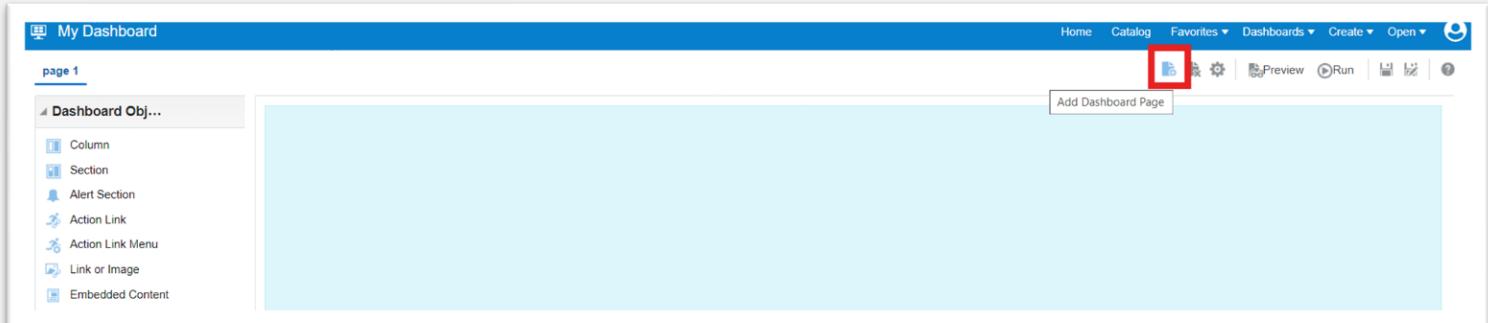
For example, you can first add a new dashboard page that contains regional sales data in a table and in a bar graph. Then, you can add another that contains links to various competitors' web sites.

- Open the dashboard for editing.

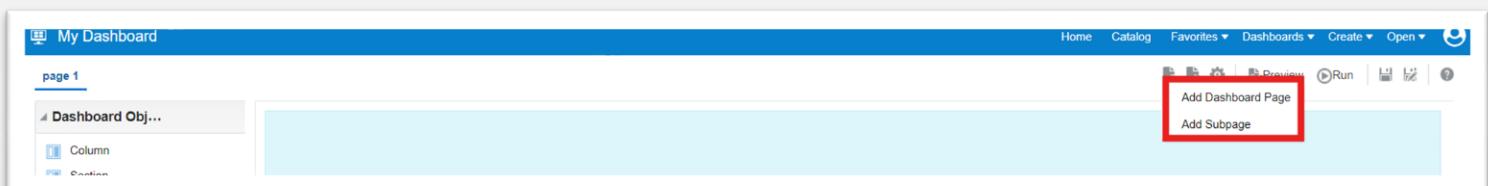


The screenshot shows the Catalog interface with a sidebar labeled 'Folders'. Under 'My Folders', there is a single item: 'Subject Area Contents'. In the main area, a list of dashboard pages is shown. The first item is 'page 1', which has a small icon, the text 'Last Modified 12/10/24 05:13 PM', and 'Owner Sachin'. To the right of 'page 1' are three buttons: 'Open', 'Edit' (which is highlighted with a red box), and 'More'.

- On the toolbar of the Dashboard builder, click **Add Dashboard Page** and select the Add Dashboard Page menu option.



The screenshot shows the 'My Dashboard' builder interface. The left sidebar lists 'Dashboard Obj...' items such as Column, Section, Alert Section, Action Link, Action Link Menu, Link or Image, and Embedded Content. The main workspace is a large light blue area. The toolbar at the top includes standard icons like Home, Catalog, Favorites, Dashboards, Create, Open, and a help icon. A specific button labeled 'Add Dashboard Page' is highlighted with a red box.



This screenshot is similar to the previous one, showing the 'My Dashboard' builder interface. The left sidebar and main workspace are identical. However, the toolbar now includes an additional button labeled 'Add Subpage' next to the 'Add Dashboard Page' button, both of which are highlighted with red boxes.

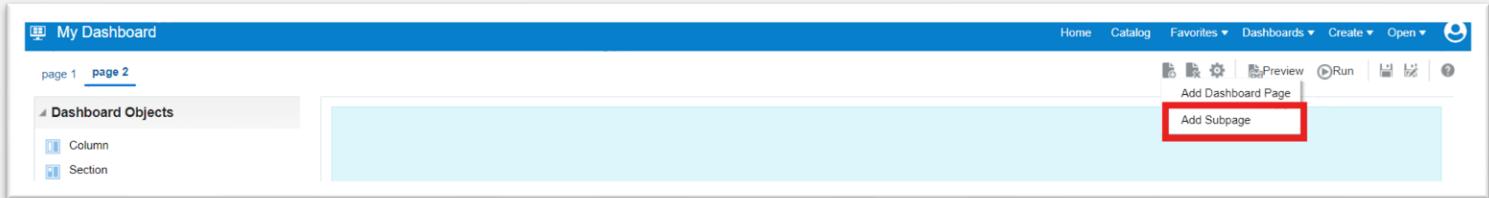
Add Subpages to Dashboards

You can add a new subpage to a dashboard to display additional information.

Adding subpages allows a second level of information to be presented to users. For example, you can first add a new dashboard page that contains regional sales data in a table and in a bar graph.

