

CREATING ANALYSES AND DASHBOARDS

DOCUMENT CONTROL

DOCUMENT NAME: OBIEE 12c Dashboarding.

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SECURITY CLASSIFICATION: Company-Confidential

OBJECTIVES:

Course Objectives

To provide a concept of OBIEE Dashboarding.

Prerequisites

This class is designed for people who don't know concept of OBIEE.

Intended audience

The Training is meant for an induction level or anyone coming into Data Warehousing stream.

-Beginning the Analytic Process-

In this topic, you will learn how to access Oracle BI EE and search the catalog.

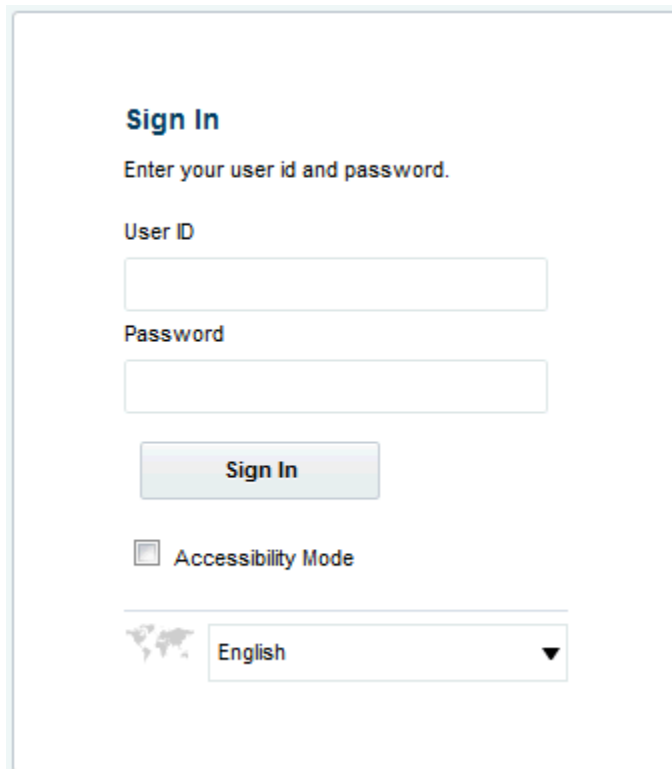
1. **Logging In**
2. **Searching the Catalog (Basic Search)**

Logging In

This topic will cover the general navigation.

To log into Oracle BI EE, perform the following steps:

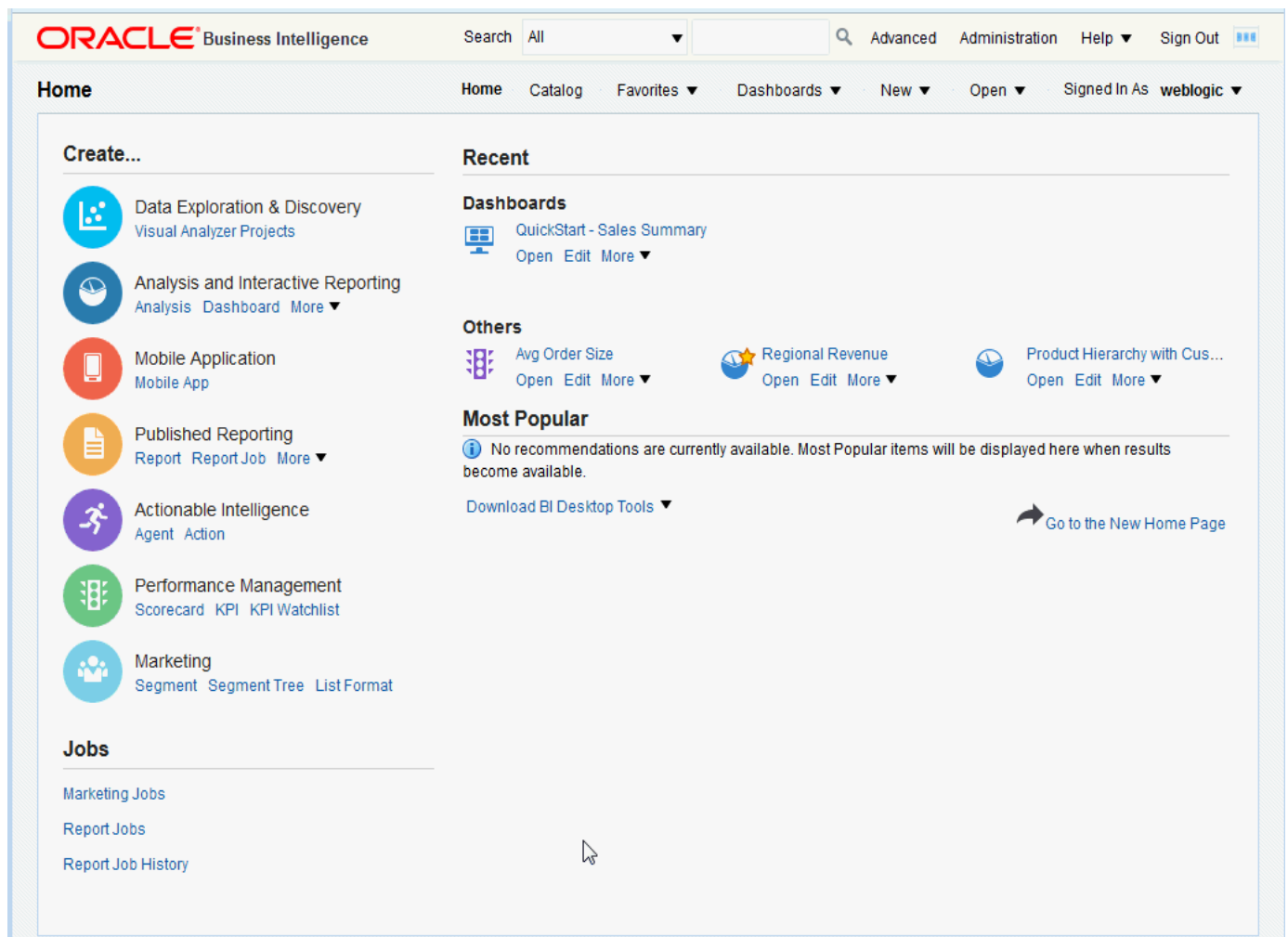
1. **In a browser window, enter the url for analytics. In this example it is - `http://localhost:9502/analytics`.**
2. **At the sign in page, enter your User ID and Password and click Sign In. Observe that you can select Accessibility Mode.**

The image shows a web form for signing in to Oracle BI EE. At the top, it says "Sign In" in blue. Below that, it says "Enter your user id and password." in orange. There are two input fields: "User ID" and "Password". Below the "Password" field is a "Sign In" button. At the bottom, there is a checkbox labeled "Accessibility Mode" and a language selector showing "English" with a dropdown arrow.

When you sign in, the Home page is displayed. The Home page is a task-oriented, centralized workspace combined with a global header, allowing access to Oracle BI EE objects, their respective editors, help documentation, and so on.

The Home Page contains a global header with drop-down menus for the most frequently performed tasks. The Create section provides short cut for creating objects such as Visual Analyzer projects, analyses,

reports, and KPIs. The Jobs section provide information on currently running jobs. The Recent section displaying recently viewed or created analysis or dashboards, and the Most Popular section include frequently accessed items.

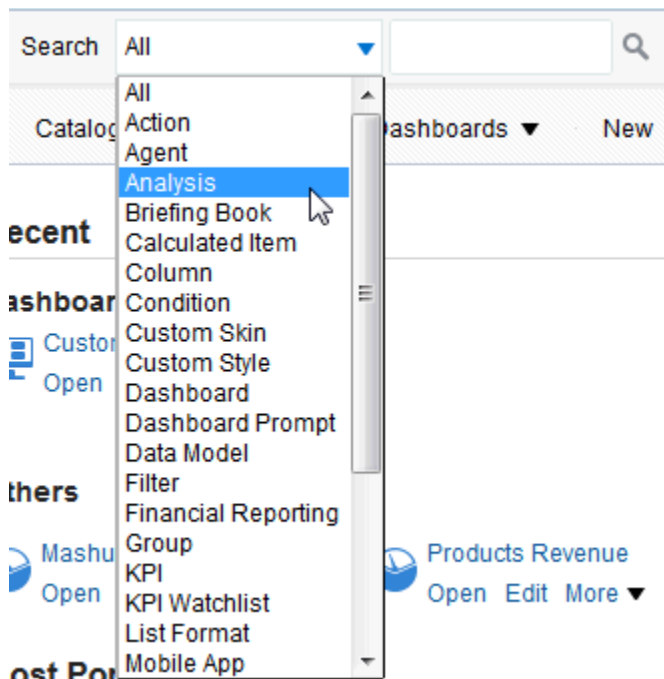


Searching the Catalog (Basic Search)

This topic covers the basic search of catalog objects from the global header. Depending upon how your system is configured, you will use the basic search or the fully integrated full-text search to quickly find an object within the catalog.

The basic Catalog search, which is the standard search delivered with Oracle BI EE, enables you to search for objects from the global header and the Home or Catalog pages. In the Catalog page, you can use the basic Catalog search to locate an object by searching for its exact name, description, location, and type, only. You find only those objects for which you have the appropriate permissions. When the desired object is located, you can select the object to display it for viewing or editing, as your permissions allow.

- 1. In the global header's Search field, click the drop-down list, and select the object type for which you want to search. In the example, we search for Analysis.**

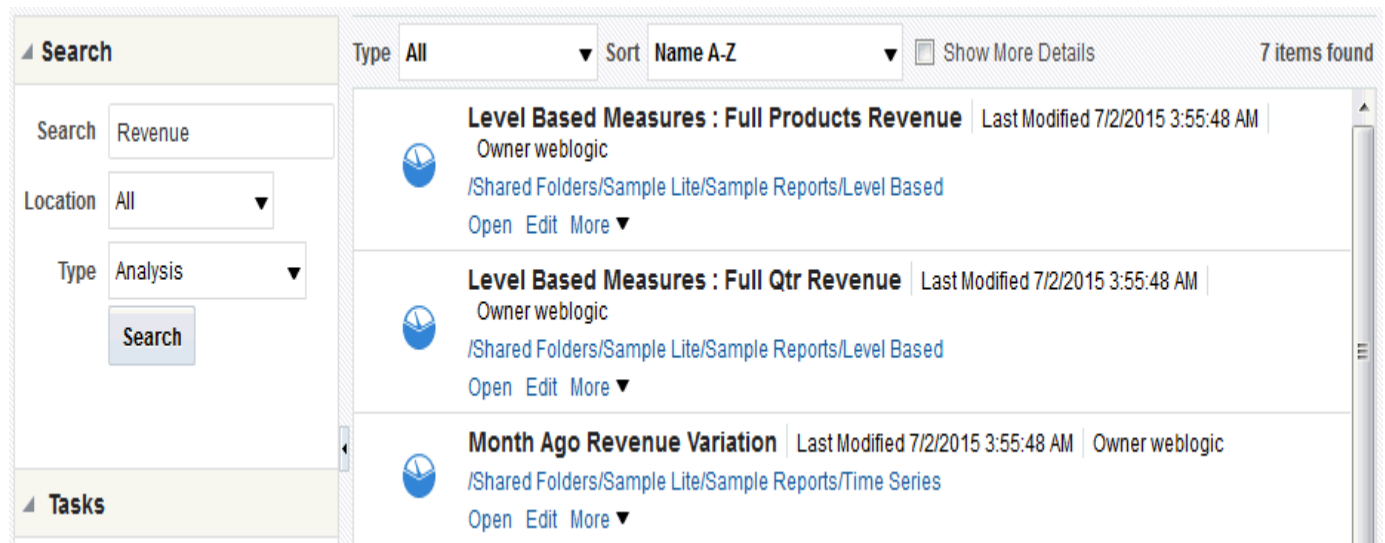


2. Place your cursor in the field next to the Search field and enter **Revenue**. When you search, you can enter part or all of the object's name or description.



3. Click the magnifying glass icon to begin the search.

The Catalog page is displayed with the results that match your search criteria.



-Creating an Analysis-

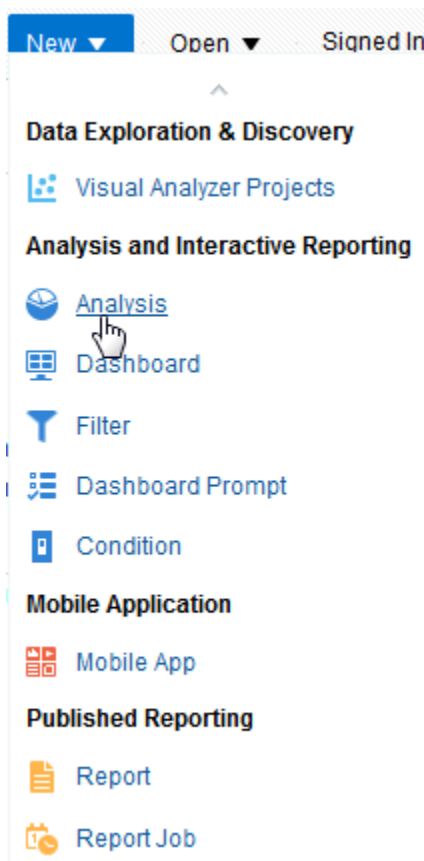
1. Creating an Analysis and Using the Analysis Editor

2. Filtering, Sorting, and Saving Your Analysis
3. Creating Selection Steps for Your Analysis
4. Adding Totals to Your Analysis
5. Adding Formatting to Your Analysis

Creating an Analysis and Using the Analysis Editor

This topic covers creating a new analysis by using the Analysis Editor.

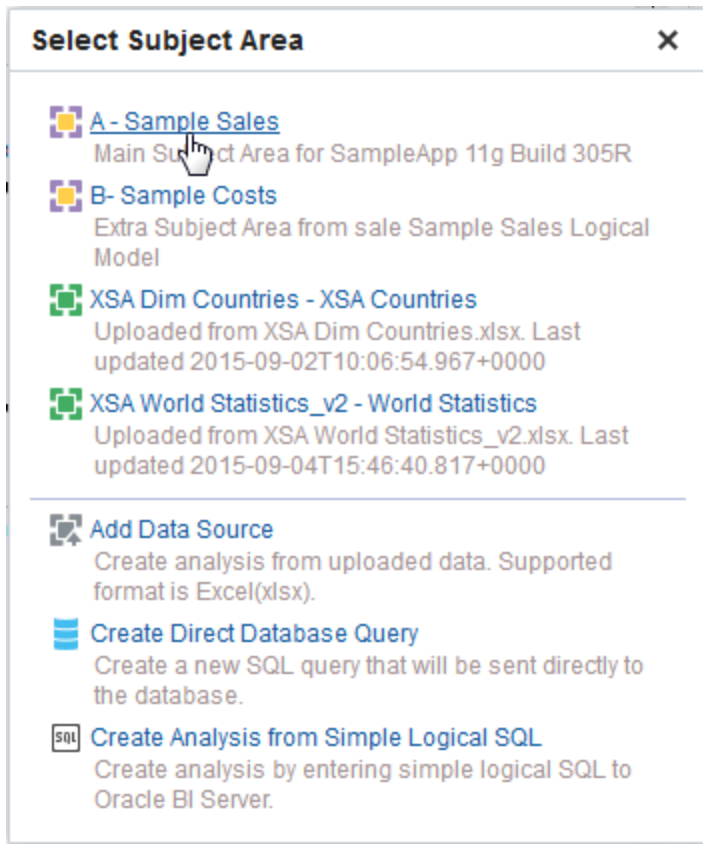
1. In the global header, click New, and select Analysis.



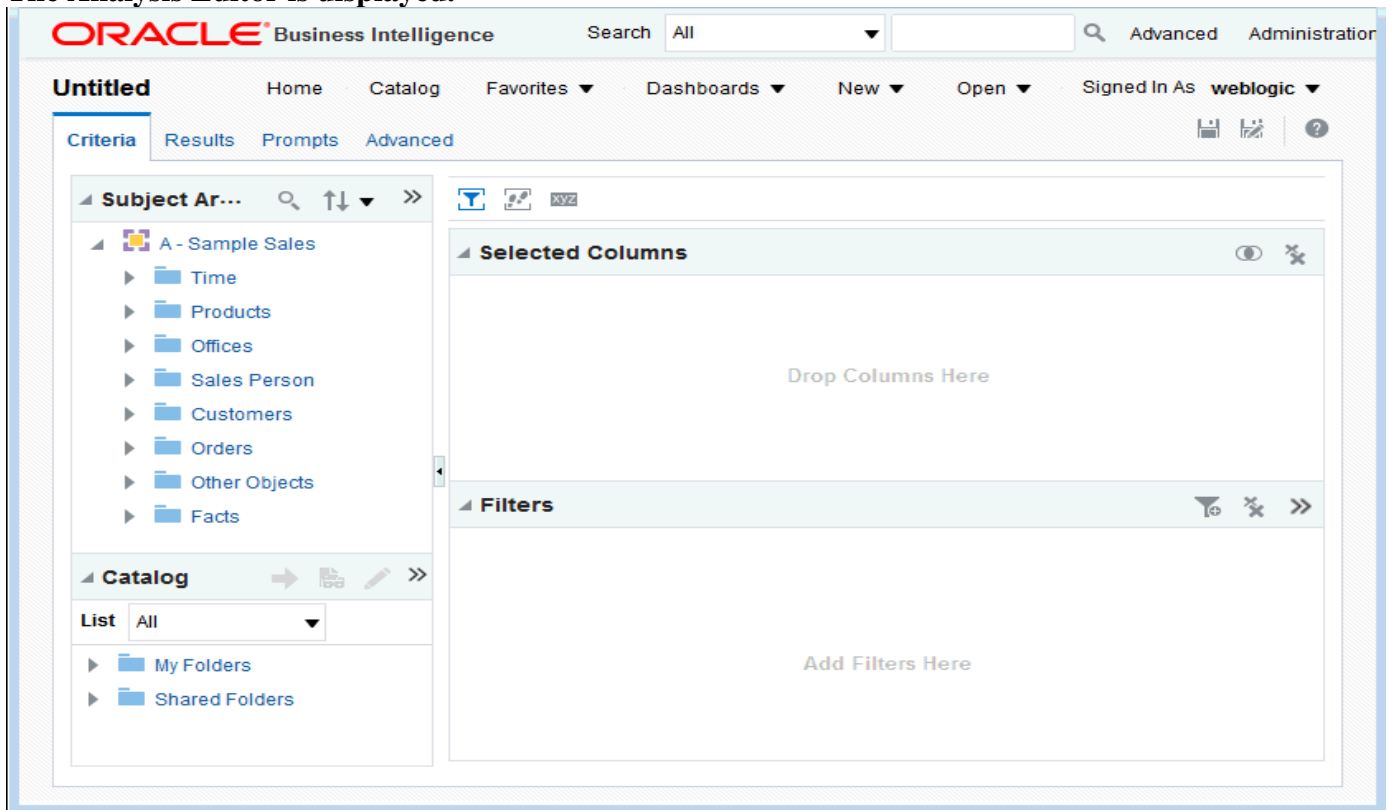
The Select Subject Area pop-up appears.

A subject area contains columns that represent information about the areas of an organization's business or about groups of users within an organization. When you create a new analysis, this subject area is known as the primary subject area and will appear in the Subject Areas pane of the Analysis Editor. If, as you work, you need more data, you can add additional subject areas if you have permission to access these additional subject areas.

2. In the Select Subject Area pop-up, select A - Sample Sales.



The Analysis Editor is displayed.



The Analysis Editor is composed of tabs and panes, as shown in the screen shot, representing the subject area (columns), available catalog objects, selected columns for the analysis, and filters (which limit the selected data).

A subject area contains folders, measure columns, attribute columns, hierarchical columns, and hierarchy levels that represent information about the areas of an organization's business or about groups of users with an organization. Subject areas usually have names that correspond to the types of information that they contain, such as Period, Regions, Products, Orders, and so on.

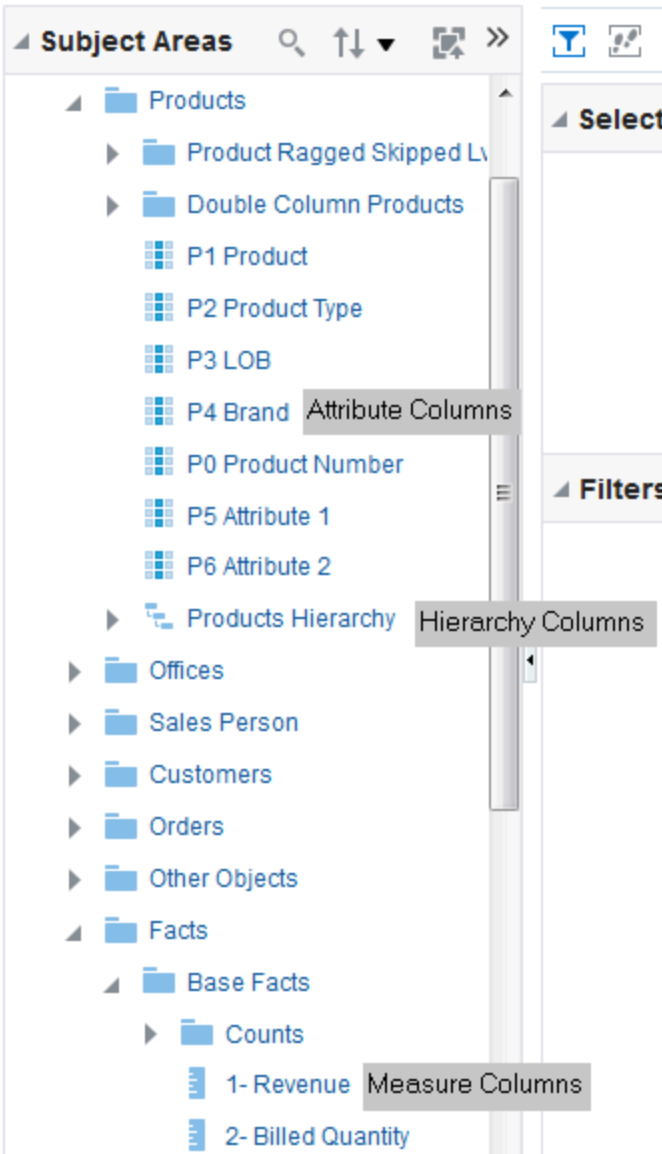
In this example:

- The selected subject area is **A - Sample Sales**
- The four tabs - **Criteria, Results, Prompts** and **Advanced** are displayed at the top of the Editor
- Selected columns pane is empty as you are yet to choose the columns
- Filters is empty as well waiting for the column selections and further criteria

There are various column types in a subject area. They are:

Attribute Column	Is similar to a column in a table in a relational data source. Holds a simple list of members, which function as attributes, similar to a dimension. Examples include Product ID or City.	
Hierarchy Column	Is similar to a hierarchy of a dimension in a multidimensional data source. Holds a list in which individual members are shown in an outline manner, with lower-level members rolling into higher-level members, and outline totals being shown for the higher-level members. For example, a specific day belongs to a particular month, which in turn is within a particular year.	
	Hierarchy columns can also be:	
	Level-based	Consists of one or more levels. For example, a Time hierarchy might have levels for Year, Quarter, and Month.
	Value-based	Consists of values that define the hierarchy, rather than levels. For example, an Employee hierarchy might have no levels, but instead have names of employees who are managed by other employees. Employees can have titles, such as Vice President. Vice Presidents might report to other Vice Presidents and different Vice Presidents can be at different depths in the hierarchy.
	Ragged	A hierarchy in which all the lower-level members do not have the same depth. For example, a Time hierarchy might have data for the current month at the day level, the previous month's data at the month level, and the previous 5 years' data at the quarter level. This is also known as an unbalanced hierarchy.
	Skip-level	A hierarchy in which certain members do not have values for certain higher levels. For example, in the United States, the city of Washington in the District of Columbia does not belong to a state. The expectation is that users can still navigate from the country level (United States) to Washington and below without the need for a state.
Measure Column	Is similar to a column of data in a table in a relational data source. Holds a simple list of data values. It is a column in an Oracle BI Enterprise Edition repository, usually in a fact table, that can change for each record and can be added up or aggregated in some way. Examples include Revenue or Units Sold.	

The screen shot shows folders and columns.



3. To select columns, expand the folders and double click the required column names to get them in the Selected Columns section. Select the following columns for your analysis.

Folder	Columns
Customers > Cust Regions	C50 Region
Products	P1 Product
Fact > Base Facts	1 - Revenue

The selected columns are displayed in the Selected Columns section. Your analysis criteria should look like this:

Subject Areas

Customer Age

Cust Segments Hier

Cust Type Hier

Cust Region Hier

Orders

Other Objects

Facts

Base Facts

Counts

1- Revenue

2- Billed Quantity

3- Discount Amount

4- Paid Amount

5- Target Revenue

Selected Columns

Cust Regions

Products

Base Facts

C50 Region

P1 Product

1- Revenue

Filters

Note: In the Selected Columns section, you can reorder the columns in your analysis by clicking and dragging them.

4. Click the Results tab. The default Compound Layout is displayed.

Subject Areas

A - Sample Sales

Time

Products

Offices

Sales Person

Customers

Orders

Other Objects

Facts

Catalog

Views

Compound Layout

Title

Table

C50 Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988
	CompCell RX3	839,407
	Game Station	1,054,701
	HomeCoach 2000	689,154
	Install	187,315
	KeyMax S-Phone	906,918
	LCD 36X Standard	1,364,184
	LCD HD Television	523,207
	MP3 Speakers System	376,816
	MPEG4 Camcorder	1,340,402
	Maintenance	210,047
	MaxiFun 2000	821,081
	MicroPod 60Gb	1,828,738

The Compound Layout is a composition of many views. By default, both a Title and Table view are defined for you when using attribute and measure columns. A Pivot Table view is automatically created when using hierarchical columns in your analysis.

The Title view allows you to add a title (the default), a subtitle, a logo, a link to a custom online help page, and timestamps to the results. The Table view displays results in a standard table. You can navigate and drill down in the data. You can add totals, customize headings, and change the formula or aggregation rule for a column. You can also swap columns, control the appearance of a column and its contents, and specify formatting to apply only if the contents of the column meet certain conditions.

Note: In the Compound Layout, you can create different views of the analysis results such as graphs, tickers, and pivot tables. These are covered in this tutorial going forward.

Filtering, Sorting, and Saving Your Analysis

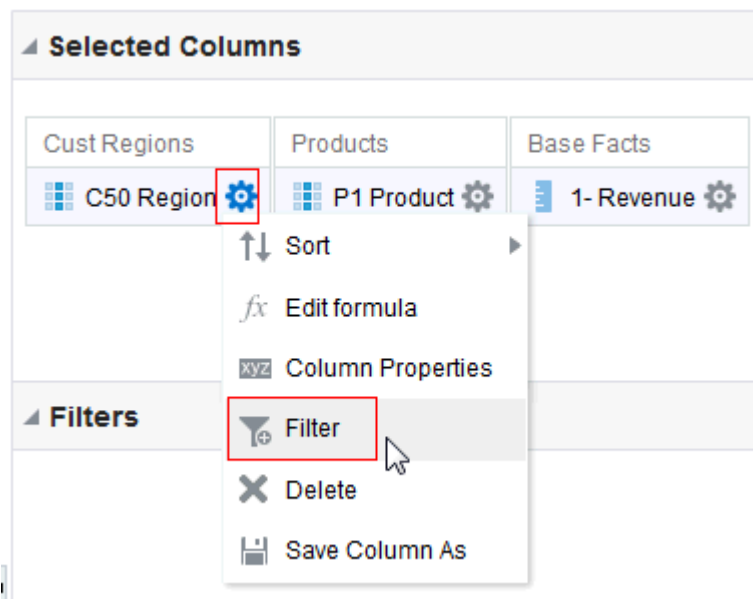
This topic demonstrates how to filter, sort, and save the analysis you have created above.

You will add a filter to the analysis and then save the filter. Filters allow you to limit the amount of data displayed in the analysis and are applied before the analysis is aggregated. Filters affect the analysis and thus the resulting values for measures. Filters can be applied directly to attribute columns and measure columns.

A filter created and stored at the analysis level is called an inline filter because the filter is embedded in the analysis and is not stored as an object in the Presentation Catalog (Catalog). Therefore, an inline filter cannot be reused by other analysis or dashboards. If you save the filter however, it can be reused and is known as a named filter. (Named filters can also be created from the global header.)

Perform the following steps to filter, sort and save the previously created analysis.

1. **Click the Criteria tab. In the Selected Columns area for C50 Region, click the More icon, and select Filter.**



2. Accept the default value for the operator, that is is equal to / is in, and enter a column value (or a range of column values) for this condition. To do this, click the drop-down list for Value, and click the desired check boxes. Select Americas and EMEA.

New Filter

Column

C50 Region

fx

Operator

is equal to / is in

Value

☒ AMERICAS

☐ APAC

☒ EMEA

Search...|Limited Values|All Values

☐ Protect F

☐ Convert t

OK

Cancel

3. Click OK. The Filters pane displays the newly created filter.

Selected Columns

Cust Regions

Products

Base Facts

C50 Region

P1 Product

1- Revenue

Filters

C50 Region is equal to / is in AMERICAS; EMEA

4. Save this filter. Click the More Options icon in the filters pane and select Save Filters.

Selected Columns

Cust Regions

Products

Base Facts

C50 Region

P1 Product

1- Revenue

Filters

C50 Region is equal to / is in AMERICAS

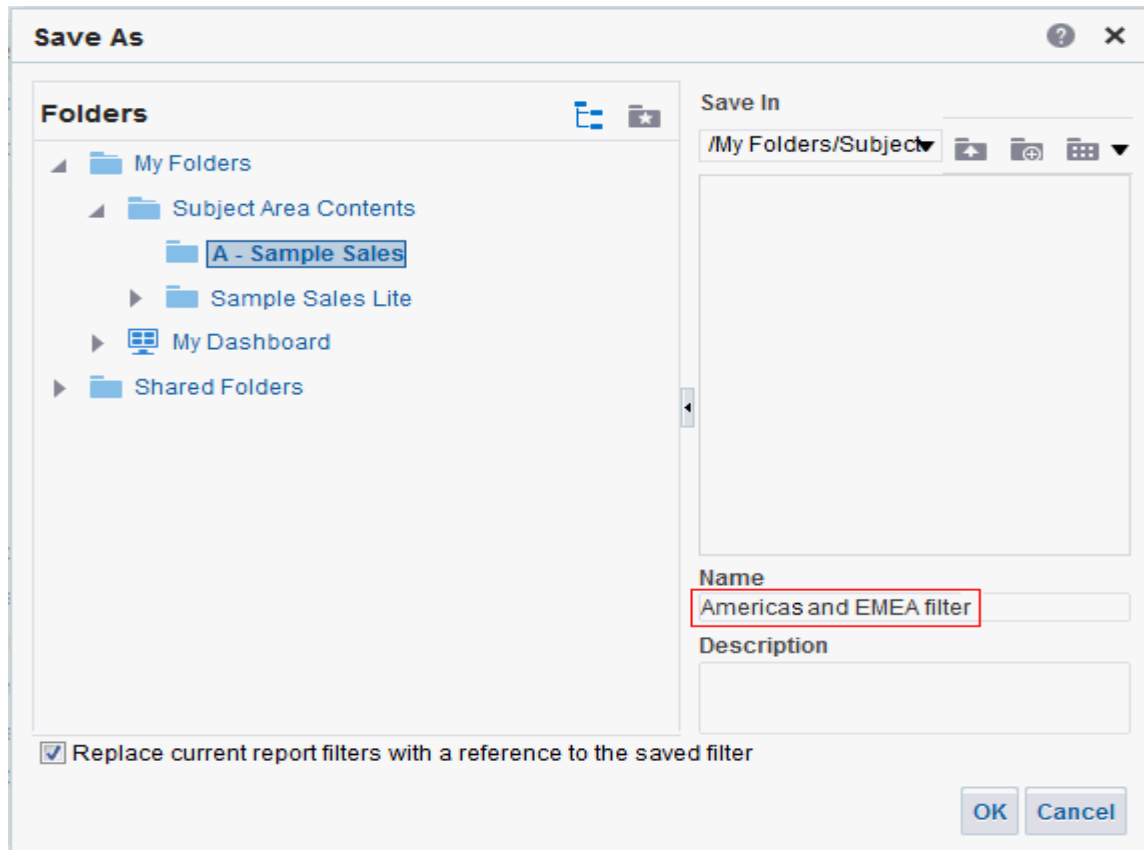
Save Filters

Add EVALUATE_PREDICATE Function

The Save As dialog box appears. A filter must be saved to a subject area folder so that it is available when you create an analysis using the same subject area.

5. **Navigate to the Subject Area Contents folder under the My Folders and select the A - Sample Salesfolder. Name the filter Americas and EMEA filter and accept the default location. If a Confirm Save Location dialog box appears, accept the default. Oracle BI EE allows you to save any type of business intelligence object to any location within the Catalog. However, for some object types such as filters, Oracle BI EE suggests the best Catalog location.**

The Save As dialog box should look like this:



6. **Click OK.**

The Filters pane should look like this:

Selected Columns

Cust Regions	Products	Base Facts
<div>C50 Region</div>	<div>P1 Product</div>	<div>1- Revenue</div>

Filters

Americas and EMEA filter

Next, you save the analysis so that you can verify the creation of your named filter within the Catalog.

- Click the Save icon to save your analysis. First you create a folder named Regional Revenue. In the Save As dialog box, navigate to My Folders and click the New Folder icon .

Save As

Folders

My Folders

Subject Area Conte

A - Sample Sale

Sample Sales Li

My Dashboard

Selections

Shared Folders

Save In

/My Folders

My Dashboard

Selections

Subject Area Contents

Mashup data - ks

Name

Untitled

Description

OK

Cancel

- In the Name field, enter Regional Revenue and click OK. Click Cancel to exit Save As dialog box.

New Folder

?

×

Name

OK

Cancel

9. Click the Save icon. Verify that the Regional Revenue folder is selected. In the Name text box, enter Regional Revenue and click OK.

The analysis is saved to the catalog folder Regional Revenue.

10. Click Home in the global navigation bar. In the Recent area, click the More link for the Regional Revenue analysis, and select Add to Favorites.

Others

Regional Revenue

Open

Edit

More

Print

Export

Add to Briefing Book

Schedule

Add to Favorites

Archive

Properties

Permissions

Most Popular

No recommendations become available

The analysis is added to the Favorites list and a Favorites icon displays next to the analysis name.

11. Click the Edit link for the Regional Revenue analysis.

Create...

Data Exploration & Discovery

Visual Analyzer Projects

Analysis and Interactive Reporting

Analysis Dashboard More

Mobile Application

Mobile App

Recent

Dashboards

QuickStart - Sales Summary

Open Edit More

Others

Avg Order Size

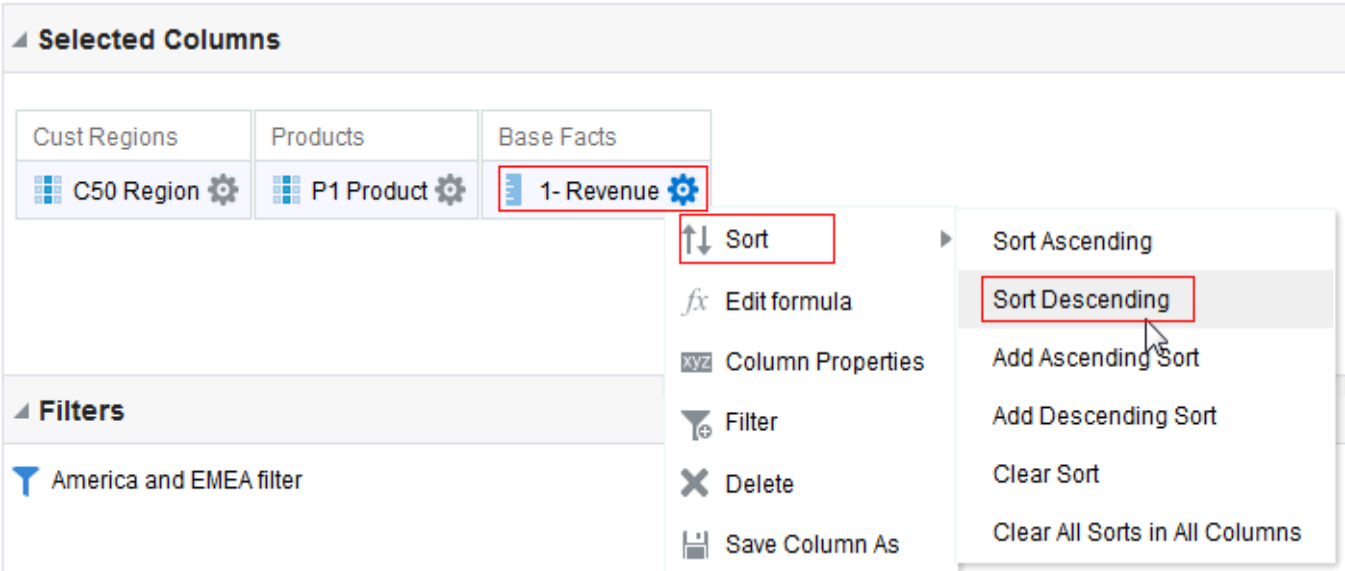
Open Edit More

Regional Revenue

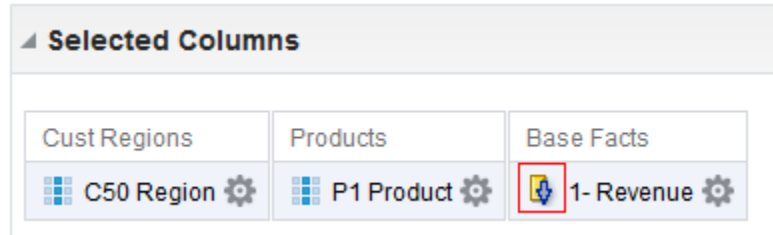
Open Edit More

The analysis is added to the Favorites list and a Favorites icon displays next to the analysis name.

12. To add a sort to this analysis, click the Criteria tab, click the More Options icon for 1- Revenue, and then select Sort > Sort Descending.



Observe that a sort icon is added to 1- Revenue. The order of the sort is indicated by an arrow; in this case, the arrows points down, indicating that it is descending. Additionally, if multiple sorts are added, a subscript number will also appear, indicating the sequence for the sort order.



13. Save your analysis again.
14. Click the Results tab to verify the filter and sort are being applied to your analysis. The Compound Layout display the filtered and sorted analysis.

Criteria
Results
Prompts
Advanced

Subject Ar...

A - Sample Sales

Time
Products
Offices
Sales Person
Customers
Orders
Other Objects
Facts

Catalog

List
All

My Folders
Shared Folders

Views

Title
Regional Revenue

Table

C50 Region	P1 Product	1- Revenue
EMEA	MicroPod 60Gb	1,834,881
AMERICAS	MicroPod 60Gb	1,828,738
EMEA	MPEG4 Camcorder	1,566,529
EMEA	Tungsten E Plasma TV	1,556,560
EMEA	LCD 36X Standard	1,516,738
EMEA	V5x Flip Phone	1,500,550
EMEA	7 Megapixel Digital Camera	1,412,995
AMERICAS	Tungsten E Plasma TV	1,374,338
AMERICAS	LCD 36X Standard	1,364,184
AMERICAS	MPEG4 Camcorder	1,340,402
AMERICAS	7 Megapixel Digital Camera	1,293,069
AMERICAS	V5x Flip Phone	1,276,820
EMEA	PocketFun ES	1,134,895
AMERICAS	PocketFun ES	1,118,700

This concludes the topic of saving an analysis and sorting it.

Creating Selection Steps for Your Analysis

This topic covers how to add selection steps to an analysis. Both filters and selection steps allow you to limit the data displayed in your analysis. Unlike filters that are applied before the analysis is aggregated, selection steps are applied after the analysis is aggregated. Selection steps only affect the members displayed, not the resulting aggregate values. For example, the outline total for the top level of a hierarchy is not affected if some members of the hierarchy are excluded from the selection. Selection steps are per column and cannot cross columns. While measure columns appear in the Selection Steps pane, you cannot create selection steps for them. Note that however, the grand totals and column totals are affected by selections. You can create selection steps for both attribute columns and hierarchical columns.

You will add a selection step for products.

- Criteria** **Results** Prompts Advanced

Subject Area

 - A - Sample Sales
 - Time
 - Products
 - Offices
 - Sales Person
 - Customers
 - Orders
 - Other Objects
 - Facts

Catalog

List: All

 - My Folders
 - Shared Folders

Views

Compound Layout

Regional Revenue		
C50 Region	P1 Product	1- Revenue
EMEA	MicroPod 60Gb	1,834,881
AMERICAS	MicroPod 60Gb	1,828,738
EMEA	MPEG4 Camcorder	1,566,529
EMEA	Tungsten E Plasma TV	1,556,560
EMEA	LCD 36X Standard	1,516,738
EMEA	V5x Flip Phone	1,500,550
EMEA	7 Megapixel Digital Camera	1,412,995
AMERICAS	Tungsten E Plasma TV	1,374,338
AMERICAS	LCD 36X Standard	1,364,184
AMERICAS	MPEG4 Camcorder	1,340,402
AMERICAS	7 Megapixel Digital Camera	1,293,069
AMERICAS	V5x Flip Phone	1,276,820
EMEA	PocketFun ES	1,134,895
AMERICAS	PocketFun ES	1,118,700

Add to Briefing Book

Selection Steps

The Selection Steps pane opens.

Compound Layout

Title

Regional Revenue

Table

C50 Region	P1 Product	1- Revenue
EMEA	MicroPod 60Gb	1,834,881
AMERICAS	MicroPod 60Gb	1,828,738
EMEA	MPEG4 Camcorder	1,566,529
EMEA	Tungsten E Plasma TV	1,556,560
EMEA	LCD 36X Standard	1,516,738

Selection Steps

List: ALL

Measures

Base Facts - 1- Revenue

Cust Regions - C50 Region

1. Start with all members

2. Then, New Step...

Products - P1 Product

1. Start with all members

2. Then, New Step...

- Under Products - P1 Product, hover over 1. Start with all members, and click the pencil icon.

Selection Steps

List: ALL

Measures

Base Facts - 1- Revenue

Cust Regions - C50 Region

1. Start with all members

2. Then, New Step...

Products - P1 Product

1. Start with all members

2. Then, New Step...

The Edit Member Step dialog box appears with the list of available products.

Edit Member Step ? x

Action: Start with selected members ▼

Available 🔍

Name: Starts ▼

☒ Match Case

▲ **Products.P1 Product**

- 7 Megapixel Digital Camera
- Bluetooth Adaptor
- CompCell RX3
- Game Station
- HomeCoach 2000
- Install
- KeyMax S-Phone
- LCD 36X Standard

> >> < <<

Selected

☐ Override with

You will use the shuttle icons to move column members between the Available and the Selected columns.



3. Click the Move All shuttle icon to move all members from Available to Selected pane.

Edit Member Step

Action: Start with selected members ▼

Available

Name: Starts ▼

☒ Match Case

Products.P1 Product

- ✓ 7 Megapixel Digital Camera
- ✓ Bluetooth Adaptor
- ✓ CompCell RX3
- ✓ Game Station
- ✓ HomeCoach 2000
- ✓ Install
- ✓ KeyMax S-Phone
- ✓ LCD 36X Standard

Selected

- 7 Megapixel Digital Camera
- Bluetooth Adaptor
- CompCell RX3
- Game Station
- HomeCoach 2000
- Install
- KeyMax S-Phone
- LCD 36X Standard
- LCD HD Television
- MP3 Speakers System
- MPEG4 Camcorder
- Maintenance

4. In the Selected column, select Install and Maintenance and click the Remove icon to return these two members to the Available column. You can use Ctrl-click to select multiple members in the list.

Edit Member Step

ActionStart with selected members▼

Available

NameStarts▼
SearchMatch Case

Products.P1 Product

- ✓ 7 Megapixel Digital Camera
- ✓ Bluetooth Adaptor
- ✓ CompCell RX3
- ✓ Game Station
- ✓ HomeCoach 2000
- ✓ Install
- ✓ KeyMax S-Phone
- ✓ LCD 36X Standard

>><<

Selected

- CompCell RX3
- Game Station
- HomeCoach 2000
- Install
- KeyMax S-Phone
- LCD 36X Standard
- LCD HD Television
- MP3 Speakers System
- MPEG4 Camcorder
- Maintenance
- MaxiFun 2000
- MicroPod 60Gb

☐ Override with Prompt

OKCancel

5. Click OK.

The Selection Steps pane appears with the new values added. Observe that you can also save the Selection Steps as an object in the Catalog by clicking the Save icon.

Selection Steps

List: ALL

Measures

Base Facts - 1- Revenue

Cust Regions - C50 Region

1. Start with all members

2. Then, New Step...

Products - P1 Product

1. Start with 7 Megapixel Digital Camera; Bluetooth Adaptor; CompCell RX3; Game St...

2. Then, New Step...

6. Click the Selection Steps pane again to minimize the Selection Steps pane

Selection Steps

List: ALL

Measures

Base Facts - 1- Revenue

Cust Regions - C50 Region

1. Start with all members

2. Then, New Step...

Products - P1 Product

1. Start with 7 Megapixel Digital Camera; Bluetooth Adaptor; CompCell RX3; Game St...

2. Then, New Step...

7. Verify your results by reviewing your analysis in the Table view of the Results tab. Install and Maintenance should not be list in the product list.

Compound Layout

Title

Regional Revenue

Table

xyz

C50 Region	P1 Product	1- Revenue
EMEA	MicroPod 60Gb	1,834,881
AMERICAS	MicroPod 60Gb	1,828,738
EMEA	MPEG4 Camcorder	1,566,529
EMEA	Tungsten E Plasma TV	1,556,560
EMEA	LCD 36X Standard	1,516,738
EMEA	V5x Flip Phone	1,500,550
EMEA	7 Megapixel Digital Camera	1,412,995
AMERICAS	Tungsten E Plasma TV	1,374,338
AMERICAS	LCD 36X Standard	1,364,184
AMERICAS	MPEG4 Camcorder	1,340,402
AMERICAS	7 Megapixel Digital Camera	1,293,069
AMERICAS	V5x Flip Phone	1,276,820
EMEA	PocketFun ES	1,134,895
AMERICAS	PocketFun ES	1,118,700

Adding Totals to Your Analysis

- 1. Click the Edit View icon in the Table view.

Compound Layout

Title

A

X

Regional Revenue

Table

A

xyz

X

C50 Region	P1 Product	1 - Revenue
EMEA	MicroPod 60Gb	1,834,881
AMERICAS	MicroPod 60Gb	1,828,738
EMEA	MPEG4 Camcorder	1,566,529
EMEA	Tungsten E Plasma TV	1,556,560
EMEA	LCD 36X Standard	1,516,738
EMEA	V5x Flip Phone	1,500,550
EMEA	7 Megapixel Digital Camera	1,412,995
AMERICAS	Tungsten E Plasma TV	1,374,338
AMERICAS	LCD 36X Standard	1,364,184
AMERICAS	MPEG4 Camcorder	1,340,402
AMERICAS	7 Megapixel Digital Camera	1,293,069
AMERICAS	V5x Flip Phone	1,276,820
EMEA	PocketFun ES	1,134,895
AMERICAS	PocketFun ES	1,118,700

The Table Editor appears.

C50 Region	P1 Product	1- Revenue
EMEA	MicroPod 60Gb	1,834,881
AMERICAS	MicroPod 60Gb	1,828,738
EMEA	MPEG4 Camcorder	1,566,529
EMEA	Tungsten E Plasma TV	1,556,560
EMEA	LCD 36X Standard	1,516,738
EMEA	V5x Flip Phone	1,500,550
EMEA	7 Megapixel Digital Camera	1,412,995

Layout

Drag/drop measures, columns and hierarchies to determine table layout.

Table Prompts Σ xyz

Drop here for Table prompts

Sections Σ xyz

Drop here for a sectioned Table

Table xyz

Columns and Measures Σ xyz

Cust Regions	Products	Base Facts
C50 Region Σ	P1 Product Σ	1- Revenue Σ

- To add a grand total to the analysis, click the Total icon to the right of Columns and Measures in the Layout pane of the Table editor. Select After from the drop-down list.

Layout

Drag/drop measures, columns and hierarchies to determine table layout.

Table Prompts Σ xyz

Drop here for Table prompts

Sections Σ xyz

Drop here for a sectioned Table

Table xyz

Columns and Measures Σ xyz

Cust Regions	Products	Base Facts
C50 Region Σ	P1 Product Σ	1- Revenue Σ

Σ

- None
- After
- Format Labels...
- Format Values...

- Review the results in the Preview pane, and note that the Total icon in the Columns and Measures area now displays a green check mark, indicating that a grand total has been added to the analysis.

EMEA	Bluetooth Adaptor	617,591
EMEA	Plasma HD Television	528,391
AMERICAS	LCD HD Television	523,207
EMEA	LCD HD Television	501,511
AMERICAS	MP3 Speakers System	376,816
AMERICAS	Plasma HD Television	372,097
EMEA	MP3 Speakers System	365,710
Grand Total		36,332,925







Layout

Table xyz


Columns and Measures xyz		
Cust Regions	Products	Base Facts
 C50 Region  	 P1 Product  	 1- Revenue 

- Click Done.
- Before adding a total for Region, remove the sort from 1 - Revenue: Click the Criteria tab, click the More Options icon for 1- Revenue, and then select Sort > Clear Sort.

Selected Columns

Cust Regions	Products	Base Facts
 C50 Region 	 P1 Product 	 1- Revenue 

Filters


 C50 Region is equal to / is in AMERICAS; EMEA

- Sort
 - Sort Ascending
 - ☒ Sort Descending
 - Add Ascending Sort
 - Add Descending Sort
 - Clear Sort**
 - Clear All Sorts in All Columns
- Edit formula
- Column Properties
- Filter
- Delete
- Save Column As

- Click the Results tab and review the Table view to confirm that the sort has been removed from the analysis.

C50 Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988
	CompCell RX3	839,407
	Game Station	1,054,701
	HomeCoach 2000	689,154
	KeyMax S-Phone	906,918
	LCD 36X Standard	1,364,184
	LCD HD Television	523,207
	MP3 Speakers System	376,816
	MPEG4 Camcorder	1,340,402
	MaxiFun 2000	821,081
	MicroPod 60Gb	1,828,738
	Plasma HD Television	372,097
	PocketFun ES	1,118,700

Now you will add a total by region to your analysis.

7. Click the Edit View icon  in the Table view. The Table Editor appears.
8. In the Layout pane, click the Total icon for C50 Region, and select After.

Layout

Sections Σ xyz

Drop here for a section:

Table xyz

Columns and Measure

Cust Regions

C50 Region Σ

P1 Product Σ

1- Revenue Σ

Base Facts

Format Labels...

Format Values...

None

After

9. Review the results in the Preview pane, and note that the Total icon now displays a green check mark, indicating that a total has been added for that specific column/region.

C50 Region	P1 Product	1- Revenue
	Plasma HD Television	372,097
	PocketFun ES	1,118,700
	SoundX Nano 4Gb	876,679
	Touch-Screen T5	991,342
	Tungsten E Plasma TV	1,374,338
	V5x Flip Phone	1,276,820
AMERICAS Total		17,719,642

Layout

Sections

Drop here for a sectioned Table

Table

Columns and Measures

Cust Regions	Products	Base Facts
C50 Region	P1 Product	1- Revenue

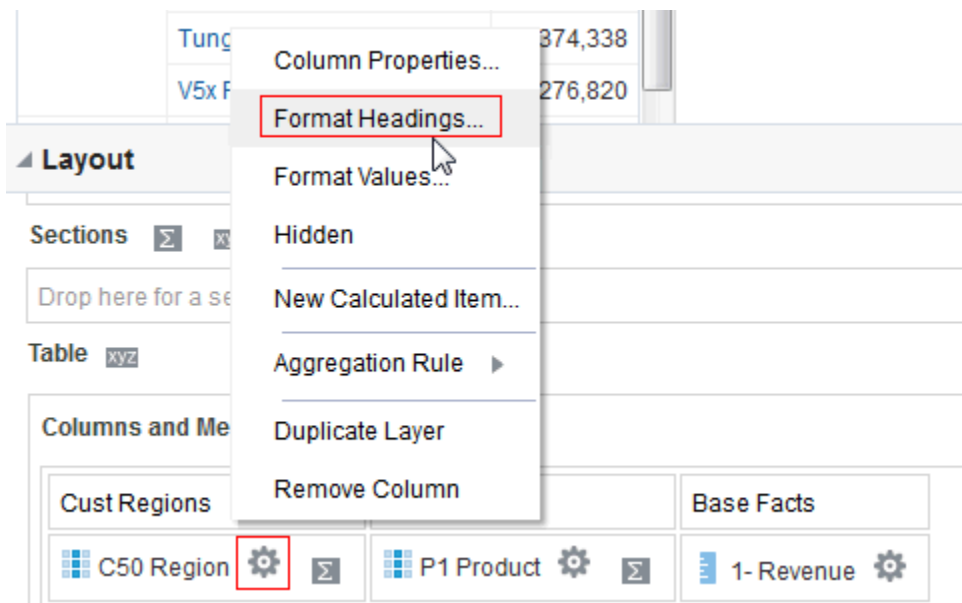
This concludes the section on adding totals to your analysis.

Adding Formatting to Your Analysis

After you create and run an analysis, default formatting rules are applied to the analysis' results. Default formatting rules are based on cascading style sheets and XML message files. You can create additional formatting to apply to specific results. Additional formats help you to highlight blocks of related information and call attention to specific data elements. You can also use additional formatting to customize the general appearance of analyses and dashboards.

You will apply formatting to the C50 Region column.

1. In the Layout pane, click the More options icon  for C50 Region and select **Format Headings**.



The Edit Format dialog box appears.

The 'Edit Format' dialog box is shown with the following sections and options:

- Caption:** A text input field.
- Font:**
 - Family: Default (System) (dropdown)
 - Size: (input field)
 - Color: (color picker)
 - Style: Default (System) (dropdown)
 - Effects: Default (System) (dropdown)
- Cell:**
 - Horizontal Alignment: Default (System) (dropdown)
 - Background Color: (color picker)
 - Vertical Alignment: Default (System) (dropdown)
 - ☒ Wrap Text
- Border:**
 - Position: Default (System) (dropdown)
 - Border Style: Default (System) (dropdown)
 - Border Color: (color picker)
- Additional Formatting Options** (expandable section)
- Custom CSS Style Options (HTML Only)** (expandable section)
- Buttons:** OK, Cancel

2. In the Caption text box, enter **Region**.

Caption Region

3. In the Font area, click the Color list, select a red color from the Color Selector dialog box, and click OK.

Font

Family Default (System) Size

Color

Cell

Horizontal Alignment

Vertical Alignment

Border

Position Default (System)

Additional

Color Selector

#FF0000

Clear

OK Cancel

4. In the Cell area, click the Background Color list, select a light blue color from the Color Selector dialog box, and click OK.

Cell

Horizontal Alignment Default (System)

Vertical Alignment Default (System)

Background Color

Wrap Text

Border

Position Default (System)

Border Style Default (System)

Border Color

Additional Formatting Options

Custom CSS Style Options (HTML Only)

Color Selector

#CCFFFF

Clear

OK Cancel


5. Click OK in the Edit Format dialog box to see the results of your format changes for C50 Region.

The Preview pane should look like this:

Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988
	CompCell RX3	839,407
	Game Station	1,054,701
	HomeCoach 2000	689,154
	KeyMax S-Phone	906,918
	LCD 36X Standard	1,364,184

Layout

6. Click the Table View Properties icon on the toolbar.



Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988
	CompCell RX3	839,407
	Game Station	1,054,701
	HomeCoach 2000	689,154
	KeyMax S-Phone	906,918
	LCD 36X Standard	1,364,184

The Table Properties dialog box appears.

7. Select the Enable alternate styling check box, and click OK.

Table Properties

?

×

Style

Data Viewing

☒ Fixed headers with scrolling content

☐ Content paging

Maximum Width

Pixels

Maximum Height

Pixels

Display Folder & Column Headings

Only column headings

▼

Null Values

☐ Include rows with only Null values

Row styling

☒ Enable alternate styling

Aa

Duplicate values

☐ Repeat in each row

Master-Detail

☐ Listen to Master-Detail Events

Event Channels

☐ Enable Write Back

Template Name

☒ Toggle Table Mode

Apply Button

Revert Button

Done Button

Button Position

Right

OK

Cancel

8. Click Done and then save your analysis.

Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988
	CompCell RX3	839,407
	Game Station	1,054,701
	HomeCoach 2000	689,154
	KeyMax S-Phone	906,918
	LCD 36X Standard	1,364,184
	LCD HD Television	523,207
	MP3 Speakers System	376,816
	MPEG4 Camcorder	1,340,402
	MaxiFun 2000	821,081
	MicroPod 60Gb	1,828,738
	Plasma HD Television	372,097
	PocketFun ES	1,118,700

-Adding a Graph to an Analysis-

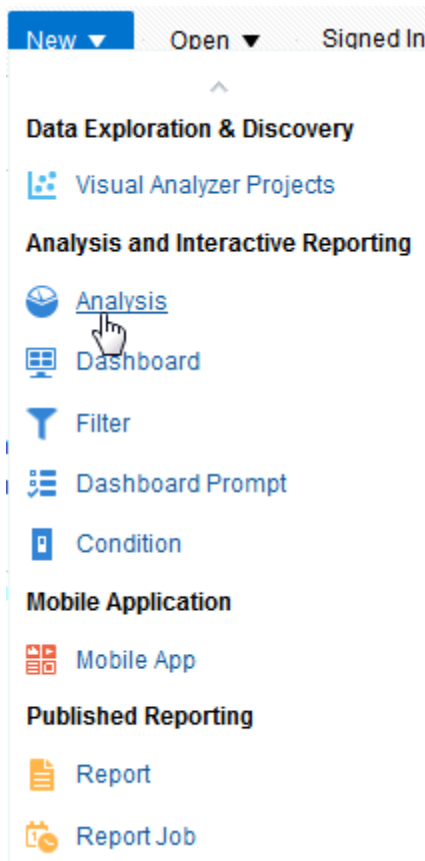
In this topic, you learn how to add a graph to an analysis, apply a saved filter, and format the graph.

1. Enhancing an Analysis by Adding a Graph
2. Formatting the Graph

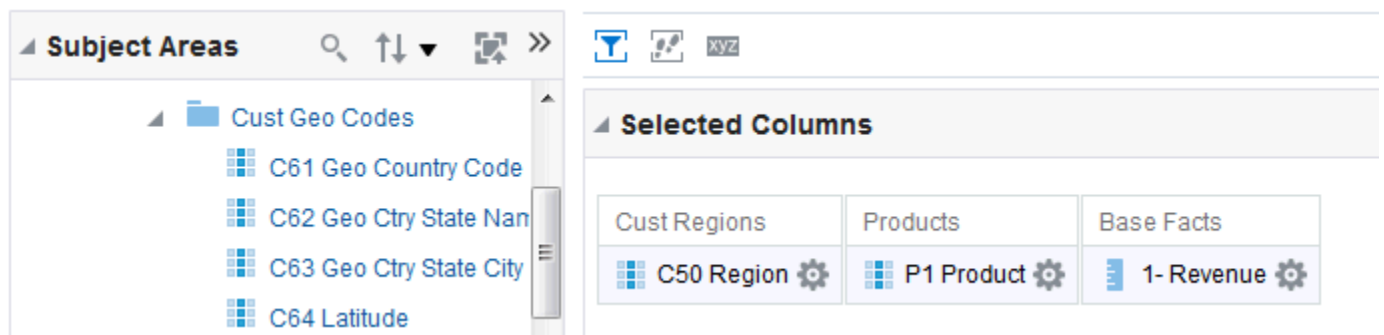
Enhancing an Analysis by Adding a Graph

In this topic, you create a new analysis to which you add a graph, and then apply the named filter created in the first topic.

1. Click New > Analysis on the global header. Use A - Sample Sales Subject Area.

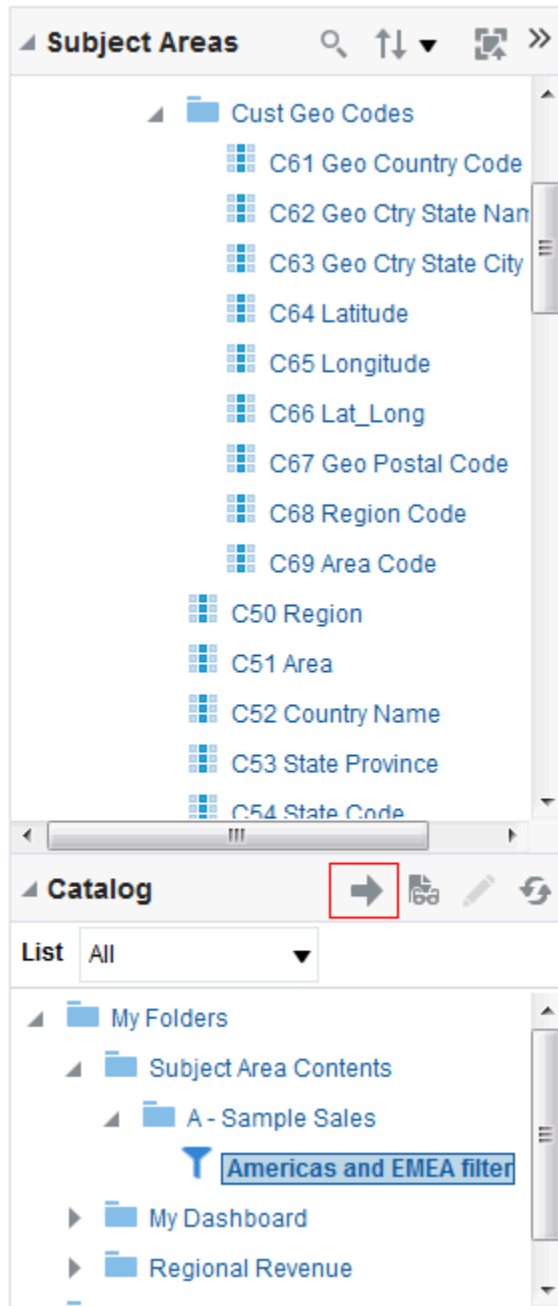


2. Add C50 Region from Cust Regions, P1 Product from Products, and 1 - Revenue from Base Facts to Selected Columns.



Next, you will add a named filter to limit the analysis to just Americas and EMEA data.

3. In the Catalog pane, navigate to locate your filter named Americas and EMEA filter. Select the filter and click the Add More Options icon.




4. In the Apply Saved Filter dialog box, select the Apply contents of filter instead of a reference to the filter check box. This option adds the filter as an inline filter, allowing you to make changes without changing the Catalog filter item. Note that if you do not select this check box, the filter is added as a named filter that you can view, but not edit.

Apply Saved Filter
? ×

Filter Location and Contents

Filter Location
/My Folders/Subject Area Contents/Americas and EMEA filter

Contents of Filter
 C50 Region is equal to / is in AMERICAS; EMEA







Filter Options
Choose one or more of the following options to control how the filter should be applied to the analysis.

☐ Clear all existing filters before applying
☒ Apply contents of filter instead of a reference to the filter


OK Cancel

5. Click OK. The filter is added to your analysis.

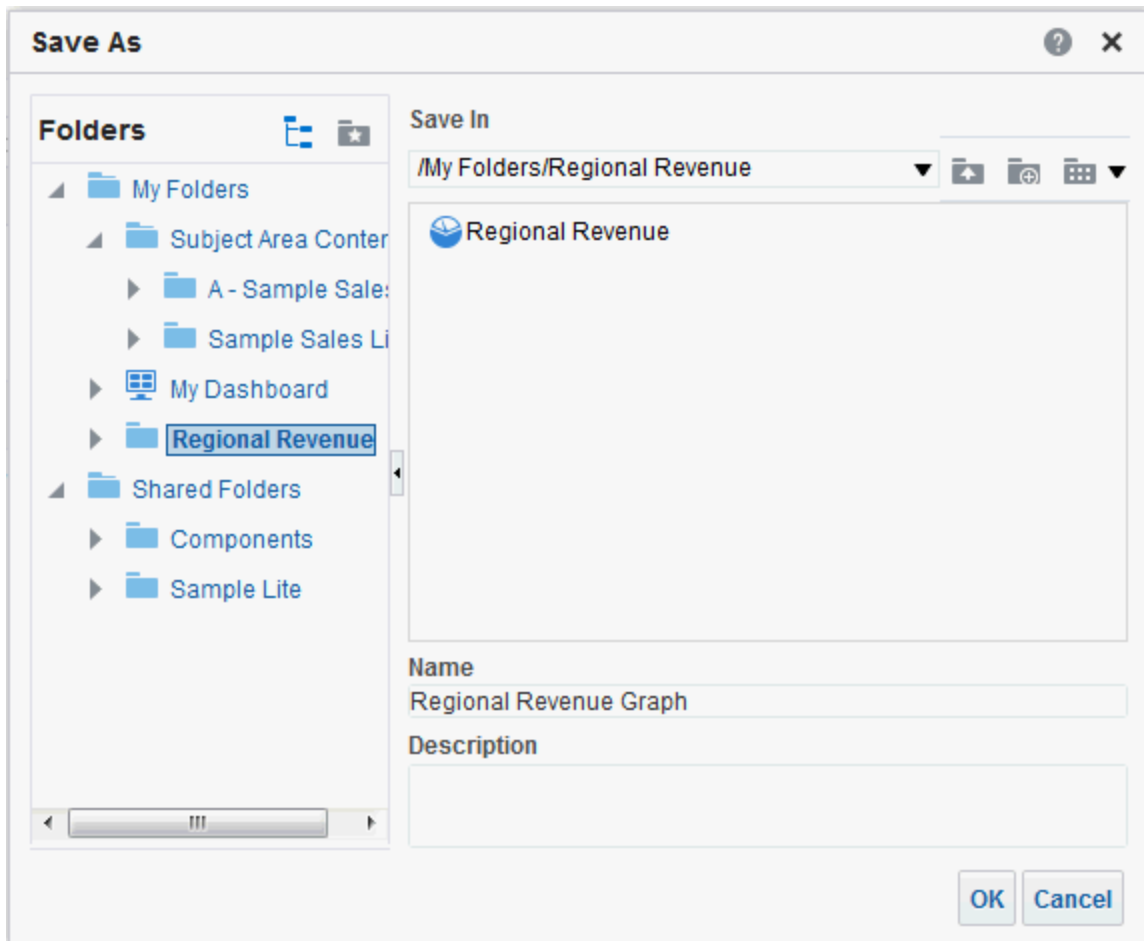
Selected Columns

Cust Regions	Products	Base Facts
 C50 Region 	 P1 Product 	 1- Revenue 

Filters

 C50 Region is equal to / is in AMERICAS; EMEA

6. Save the analysis to your Regional Revenue folder, entering Regional Revenue Graph as the analysis name.



You will add a graph to this analysis.

7. Click the **Results** tab, then click the **New View** icon, and select **Graph > Bar > Vertical** from the menu.

Compound Layout

Title
Regional Revenue Graph

Table

C50 Region	P1 Product
AMERICAS	7 Megapixel Digital Camera
	Bluetooth Adaptor
	CompCell RX3
	Game Station
	HomeCoach 2000
	Install
	KeyMax S-Phone
	LCD 36X Standard
	LCD HD Television
	MP3 Speakers System
	MPEG4 Camcorder
	Maintenance
	MaxiFun 2000

Best Visualization

Recommended Visualization for

Title

Table

Pivot Table

Performance Tile

Treemap

Heat Matrix

Trellis

Graph

Gauge

Funnel

Map

Filters

Selection Steps

Other Views

Bar

Line

Area

Pie

Line-Bar

Time Series Line

Pareto

Recommended Subtype

Vertical

Horizontal

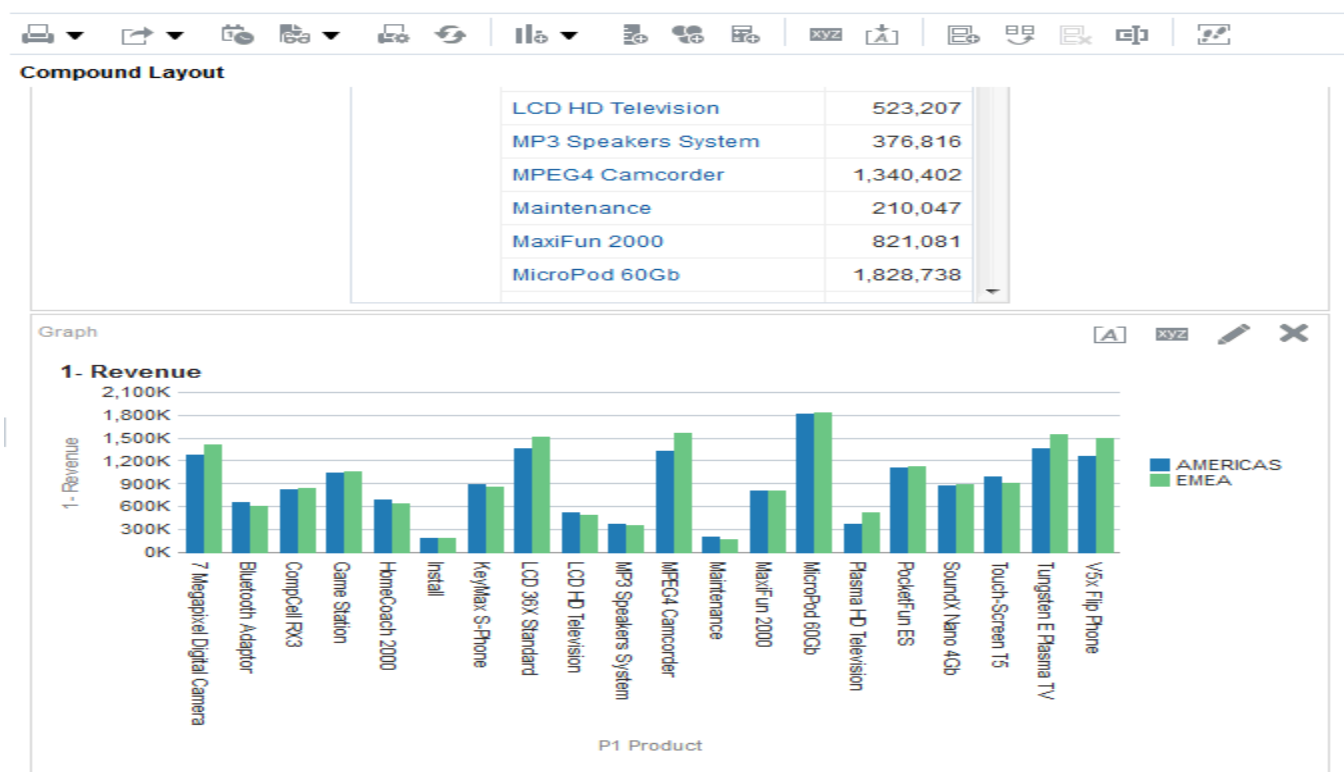
Stacked Vertical

Stacked Horizontal

100% Stacked Vertical

100% Stacked Horizontal

The default Graph view appears below the Table view.



8. Click the Remove View from Compound Layout icon for both Title and Table views.

C50 Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988
	CompCell RX3	839,407

Both views are removed from the Compound Layout. Note however, that they are still available for use from the Views pane.

Subject Areas

- A - Sample Sales
 - Time
 - Products
 - Offices
 - Sales Person
 - Customers
 - Orders
 - Other Objects
 - Facts

Catalog

List: All

- My Folders
 - Subject Area Contents
 - A - Sample Sales
 - My Dashboard
 - Regional Revenue

Views

- Title
- Table
- Graph

Compound Layout

Graph

P1 Product	AMERICAS	EMEA
7 Megapixel Digital Camera	1,200K	1,400K
Bluetooth Adaptor	600K	500K
ComCell RX3	800K	900K
Game Station	1,000K	1,100K
HomeCoach 2000	700K	600K
Install	200K	100K
KeyMax S-Phone	900K	800K
LCD 36X Standard	1,300K	1,500K
LCD HD Television	400K	500K
MP3 Speakers System	300K	300K
MPEG4 Camcorder	1,300K	1,500K
Maintenance	200K	100K
MaxiFun 2000	800K	800K
MicroPod 80Cb	1,800K	1,800K
Plasma HD Television	300K	400K
PocketFun ES	1,100K	1,100K
SoundX Nano 4Gb	900K	900K
Touch-Screen T5	1,000K	900K
Tungsten E Plasma TV	1,300K	1,500K
V6X Flip Phone	1,200K	1,400K

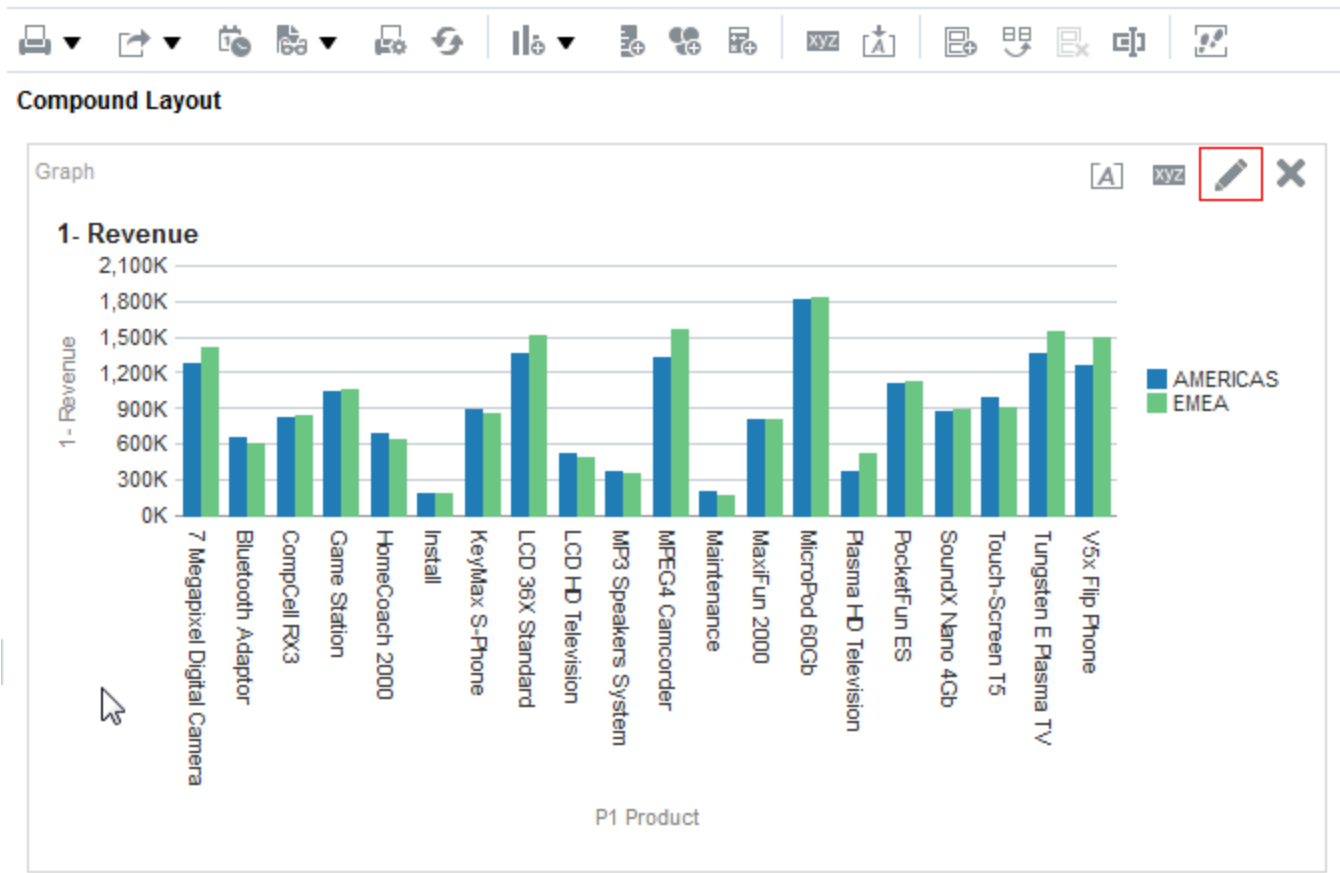
[Add to Briefing Book](#)

Selection Steps

9. Save the analysis.

Formatting the Graph

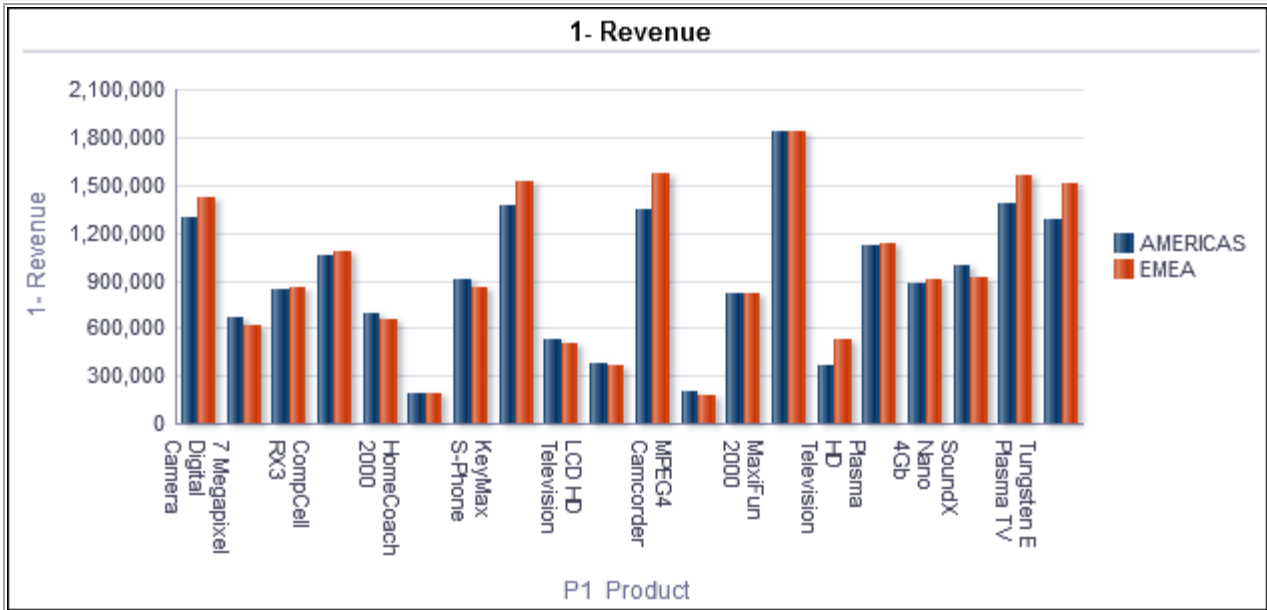
- Click the **Edit View** icon to begin your formatting changes. The Graph editor appears.