Then, you can add a subpage that contains links to various competitors' web sites.

- On the toolbar of the Dashboard builder, click **Add Dashboard Page** and select the **Add Subpage** menu option.



This screenshot shows the 'My Dashboard' builder interface after a subpage has been added. The left sidebar and main workspace remain the same. The toolbar now includes the 'Add Subpage' button, which is highlighted with a red box, positioned next to the 'Add Dashboard Page' button.

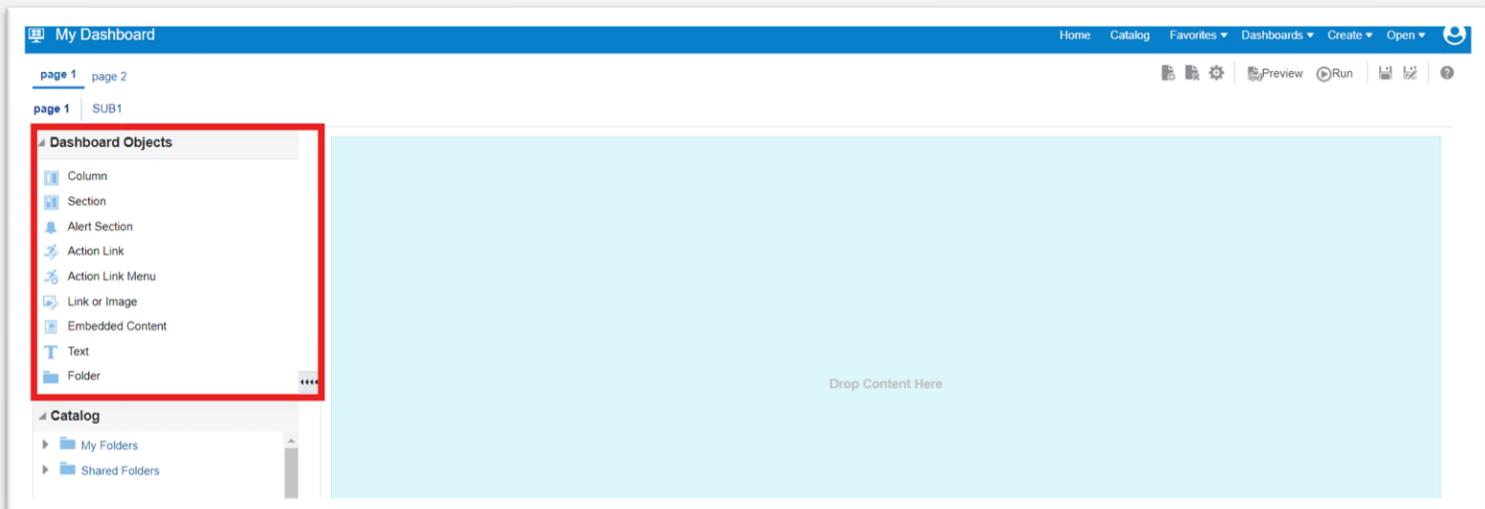
Add content to a dashboard page

Add content to dashboard pages to display items such as views and prompts.

You can add dashboard objects (any of the objects from the Dashboard objects pane) to dashboard pages. You can also add objects that you have saved in the catalog.

For example, you can add content to the newly created Sales Performance dashboard to track your team's progress. To do so, you can add a Brand Revenue analysis from the catalog.

- Navigate to the page to which you want to add content.



- In the Dashboard Builder, select the objects to analyze in the Dashboard Objects pane or the Catalog pane and drag and drop them to the Page Layout area.
 1. Use **Column** to add a column to align content on a dashboard. You can create as many columns on a dashboard page as you need. You can place columns horizontally or vertically.
 2. Use **Section** to add sections within columns to hold the content for the page, such as action links and analyses. You can include as many sections as you need for a column.
 3. Use Publisher Report to add one or more reports to make them available to other users. You can use a report to add configured analyses to a dashboard page. You can add a report as embedded content for display on the dashboard page or as a link to open the report in Oracle Analytics Publisher. If you modify in Oracle Analytics Publisher a report you added to a dashboard page and save your changes, then you must refresh the dashboard page to see those modifications.
- Set the properties of each object, as appropriate by clicking **Properties**.
- Click **Save**.

Understand How Dashboard Pages and Publisher Reports Interact

You can run, view, and interact with a Publisher report on a dashboard page.

When you add a Publisher report to a dashboard page, the report includes a toolbar that provides these options:

- Analyze the data in the report.
- Select the layout template of the report.
- Change the output format of the report.
- Export the report.
- Send the report to an available destination such as a printer, fax, email, or FTP.
- Schedule the report.

When you configure an agent for a dashboard page that contains a Publisher report, be aware of these criteria:

- The output format of the Publisher report must be PDF.
- The agent must be set to deliver content in PDF format.

You can print a dashboard page or a briefing book that contains a Publisher report in certain formats.

If you want to print a dashboard page that contains a Publisher report or to include the page in a briefing book, then you must keep the following points in mind:

- If you print the briefing book as PDF and if the output format of the Publisher report is PDF, then the Publisher report is printed after the other objects on the page. If you print a dashboard page that contains a Publisher report as PDF, but the dashboard page isn't part of a briefing book, then the Publisher report isn't printed.
- If you print the dashboard page or briefing book as MHTML, then the Publisher report isn't printed.

For more details

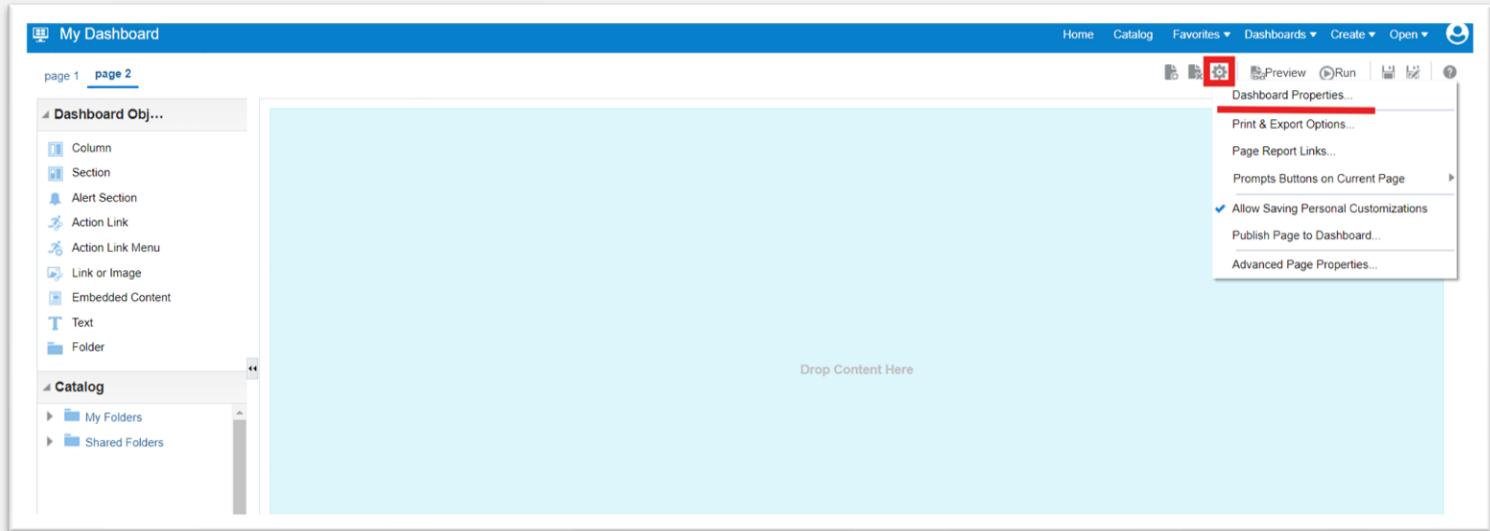
<https://www.youtube.com/watch?v=UTgaSqIpuVg>

Configure the Style and Behavior of Dashboards and Pages

Use dashboard properties to configure style and behavior of dashboards and pages.

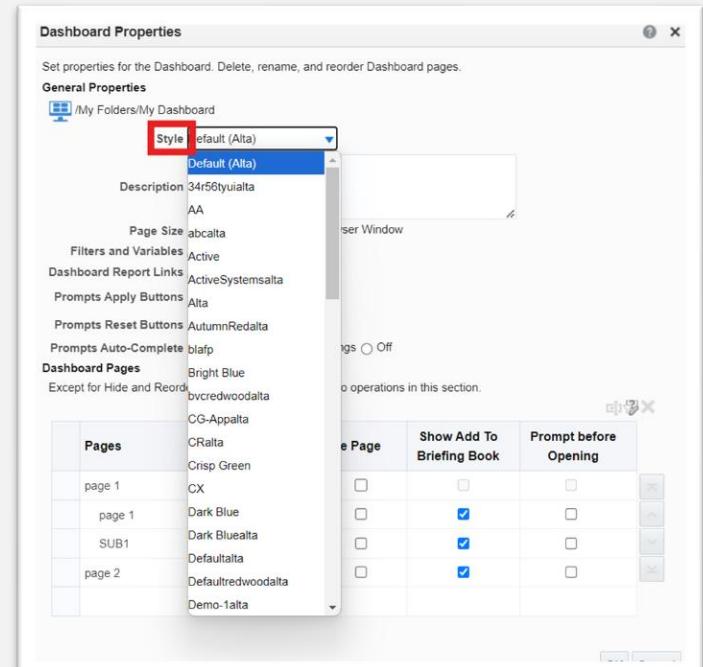
For example, you might specify whether your team members can export, refresh, or print pages in a dashboard.

- To specify the dashboard style and behavior, click **Tools** and select **Dashboard Properties**.