The Graph, like other view editors, is composed of three sections:

Toolbar	
	The toolbar allows you to change graph types and subtypes, print, preview, edit graph properties, and so on.

Preview pane



The preview pane is a dynamic view of the graph, allowing you to view the changes instantly.

Layout

Layout

Drag/drop measures, columns and hierarchies to determine graph layout

Graph Prompts

Drop here for graph prompts

Sections ☐ Display as Slider

Drop here for sectioned view

Bar Graph

Measures

Bars (Vertical Axis)

1- Revenue

Bars

Group By (Horizontal Axis)

P1 Product

Vary Color By (Horizontal Axis)

☒ Show In Legend

C50 Region

Measure Labels

Sample

1- Revenue

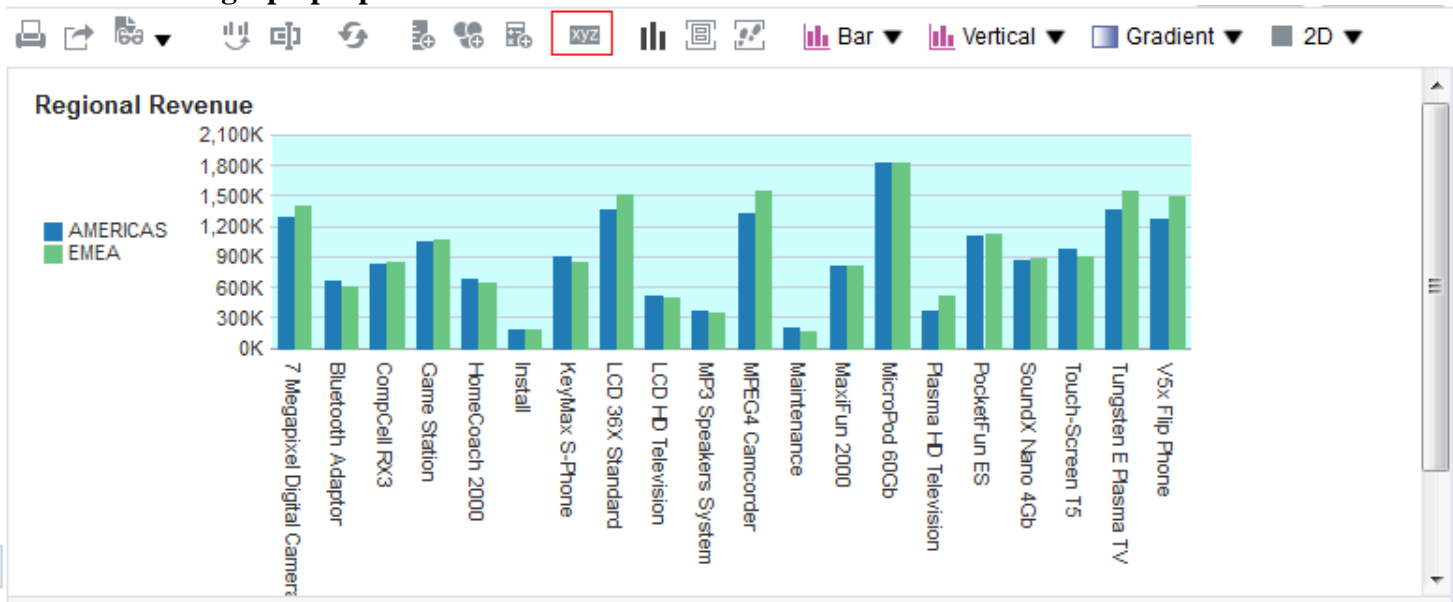
P1 Product

☐ Show Subject Area Folders

Excluded

The layout allows you to change the properties of prompts, sections, measures, and so on, and allows you to regroup columns for graph display.

- Click the **Edit graph properties** icon.



The Graph properties dialog box appears. The Graph properties dialog box is composed of four tabs: General, Style, Scale, and Titles and Labels. These tabbed pages allow you to do the following:

General	Set properties related to the graph canvas, such as canvas width, height, legend location, and so on.
Style	Set properties that control the appearance of the graph such as plot area and grid lines.
Scale	Set properties for parts of the graph, that is axis limits and tick marks.
Titles and Labels	Set properties that control the display of titles and labels for the graph.

- Select **Enable for Horizontal Axis** from the Zoom and Scroll area, and then select **Left** from the **Legend** list. When zooming and scrolling is enabled for a graph, then the graph includes a Zoom icon. The Zoom icon allows you to zoom in and out of a graph's plot area via its axes. Once you zoom in on an axis, you can scroll the axis.

When you zoom an axis, a zoom and scroll slider appears. The dialog box should look like this:

The screenshot shows the 'Graph properties' dialog box with the 'General' tab selected. The dialog has a title bar with a question mark and a close button. Inside, there are four tabs: 'General', 'Style', 'Scale', and 'Titles and Labels'. The 'General' tab contains the following settings:

- Canvas Width: 640 Pixels
- Canvas Height: 330 Pixels
- Legend: Left (dropdown menu)
- Zoom and Scroll: ☒ Enable for Horizontal Axis, ☐ Enable for Vertical Axis
- Master-Detail: ☐ Listen to Master-Detail Events
- Event Channels: (empty text box)
- Null Values: ☐ Include Null values
- Animation: ☒ Animate graph on Display

At the bottom right are 'OK' and 'Cancel' buttons.

Note: The "Animate graph on Display" check box specifies whether to show initial rendering effects and is selected by default. For example, the bars on a horizontal graph start at the x -axis and move up the scale on the x -axis to the current measurement level.

"Listen to Master-Detail Events" allows you to specify this analysis as a detail view in a master-detail relationship. You will use this option in a subsequent step when working with pivot tables

- Click the **Style** tab. In the Style list for Graph Data, select **Gradient**. In the **Background** list for Plot area, select a light blue color.

Graph properties ? x


General **Style** Scale Titles and Labels

Graph Data

Style Gradient ▼ [Style and Conditional Formatting](#)


☐ 3D

Plot Area


Background  ▼

Gridlines ☒ Default ☐ Specify


Major Grid ☐ Horizontal Lines ☐ Vertical Lines


Color  ▼

Minor Grid ☐ Horizontal Lines


Color  ▼


Legend

Background  ▼ ☒ Transparent

Border  ▼

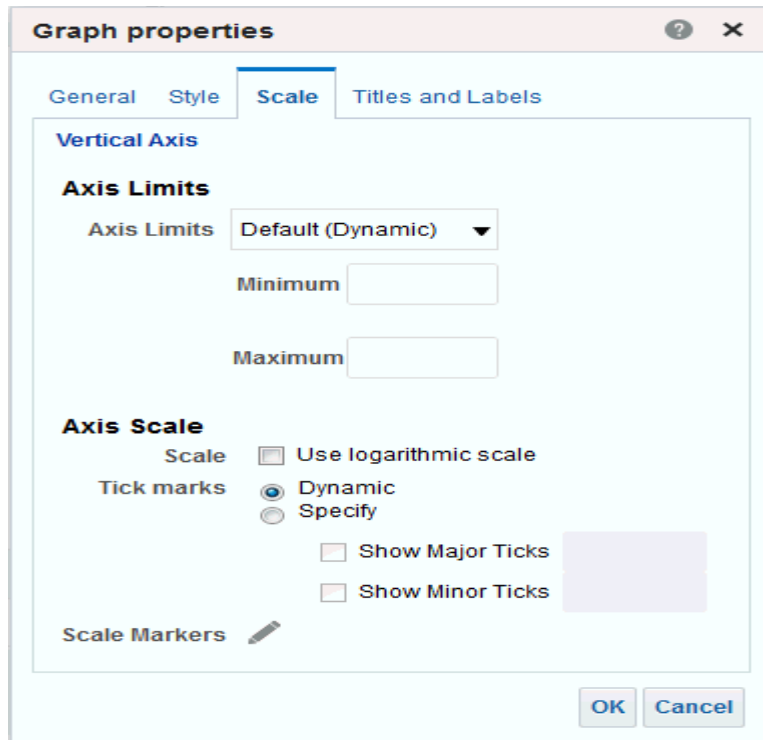
Canvas Colors and Borders

Background  ▼ ☒ Gradient

Border  ▼

OK Cancel

The Graph Data area allows you to choose a style for specific types of graphs. For example, you might choose pattern fill for to highlight differences on a line-bar graph or gradient for a bar graph to make the data values standout.



Graph properties

General Style **Scale** Titles and Labels

Vertical Axis

Axis Limits

Axis Limits Default (Dynamic) ▼

Minimum

Maximum

Axis Scale

Scale ☐ Use logarithmic scale

Tick marks ☒ Dynamic ☐ Specify

☐ Show Major Ticks

☐ Show Minor Ticks

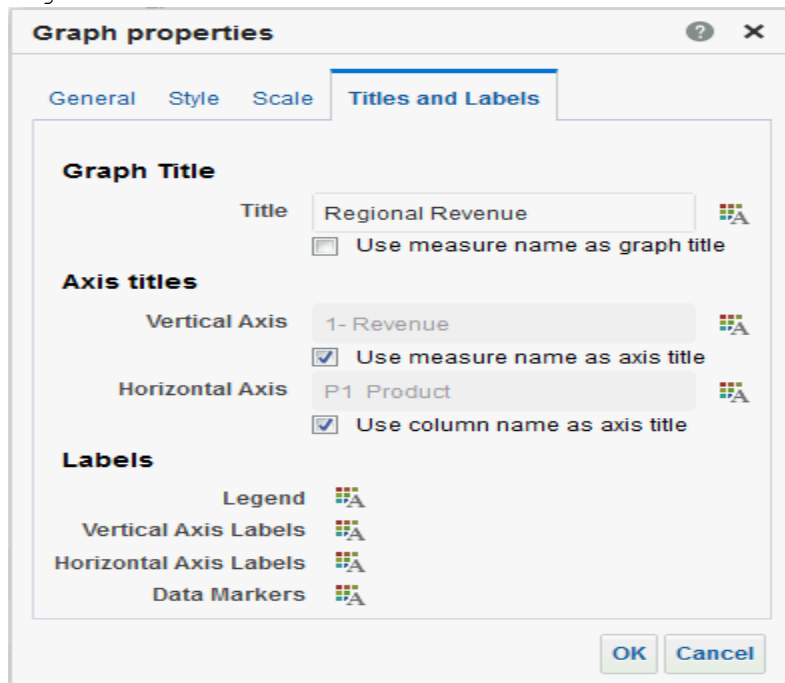
Scale Markers

OK Cancel

- Click the **Scale** tab.

Specifically setting axis limits and tick marks allows you to control what you see on your graph. If you override the system default for tick marks, the colors that you have selected for horizontal and vertical grid lines on the General properties tabbed page will be applied to both major and minor ticks.

- Click the **Titles and Labels** tab. Deselect the check box for **Use measure name as graph title** and enter **Regional Revenue** in the Title text box. Deselect the check box for **Vertical Axis Title**.



Graph properties

General Style Scale **Titles and Labels**

Graph Title

Title Regional Revenue

☐ Use measure name as graph title

Axis titles

Vertical Axis 1- Revenue

☒ Use measure name as axis title

Horizontal Axis P1 Product

☒ Use column name as axis title

Labels

Legend

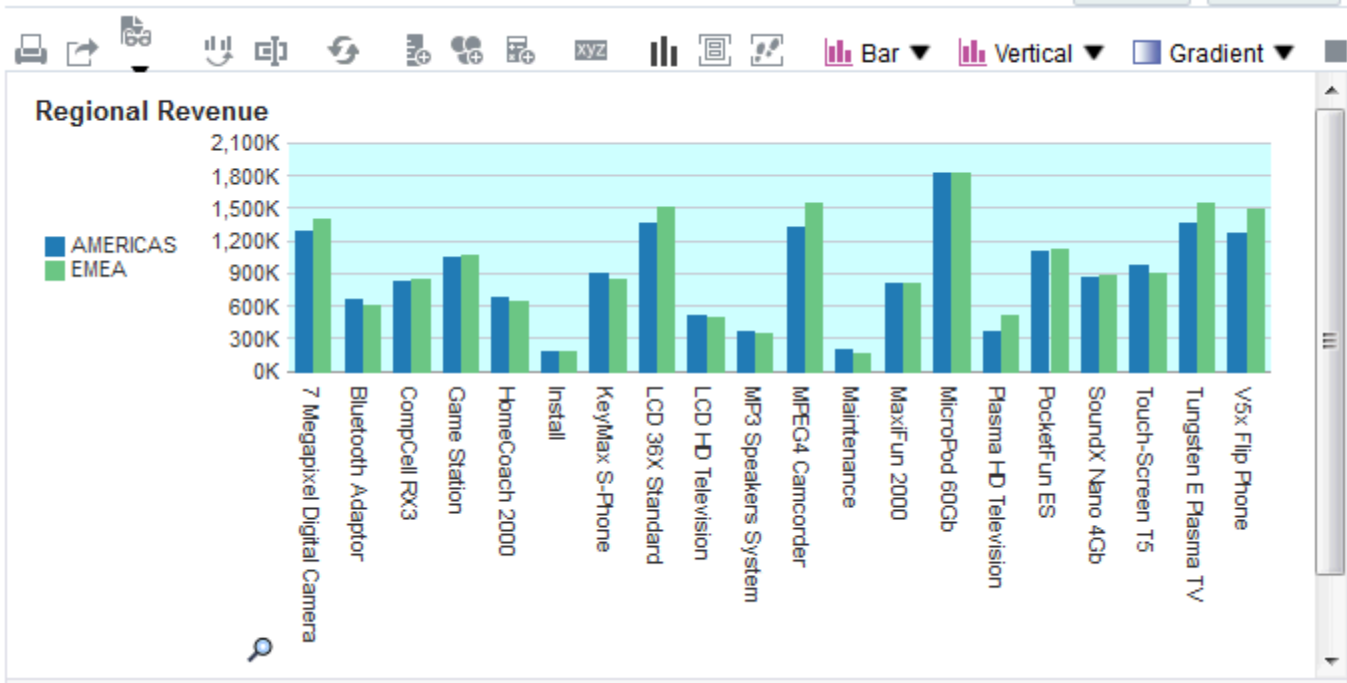
Vertical Axis Labels

Horizontal Axis Labels

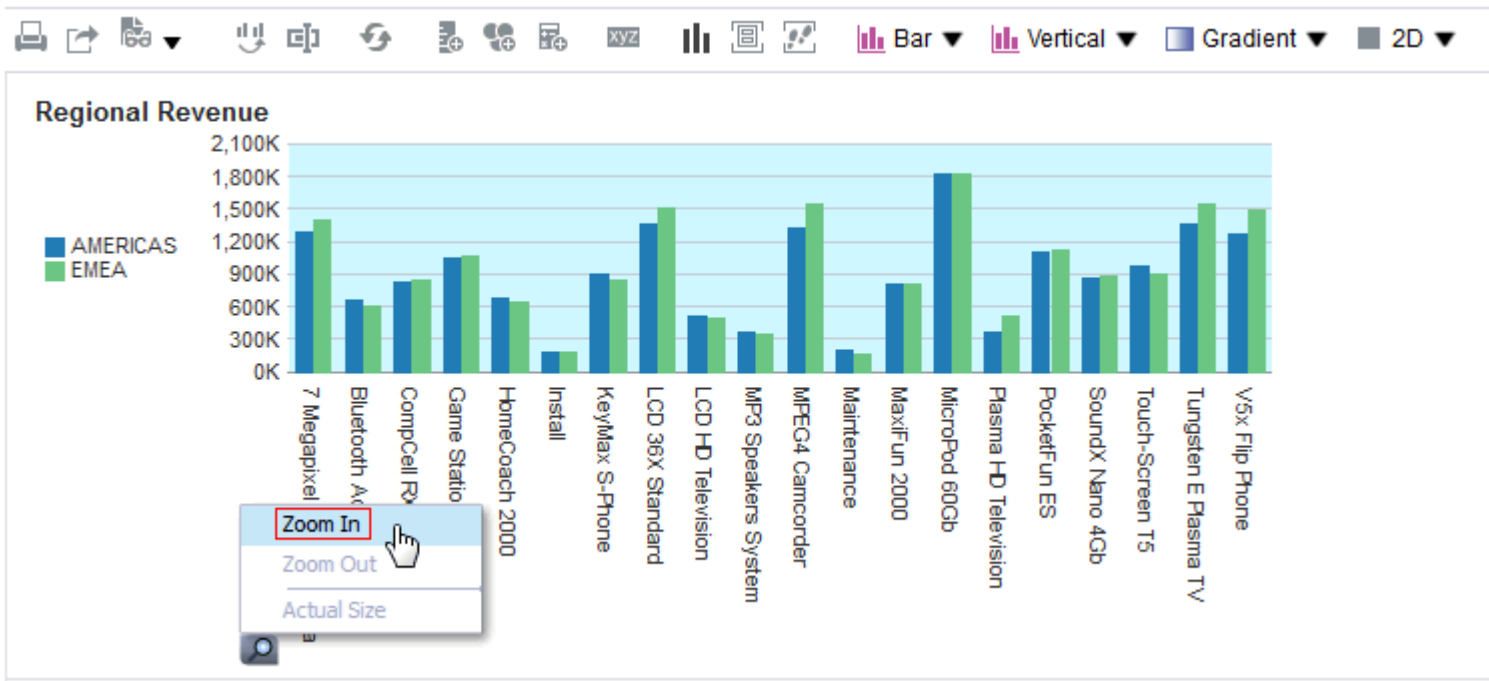
Data Markers

OK Cancel

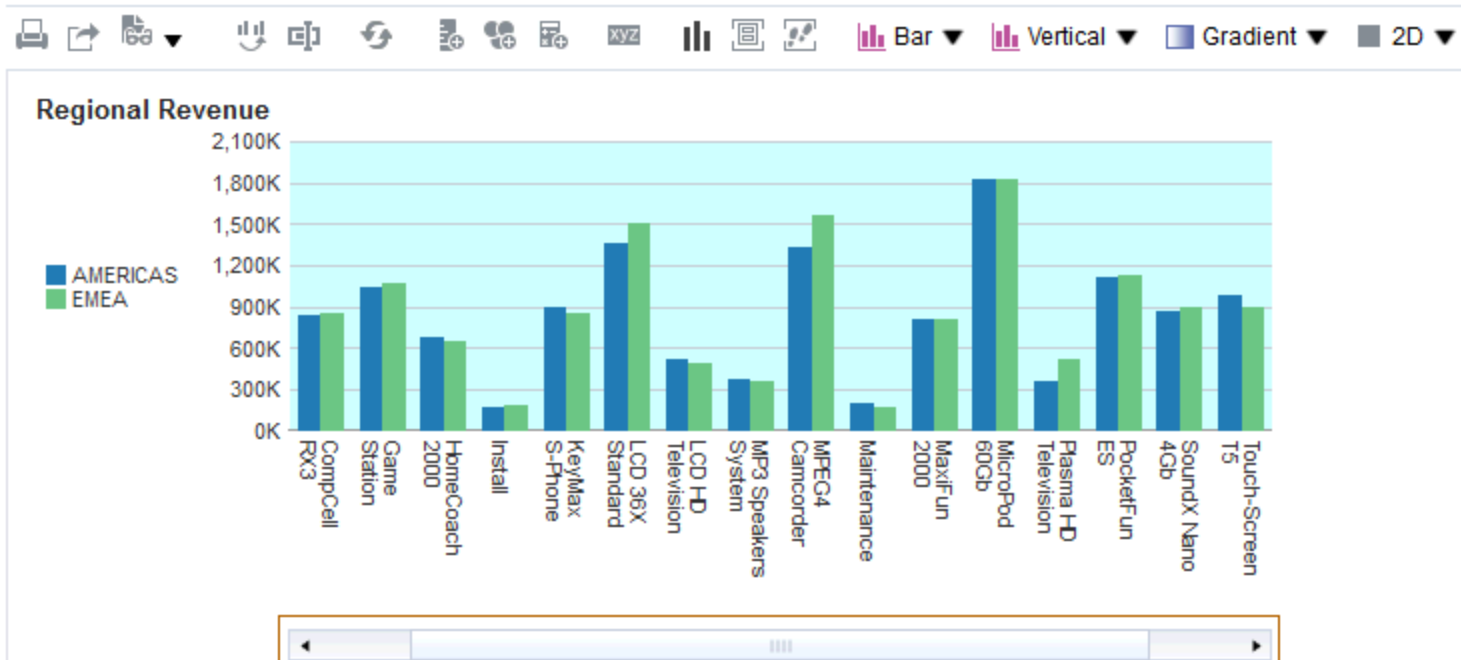
- Click **OK** The preview pane refreshes. The formatting changes have been applied along with a new title and a horizontal zoom.



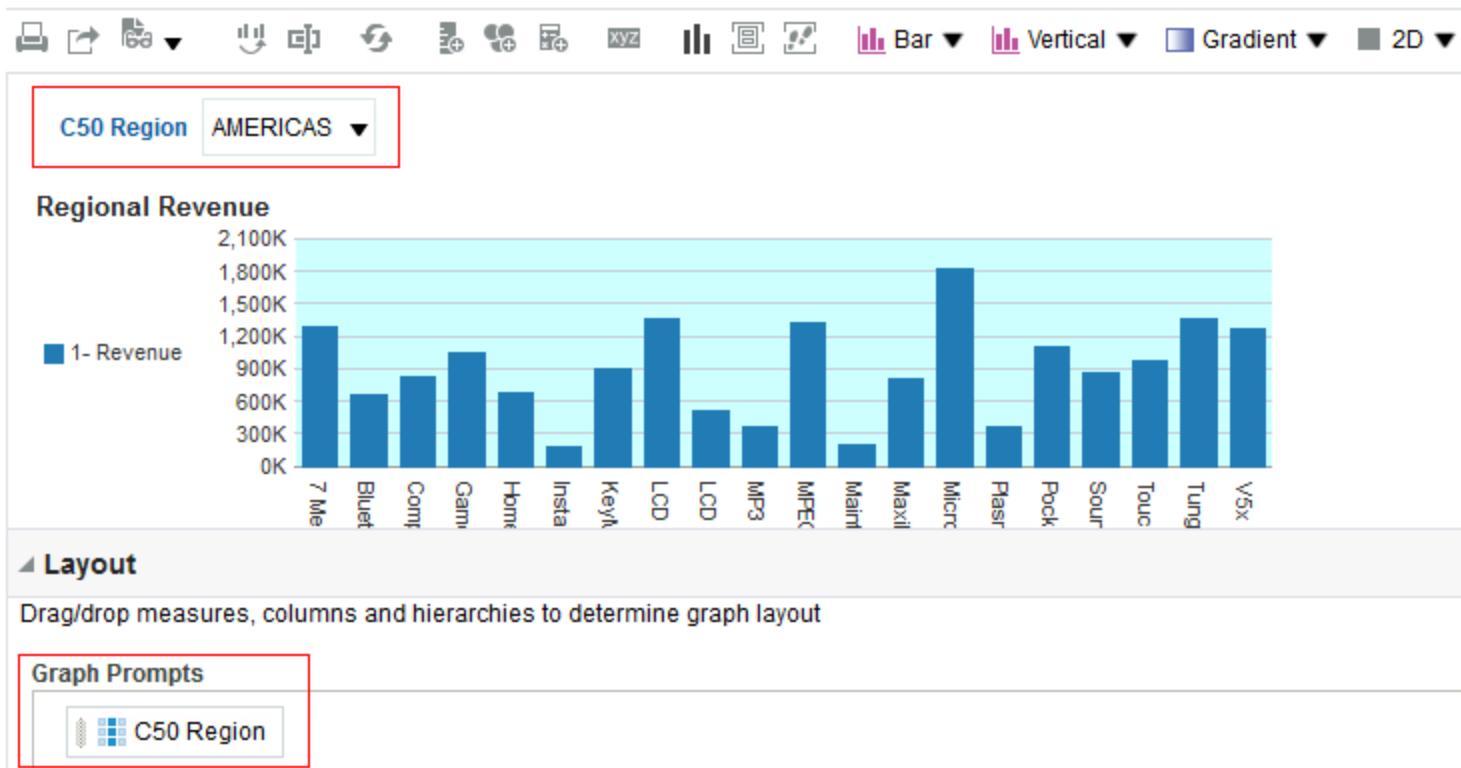
- Click the **Zoom** icon and select **Zoom In**.



Once you have zoomed in, a slider appears.

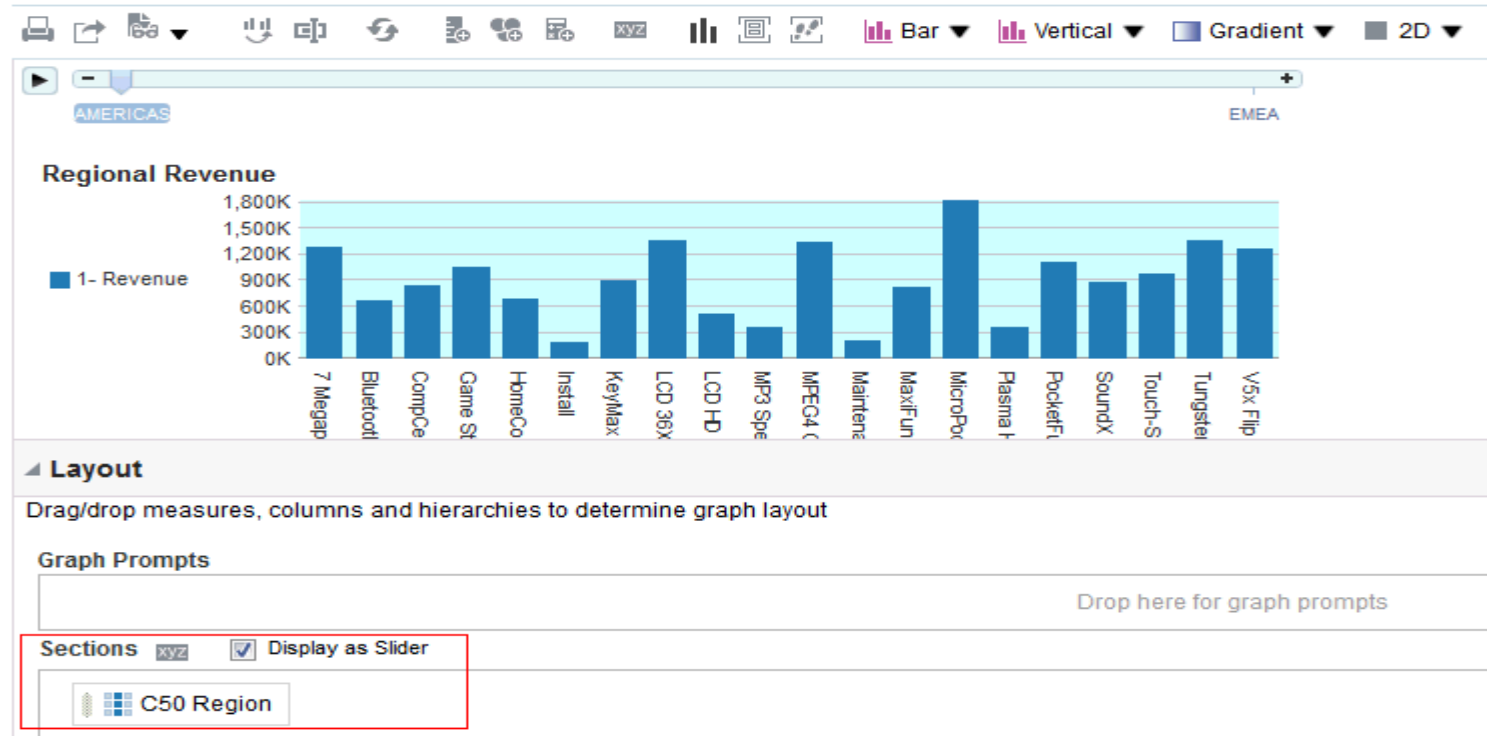


- In the Layout pane, move **C50 Region** from the Vary Color By area to the **Graph Prompts** area. The preview pane refreshes:



The prompt allows you to select each region individually, making the graph a bit easier to consume.

- Move **C50 Region** to the Sections area and select the **Display as Slider** check box to display a slider for selecting the region. When you move along the slider for a particular region, the graph changes accordingly.



Click **Done** and then save your analysis.

-Working with Pivot Tables, and Master-Detail Linking-

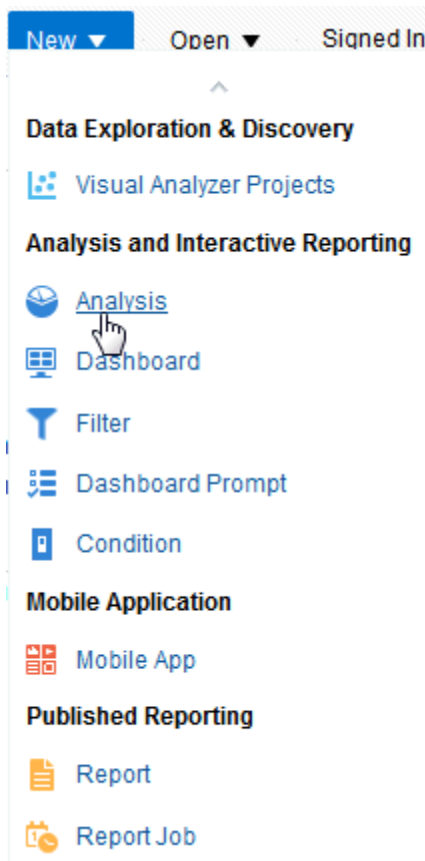
In this topic, you learn how to create an analysis with a Pivot Table view, format and add a calculation to a pivot table, and create a master-detail link.

1. Creating an Analysis with a Pivot Table View
2. Formatting a Pivot Table and Adding Calculations
3. Creating a Master-Detail Linking

Creating an Analysis with a Pivot Table View

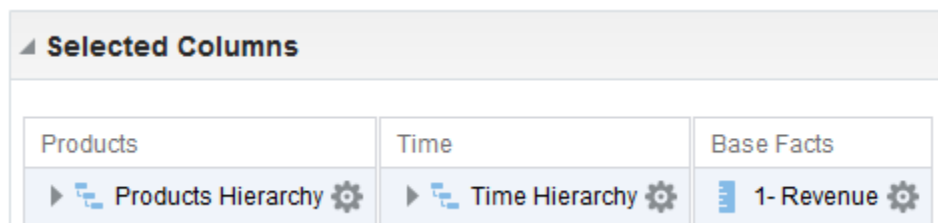
In this topic, you create a new analysis with hierarchical columns and apply selection steps.

1. Click **New > Analysis** on the global header. Select **A – Sample Sales** as the subject area.



2. In the Analysis Editor, double-click the following columns:

Folder	Columns
Products	Products Hierarchy
Time	Time Hierarchy
Base Facts	1 - Revenue



3. Click the Results tab. Two views appear: Title and Pivot Table. Because you are using hierarchical columns, a Pivot Table view is generated automatically.

Subject Areas

- A - Sample Sales
 - Time
 - Products
 - Offices
 - Sales Person
 - Customers
 - Orders

Compound Layout

Title

Pivot Table

Products Hierarchy	Time Hierarchy	1- Revenue
▶ Total Products	▶ Total Time	50,000,000

5. In the Time Hierarchy column, expand Total Time.

Compound Layout

Products Hierarchy	Time Hierarchy	1- Revenue
▶ Total Products	◀ Total Time	50,000,000
	▶ 2008	16,500,000
	▶ 2009	15,000,000
	▶ 2010	18,500,000

6. Delete the Title view.

Subject Areas

- A - Sample Sales
 - Time
 - Products
 - Offices
 - Sales Person
 - Customers
 - Orders

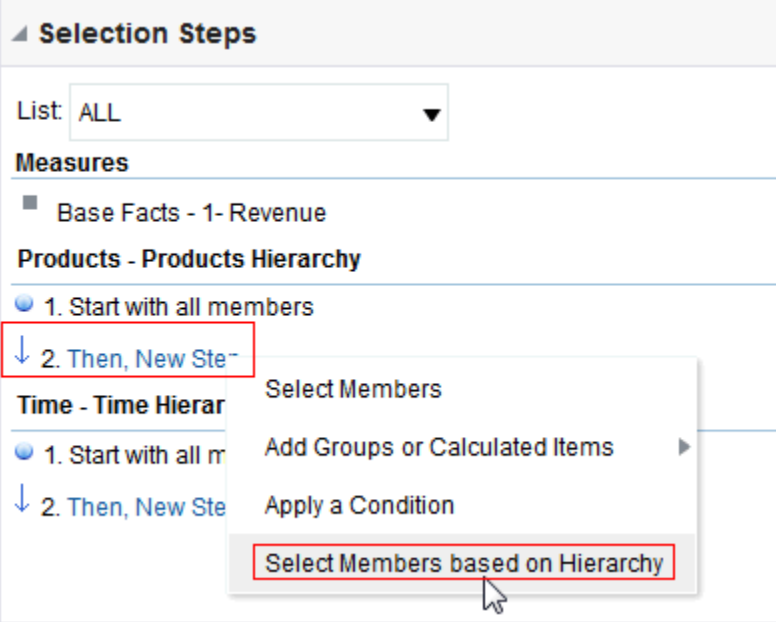
Compound Layout

Title

Pivot Table

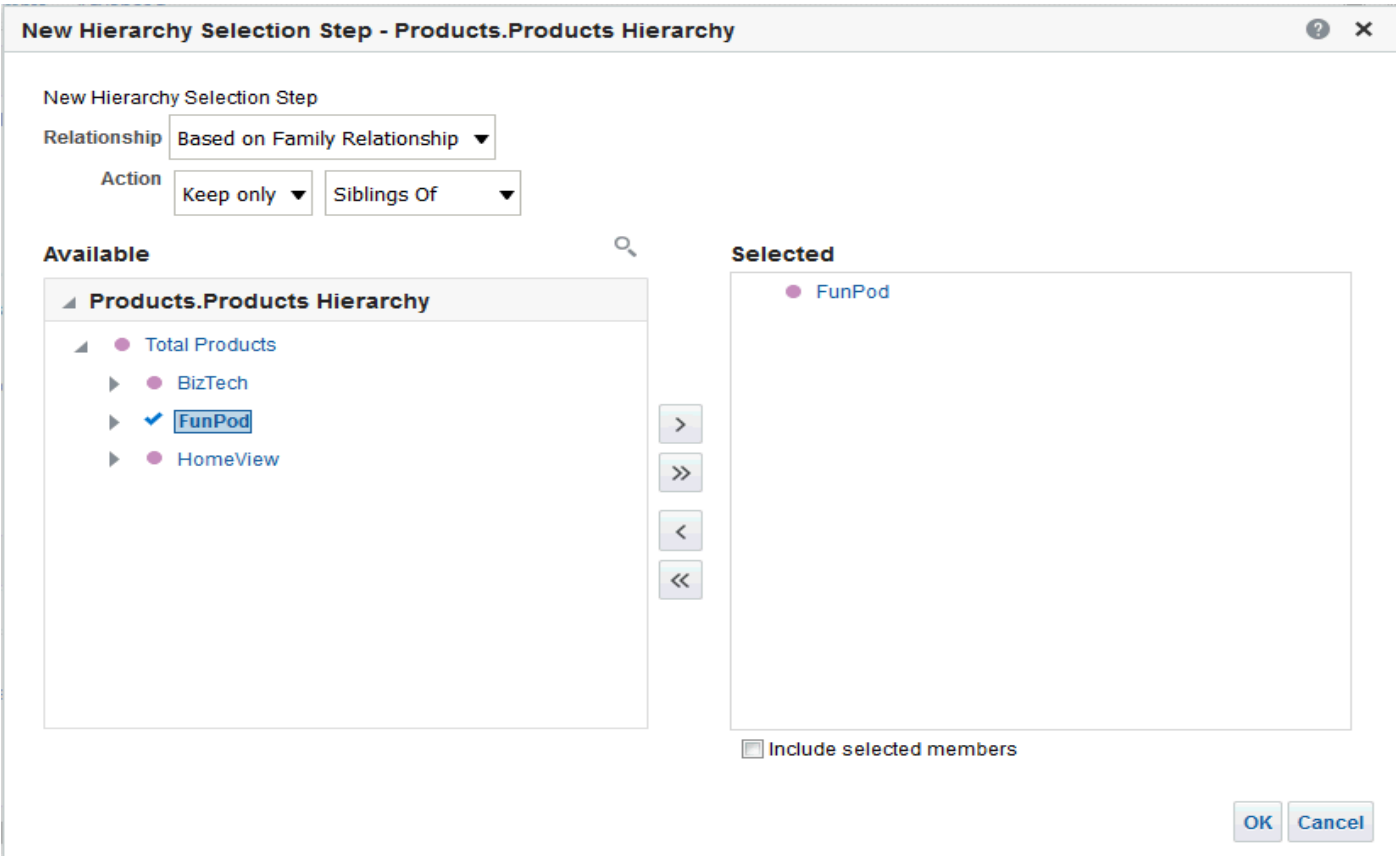
Products Hierarchy	Time Hierarchy	1- Revenue
▶ Total Products	▶ Total Time	50,000,000

7. Scroll down to view the Selection Steps pane and expand it. In the Products - Products Hierarchy members based on Hierarchy.



The New Hierarchy Selection step dialog box appears.

8. Select Based on Family Relationship from the Relationship drop-down list, and then Keep only, Siblings Of as the action. In the Available list, expand Total Products and select FunPod. Move FunPod to the Selected pane.



9. Click OK.

Notice that the table include only BizTech and HomeView, and not FunPod, because you selected Siblings of Funpod.

Compound Layout

Pivot Table

A

XYZ

Products Hierarchy	Time Hierarchy	1- Revenue
▶ BizTech	▶ Total Time	21,000,000
▶ HomeView	▶ Total Time	11,500,000

- 10. Save the analysis as My Selection Steps Analysis under the folder My Folders>Regional Revenue.
- 11. To include FunPod, click the pencil icon in Step 2 to edit the selection for Product Hierarchy.

Selection Steps

List: ALL

Measures

- Base Facts - 1- Revenue

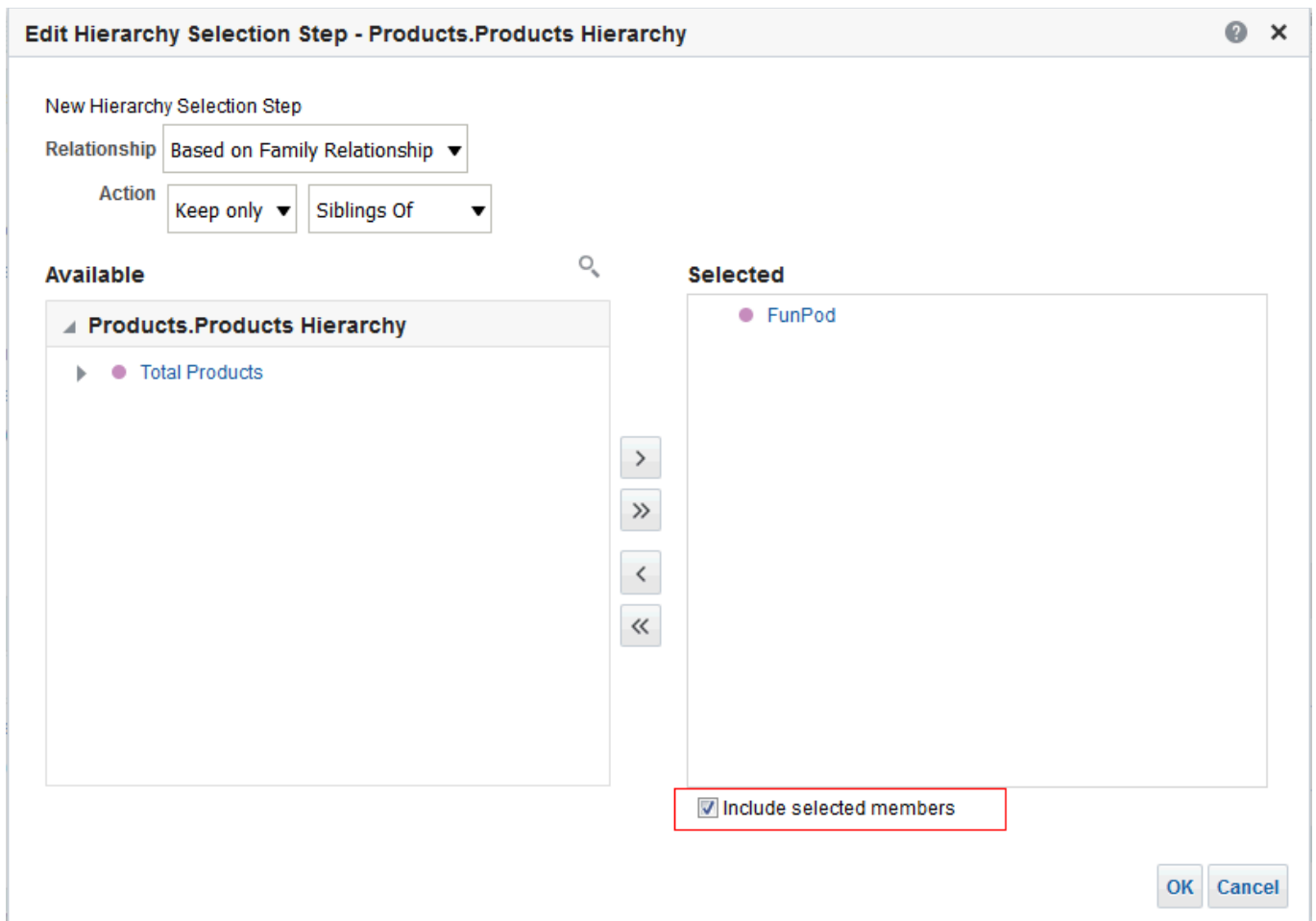
Products - Products Hierarchy

- 1. Start with all members
- 2. Then, Keep Siblings of FunPod
- 3. Then, New Step...

Time - Time Hierarchy

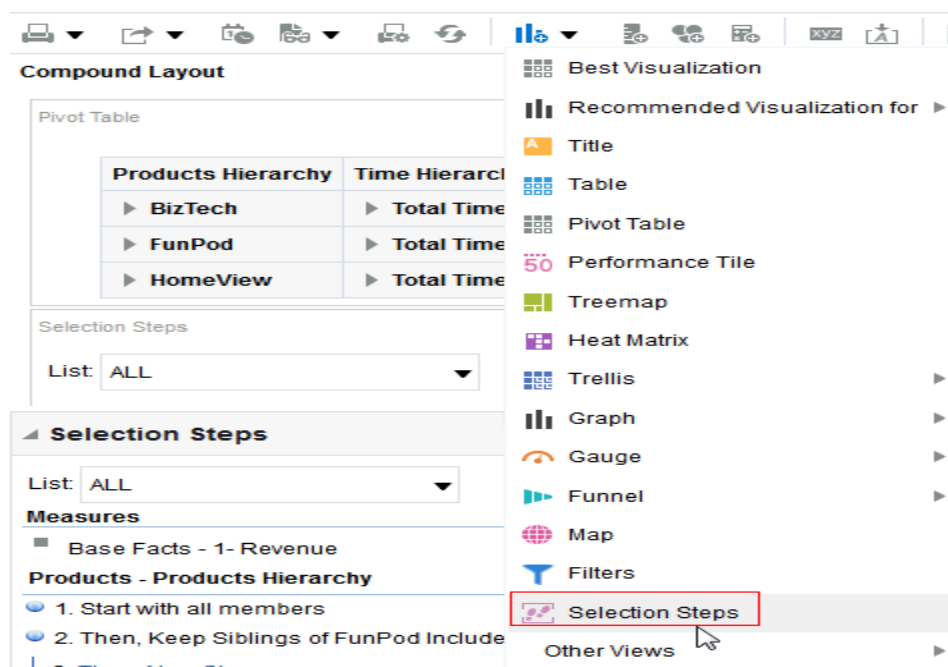
- 1. Start with all members
- 2. Then, New Step...

- 12. In the Edit Hierarchy Selection Step dialog box, select Include selected members. Click OK and save the analysis.



Observe that FunPod is now included in the table.

13. Selection Steps is now available as another view that can be included in the analysis: From the New View drop-down list, select Selection Steps.



The Selection Steps view is displayed in the compound layout.

Compound Layout

Pivot Table

A

XYZ

Products Hierarchy	Time Hierarchy	1- Revenue
▶ BizTech	▶ Total Time	21,000,000
▶ FunPod	▶ Total Time	17,500,000
▶ HomeView	▶ Total Time	11,500,000

Selection Steps

A

List: ALL

- 14. Save the analysis.
- 15. Now, you will add a Group for products. In the Product – Product Hierarchy section, click Then, New Step. Select Add Groups or Calculated Items > New Group.

Selection Steps

List: ALL

Measures

Base Facts - 1- Revenue

Products - Products Hierarchy

1. Start with all members

2. Then, Keep Siblings of FunPod Include selected members

3. Then, New Step

Time - Time Hierarchy

1. Start with :

2. Then, New

Select Members

Add Groups or Calculated Items

Apply a Condition

Select Members based on Hierarchy

Select Existing Groups and Calcul...

New Group

New Calculated Item

- 16. In the New Group dialog box, enter my Group in the Display Label text box, then expand Total Product, and select FunPod and HomeView. Move them to the Selected pane and click OK.

New Group [?] [X]

Display Label:

Values From:

Available [Search Icon]

- Products.Products Hierarchy
 - Total Products
 - BizTech
 - FunPod
 - HomeView
- Catalog

[>]

[>>]

[<]

[<<]

Selected

- FunPod
- HomeView

Format Add to ☐ Current View ☒ All Views

[OK] [Cancel]

This new group is added to the Compound Layout view.

Compound Layout

Pivot Table [A] [XYZ] [Edit] [X]

Products Hierarchy	Time Hierarchy	1- Revenue
▶ BizTech	▶ Total Time	21,000,000
▶ FunPod	▶ Total Time	17,500,000
▶ HomeView	▶ Total Time	11,500,000
▶ My Group	▶ Total Time	29,000,000

Selection Steps [A] [Edit] [X]

...

17. Click My Group in the Selection Steps pane and select Edit Group from the menu.

Selection Steps

List: ALL

Measures

- Base Facts - 1- Revenue

Products - Products Hierarchy

1. Start with all members
2. Then, Keep Siblings of FunPod Include selected members
3. Then, Add My Group
4. Then, New Step...

Time - Time Hierarchy

1. Start with all members
2. Then, New Step...

Edit Group

Save Group As ...

You will now be able to see and edit the values in **My Group**.

Edit Group

Display Label: My Group

Values From: Products.Products Hierarchy

Available

- Products.Products Hierarchy**
 - Total Products
- Catalog**

Selected

- FunPod
- HomeView

Format Add to ☐ Current View ☒ All Views

OK **Cancel**

You can also see the values if you expand the **My Group** in the Pivot table. You can add **My Group** to all other views in addition to the current pivot table of the analysis.

18. Click Cancel to exit the Edit Group dialog box.

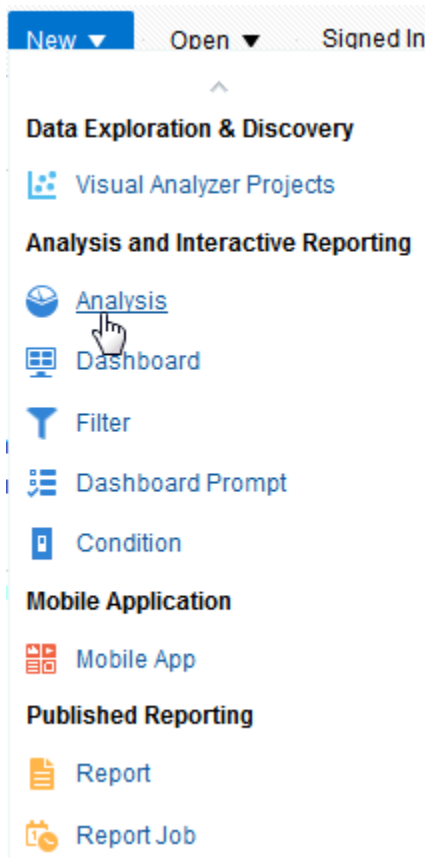
19. Save the analysis.

This concludes the topic of creating a Pivot table and applying selection steps to the table.

Formatting a Pivot Table and Adding Calculations

In this topic, you by create a new analysis with a hierarchical column, and you apply a named filter, gauges, and some formatting. You also add totals. Pivot tables provide the ability to rotate rows, columns, and section headings to obtain different perspectives of the same data. They are interactive in that they are drillable, expandable, and navigable. You review some features of pivot tables.

1. Click New > Analysis on the global header and select A - Sample Sales.



2. In the Analysis Editor, add the following columns to the analysis criteria:

Folder	Columns
Orders	Orders Hierarchy
Customers	C50 Region
Products	P4 Brand
Base Facts	1-Revenue

Selected Columns			
Orders	Cust Regions	Products	Base Facts
► Orders Hierarchy ⚙	■ C50 Region ⚙	■ P4 Brand ⚙	■ 1- Revenue ⚙

- Click the Results tab to view the analysis and inspect the pivot table. Observe that the Pivot Table view is included by default.

Title			
Pivot Table			
Orders Hierarchy	C50 Region	P4 Brand	1- Revenue
► Total Orders	AMERICAS	BizTech	7,768,709
		FunPod	6,317,107
		HomeView	4,031,188
	APAC	BizTech	5,384,626
		FunPod	4,519,476
		HomeView	2,984,981
	EMEA	BizTech	7,846,666
		FunPod	6,663,417
		HomeView	4,483,831

- Click the Criteria tab.
- Apply the Americas and EMEA named filter as you did previously.
- Click the More Options icon for 1 - Revenue and select Column Properties.

Selected Columns			
Orders	Cust Regions	Products	Base Facts
► Orders Hierarchy ⚙	■ C50 Region ⚙	■ P4 Brand ⚙	■ 1- Revenue ⚙

Filters	
C50 Region is equal to / is in AMERICAS; EMEA	

Sort

Edit formula

Column Properties

Filter

Delete

Save Column As

The Column Properties dialog box appears.

7. Click the Column Format tab. Select the Custom Headings check box, and enter Revenue in the Column Heading text box.

The screenshot shows the 'Column Properties' dialog box with the 'Column Format' tab selected. The 'Headings' section has 'Folder Heading' set to 'Base Facts' and 'Column Heading' set to 'Revenue'. The 'Custom Headings' checkbox is checked and highlighted with a red rectangle. Below it, the 'Contains HTML Markup' checkbox is unchecked. The 'Value Suppression' section shows two preview tables. The first table has 'XX' in the first column and 'XXXX' in the second column. The second table has 'XX' in the first column and 'XXXX' in the second column. The 'Repeat' radio button is selected.

Column Properties

Style **Column Format** Data Format Conditional Format Interaction Write Back

Headings Hide

Folder Heading Base Facts

Column Heading Revenue

☒ Custom Headings

☐ Contains HTML Markup

Value Suppression

XX	XXXX
XX	XXXX

XX	XXXX
XX	XXXX

☐ Suppress ☒ Repeat

Save as Default ▼ OK Cancel

8. Click the Data Format tab.
9. Select the Override Default Data Format check box and select the values as indicated below in the image.

Column Properties ? x

Style Column Format **Data Format** Conditional Format Interaction Write Back

☒ Override Default Data Format

Treat Numbers As Currency ▼

Currency Symbol \$ ▼

Negative Format Minus: -123 ▼

Decimal Places 2 ▼

☒ Use 1000's Separator

Save as Default ▼ OK Cancel

10. Click OK.

11. Click the Results tab. Review the formatting changes that you made to the Revenue column.

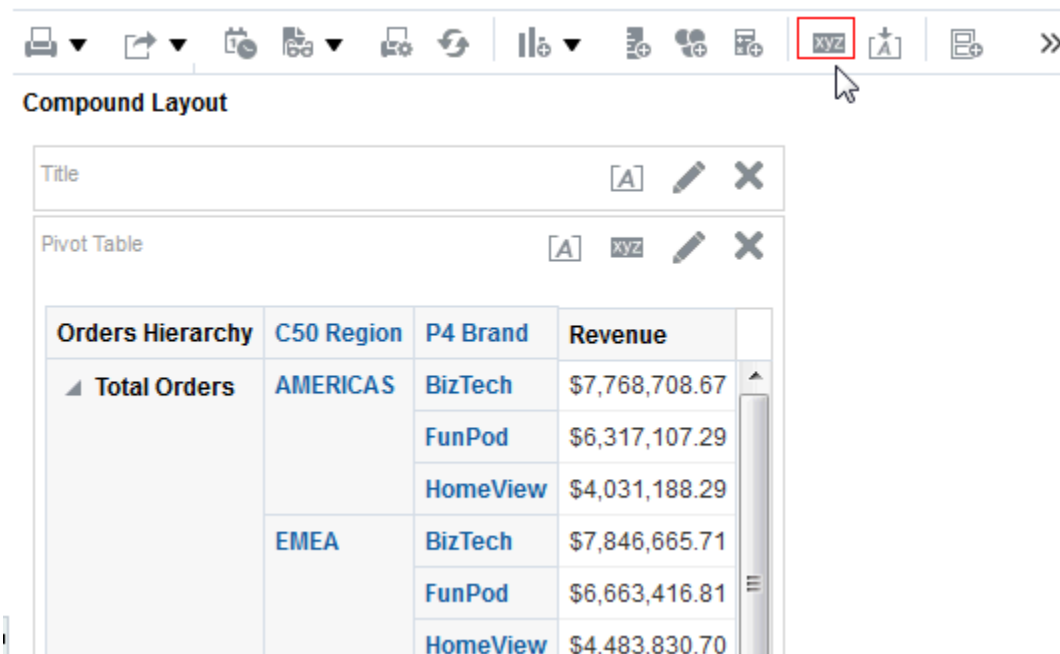
Compound Layout

Title			
Pivot Table			
Orders Hierarchy	C50 Region	P4 Brand	Revenue
▶ Total Orders	AMERICAS	BizTech	\$7,768,708.67
		FunPod	\$6,317,107.29
		HomeView	\$4,031,188.29
	EMEA	BizTech	\$7,846,665.71
		FunPod	\$6,663,416.81
		HomeView	\$4,483,830.70

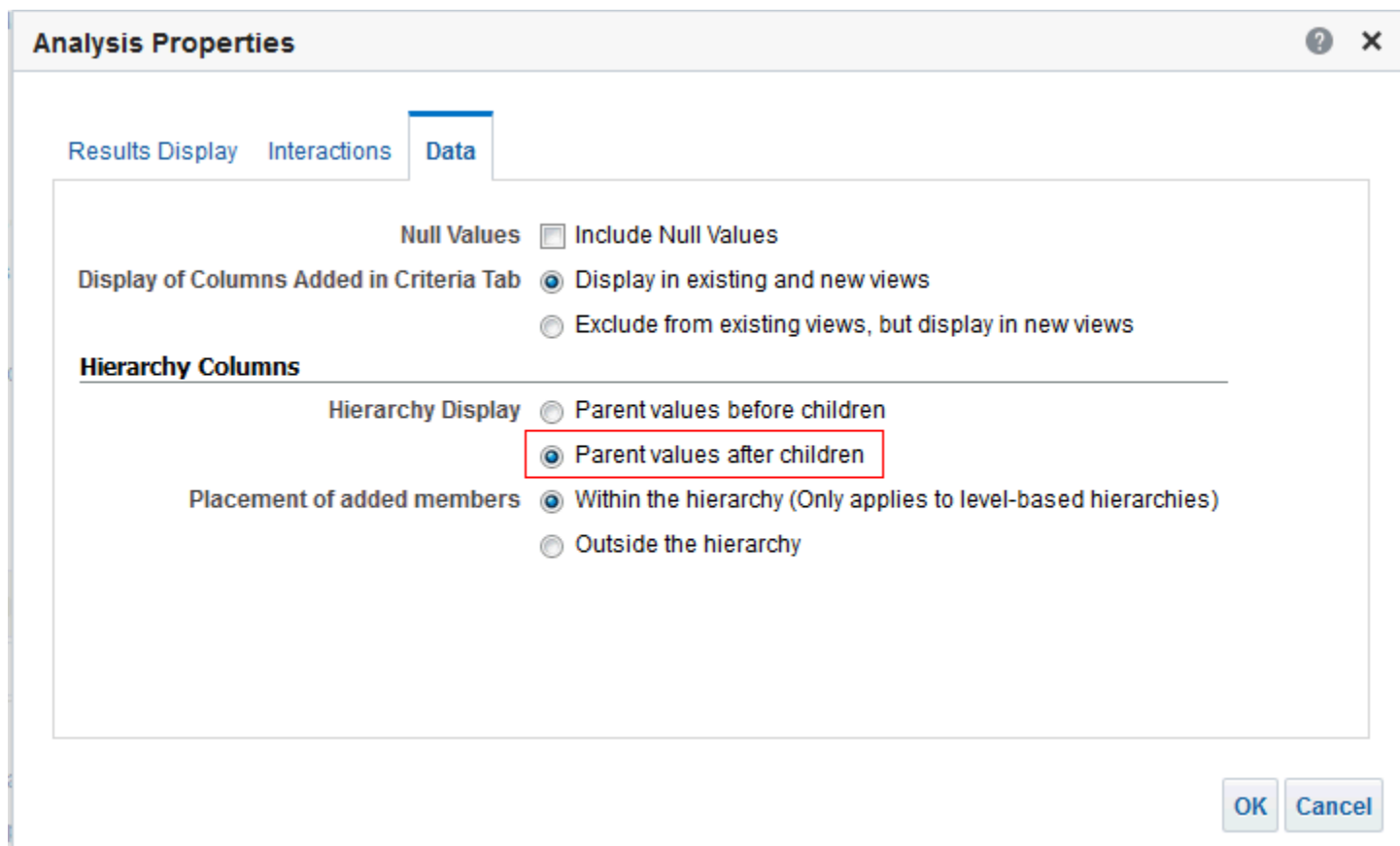
12. Click on icon to expand Total Orders.

Title			
Pivot Table			
Orders Hierarchy	C50 Region	P4 Brand	Revenue
◀ Total Orders	AMERICAS	BizTech	\$7,768,708.67
		FunPod	\$6,317,107.29
		HomeView	\$4,031,188.29
	EMEA	BizTech	\$7,846,665.71
		FunPod	\$6,663,416.81
		HomeView	\$4,483,830.70
▶ Express	AMERICAS	BizTech	\$1,334,331.37
		FunPod	\$1,490,327.02
		HomeView	\$690,809.01
	EMEA	BizTech	\$1,549,982.39
		FunPod	\$1,562,743.31
		HomeView	\$811,021.45
▶ Secure	AMERICAS	BizTech	\$3,572,580.86
		FunPod	\$1,933,347.95

13. You can move the parent, Total Orders, to display at the bottom of the hierarchy: Click the Analysis Properties icon.



14. In the Analysis Properties dialog box, click the Data tab and select Parent values after children.



15. Click OK.

Notice Total Orders has moved to the bottom of the hierarchy.

Title

Pivot Table

xyz

<div>Orders Hierarchy</div> <div> <div>Secure</div> </div>	C50 Region AMERICAS	P4 Brand BizTech	Revenue \$3,572,580.86	
		FunPod	\$1,933,347.95	
		HomeView	\$1,927,360.42	
	EMEA	BizTech	\$3,362,955.68	
		FunPod	\$1,968,634.87	
		HomeView	\$2,008,350.17	
	<div>Standard</div>	AMERICAS	BizTech	\$2,861,796.44
			FunPod	\$2,893,432.32
			HomeView	\$1,413,018.86
EMEA		BizTech	\$2,933,727.64	
		FunPod	\$3,132,038.63	
		HomeView	\$1,664,459.08	
<div>Total Orders</div>	AMERICAS	BizTech	\$7,768,708.67	
		FunPod	\$6,317,107.29	
		HomeView	\$1,927,360.42	

16. Go back to the Analysis Properties dialog box and revert the changes.

17. Delete the Title view from the analysis and then click the Edit View icon  to format the pivot table. Use the Layout pane to format the pivot table as follows: Drag P4 Brand below Measure Labels, and then drag C50 Region to the Sections area.

The Layout pane should look like this:

Layout

Pivot Table Prompts Σ xyz

Drop here for Pivot prompts

Sections Σ xyz

Cust Regions

C50 Region

Pivot Table xyz

Columns Σ xyz

Measure Labels Σ

Products P4 Brand

Rows Σ xyz

Orders

Measures

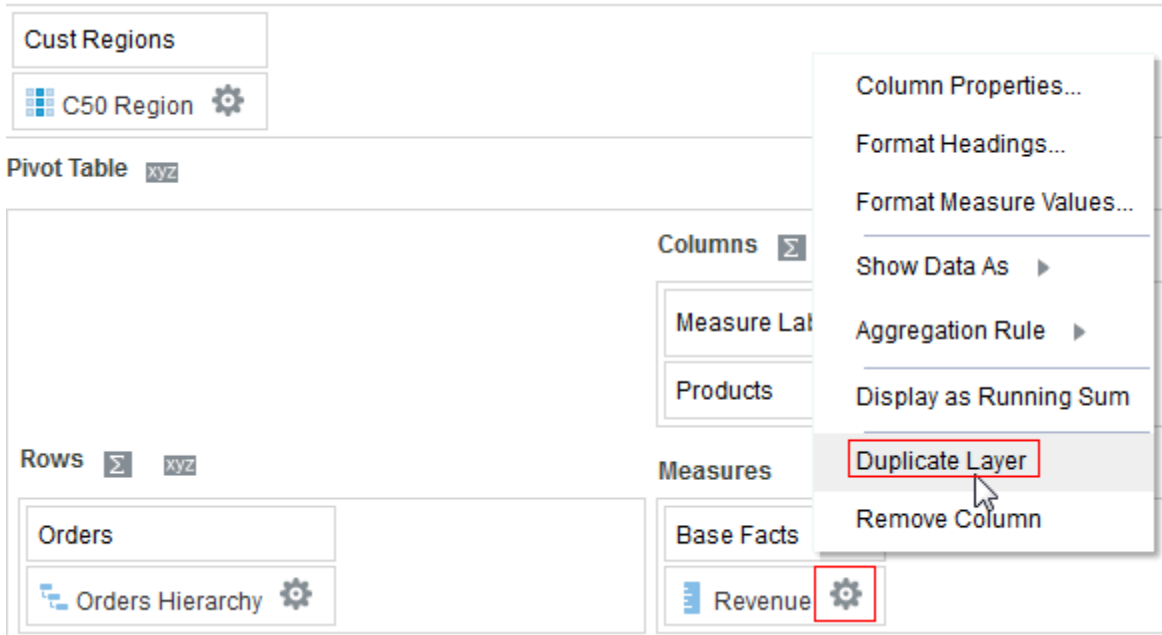
Base Facts

The pivot table should look like this:

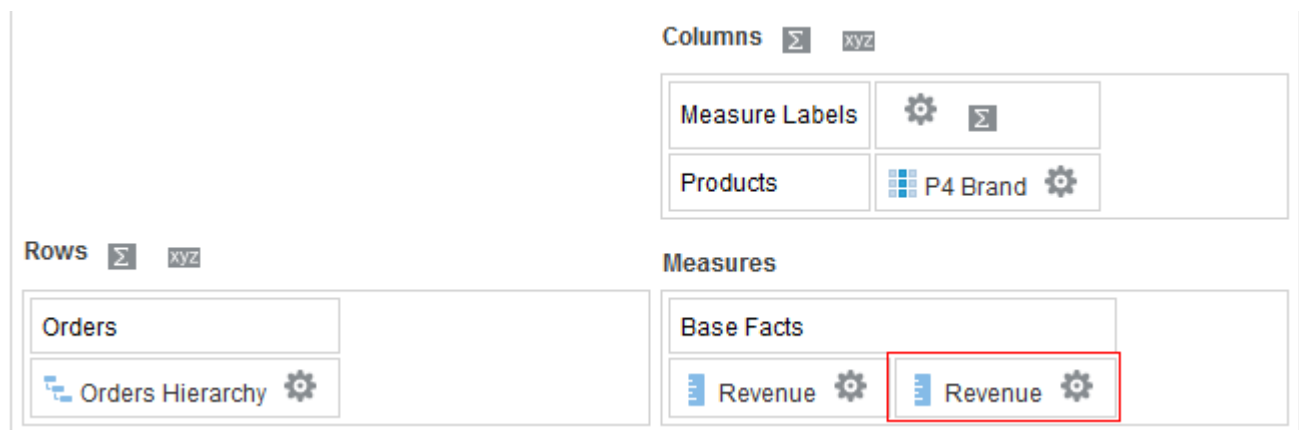
AMERICAS			
	Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView
► Total Orders	\$7,768,708.67	\$6,317,107.29	\$4,031,188.29

EMEA			
	Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView
► Total Orders	\$7,846,665.71	\$6,663,416.81	\$4,483,830.70

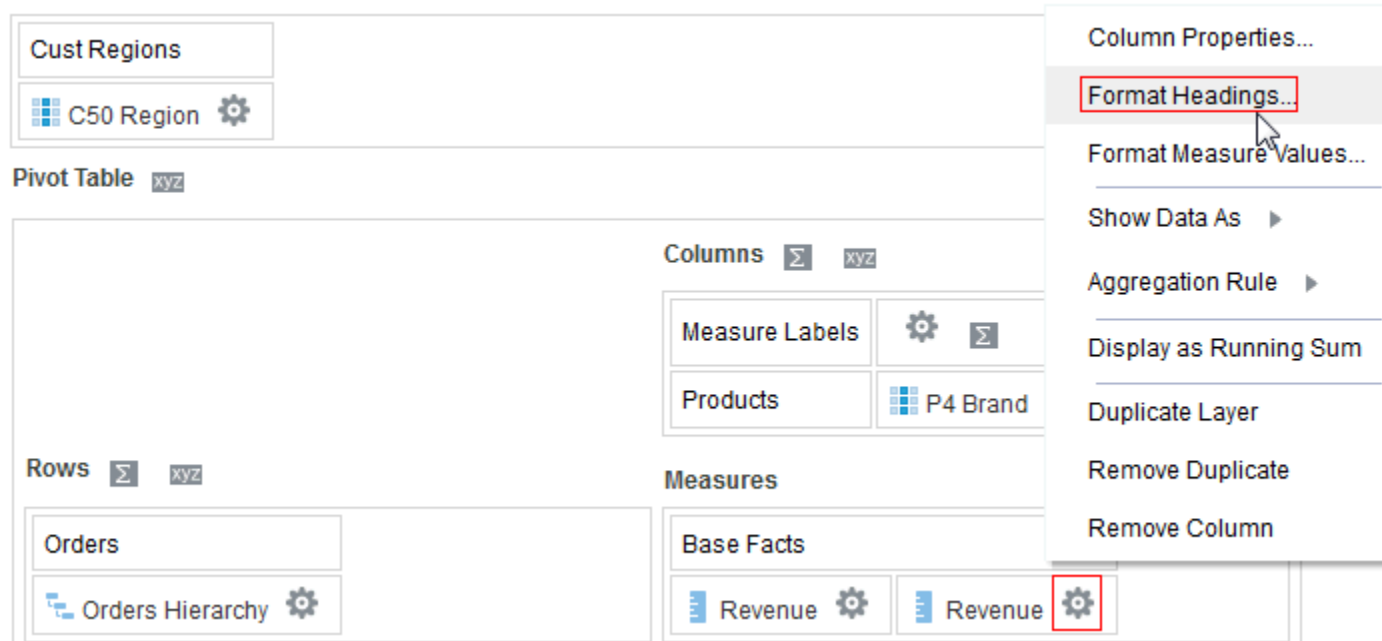
18. Next, you add a calculation to the pivot table by duplicating the Revenue column. Click the More Options icon for the Revenue column and select Duplicate Layer.



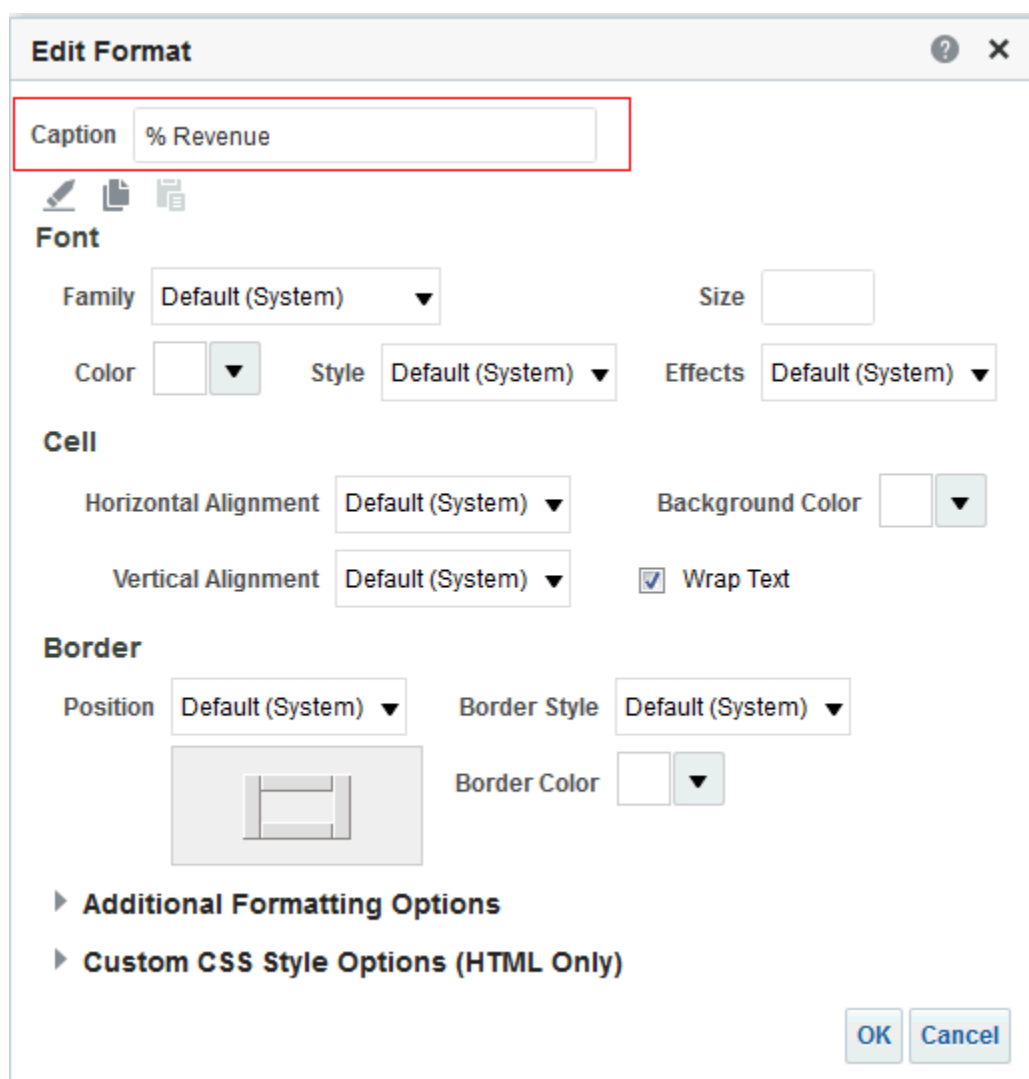
The duplicated Revenue column appears.



19. For the duplicate Revenue column, click More Options > Format Heading.



20. In the Caption text entry box in the Edit Format dialog box, enter % Revenue and click OK.



21. To add a calculation to reflect a percentage of the parent, for the duplicate Revenue column click More Options > Show Data As > Percent of > Row Parent.


The screenshot shows the Tableau interface with the following components:

- Sections:** Cust Regions, C50 Region (with a gear icon).
- Pivot Table:** Orders, Orders Hierarchy (with a gear icon).
- Columns:** Measure Labels, Products, P4 Brand (with a gear icon).
- Measures:** Base Facts, Revenue (with a gear icon), % Revenue (with a gear icon and a red box).
- Context Menu:** Open for the '% Revenue' measure, showing the path: Show Data As > Percent of > Row Parent (highlighted with a red box).

The calculation is added to the column. The pivot table should look like this:

Pivot Table

AMERICAS						
	Revenue			% Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView	BizTech	FunPod	HomeView
▶ Total Orders	\$7,768,708.67	\$6,317,107.29	\$4,031,188.29	100.0%	100.0%	100.0%
EMEA						
	Revenue			% Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView	BizTech	FunPod	HomeView
▶ Total Orders	\$7,846,665.71	\$6,663,416.81	\$4,483,830.70	100.0%	100.0%	100.0%

22. Click Done and save the analysis as Regional Revenue Pivot.
23. Expand the Orders Hierarchy by clicking the carat sign icon  Total Orders for Total Orders for the Americas. The carat icons are used to expand and collapse the data for analysis. The Orders Hierarchy contains Orders on the row edge and Total Orders as the parent. Revenue is the measure.