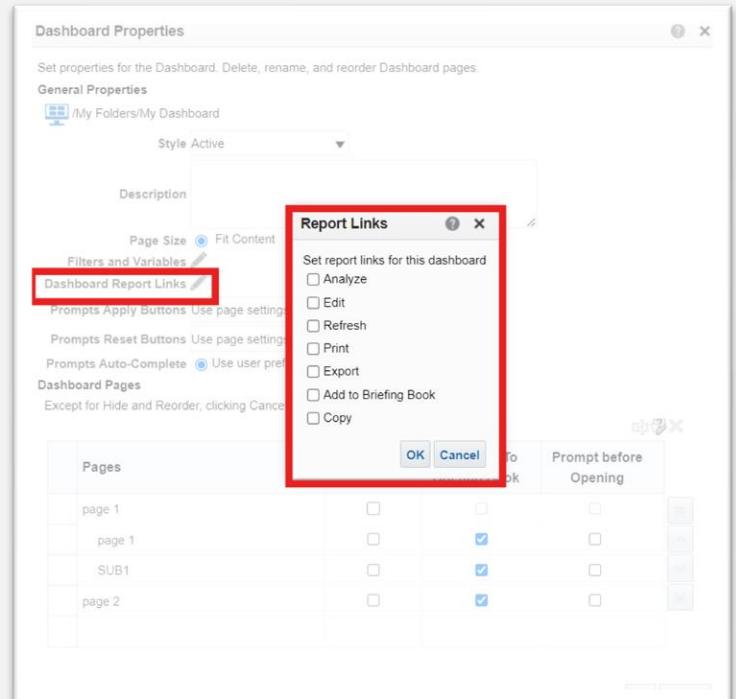


In the Dashboard Properties dialog, make the property changes that you want.

For example:



1. Use **Style** to select from a list of available dashboard styles if you want to change dashboard properties, such as logo, branding, page color, and link color. Administrators create styles and make them available to dashboard builders and users. If you want to use a style that isn't listed, ask your administrator to create a new style for you then start a new browser session and try again.



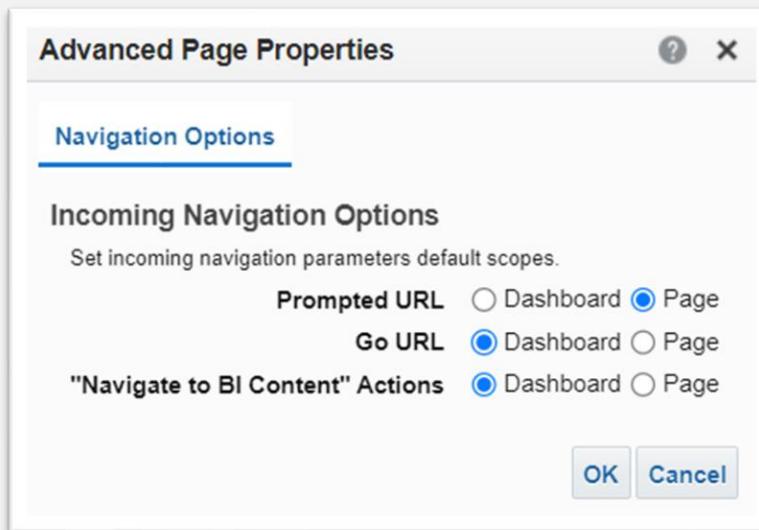
2. Use Dashboard Report Links

to specify which report links (Analyze, Edit, Refresh, Print, Export, Add to Briefing Book, and Copy) to include with analyses at the dashboard level. You can set these links at the dashboard page level and the analysis level, which overrides the links that you set at the dashboard level.

3. Use **Contains HTML Markup** if you have administrator privileges to format content with valid HTML markup, including JavaScript.
4. Use **Hidden Page** to show the page heading of a hidden page when you navigate to it.
- To specify how a dashboard handles incoming navigation parameters, click **Tools** and select **Advanced Page Properties**.

Incoming navigation parameters control the behavior of Oracle Analytics content shared to external portals or applications. For example, navigation parameters might direct users to a particular page in a dashboard, and format the content for PDF output. In the Advanced Page Properties dialog, you use the **Incoming Navigation Options** to specify whether navigation parameters are applied to all pages in the dashboard or just the landing page.

You can configure the behavior of these navigation links:



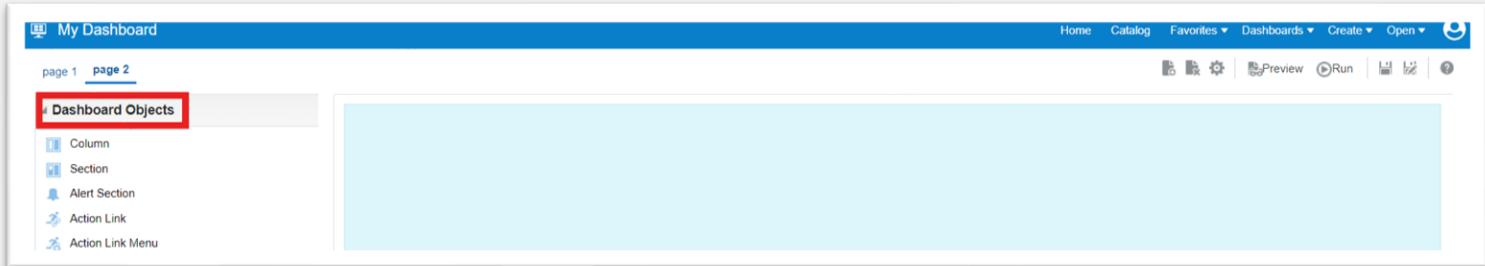
1. **Prompted URL** – These links direct users to a specific dashboard page and can include formatting parameters. For example, a Prompted URL might go straight to a particular page, and format the content for PDF output.
 2. **Go URL** – These links include parameters to control how content looks and behaves. For example, a Go URL might include a username and password, and a command to refresh the results on a page.
 3. **"Navigate to BI Content" Actions** – These links use the Action Framework to direct users to specific areas of content.
- For each type of navigation link, select the scope of the navigation parameters.
 1. Click **Dashboard** to apply the navigation parameters to all pages in the dashboard. For example, if a prompted URL link formats the content for PDF output (using &Action=Print), then you format all pages in the dashboard for output to PDF.
 2. Click **Page** to apply the navigation parameters to the landing page only. For example, if a prompted URL link formats the content for PDF output (using &Action=Print), then you format just the landing page for output to PDF.
 - Click **OK**, and then **Save**.