Pivot Table						
AMERICAS						
	Revenue			% Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView	BizTech	FunPod	HomeView
▲ Total Orders	\$7,768,708.67	\$6,317,107.29	\$4,031,188.29	100.0%	100.0%	100.0%
▶ Express	\$1,334,331.37	\$1,490,327.02	\$690,809.01	17.2%	23.6%	17.1%
▶ Secure	\$3,572,580.86	\$1,933,347.95	\$1,927,360.42	46.0%	30.6%	47.8%
▶ Standard	\$2,861,796.44	\$2,893,432.32	\$1,413,018.86	36.8%	45.8%	35.1%
EMEA						
	Revenue			% Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView	BizTech	FunPod	HomeView
▶ Total Orders	\$7,846,665.71	\$6,663,416.81	\$4,483,830.70	100.0%	100.0%	100.0%

Because hierarchical columns imply pivot tables, you are able to not only sort on members and measures, but on rows. Hierarchical members on the row edge can include sort carat icons (◀▶), which allow you to sort the members on the column edge by that row, in either ascending or descending order. These carat icons do not appear for attribute columns, which do not have the concept of a row edge.

When you sort members in a hierarchical column, you always sort within the parent; that is, children are never sorted outside of their parent. The children appear below the parent in the proper sort order; the parent is not sorted within its children.

24. The Total Orders parent member represents an outline total for the orders. Row sort Total Orders, for the Americas in Descending sequence and examine the results within the pivot table. The product brands on the column edge are sorted, reflecting sorted Revenue values in ascending sequence for each Total Order.

Pivot Table						
AMERICAS						
	Revenue			% Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView	BizTech	FunPod	HomeView
▲ Total Orders ▶	\$7,768,708.67	\$6,317,107.29	\$4,031,188.29	100.0%	100.0%	100.0%
▶ Express	\$1,334,331.37	\$1,490,327.02	\$690,809.01	17.2%	23.6%	17.1%
▶ Secure	\$3,572,580.86	\$1,933,347.95	\$1,927,360.42	46.0%	30.6%	47.8%
▶ Standard	\$2,861,796.44	\$2,893,432.32	\$1,413,018.86	36.8%	45.8%	35.1%

25. Expand Express orders and then expand 6 - Cancelled to view the % of total revenue lost from cancellations.

Pivot Table [A] XYZ ✎ ✕

AMERICAS

	Revenue			% Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView	BizTech	FunPod	HomeView
▲ Total Orders ◀ ▶	\$7,768,708.67	\$6,317,107.29	\$4,031,188.29	100.0%	100.0%	100.0%
▲ Express	\$1,334,331.37	\$1,490,327.02	\$690,809.01	17.2%	23.6%	17.1%
▶ 1-Booked	\$77,158.00	\$96,310.86	\$44,659.80	5.8%	6.5%	6.5%
▶ 2-Fulfilled	\$252,928.29	\$286,222.75	\$118,517.46	19.0%	19.2%	17.2%
▶ 3-Shipped	\$163,418.91	\$185,726.17	\$87,719.36	12.2%	12.5%	12.7%
▶ 4-Billed	\$222,692.91	\$206,114.16	\$64,407.26	16.7%	13.8%	9.3%
▶ 5-Paid	\$460,045.58	\$529,799.17	\$274,056.70	34.5%	35.5%	39.7%
▲ 6-Cancelled	\$74,640.40	\$85,287.31	\$65,615.30	5.6%	5.7%	9.5%
204	\$2,809.62			3.8%		
234		\$4,883.86			5.7%	
594	\$4,854.25			6.5%		
984			\$3,242.74			4.9%
1494		\$2,473.21			2.9%	
1629			\$3,286.13			5.0%
1644		\$2,885.33			3.4%	

▶ Selection Steps

26. Place your cursor on top of Orders Hierarchy, then right-click, and then select Collapse all items in view from the menu. Notice that you can also sort, exclude columns, and move items around using this menu.

Pivot Table [A] XYZ ✎ ✕

AMERICAS

	Revenue			% Revenue		
Orders Hierarchy	BizTech	FunPod	HomeView	BizTech	FunPod	HomeView
▲ Total Orders	Sort Column		\$4,031,188.29	100.0%	100.0%	100.0%
▲ Express	Collapse all items for this column		\$690,809.01	17.2%	23.6%	17.1%
▶ 1-Booked	Collapse all items in view		\$44,659.80	5.8%	6.5%	6.5%
▶ 2-Fulfilled	Keep Only		\$118,517.46	19.0%	19.2%	17.2%
▶ 3-Shipped	Remove		\$87,719.36	12.2%	12.5%	12.7%
▶ 4-Billed	Add Members...		\$64,407.26	16.7%	13.8%	9.3%
▶ 5-Paid	Add Custom Calculated Item...		\$274,056.70	34.5%	35.5%	39.7%
▲ 6-Cancelled	Show Row level Grand Total		\$65,615.30	5.6%	5.7%	9.5%
204	Show Column level Grand Total			3.8%		
234					5.7%	
594	Exclude column			6.5%		
984	Move Column		\$3,242.74			4.9%

27. Place your cursor to the left of the Brand column (BizTech). A tab appears. When you hover over this tab, a swap icon appears. You use this swap icon to swap columns with rows or to reposition a column or row along a different axis.

Pivot Table

A

xyz

X

AMERICAS

		Revenue			% Revenue		
Orders Hierarchy	P4 Brand	BizTech	FunPod	HomeView	BizTech	FunPod	HomeView
► Total Orders ◀►		\$7,768,708.67	\$6,317,107.29	\$4,031,188.29	100.0%	100.0%	100.0%

28. Use the swap icon to drag Brand on top of Orders Hierarchy. then release the mouse button. Review the pivot table. It should match the following:

Pivot Table

A

xyz

X

AMERICAS

P4 Brand	Orders Hierarchy	Revenue	% Revenue
BizTech	► Total Orders	\$7,768,708.67	100.0%
FunPod	► Total Orders	\$6,317,107.29	100.0%
HomeView	► Total Orders	\$4,031,188.29	100.0%

EMEA

P4 Brand	Orders Hierarchy	Revenue	% Revenue
BizTech	► Total Orders	\$7,846,665.71	100.0%
FunPod	► Total Orders	\$6,663,416.81	100.0%
HomeView	► Total Orders	\$4,483,830.70	100.0%

29. Save the analysis.

30. To Add a gauge view to this pivot table, click New View in the analysis toolbar and select Gauge >

Compound Layout

Pivot Table

AMERICAS

P4 Brand	Orders Hierarchy	Revenue
BizTech	▶ Total Orders	\$7,768,7
FunPod	▶ Total Orders	\$6,317,1
HomeView	▶ Total Orders	\$4,031,1

EMEA

P4 Brand	Orders Hierarchy	Revenue
BizTech	▶ Total Orders	\$7,846,6
FunPod	▶ Total Orders	\$6,663,4
HomeView	▶ Total Orders	\$4,483,8

[Add to Briefing Book](#)

Visualization menu:

- Best Visualization
- Recommended Visualization for ▶
- Title
- Table
- Pivot Table
- Performance Tile
- Treemap
- Heat Matrix
- Trellis ▶
- Graph ▶
- Gauge
- Funnel ▶
- Map
- Filters
- Selection Steps
- Other Views ▶

Sub-menu for Gauge:

- Dial
- Vertical Bar
- Horizontal Bar
- Bulb

31. Dial.

The gauge view is added.

Compound Layout

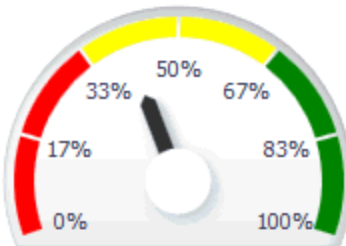
BizTech	▶ Total Orders	\$7,846,665.71	100.0%
FunPod	▶ Total Orders	\$6,663,416.81	100.0%
HomeView	▶ Total Orders	\$4,483,830.70	100.0%

Gauge

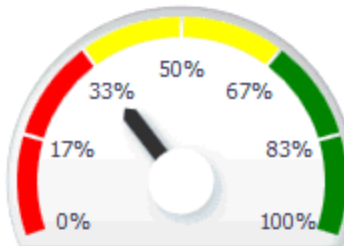


Revenue

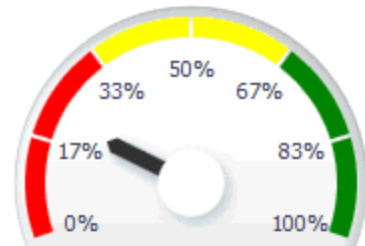
■ 0% - 33% ■ 33% - 67% ■ 67% - 100%



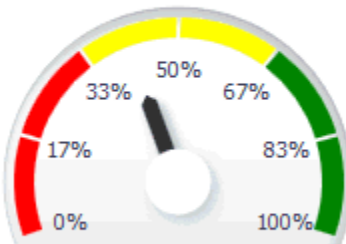
Total Orders, AMERICA...



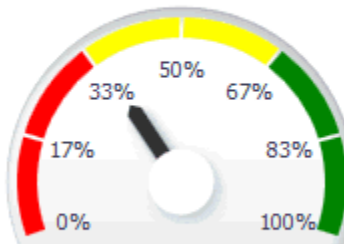
Total Orders, AMERICA...



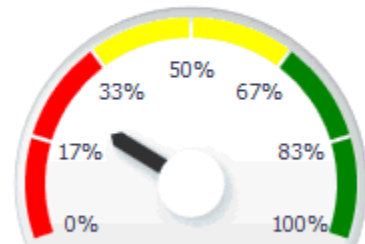
Total Orders, AMERICA...



Total Orders, EMEA



Total Orders, EMEA



Total Orders, EMEA

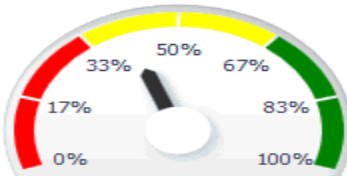
32. You will change the size of the gauges to better fit the page, and add a slider for regions. Click the Edit View icon in the Gauge view.

Gauge

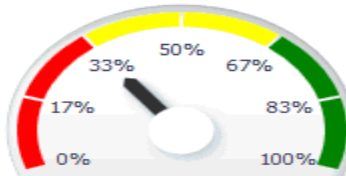


Revenue

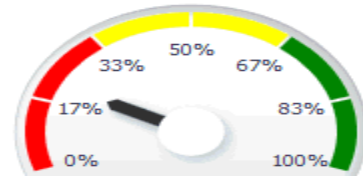
■ 0% - 33% ■ 33% - 67% ■ 67% - 100%



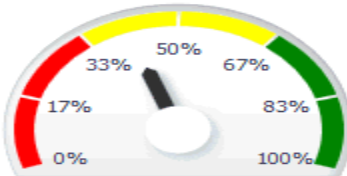
Total Orders, AMERICA...



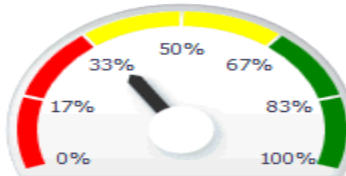
Total Orders, AMERICA...



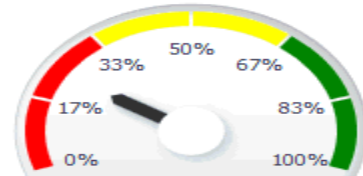
Total Orders, AMERICA...



Total Orders, EMEA



Total Orders, EMEA



Total Orders, EMEA

33. In the toolbar, select Medium for size. In the layout pane, drag C50 Region to the Sections drop target and select Display as Slider.

Editing from: "Compound Layout" Done Revert

Medium Width 150

Layout

Gauge Prompts

Drop here for gauge prompts

Sections xyz ☒ Display as Slider

Cust Regions

- C50 Region

Gauge

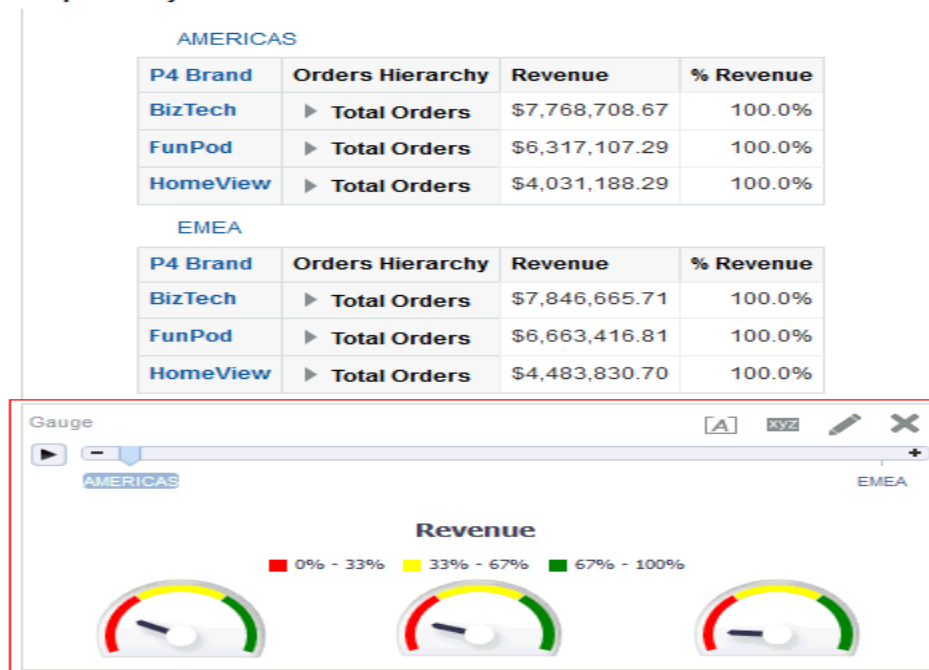
Rows		Measures
Orders	Products	Base Facts
Orders Hierarchy	P4 Brand	Revenue

Excluded

Drop here to exclude from this view only

34. Click Done and save the analysis.

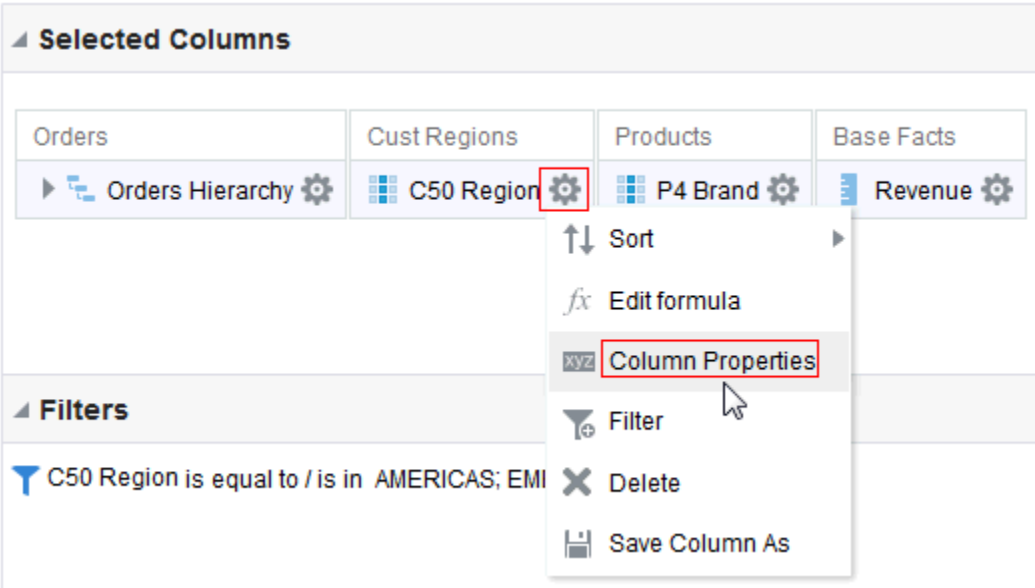
Compound Layout



Creating a Master-Detail Linking

Master-detail linking of views allows you to establish a relationship between two or more views such that one view, called the master view, will drive data changes in one or more other views, called detail views. You will create a Master-Detail linking for the Regional Revenue Pivot analysis.

- Open the **Regional Revenue Pivot** analysis for editing if it is not already open. This is the master view to which you link the detail view.
- Click the **Criteria** tab.
- Click the **More Options** icon and select Column Properties for the **C50 Region** column.



- In the Column Properties dialog box, click the **Interaction** tab. In the Value area, click the **Primary Interaction** list, and select **Send Master-Detail Events**.

Column Properties

?

×

Style

Column Format

Data Format

Conditional Format

Interaction

Write Back

Column Heading

Primary Interaction

Default (Drill) ▼

Value

Primary Interaction

Default (Drill) ▼

Default (Drill)

None

Drill

Action Links

Send Master-Detail Events

Save as Default ▼

OK

Cancel

- When Send Master-Detail Events is selected, a qualification text box, Specify channel, appears. You use this text box to enter a name for the channel to which the master view will send master-detail events. Enter `region` in the

Specify channel text box. **Note:** This is a case sensitive text box.

Column Properties

?

×

Style

Column Format

Data Format

Conditional Format

Interaction

Write Back

Column Heading

Primary Interaction

Default (Drill) ▼

Value

Primary Interaction

Send Master-Detail Events ▼

Specify channel

region

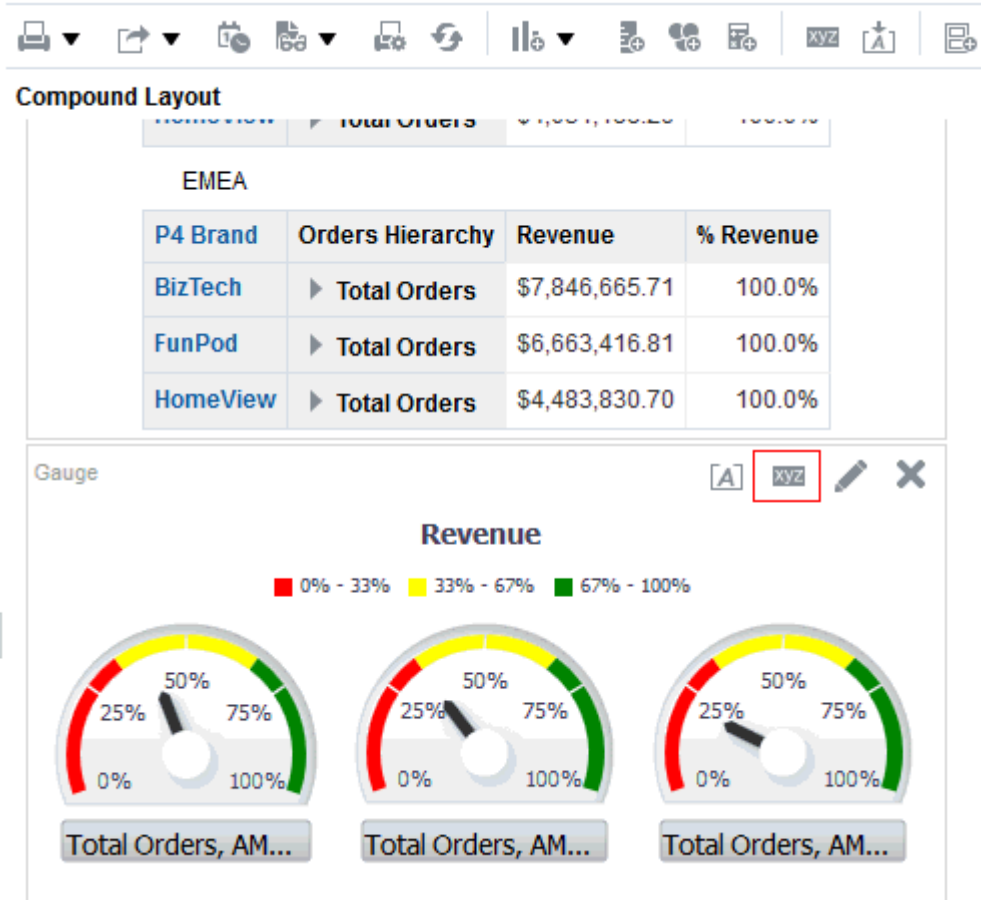
Save as Default ▼

OK

Cancel

- Click **OK**.
- Save the analysis.

- Now you will define the detail view to which the master view should link. (You can add any view that includes the same master column as the master view.) Click the **Results** tab to view the Compound Layout and click **View**



Properties for the Gauge view.

- Select the **Listen to Master-Detail Events** check box. Enter `region` in the Event Channels text box. Remember that this must match precisely with the text entered for the master view.

The screenshot shows the "Gauge Properties" dialog box with the "General" tab selected. The "Gauges Per Row" is set to 3. The "Legend" is set to "Default (Top)". The "Listen to Master-Detail Events" checkbox is checked. The "Event Channels" text box contains the value "region". The "Null Values" section has the "Include Null values" checkbox unchecked. The "OK" button is highlighted.

Gauge Properties

General | Style | Scale | Titles and Labels

Gauges Per Row: 3

Legend: Default (Top)

☒ Listen to Master-Detail Events

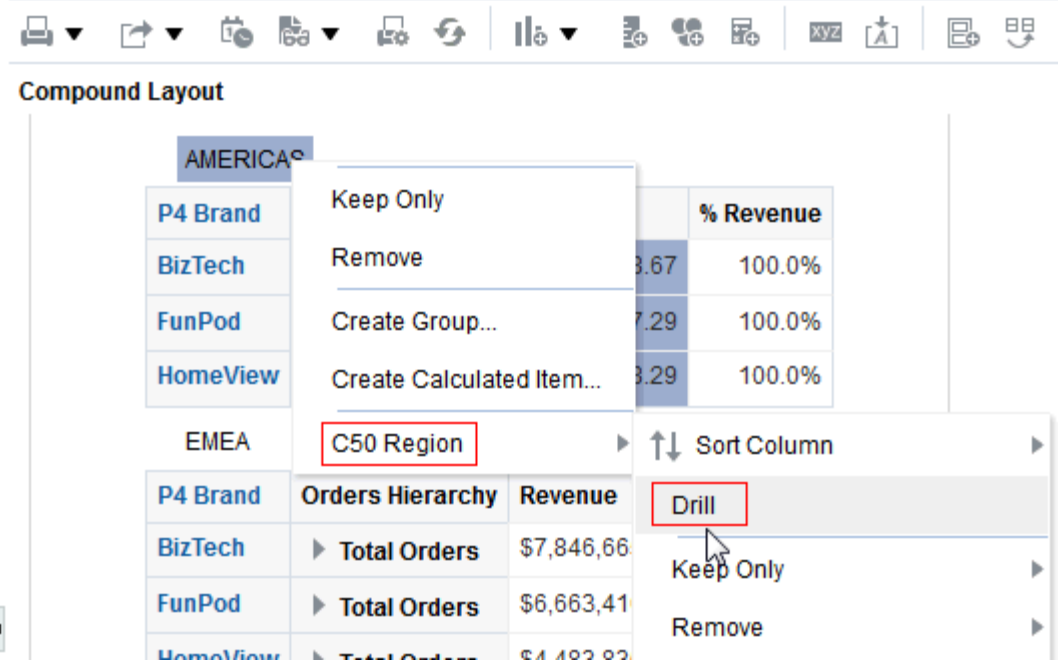
Event Channels: region

Null Values: ☐ Include Null values

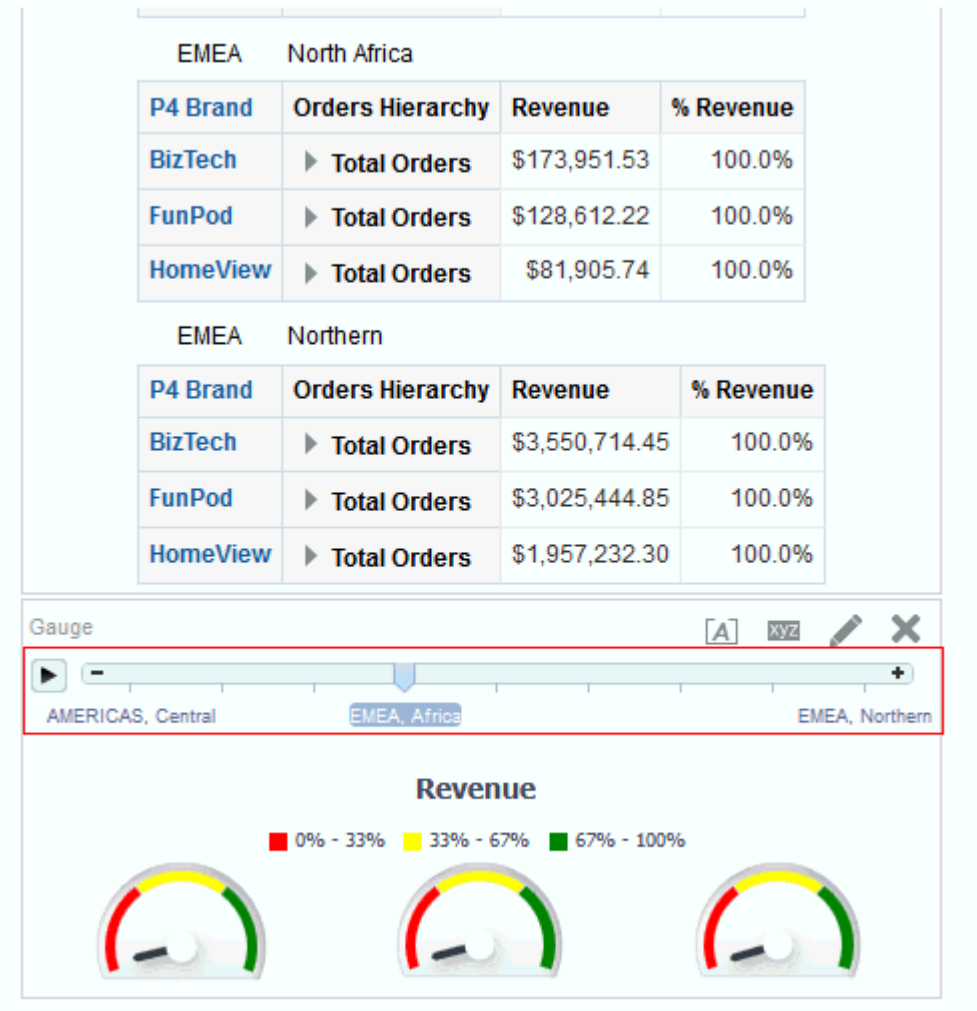
OK Cancel

- Click **OK**.

- In the Pivot Table view (the master view), right-click **AMERICAS**, select **C50 Region**, and then select **Drill**.



Both the Pivot Table view and the Gauge view (the detail view) update to reflect the drill. Notice that the slider in the Gauge view includes the drill-down members for region.

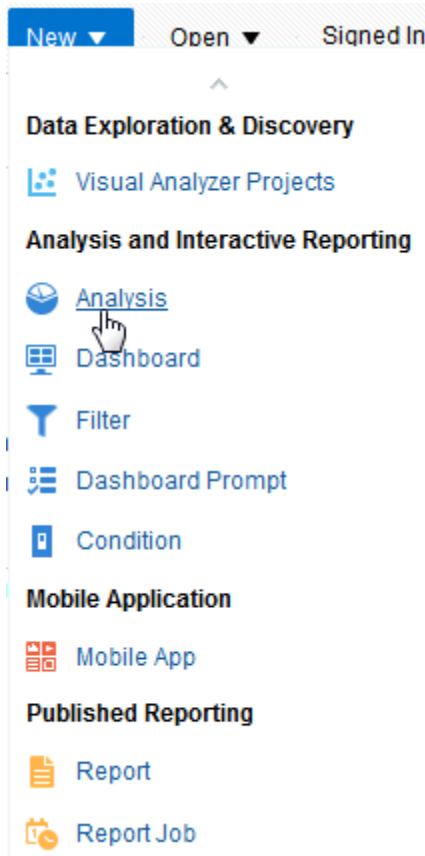


- Save your analysis.

-Adding Performance Tiles to an Analysis-

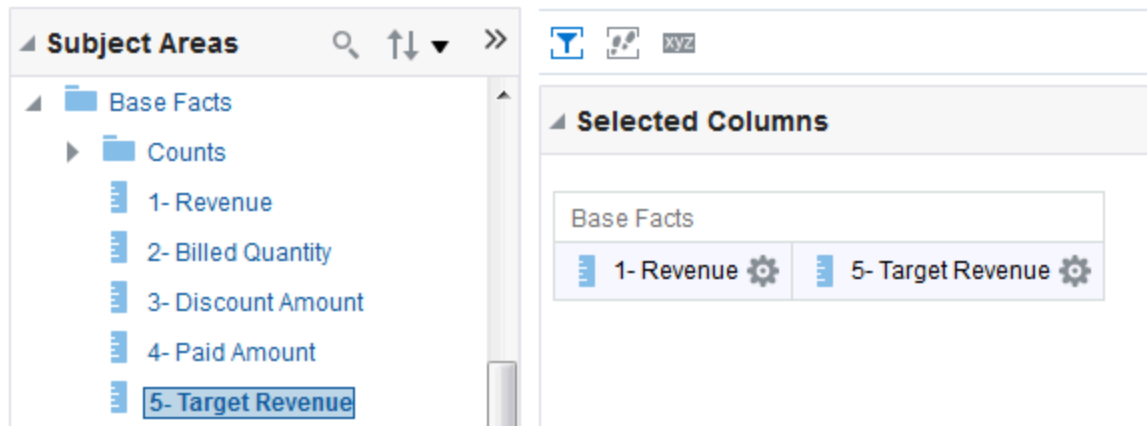
In this topic you learn how to add a Performance Tile view to your analysis. Performance tiles draw your attention to a single piece of high-level aggregate data in a simple and prominent manner.

1. **Create a new analysis. Click New > Analysis on the global header. Select the A - Sample Sales subject area.**

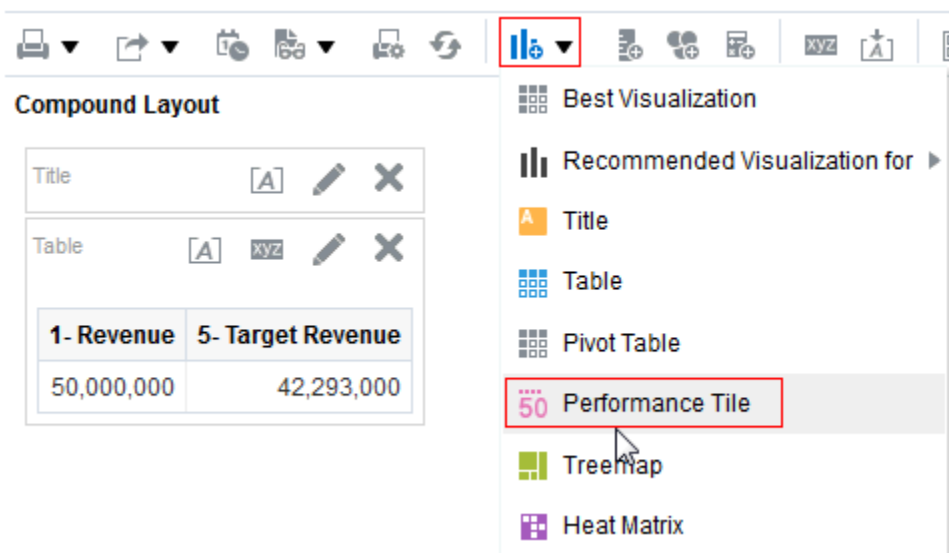


2. **In the Analysis Editor, double-click the following columns:**

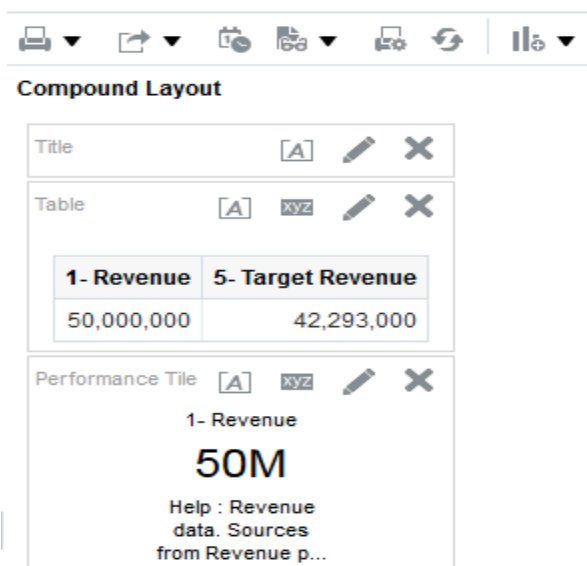
Folder	Columns
Base Facts	1 - Revenue
Base Facts	5 - Target Revenue



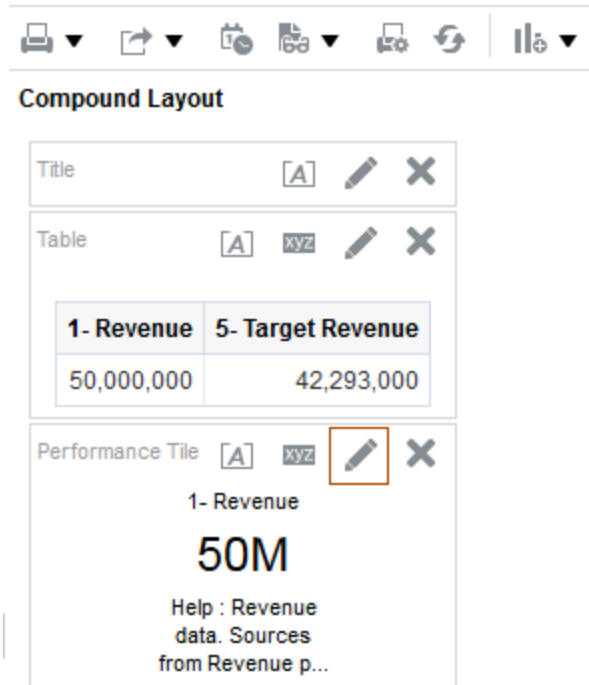
- 3.
4. Click the Results tab. Click the New View icon and select Performance Tile.



Review the performance tile. By default, the first measure in the analysis on the criteria tab is selected as the performance tile measure.

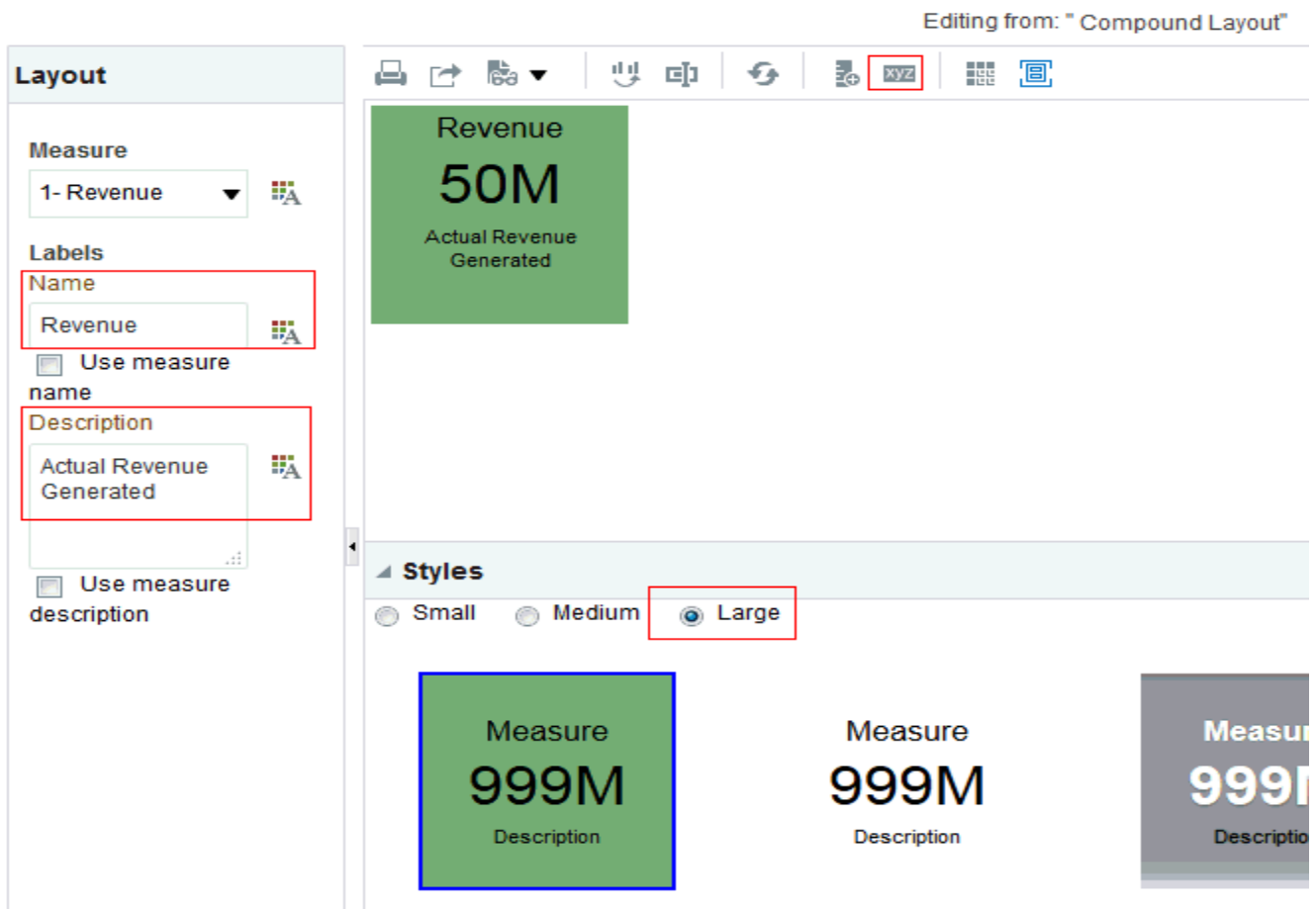


5. Click the Edit View icon in the Performance Tile to go to the edit window.



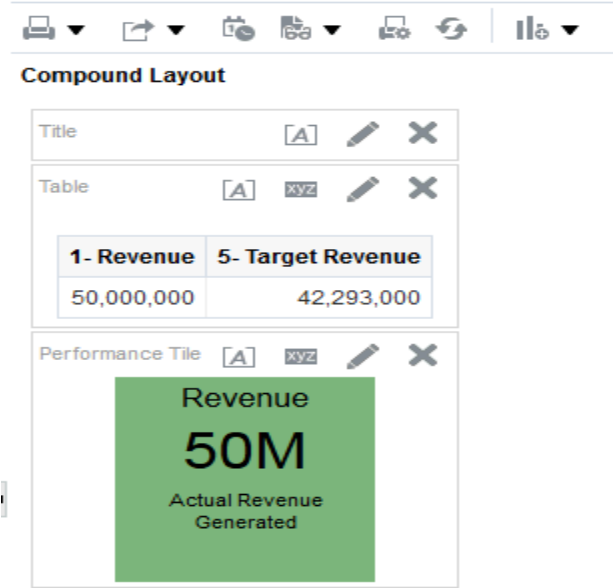
6. Make the following changes in the editor:

- Under labels, change the Name to Revenue and the Description to Actual Revenue Generated.
- In the Styles pane, change the Style to Large.
- Click Performance Tile Properties in the toolbar and select a light green color for Background.