Change the Properties of Objects Added to Dashboard Pages

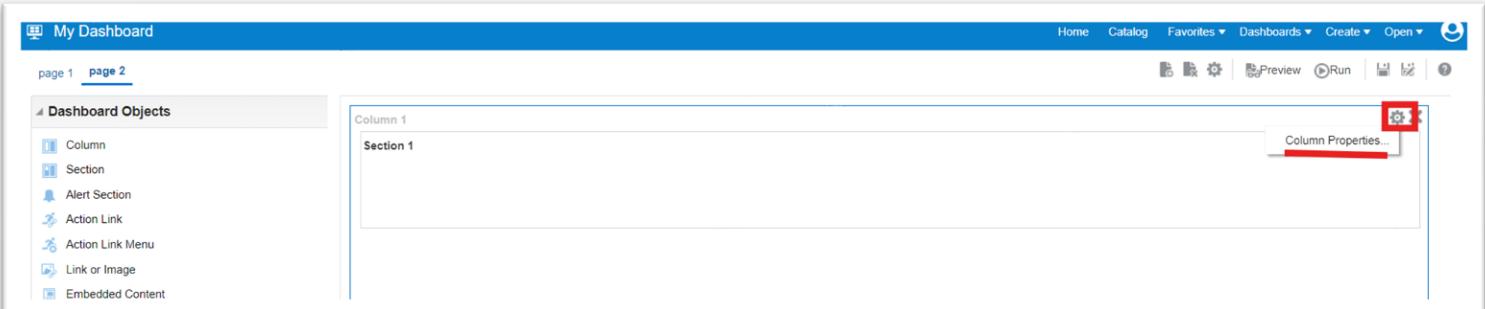
You can change the properties of objects that have been added to a dashboard page.

For example, you can change the column properties of the Brand Revenue analysis to specify the heading display in 14-point bold Helvetica font.

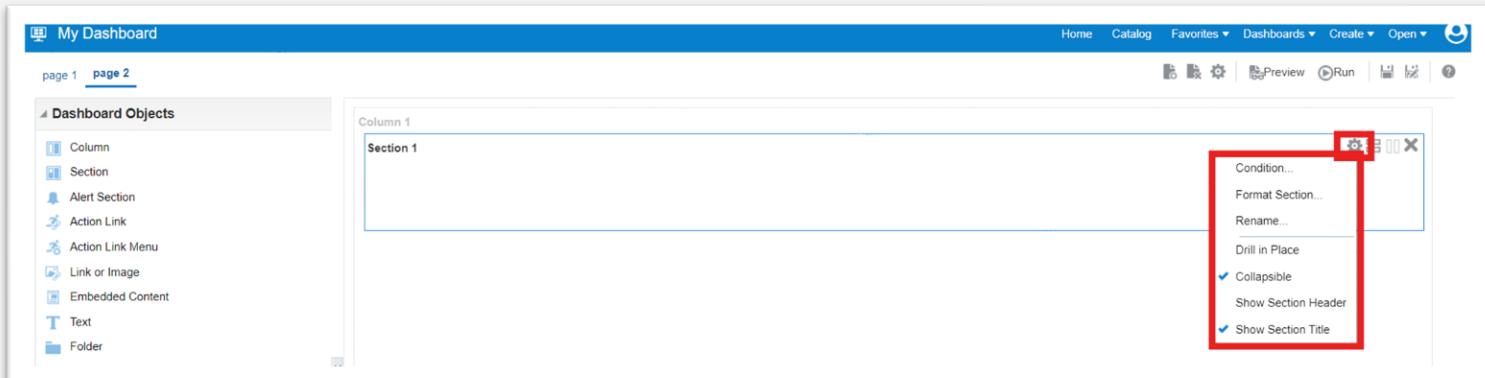
- Navigate to the page that contains the object.



- Hover the mouse pointer over the object in the Page Layout area to display the object's toolbar and click **Properties**.



Depending on the object type, you'll either display a menu of editing options or a properties dialog.



- Make the property changes that you want.