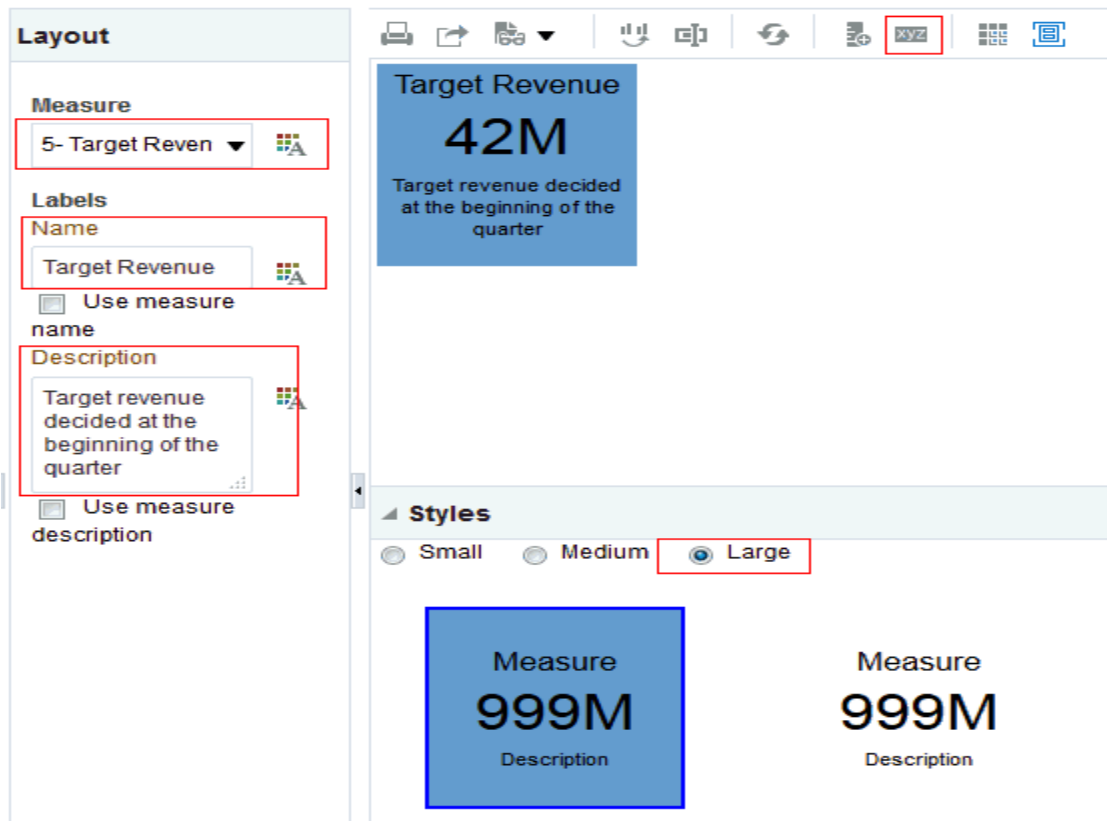


7. Click Done.

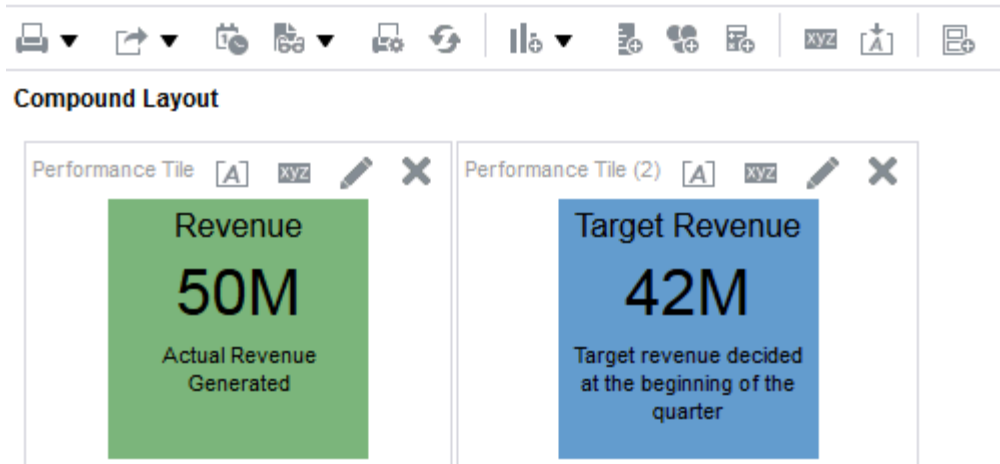
The Performance Tile view is displayed with your format changes.



8. Create another performance tile for the measure:5 - Target Revenue. Use the image below as a guideline.



9. Remove the title and table views from the analysis. Use drag and drop to place the performance tiles side by side.



10. Save the analysis in the Regional Revenue folder as Performance Tile Analysis.

-Adding a Simple Trellis to an Analysis-

In this topic you learn how to add a simple Trellis view to your analysis. A trellis is like a 'Grid of Charts' that displays a matrix of measures over multiple dimensions, with each cell in the matrix containing a micro chart, showing for example revenue in each product brand and territory over time.

1. Create a new analysis by selecting New > Analysis on the global header, and then selecting A-Sample Sales as the subject area.
2. In the Criteria tab, select the following columns:

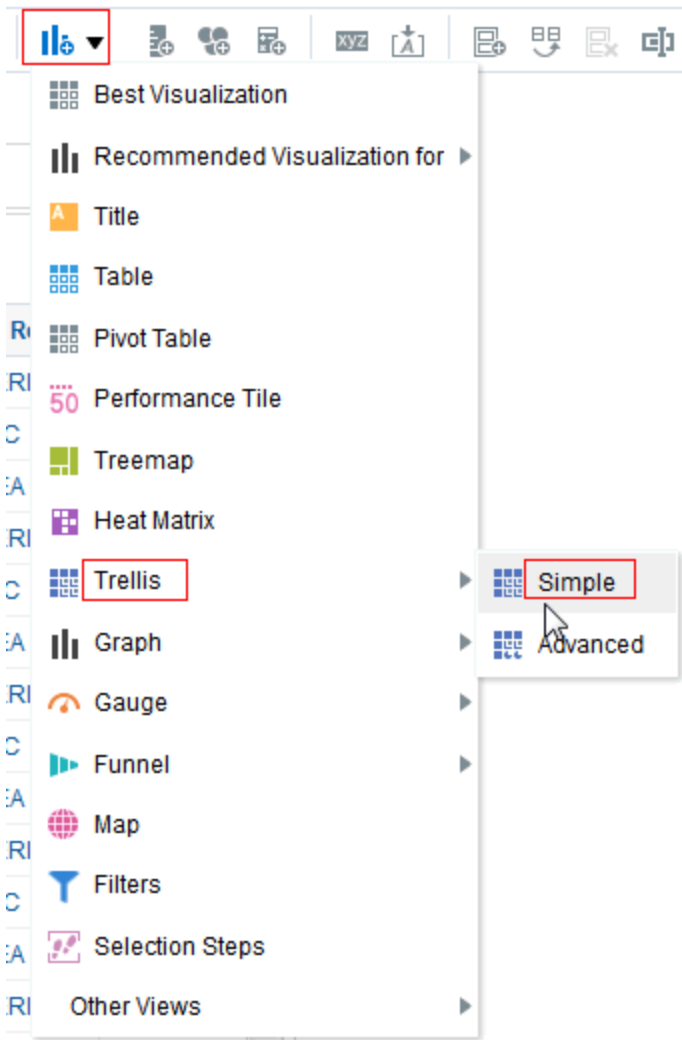
Folder	Columns
Time	T05 Per Name Year
Products	P4 Brand
Customers	C50 Region
Base Facts	1-Revenue

Selected Columns			
Time	Products	Cust Regions	Base Facts
T05 Per Name Year [gear]	P4 Brand [gear]	C50 Region [gear]	1- Revenue [gear]

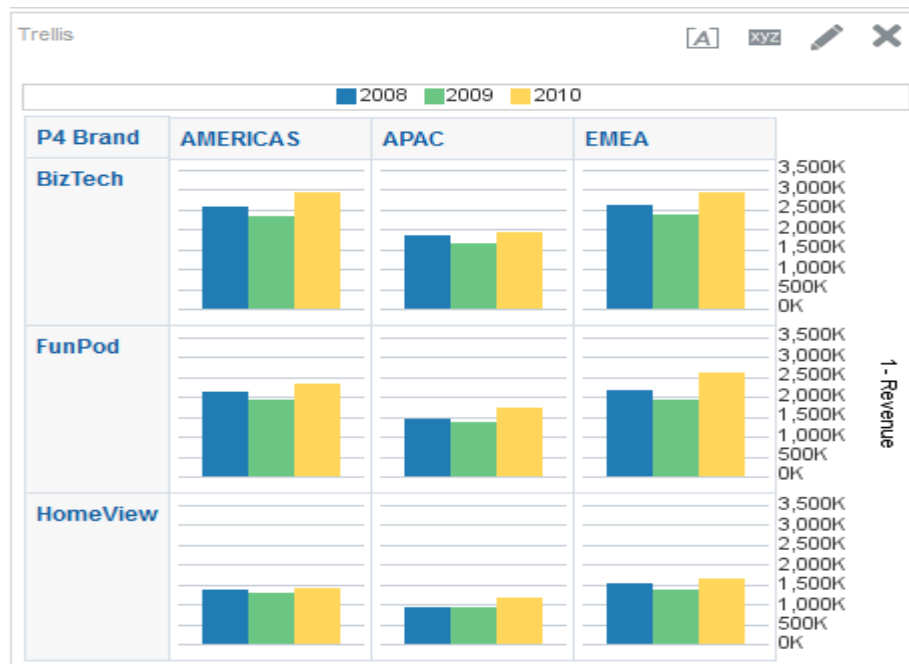
- 3.
4. Click the Results tab.

Title				
Table				
T05 Per Name Year	P4 Brand	C50 Region	1- Revenue	
2008	BizTech	AMERICAS	2,555,485	
		APAC	1,828,853	
		EMEA	2,606,403	
	FunPod	AMERICAS	2,110,174	
		APAC	1,453,621	
		EMEA	2,159,393	
	HomeView	AMERICAS	1,353,260	
		APAC	926,563	
		EMEA	1,506,249	
2009	BizTech	AMERICAS	2,314,720	
		APAC	1,644,508	
		EMEA	2,342,859	
	FunPod	AMERICAS	1,900,025	
		APAC	1,343,405	

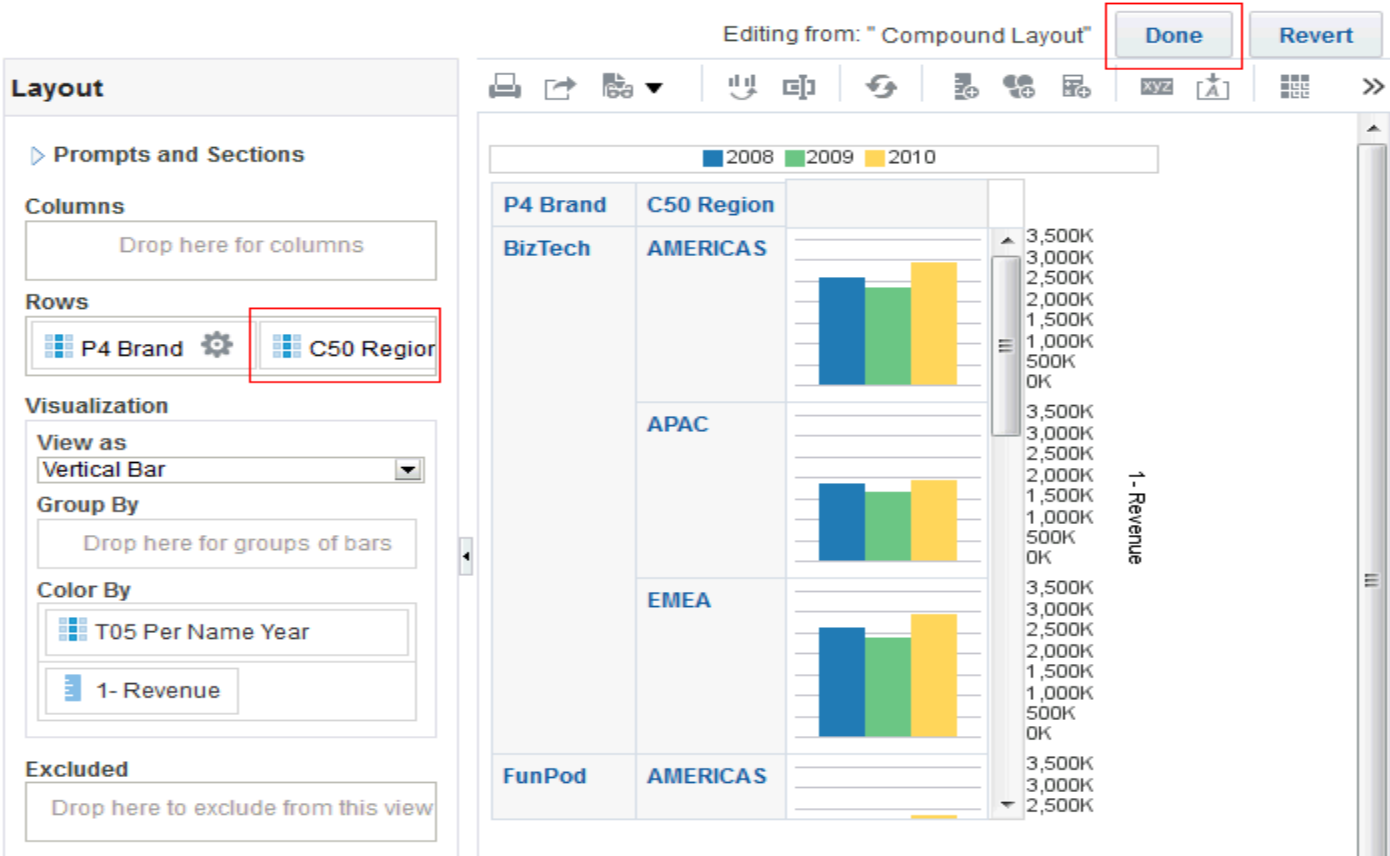
5. To add the Trellis view, click New View > Trellis > Simple.




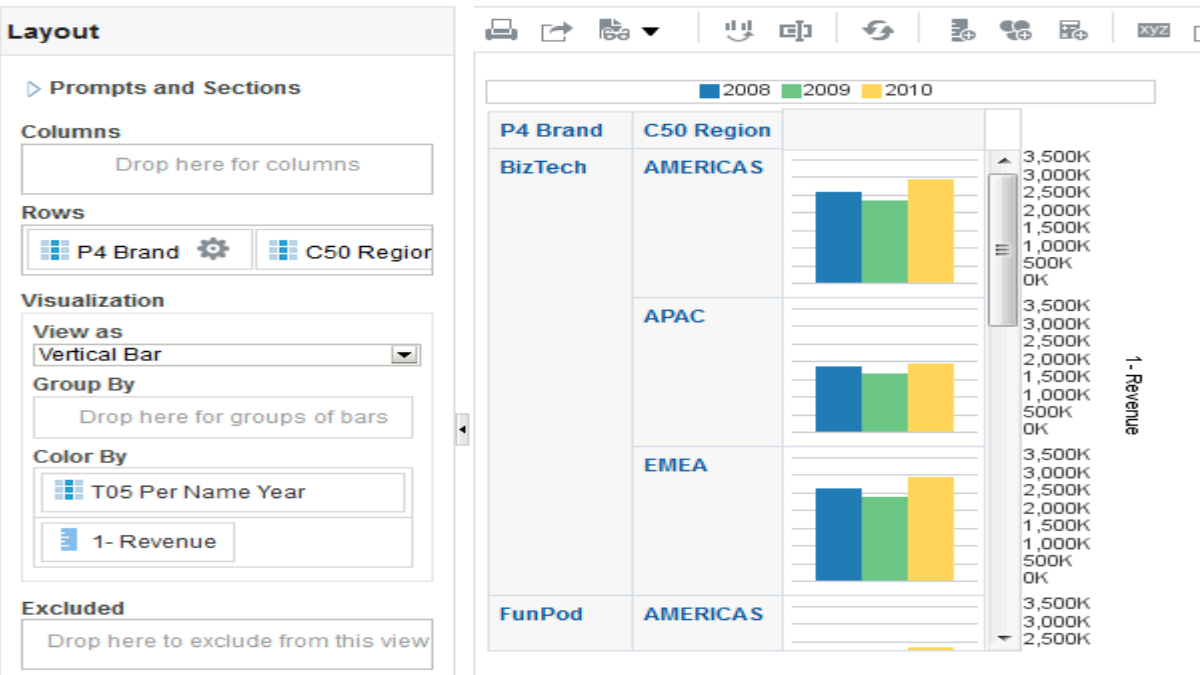
6. Scroll down to view the Trellis view.



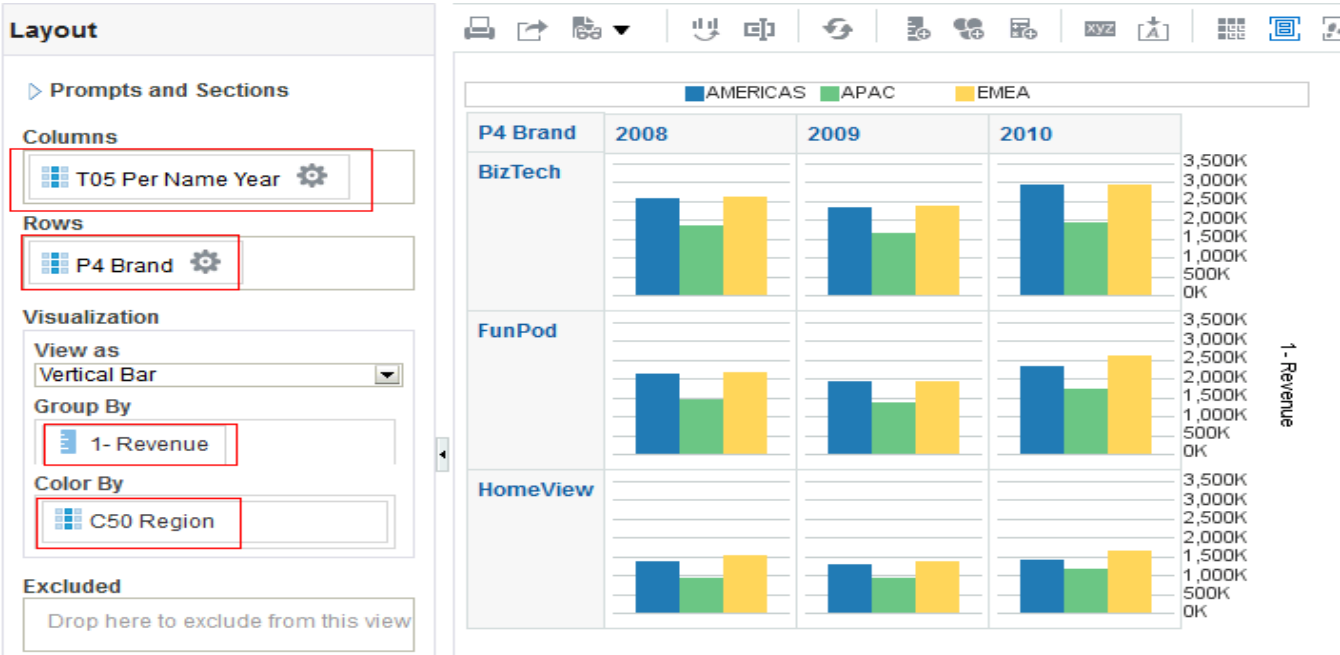
7. Delete both the Title and Table views from the analysis. Click Edit View, move C50 Region from the Columns to the Rows section, and click Done.



8. Save the analysis in the Regional Revenue folder as My Trellis View.
9. Click the Edit View pencil icon  in the Trellis view in the Compound Layout. The Layout pane is displayed.



10. Arrange the dimensions and measure as shown below:



- 11. Click Done.
- 12. The Trellis view appears. Observe that the measure has the same scale for all the Brands.



-Working with Other View Types and External Data-

You have learned about creating the following views:

- Title
- Table
- Pivot Table
- Graph
- Gauge
- Performance Tile
- Trellis

In this topic, you will create a Narrative view, a Column Selector view and a View Selector view. You also will create an analysis that uses external data from a Microsoft Excel spreadsheet.

1. **Creating a Narrative View**
2. **Creating Column Selector and View Selector Views**
3. **Adding Your Own Data to Analyses**

Creating a Narrative View

You create a Narrative view to provide information such as context, explanatory text, or extended descriptions along with column values for an analysis. You can include values from attribute, hierarchical, and measure columns. If you want to include hierarchy levels in a Narrative view, use selection steps to display the levels. The Narrative view is a combination of text and query column values.

To create a meaningful Narrative view, begin by creating a new analysis that includes a calculated item.

1. **Create a new analysis that includes the following columns:**

Folder	Columns
Customers	C50 Region
Customers	C0 Customer Number
Customers	C1 Customer Name
Base Facts	4-Paid Amount
Base Facts	3-Discount Amount

2.

Selected Columns

Cust Regions

Customers

Base Facts

C50 Region

C0 Customer Number

C1 Customer Name

4- Paid Amount

3- Discount Amount

3. Change the column properties of 4 - Paid Amount and 3 - Discount Amount to include dollar signs, commas, and two decimal places. The properties should look like this:

Column Properties

Style

Column Format

Data Format

Conditional Format

Interaction

Write Back

☒ Override Default Data Format

Treat Numbers As

Currency

Currency Symbol

\$

Negative Format

Minus: -123

Decimal Places

2

☒ Use 1000's Separator

4. Add a filter to C50 Region and select only the Americas region. Save the filter as AMERICAS only.

Selected Columns

Customers

C0 Customer Number

C1 Customer Name

Base Facts

4- Paid Amount

3- Discount Amount

Filters

AMERICAS only

5. Add 3 - Discount Amount to the Criteria tab page a second time. The Selected Columns within the Criteria tab page should look like this:

Selected Columns

Customers

C0 Customer Number

C1 Customer Name

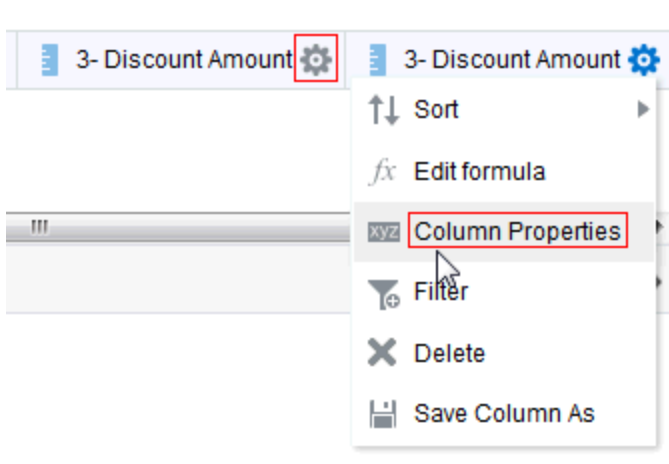
Base Facts

4- Paid Amount

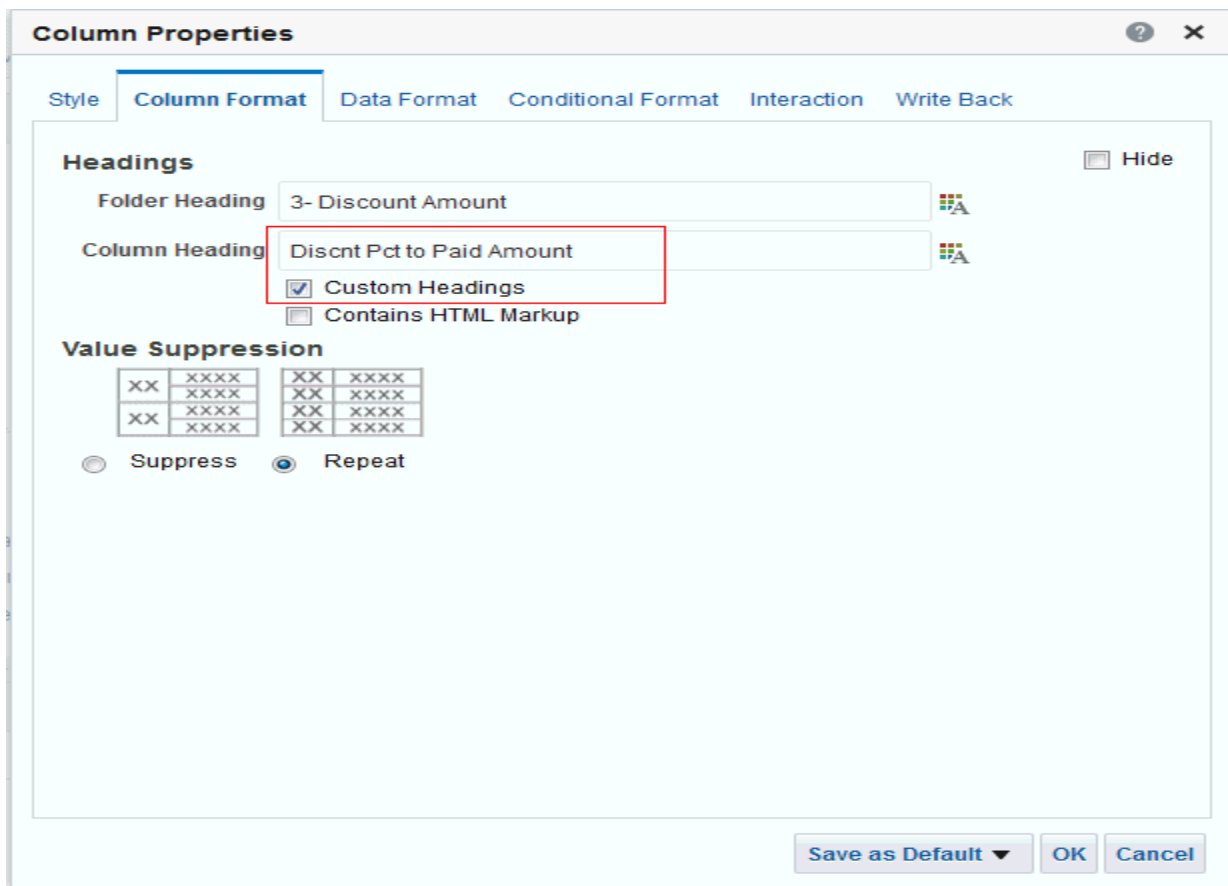
3- Discount Amount

3- Discount Amount

6. Click More Options for this duplicate column and select Column Properties.



- Click the Column Format tab, and then select the check box for Custom Headings. Enter Discnt Pct to Paid Amt in the Column Heading text box.



- Click the Data Format tab. Format the data for this column as a percentage with two decimal places and then click OK.

Column Properties [?] [X]

Style Column Format **Data Format** Conditional Format Interaction Write Back

☒ Override Default Data Format

Treat Numbers As Percentage ▼

Negative Format Minus: -123 ▼

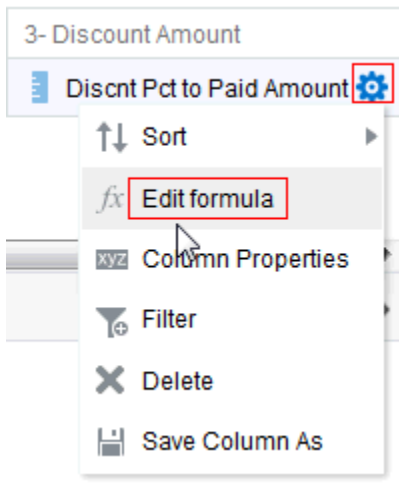
Decimal Places 2 ▼

☒ Use 1000's Separator

☐ Scale for % (x 100)

Save as Default ▼ OK Cancel

9. Click More Options for the Discnt Pct to Paid Amt column and select Edit Formula.



10. Enter the following formula into the Column Formula text box.

```
("Base Facts"."3- Discount Amount"/"Base Facts"."4- Paid Amount")*100
```

Tip: You can copy the line of code from this page and paste it into the Column Formula text box. The Column Formula text box should look like this:

Available

Subject Areas

- A - Sample Sales
 - Time
 - Products
 - Offices
 - Sales Person
 - Customers
 - Orders
 - Other Objects
 - Facts

Column Formula

("Base Facts"."3- Discount Amount"/"Base Facts"."4- Paid Amount")*100

f(...) Filter... Column Variable + - x / % () ||

☐ Treat as an attribute column

11. Click OK.

12. Click the Results tab. Remove the Title view from the Compound Layout.

13. Click the Edit View icon to open the table editor.

Compound Layout

Table

C50 Region	C0 Customer Number	C1 Customer Name	4- Paid Amount	3- Discount Amount	Discnt Pct to Paid Amount
AMERICAS	4	Tamara Aaron	\$60,290.45	\$1,659.00	2.75%
	5	Stacy Kidder	\$33,677.37	\$948.00	2.81%
	9	Diego Link	\$28,500.30	\$680.00	2.39%

14. In the Layout pane, click the More Options icon for C50 Region, and then select Hidden to hide the column.





Layout

Drop here for a selection

Table **xyz**

Columns and Measures

Cust Regions

C50 Region   C0 Customer Number  

Excluded

Drop here to exclude from this Table only

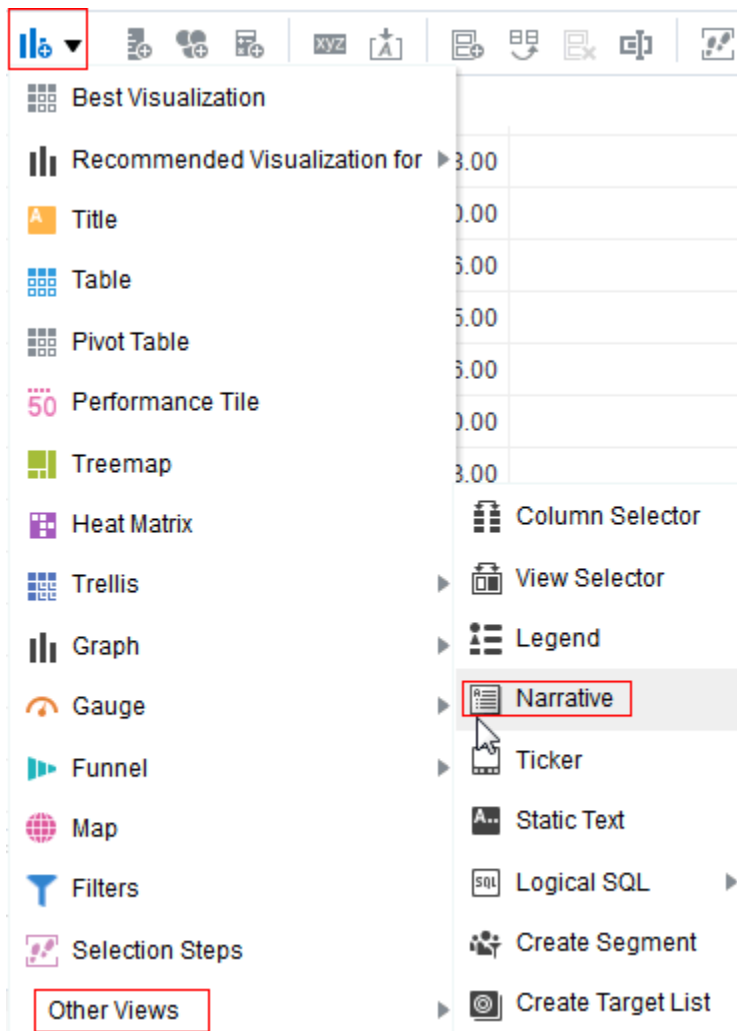
Column Properties...
Format Headings...
Format Values...
Hidden
New Calculated Item...
Aggregation Rule
Duplicate Layer
Remove Column

15. Click Done to review your results. The Table view should look like this:

C0 Customer Number	C1 Customer Name	4- Paid Amount	3- Discount Amount	Discnt Pct to Paid Amount
4	Tamara Aaron	\$60,290.45	\$1,659.00	2.75%
5	Stacy Kidder	\$33,677.37	\$948.00	2.81%
9	Diego Link	\$28,500.30	\$680.00	2.39%
14	Sue Yamamoto	\$61,532.29	\$2,406.00	3.91%
16	Lauren Green	\$33,605.66	\$755.00	2.25%
18	Elaine Hsieh	\$54,850.16	\$1,726.00	3.15%
21	Rachel Coles	\$32,295.54	\$1,130.00	3.50%
22	Elaine Hazleton	\$29,550.31	\$1,083.00	3.66%
23	M Brown	\$43,683.62	\$1,533.00	3.51%
27	Robin Fisher	\$42,390.96	\$1,361.00	3.21%
28	Howard Buckley	\$44,672.72	\$1,819.00	4.07%
30	Illa Ames	\$58,049.19	\$1,545.00	2.66%
33	Farinaz Farsai	\$34,341.56	\$1,087.00	3.17%
36	Heidi Burgdorf	\$25,859.94	\$926.00	3.58%

16. Save the analysis as **Customer Discounts by Region**.

17. Next you add the Narrative view. In the **Results** tab of the **Customer Discounts by Regions** analysis, click the **New View** icon on the toolbar and select **Other Views > Narrative**.



[illegible]

The Narrative editor appears.

- You use the Prefix text box to enter the header for the narrative. This text is displayed at the beginning of the narrative.
- You use the Narrative text box to enter the narrative text that will appear for each row in the results. You can include both text and column values. Include a line break code at the end of this field to

force each line of text and values onto its own line. To include values, use the at sign (@ by itself to indicate the first column. If you include multiple signs, then the first occurrence of the sign corresponds to the first column, the second occurrence corresponds to the second column, and so on. You use the @ sign to include the results from the designated column in the narrative.

- You use the Row separator text box to enter a row separator for each line from the Narrative field that contains values. For example you might enter a string of plus signs (+) between each line.
- You use the Rows to display text box to enter the number of rows from the column to return. For example, enter 5 to display values from the first 5 rows of the column. For a hierarchical column, you can use selection steps to display hierarchy levels with the hierarchical column. A hierarchy level is considered a row.
- You use the Postfix text box to enter the footer text to appear at the bottom of the narrative. To display the footer information on a separate line from the actual narrative text, include markup tags in the Postfix field. Ensure that the narrative ends in a line break, or that the footer begins with a line break.
- The toolbar allows you to use HTML code and markup to enhance the narrative text.

20. Enter the following values:

- In the Prefix text box, enter This analysis shows the discount percentage for each customer within the , ensuring that you leave a single space following the last word.
- In the Narrative text box, enter @1, where the number "1" represents the first column in the analysis C50 Region. Then, select the @1 that you entered and click the **bold** icon.
- In the Postfix text box, enter region., ensuring that you include a space before region and period after region.
- Enter 1 in the "Rows to display" text box.

The screenshot shows the Compound Layout editor interface. At the top is a toolbar with buttons for Bold (B), Italic (i), Underline (u), and Line Break, along with a checkbox for "Contains HTML Markup". Below the toolbar are four text input fields: "Prefix" containing "This analysis shows the discount percentage for each customer within the ", "Narrative" containing "[b]@1[/b]", "Row separator" which is empty, and "Postfix" containing "region.". To the right of the "Row separator" field is a "Rows to display" field containing the number "1". At the bottom of the editor is a preview of the rendered output: "This analysis shows the discount percentage for each customer within the AMERICAS region." The text "AMERICAS" is bolded in the preview.

Notice that a preview is provided at the bottom of the editor.