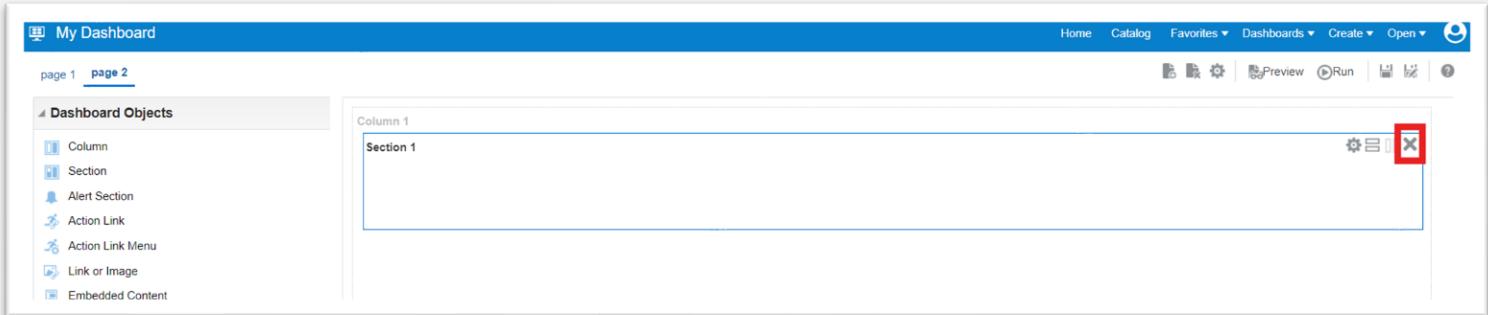
For example, for a dashboard section, you might select **Rename** to change the default section name, or for a dashboard web link you might change the caption or target URL.

- Save your changes.

Delete Objects on Dashboard Pages, Subpages

If you add an object that you later decide that you don't want, then you can delete it.

- Navigate to the page that contains the object to delete.
- Hover the mouse pointer over the object in the Page Layout area to display the object's toolbar and click **Delete**.

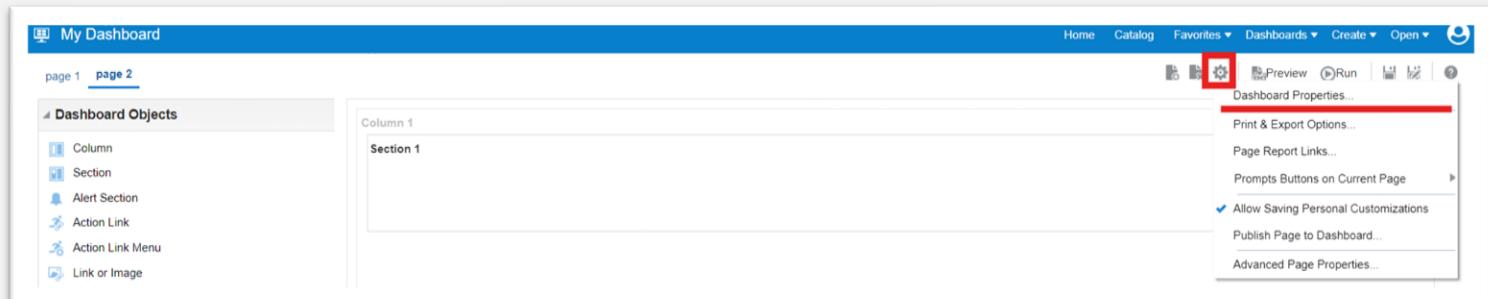


Delete Dashboard Pages

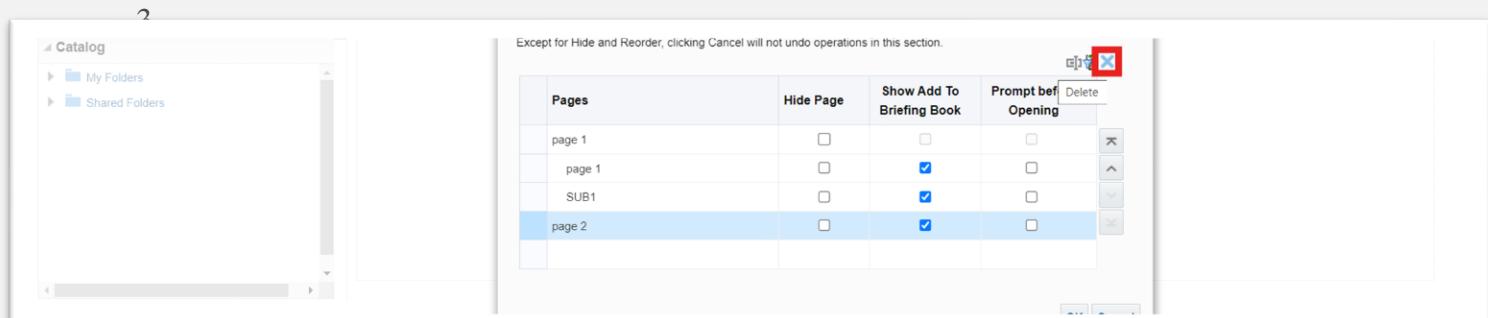
You can delete the current dashboard page, or one or more dashboard pages.

You can delete one or more dashboard pages:

- Click **Tools** and select **Dashboard Properties**.
- For each page to delete:
 1. In the **Dashboard Pages** area of the dialog, select the page.