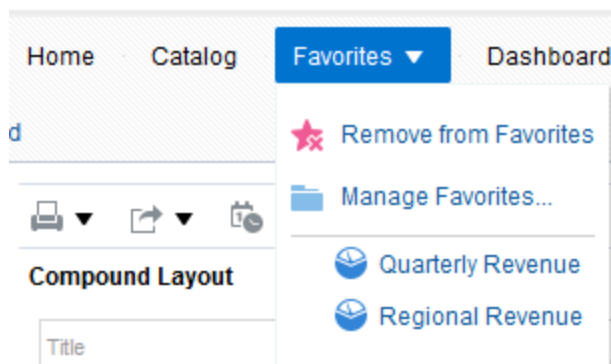
21. Click Done and save your analysis. The Compound Layout should look like this:

Compound Layout				
Narrative [A] ✎ ✕				
This analysis shows the discount percentage for each customer within the AMERICAS region.				
Table [A] XYZ ✎ ✕				
C0 Customer Number	C1 Customer Name	4- Paid Amount	3- Discount Amount	Discnt Pct to Paid Amount
4	Tamara Aaron	\$60,290.45	\$1,659.00	2.75%
5	Stacy Kidder	\$33,677.37	\$948.00	2.81%
9	Diego Link	\$28,500.30	\$680.00	2.39%
14	Sue Yamamoto	\$61,532.29	\$2,406.00	3.91%
16	Lauren Green	\$33,605.66	\$755.00	2.25%

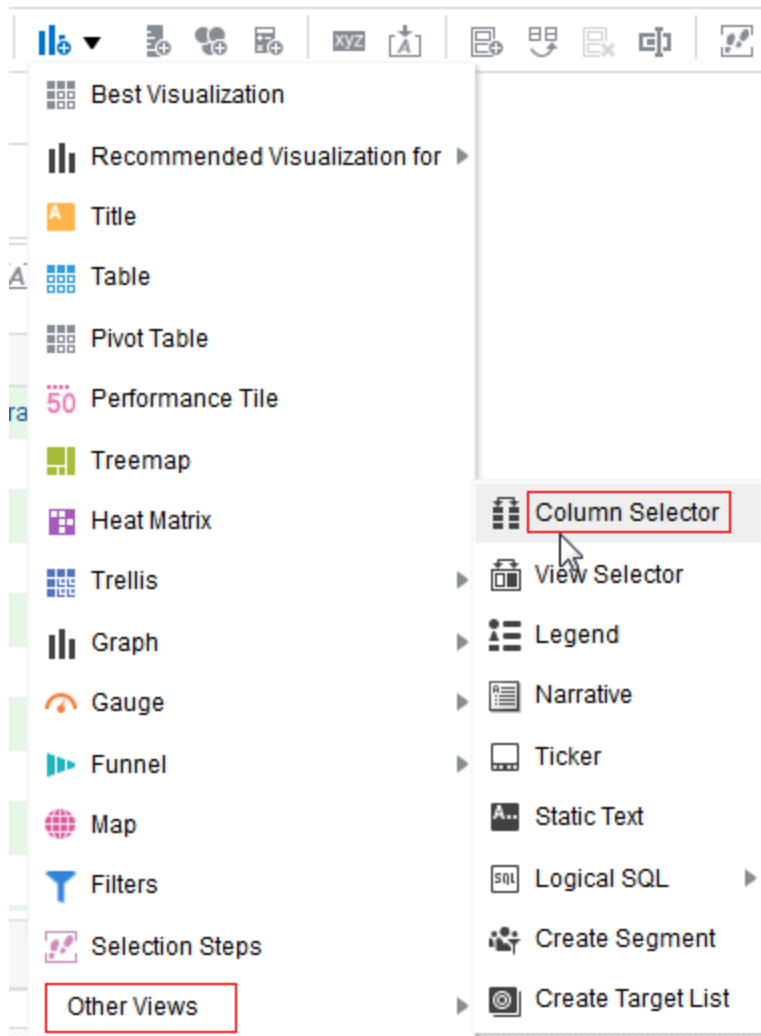
Creating Column Selector and View Selector Views

In this topic, you add a Column Selector view and a View Selector view to an analysis. A Column Selector view adds a column selector to the results. A column selector is a list from which users can dynamically select the columns that display in results. This allows you to analyze data along several dimensions. By changing the measure columns, you can dynamically alter the content of the analyses you have created. A View Selector view enables you to select from saved views.

1. From the Favorites list in the global header, select **Regional Revenue**.



2. In the Results tab, click the New View icon and select **Other Views > Column Selector**.



3. The Column Selector view appears beneath the table view. Drag the Column Selector view above the Title view.

Compound Layout

Column Selector

Title

Regional Revenue

Table

Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988
	CompCell RX3	839,407
	Game Station	1,054,701
	HomeCoach 2000	689,154
	KeyMax S-Phone	906,918
	LCD 36X Standard	1,364,184
	LCD HD Television	523,207

- Click the Edit View icon for the Column Selector view.
The Column Selector editor appears.

Editing from: "Compound Layout" Done Revert

Label Position Start ☒ Automatically refresh when a new column is selected

	Column 1	Column 2	Column 3
	<input type="checkbox"/> Include Selector	<input type="checkbox"/> Include Selector	<input type="checkbox"/> Include Selector
	C50 Region	P1 Product	1- Revenue
Label (optional)			
Choices			

- Select the Include Selector check box and In the Label (optional) text box for C50 Region, enter Choose a column:. Then double-click the following columns in the Subject Area pane to add to the selector: P4 Brand, P3 LOB, and P2 Product Type.

Column Selector

Choose a column: C50 Region

Title

Regional Revenue

Table

Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988

The values change appropriately. Note, because you have set a custom heading for the C50 Region column earlier, the custom heading is still displayed for the column.

Column Selector

Choose a column: P3 LOB

Title

Regional Revenue

Table

Region	P1 Product	1- Revenue
Communication	CompCell RX3	1,696,151
	KeyMax S-Phone	1,765,728
	Touch-Screen T5	1,903,081
	V5x Flip Phone	2,777,370

8. Next you will add a View Selector view. A View Selector view provides a drop-down list from which users can select a specific view of analysis results from among saved views. A View Selector view is analogous to a storage container, in that it holds other views which have been selected in the editor for display.
9. Perform the following before adding the View Selector view:
 - Delete the Title view from the Compound Layout.
 - In the Choose a column: list of the Column Selector view, select **C50 Region**, and then delete the Column Selector view from the Compound Layout.
 - From the New View menu, select **Graph > Bar > Vertical** to add a vertical bar graph.

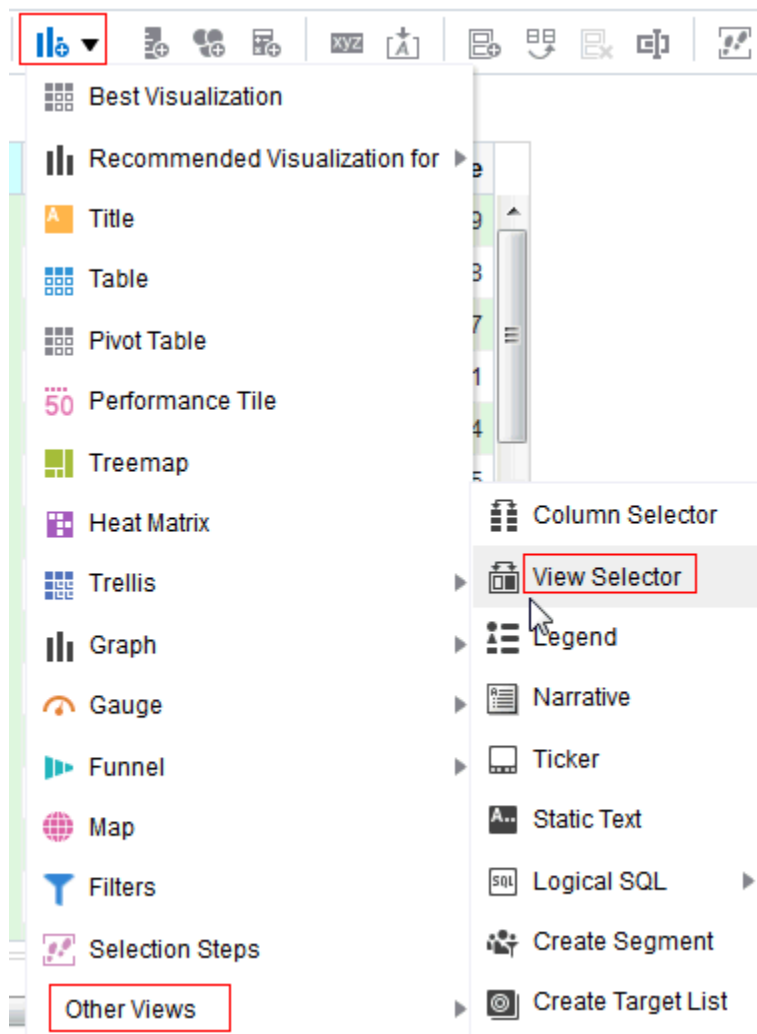
Compound Layout

Table

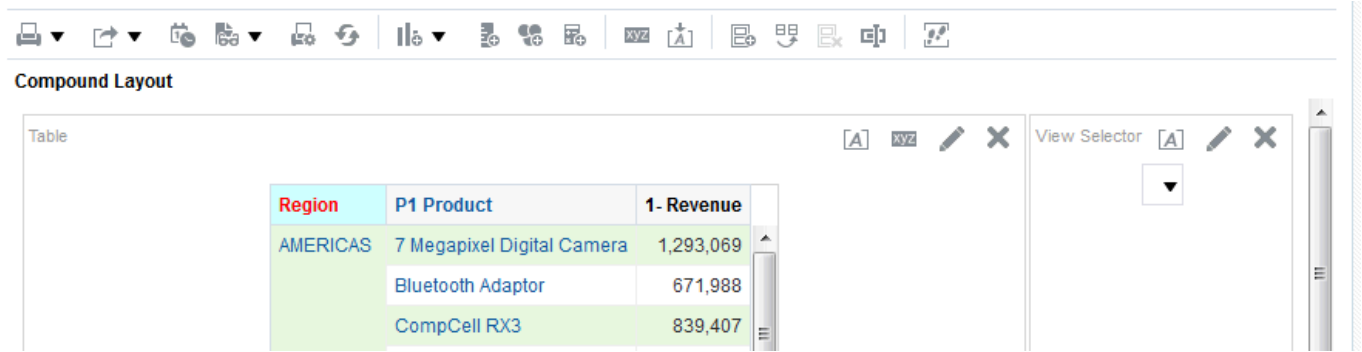
Region	P1 Product	1- Revenue
AMERICAS	7 Megapixel Digital Camera	1,293,069
	Bluetooth Adaptor	671,988
	CompCell RX3	839,407
	Game Station	1,054,701
	HomeCoach 2000	689,154
	KeyMax S-Phone	906,918
	LCD 36X Standard	1,364,184
	LCD HD Television	523,207

These changes will allow you to showcase the analytic data-driven views.

10. Click the New View icon on the toolbar and select Other Views > View Selector.

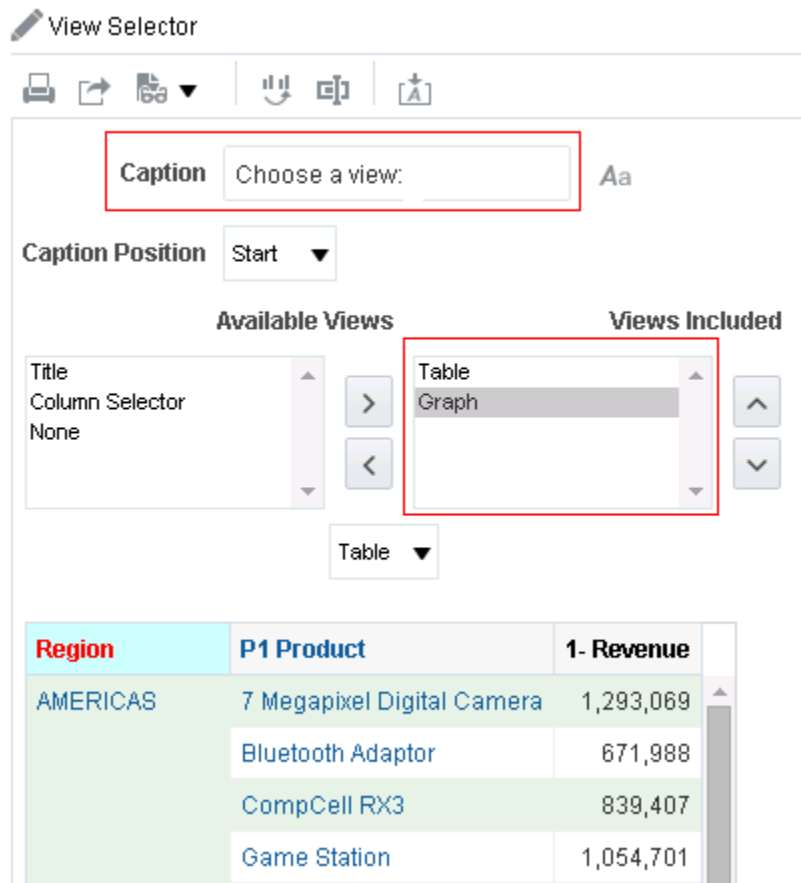


11. Drag the View Selector view to the right of the Table view.



12. Click the Edit View icon for the View Selector view. The View Selector editor appears.

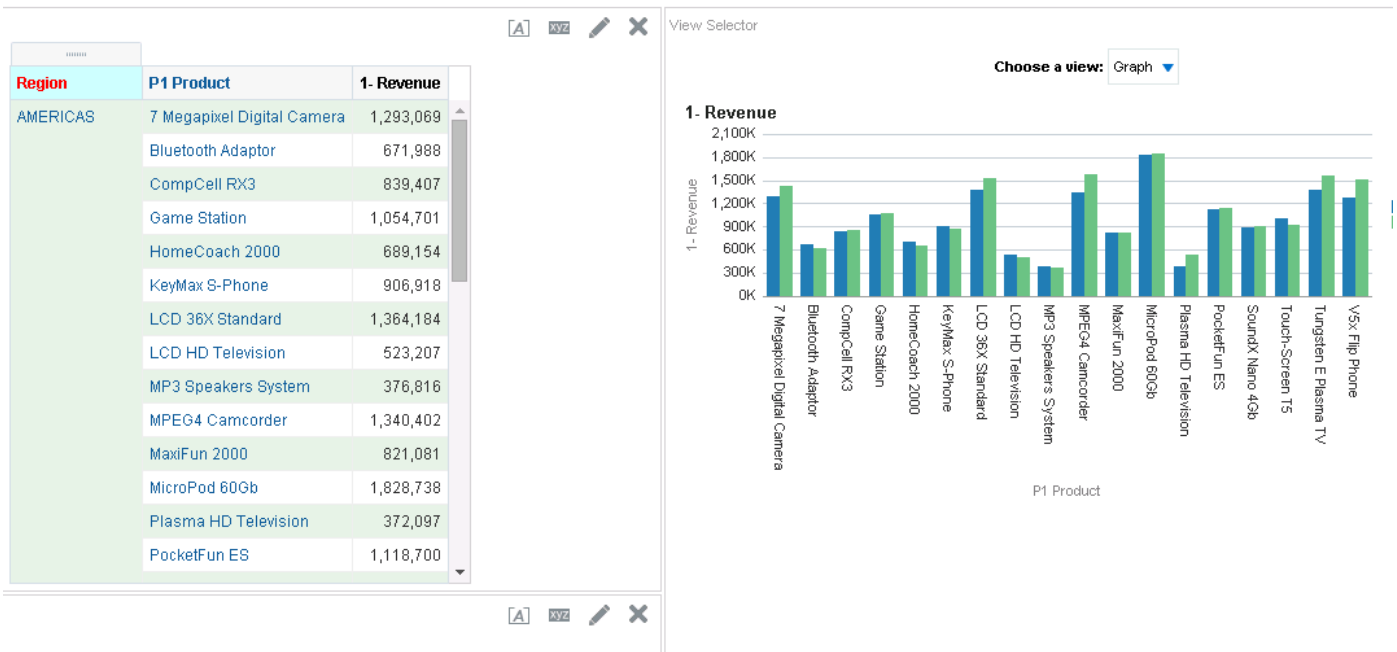
13. In the Caption text box, enter Choose a view:. In the Available Views list, select the Table and Graph views and click the shuttle icon to move them to the Views Included list.



A preview appears at the bottom of the editor. Note that these views are data-driven views, unlike the Column Selector and Title views, which were deleted from the Compound Layout.

14. Click Done.

The Compound Layout should look like this when the Graph view is selected:



15. Click **Home** in the global header to go to the Home page. Do not save your changes to the analysis if you are prompted.

Adding Your Own Data to Analyses

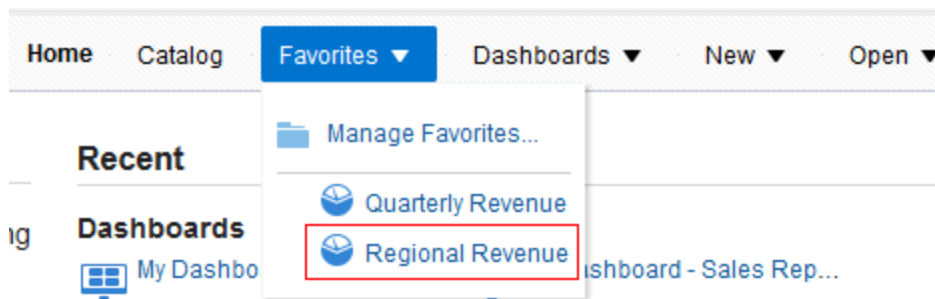
You can include dimensions and measures from external data sources in your analyses. The external data is loaded to the database, but is not part of the BI metadata catalog. You can create an analysis that include only data from an external source, or you can blend dimensions and measures from the external data source with dimensions and measures defined in the BI metadata catalog. The external data must be stored in a Microsoft Excel format spreadsheet file. You import the data from the spreadsheet file into the BI EE database as an external data source. You then add columns from the external data source to your analyses. When the data in spreadsheet file changes, you can refresh the BI EE database with the changes.

In this example, you will create a blended analysis. You will extend the dimensions for the Regional Revenue analysis by adding columns for Currency and Capitol City from an external source. The source data for the columns is stored in the file `XSA World Statistics.xlsx`.

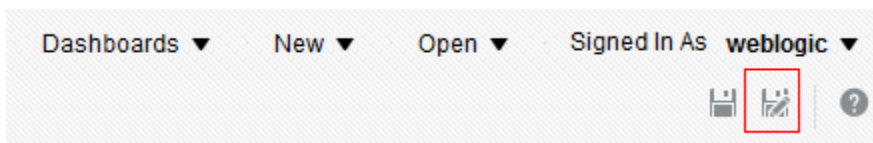
1. In your spreadsheet program, navigate to the location where you stored `XSA World Statistics.xlsx` and open the file. Review the contents, and then exit you spreadsheet program. You will use this file as your external data source.

	A	B	C	D	E
1	Name	Language	Continent	Capital City	Currency
2	Abkhazia	Abkhaz	Asia	Sukhumi	Georgian lari;
3	Afghanistan	Dari Persian	Asia	Kabul	Afghan afghani
4	Albania	Albanian	Europe	Tirana	Albanian lek
5	Algeria	Arabic	Africa	Algiers	Algerian dinar
6	Andorra	Catalán	Europe	Andorra la Vella	Euro
7	Angola	Portuguese	Africa	Luanda	Angolan kwanza
8	Antigua and Barbuda	English	North America	St. John's	East Caribbean dollar
9	Argentina	Spanish	South America	Buenos Aires	Argentine peso
10	Armenia	Armenian	Asia	Yerevan	Armenian dram

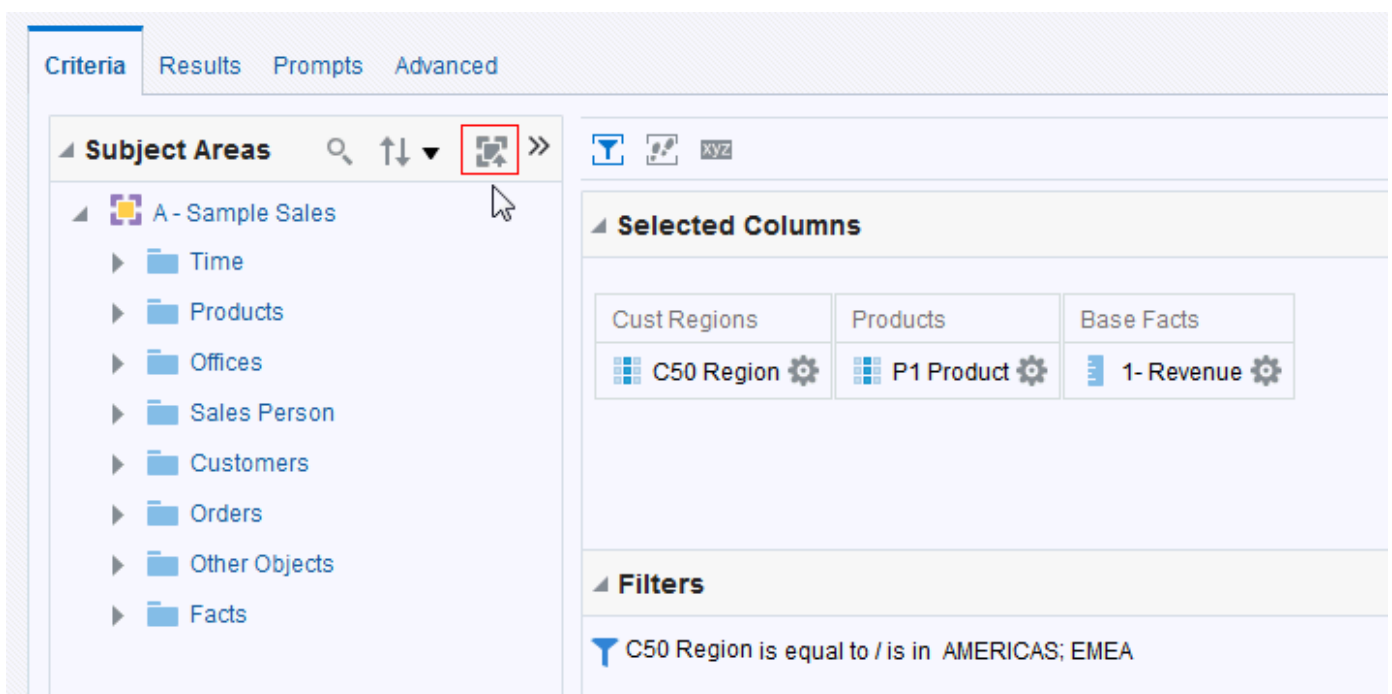
2. In the global header, click Favorites, and select Regional Revenue.



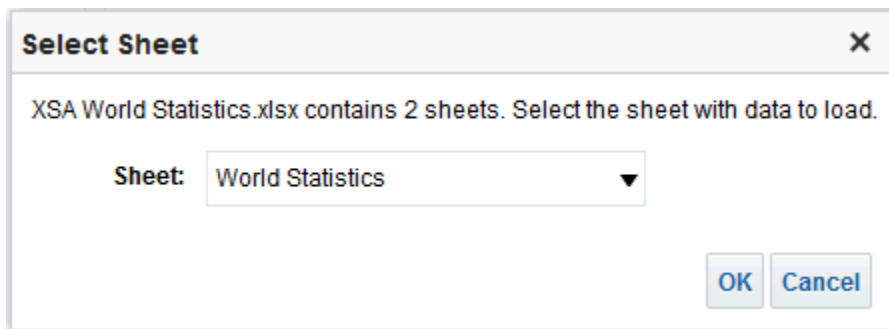
3. Click Save As, and save the analysis in the Regional Revenue folder with the name **Regional Revenue - Detail**.



4. In the Subject Areas pane, click Add Data Source.



5. Navigate to the location where you stored `XSA World Statistics.xlsx`, select the file, and click Open.
6. In the Select Sheet dialog box, verify that World Statistics is selected, and click OK.



7. Select This source will extend dimensions. In the list below the Name column, select Match With. In the list that appears after you select Match With, expand Customers, then Cust Regions, and then select C52 Country Name. Click Load.

?

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Create Subject Area from XSA World Statistics.xlsx

Data Source Name

XSA World Statistics - World Statistics

Description

Uploaded from XSA World Statistics.xlsx.

☐ This source will Add Facts.
 ☒ This source will Extend Dimensions.

<< Hide Details

Load

Cancel

<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Language
Abkhazia	Abkhaz
Afghanistan	Dari Persian
Albania	Albanian
Algeria	Arabic
Andorra	Catalán
Angola	Portuguese
Antigua and Barbuda	English
Argentina	Spanish
Armenia	Armenian
Australia	English

Match with

▼

Add Attribute

▼

C52 Country Name

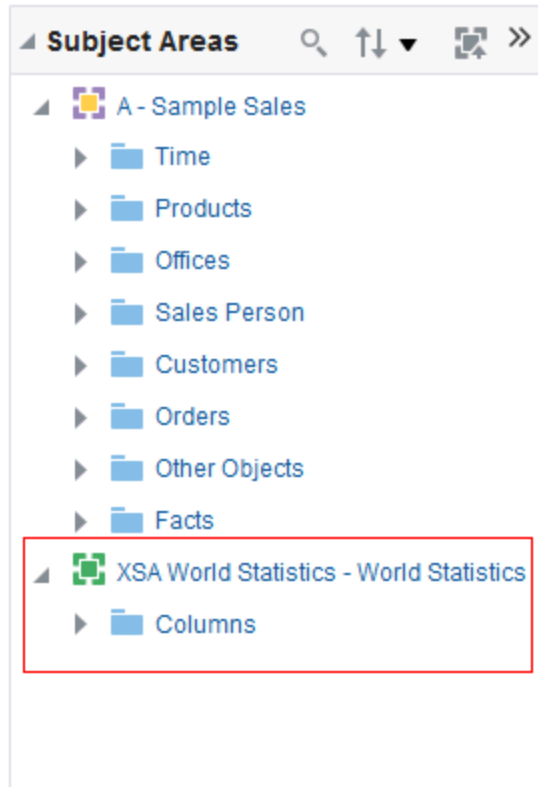
▼

◀

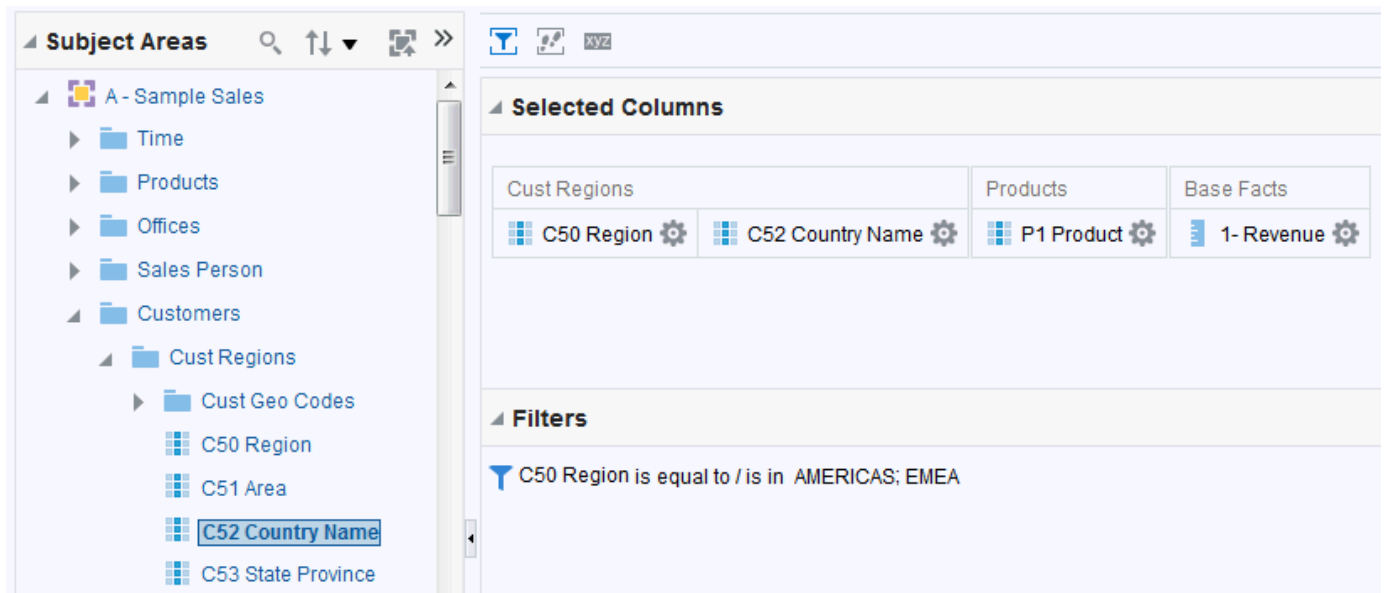
|||

▶

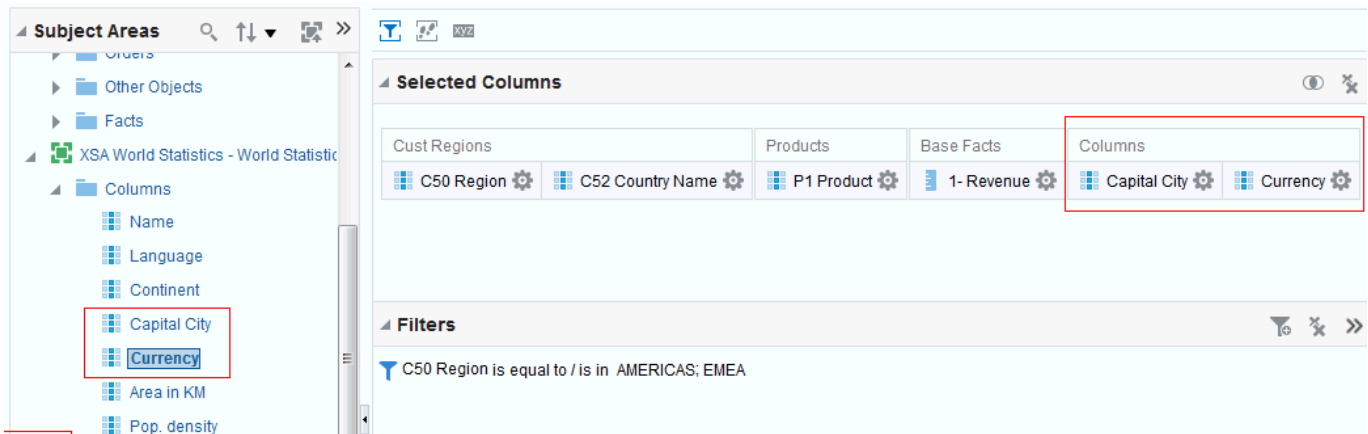
XSA World Statistics - World Statistics is added to the Subjects Areas pane as a data source.



8. In the A - Sample Sales subject area, expand Customers, and then Cust Regions. Double-click C52 Country Name to add it to the Selected Columns area..



9. In the Subject Areas pane, expand XSA World Statistics and then Columns. Double-click Capital City and Currency to add them to the Selected Columns area..



10. Click the Results tab. The table displays the data loaded from the spreadsheet.

Region	P1 Product	1- Revenue	C52 Country Name	Capital City	Currency
AMERICAS	7 Megapixel Digital Camera	70,537	Argentina	Buenos Aires	Argentine peso
		2,055	Bolivia	La Paz	Bolivian boliviano
		8,203	Brazil	Brasília	Brazilian real
		37,518	Canada	Ottawa	Canadian dollar
		684	Chile	Valparaíso	Chilean peso
		8,848	Colombia	Bogotá	Colombian peso
		10,519	Costa Rica	San José	Costa Rican colón
		1,795	Cuba	Havana	Cuban convertible peso;
		2,659	Dominican Republic	Santo Domingo	Dominican peso
		1,516	Ecuador	Quito	United States dollar
		3,038	Guatemala	Guatemala City	Guatemalan quetzal
		3,187	Honduras	Tegucigalpa	Honduran lempira

11. In the Table view, click the Edit View icon.

Region	P1 Product	1- Revenue	C52 Country Name	Capital City	Currency
AMERICAS	7 Megapixel Digital Camera	70,537	Argentina	Buenos Aires	Argentine peso
		2,055	Bolivia	La Paz	Bolivian boliviano

12. In the Layout pane, perform the following:

- Drag **C50 Region** from the Columns and Measures area to the **Sections** area.
- Drag **C52 Country Name** and drop it to the left of **P1 Product**, so that C52 Country Name is the first column.
- Drag **Capital City** and drop it to the left of **P1 Product**, so that it is between C52 Country Name and P1 product.

You Layout pane should match the following:

Layout

Table Prompts Σ xyz

Drop here for Table prompts

Sections Σ xyz

Cust Regions

Region Σ

Table xyz

Columns and Measures Σ xyz

Cust Regions	Columns	Products	Base Facts	Columns
C52 Country Name Σ	Capital City Σ	P1 Product Σ	1- Revenue Σ	Currency Σ

13. Click Done.

The analysis now includes detail by country. For each country, the Capital City and Currency columns display extended dimension data loaded from XSA World Statistics.xls.

Compound Layout

Regional Revenue - Detail

Table

AMERICAS

C52 Country Name	Capital City	P1 Product	1- Revenue	Currency
Argentina	Buenos Aires	7 Megapixel Digital Camera	70,537	Argentine peso
		Bluetooth Adaptor	61,874	Argentine peso
		CompCell RX3	53,899	Argentine peso
		Game Station	81,987	Argentine peso
		HomeCoach 2000	44,881	Argentine peso
		LCD 36X Standard	133,023	Argentine peso
		LCD HD Television	29,769	Argentine peso
		MP3 Speakers System	42,046	Argentine peso
		MPEG4 Camcorder	104,898	Argentine peso

14. Save the analysis.

-Building Dashboards-

In this topic, you will learn about the My Dashboard view and how to create and edit a shared dashboard, adding a saved analysis that you have created previously. Dashboards provide personalized views of corporate and external information. Based on your permissions, you can view pre configured dashboards or create your own personalized views. Users with administrative privileges can create shared dashboards for groups of users with common responsibilities or job functions. The ability to create and edit dashboards is controlled by the Manage Dashboard privilege, which is managed by the administrator.

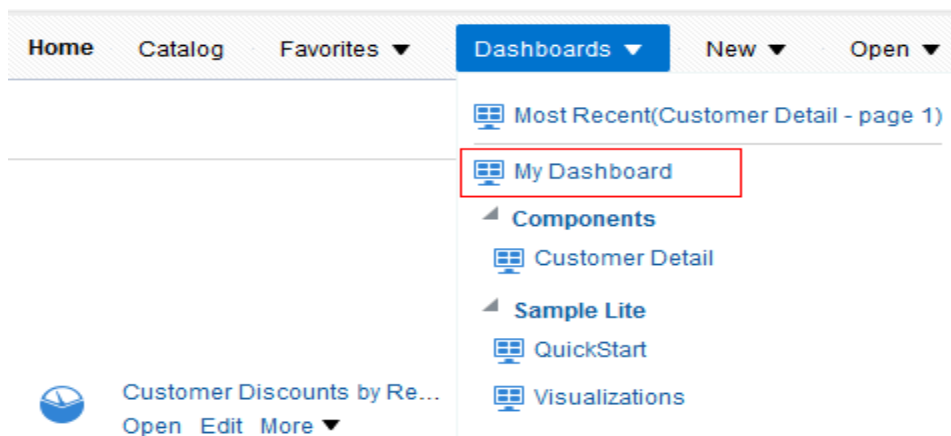
You can view your personalized views by selecting My Dashboard from the Dashboards list. You can also set My Dashboard as your default dashboard. Pre configured dashboards appear in the Dashboards drop-down list. They can be created by administrators and shared with groups of users with common responsibilities or job functions.

1. Exploring and Editing My Dashboard
2. Creating a Dashboard
3. Adding a Page to a Dashboard
4. Adding Conditions and a Title to a Section
5. Editing Report Links
6. Saving a Customized Dashboard and Setting Preferences
7. Exporting the Dashboard to a Spreadsheet

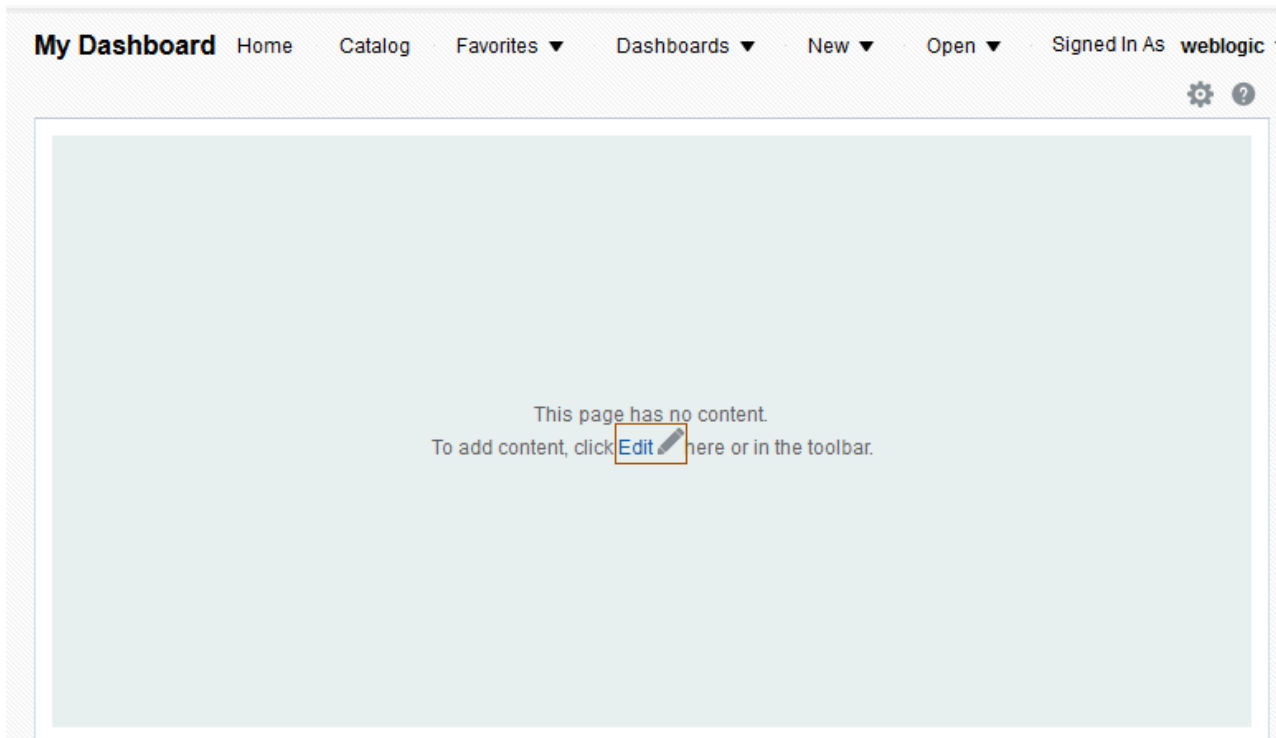
Exploring and Editing My Dashboard

My Dashboard, a personalized view, is a dashboard page that you create and save as your default, personal starting page by using the Preference tab of the My Account dialog box. To open My Dashboard, perform the following steps:

1. Click Dashboards on the global header and then select My Dashboard.



An empty My Dashboard page appears.