2. On the Dashboard Pages toolbar, click **Delete**.



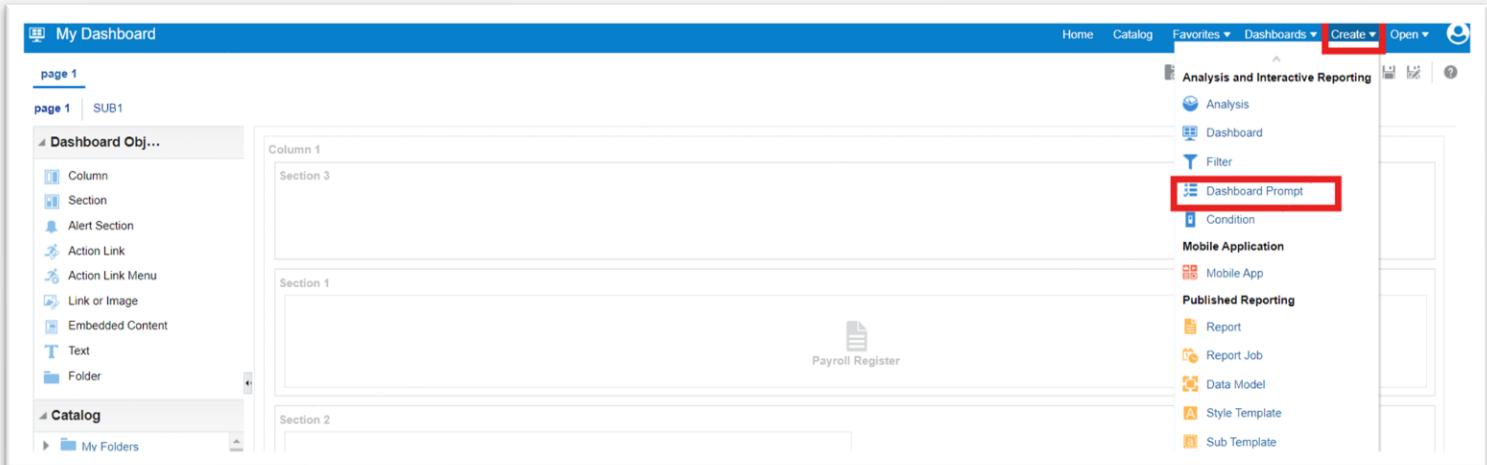
3. Confirm the deletion.

- Click **OK**.

Add Prompts to Dashboard Pages

You can add a prompt to a dashboard or dashboard page.

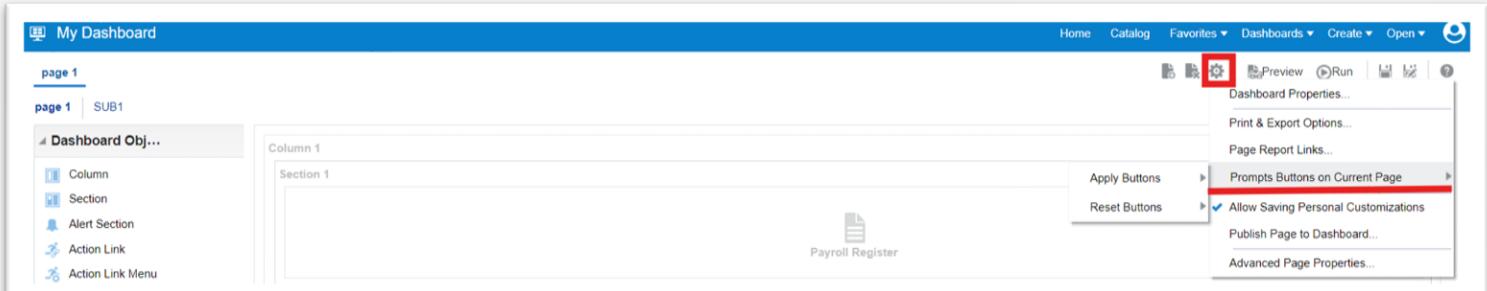
- Open the dashboard for editing.
- In the Dashboard builder's Catalog pane, locate and drag and drop an object such as an analysis onto a section in the dashboard page.
- Add a new or pre-created prompt:
 1. To add a new prompt, click **New**, then **Dashboard Prompt**, and follow the on-screen instructions.



2. To add a pre-created prompt, in the Dashboard builder's Catalog pane, locate and drag and drop the dashboard prompt onto a section in the dashboard page.

The dashboard prompt is added to the dashboard page.

- To specify whether to include the prompt's **Apply** and **Reset** buttons on the dashboard page, in the toolbar of the Dashboard builder, click **Tools**. Then select **Prompts Buttons on Current Page** and either **Apply Buttons** or **Reset Buttons**.



- Click **Save** in the dashboard toolbar.
- To preview the dashboard page, click **Preview** in the dashboard toolbar.

Recall personal settings for dashboards

Create customizations that enable you to view pages in their current state or with your favorite choices already selected.

Save and Restore Dashboard State

You can save personalized settings that you make for a dashboard page and later apply these settings to any dashboard.

As you work with dashboard pages, you frequently make the following types of settings:

- Filters
- Prompts
- Column sorts
- Drills in analyses
- Section expansion and collapse

If you save the settings as a customization, you don't have to make these choices manually each time you access the dashboard page.

Save Customizations of Dashboard Pages

You can save customization for use by you or by others who have author, but not a consumer, role.

You can also specify whether the customization is to be the default customization for a dashboard page, for you or for others.

For example, you can save a customization of the Sales Performance dashboard. The customization enables sales managers with permission to see a customized view of the Brand Revenue analysis.

- Open the dashboard.
- Navigate to the page on which you want to save a customization.
- Make your personalized settings.
- Click **Page Options** and select **Save Current Customization**.
- Enter a descriptive name for the customization and specify for whom the customization is to be saved.
- Click **OK**.

Apply Saved Customizations

You can apply customizations that you have saved for your own personal use. You can also apply customizations that have been saved by someone else for your use.

For example, you can apply a shared Sales Team customization that was created for customized viewing of a Brand Revenue analysis by members of the sales team.

1. Open the dashboard.
2. Navigate to the page that contains the customization to apply.
3. Click **Page Options** and select **Apply Saved Customization**.

Your personal saved customizations are shown, followed by shared saved customizations.

4. Click a saved customization in the list to apply it to the dashboard page.

Edit Saved Customizations

You can rename and delete customizations and change which customization to use as your default.

For example, you can change your default customization to one that you just saved for the Sales Performance dashboard.

1. Open the dashboard.
2. Navigate to the page that contains the customization to edit.
3. Click **Page Options** and select **Edit Saved Customizations**.
4. Rename or delete customizations or change the default customization, as appropriate.
5. Click **OK**.

Clear the Current Customization

You can clear the current customization if you decide that the choices for items such as filters, prompts, column sorts, drills in analyses, and section expansion and collapse aren't what you want.

For example, you can clear a customization that collapses the display of the Brand Revenue analysis.

To clear the current customization, click **Page Options** and select **Clear My Customization**.

The current customization is cleared.

Run the dashboard

Try out the completed dashboard. Click **Run**.

Export Content from Analyses and Dashboards

You can export content from analyses and dashboards.

Export the Results of Analyses

You can export analyses results to various formats, including data and formatting in Microsoft Office Excel, Adobe PDF, and CSV formats, and various data-only formats (that is, with no formatting).

For example, you can export a Stock Control analysis, so that one of your suppliers can see the results in Microsoft Excel.

- To export data and formatting, click **Export this analysis** then **Formatted**, and choose an output format.
- To export just data, click **Export this analysis** then **Data**, and choose an output format.

The screenshot shows the 'Employee Details' analysis interface. On the left, there's a navigation pane with 'Subject Areas' and a 'Catalog'. The main area displays a table titled 'Employee Details' with columns: Business Unit, Department Name, Assignment Type, Name, Country, Location Name, Postal Code, and Employee Date of Birth. A red box highlights the toolbar above the table, which includes icons for 'Formatted', 'PDF', 'Data', 'Excel', 'Powerpoint', and 'Web Archive'. The top navigation bar has tabs for 'Criteria', 'Results' (which is selected), 'Prompts', and 'Advanced'. The top right corner has links for 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', 'Open', and a user icon.

Export Dashboards and Dashboard Pages

You can export an entire dashboard or a single dashboard page to Microsoft Excel 2007+. When you export dashboard content to Microsoft Excel, the state of the dashboard (such as prompts or drills) won't change.

For example, you can export the dashboard page that contains the Brand Revenue analysis. This enables brand managers to review this data in Microsoft Excel.

- Open the dashboard or dashboard page that you want to export.
- On the Dashboard page toolbar, click **Page Options**, select **Export to Excel**, and select either **Export Current Page** or **Export Entire Dashboard**.

If you export an entire dashboard:

1. Each page is included on its own sheet in an Excel workbook.
2. Each sheet is given the name of its corresponding dashboard page.

- Use the File Download dialog to open or save the dashboard or dashboard page as a spreadsheet file.

Tips for Exporting

Here are some tips on exporting data from analyses, dashboards, and dashboard pages.

- By default, the **Value Suppression** option in the Column Properties dialog:Column Format tab determines if the cells in tables or pivot tables that span rows and cells that span columns are repeated when exporting to Excel (rather than always repeated). Don't suppress values when exporting to Excel if those who use the Excel spreadsheets want to manipulate the data.
 - If **Value Suppression** is set to **Suppress**, then cells that span rows and cells that span columns aren't repeated. For example, in a table that has Year and Month values, Year is displayed only once for Month values. This value suppression is useful if you want to simply view data in Excel spreadsheets.
 - If **Value Suppression** is set to **Repeat**, then cells that span rows and cells that span columns are repeated. For example, in a table that has Year and Month values, Year is repeated for all Month values.
- In PDF format, rows are split across page breaks rather than kept together.
- Action links aren't included in exported formats.
- When exporting to Excel, numbers and dates are exported in raw format with full number precision and format mask, rather than as a string in the data format specified.
- When exporting analysis results to formatted Excel spreadsheets, you can choose whether to export full precision values or export abbreviated values that display in a performance tile. In the Performance Tile Properties dialog, select the **Abbreviate Values** option, which determines the level of abbreviation used in the performance tile, that is, thousands, millions, and so on. To export abbreviated values to Excel, select the **Abbreviate in formatted Excel** option.
- While you can export directly to an Excel format, you might notice better performance during the export of large numbers of rows if you export first to CSV, and then import that file into Excel.

For more information

<https://www.youtube.com/watch?v=DuOkkhK7u-Q>