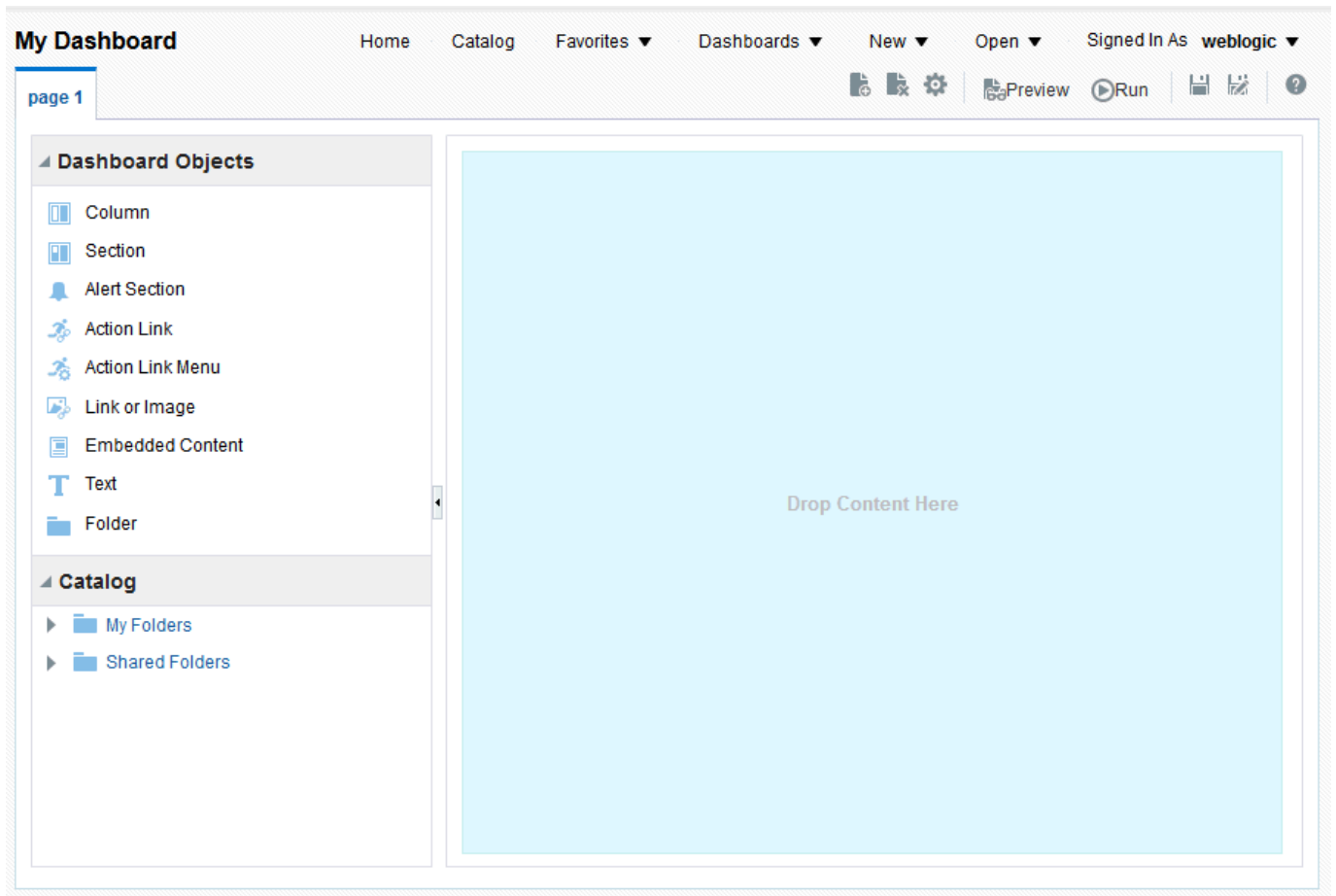
When you open a dashboard, including My Dashboard, the content appears in one or more dashboard tabbed pages. Pages contain the columns and sections that hold the content of a dashboard, and every dashboard has at least one page. Multiple pages are used to organize content.

This example shows an empty My Dashboard page with no content. You can hover over the Edit icon to edit the dashboard and add content.

Note: If you have chosen, or if your company has setup, My Dashboard as your default, then you use dashboard template pages to populate your personal dashboards (My Dashboard) when you first log in as a new user. This allows you to see one or more dashboard pages with content, rather than an empty dashboard. It also gives you a starting point to build your own dashboard pages.

2. Click the Edit icon () in the middle of the page to add content to your empty dashboard page.

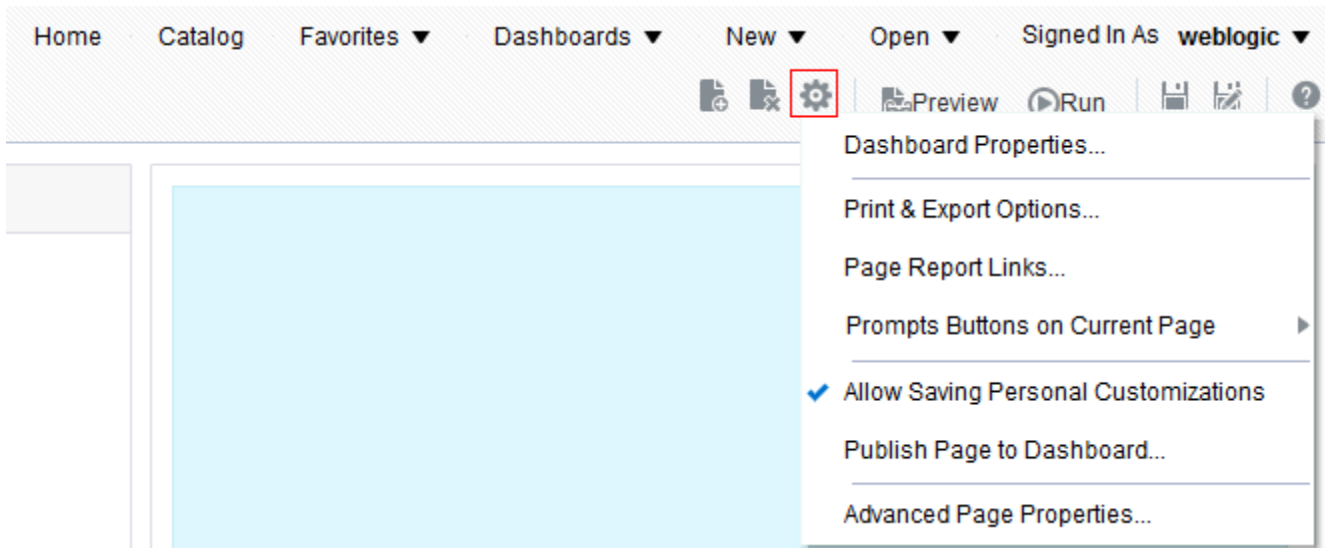
The Dashboard Builder appears and automatically creates **page 1** of your dashboard .



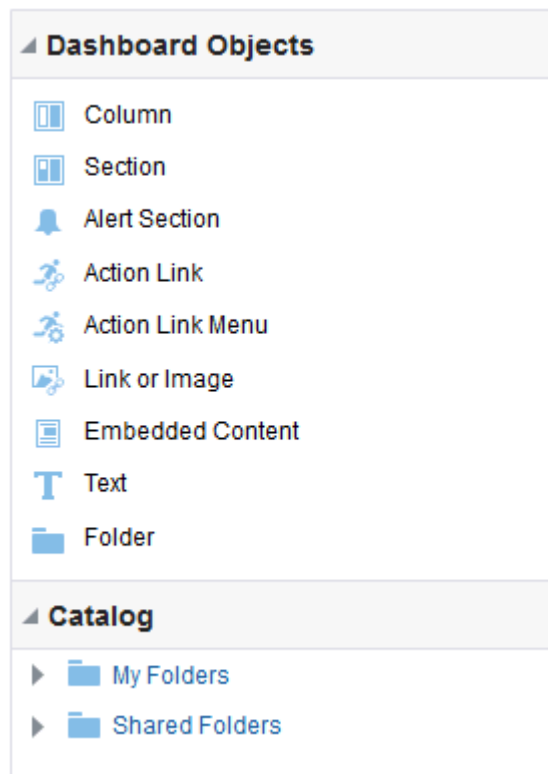
Using the Dashboard Builder, you can add pages and objects to a dashboard and control the page layout. The Dashboard Builder is composed of the following:

- **Dashboard Toolbar:** The toolbar allows you to perform tasks such as adding or deleting pages, previewing, saving, and so on.
- **Dashboard Objects pane:** Items that are used only in a dashboard. Examples of dashboard objects are sections to hold content, action links, and embedded content that is displayed in a frame on a dashboard
- **Catalog pane:** Items that you or someone else has saved to the Catalog, for example, analyses, prompts, and so on. In a dashboard, the results of an analysis can be shown in various views, such as a table, graph, and gauge. (The results of an analysis are the output that is returned from the Oracle BI Server that matches the analysis criteria.) Users can examine and analyze results, save or print them, or download them to a spreadsheet.
- **Page Layout pane:** This is a workspace that holds your objects, which are displayed on the dashboard.

In the Dashboard Toolbar, the Tools toolbar button provides options to set dashboard properties, set page report links, and so on.

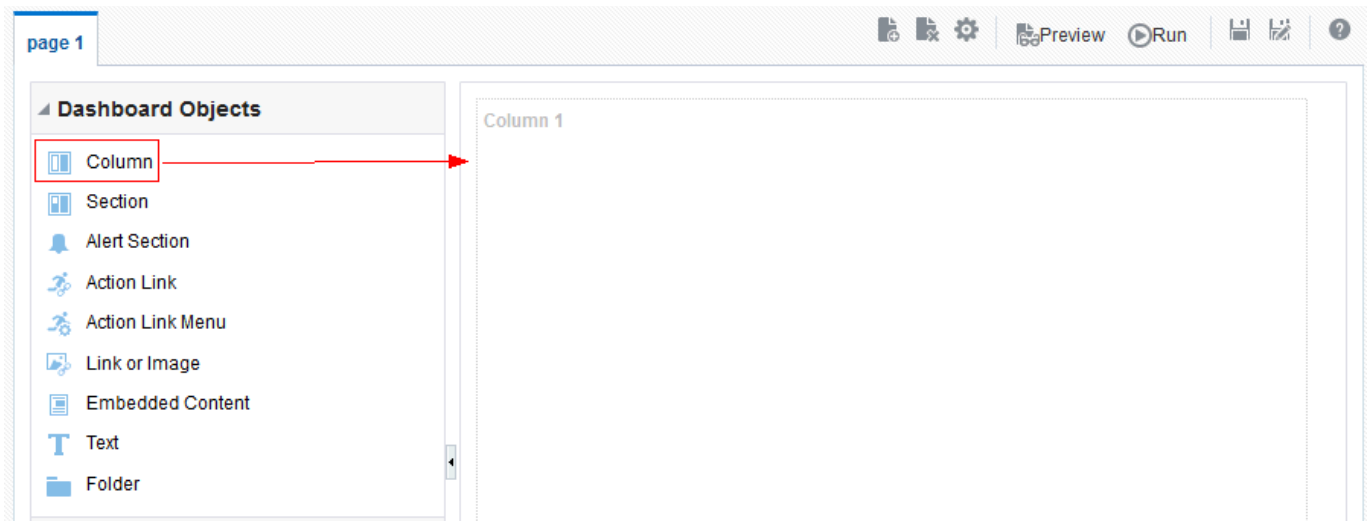


As mentioned above, the Dashboard Objects pane provides you with a list of objects to add as content to a dashboard page. You drag the object to the Page Layout pane on the right.



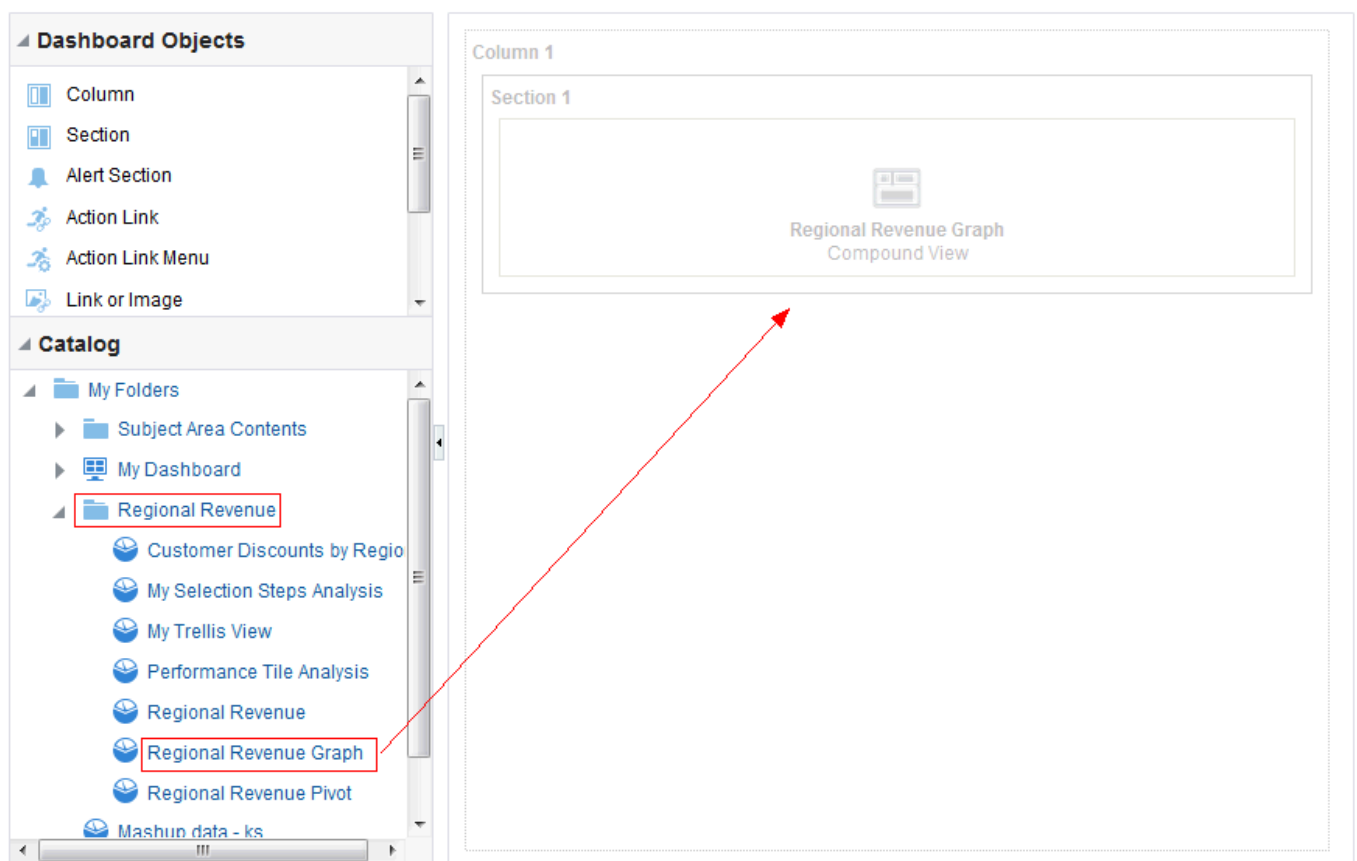
- **Columns** are used to align content on a dashboard. (Sections within columns hold the actual content.) You can create as many columns on a dashboard page as you need.
- **Sections** are used within columns to hold the content, such as action links, analyses, and so on. You can drag and drop as many sections as you need to a column.
- **Alert Section** is used to add a section in which you display Alerts from Agents, if any. (Agents dynamically detect information-based problems and opportunities, determine the appropriate individuals to notify, and deliver information to them through a wide range of devices such as e-mail, phones, dashboard alerts, and so on.) An Alert section is added by default to the first page of My Dashboard if you do not manually include one. You cannot disable the appearance of an Alert section on the first page of My Dashboard. You can add an Alert section to an additional dashboard page so that section will then appear on both dashboard pages.

3. Drag the Column object onto the Page Layout pane.

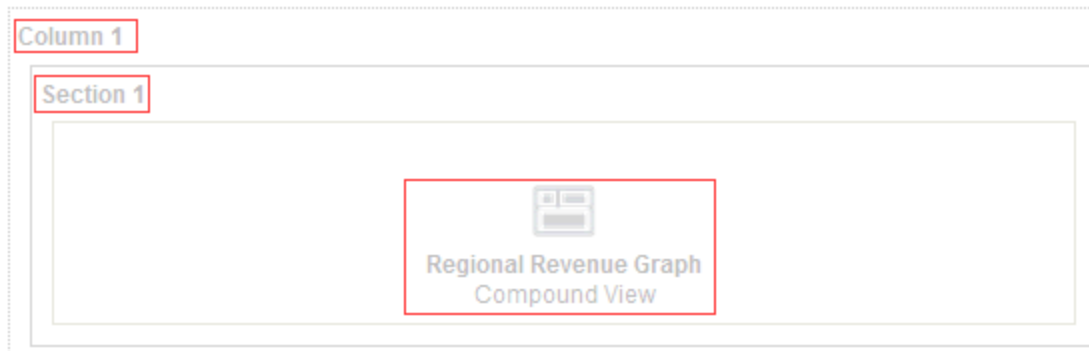


The Column object appears on the Page Layout pane.

4. In the Catalog pane, navigate to the Regional Revenue folder, and then drag the Regional Revenue Graph analysis to the Column 1.area of the dashboard.

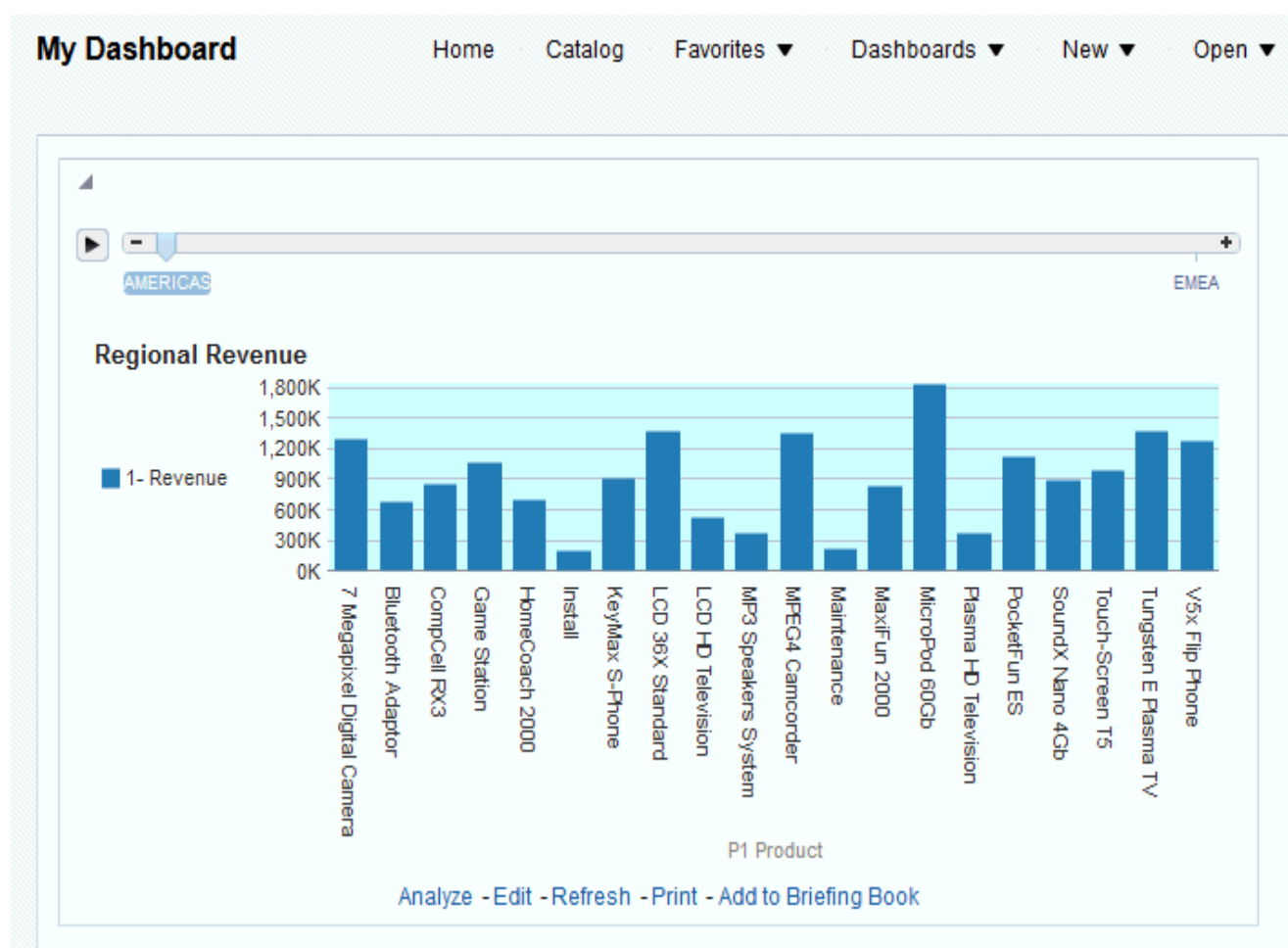


Regional Revenue Graph appears in the column. Observe that a Section is automatically created for you. You can also drag an analysis directly onto an empty Layout Pane without first creating a column. The Dashboard Builder automatically creates the column for you. You can then add sections automatically to that column by dragging analyses below the existing sections.



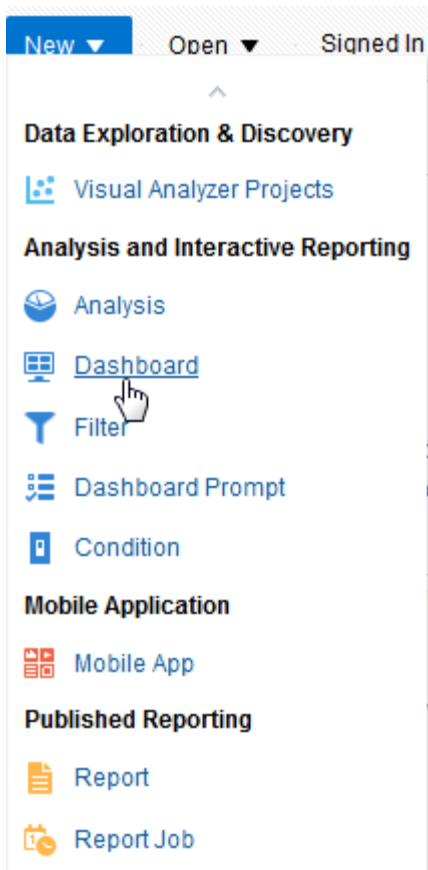
5. Click the Save icon () to save the dashboard page and then click Run  Run .

My Dashboard appears with the selected analysis **Regional Revenue Graph**.



Creating a Dashboard

1. Click New > Dashboard in the global header.



The New Dashboard dialog box appears.

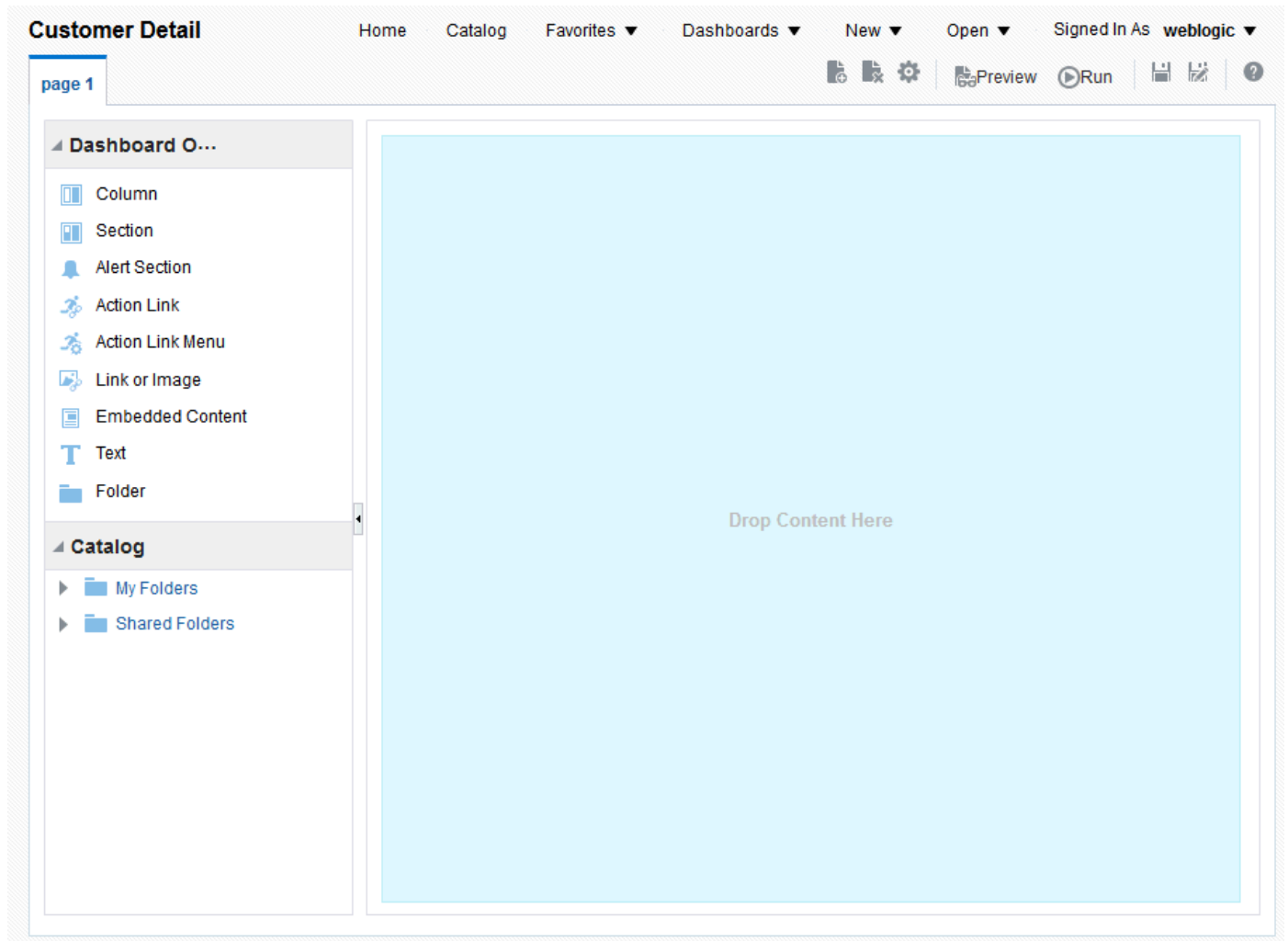
2. **Enter Customer Detail in the name text box. In the Location list, navigate to your Regional Revenue folder. (If you receive a warning message, click OK to close it.) In the Content area, select the default of Add content now.**

 A screenshot of a 'New Dashboard' dialog box. The title bar says 'New Dashboard' with a help icon and a close button. The main text says 'Choose a name and location for the new dashboard'. There are four input fields: 'Name' with the text 'Customer Detail', 'Description' (empty), 'Location' with a dropdown menu showing '/users/weblogic/Regional Revenue', and 'Content' with two radio buttons: 'Add content now' (selected) and 'Add content later (Create empty dashboard)'. At the bottom right are 'OK' and 'Cancel' buttons.

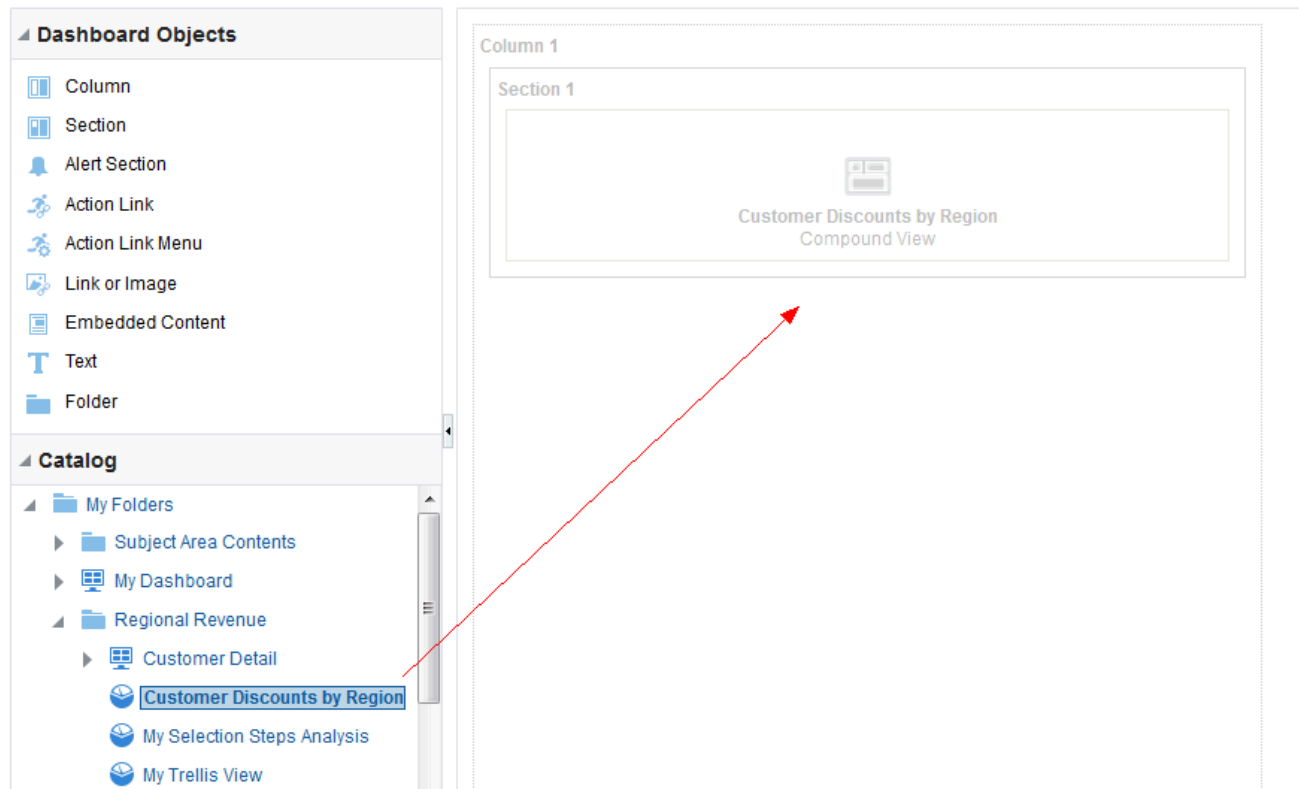
Note: If you save the dashboard in the Dashboards sub folder directly under the /Shared Folders/ sub folder, the dashboard will be listed in the Dashboard menu on the global header. If you save it in a Dashboards sub folder at any other level (such as /Shared Folders/Sales/Eastern), it will not be listed. If you choose a folder directly under /Shared Folders in which no dashboards have been saved, then a new

Dashboards folder is automatically created for you. For example, if you choose a folder named /Shared Folders/Sales in which no dashboards have been saved, a new Dashboards folder is automatically created and the Location entry changes to /Shared Folders/Sales/Dashboards. A new Dashboards folder is not automatically created if you choose a folder at any other level.

3. Click OK. The Dashboard Builder appears.



4. In the Catalog pane, navigate to the Customer Discounts by Region analysis and drag it from the Catalog to the Page Layout pane.



5. Save and run the dashboard.

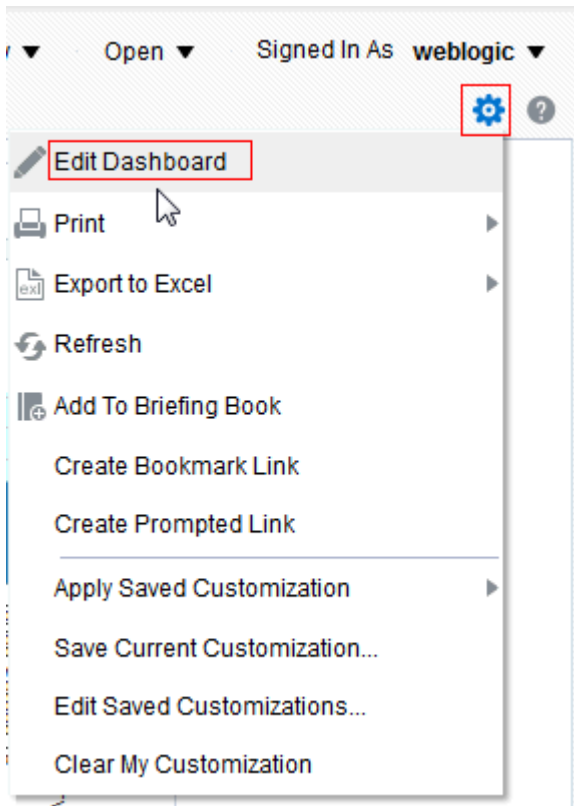
Customer Detail					Home	Catalog	Favorites ▼	Dashboards ▼	New ▼	Open ▼
This analysis shows the discount percentage for each customer within the AMERICAS region.										
C0 Customer Number	C1 Customer Name	4- Paid Amount	3- Discount Amount	Discnt Pct to Paid Amount						
4	Tamara Aaron	\$60,290.45	\$1,659.00	2.75%						
5	Stacy Kidder	\$33,677.37	\$948.00	2.81%						
9	Diego Link	\$28,500.30	\$680.00	2.39%						
14	Sue Yamamoto	\$61,532.29	\$2,406.00	3.91%						
16	Lauren Green	\$33,605.66	\$755.00	2.25%						
18	Elaine Hsieh	\$54,850.16	\$1,726.00	3.15%						
21	Rachel Coles	\$32,295.54	\$1,130.00	3.50%						
22	Elaine Hazleton	\$29,550.31	\$1,083.00	3.66%						
23	M Brown	\$43,683.62	\$1,533.00	3.51%						
27	Robin Fisher	\$42,390.96	\$1,361.00	3.21%						
28	Howard Buckley	\$44,672.72	\$1,819.00	4.07%						
30	Illa Ames	\$58,049.19	\$1,545.00	2.66%						
33	Farinaz Farsai	\$34,341.56	\$1,087.00	3.17%						
36	Heidi Burgdorf	\$25,859.94	\$926.00	3.58%						

As mentioned above, because this dashboard was not created in a Dashboards sub folder directly under a /Shared Folders/first level sub folder, the dashboard will not be listed in the Dashboard menu on the global header. To open the dashboard, navigate to it in the Catalog, or open it from the Recent list on the Home page or in the global header's Open menu.

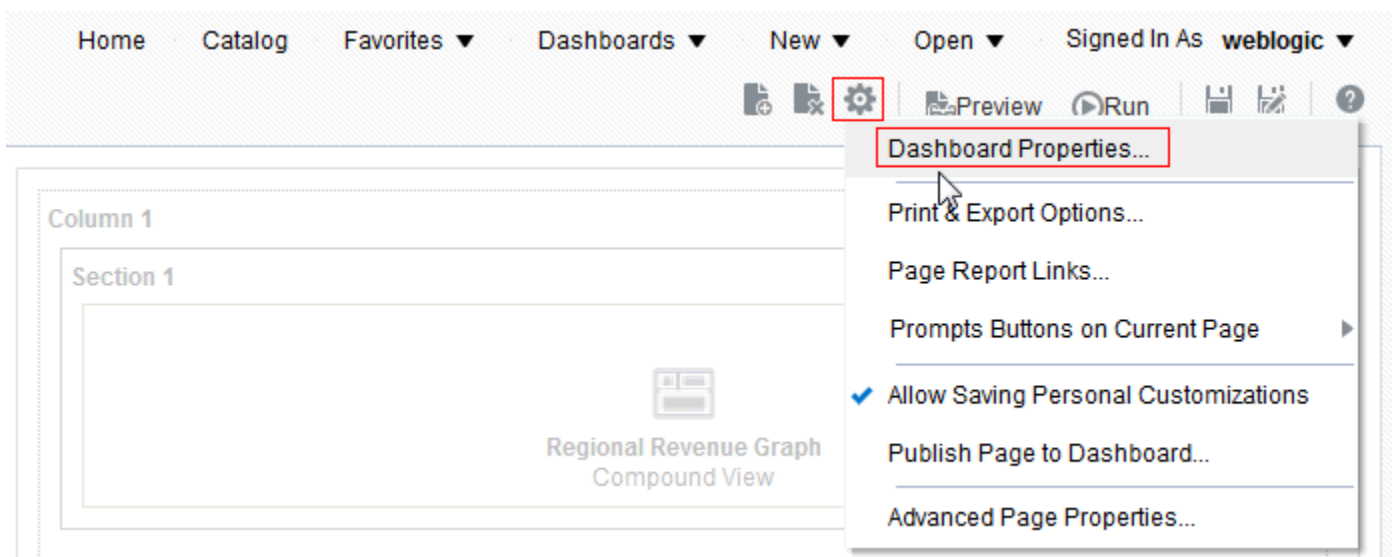
Adding a Page to a Dashboard

Dashboard editing is allowed for users with the appropriate privileges. In this topic, you enhance My Dashboard.

1. In the global header, click **Dashboards**, and then select **My Dashboard**.
2. Click the **Page Options** icon and select **Edit Dashboard**.



3. Click the **Tools** icon and select **Dashboard Properties**.



The Dashboard Properties dialog box appears.

Dashboard Properties

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

General Properties

/My Folders/My Dashboard

Style

Default (Alta) ▼

Description

Page Size

☒ Fit Content

☐ Fill Browser Window

Filters and Variables

Dashboard Report Links

Prompts Apply Buttons

Use page settings ▼

Prompts Reset Buttons

Use page settings ▼

Dashboard Pages

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

↶

↷

↶

↷

OK

Cancel

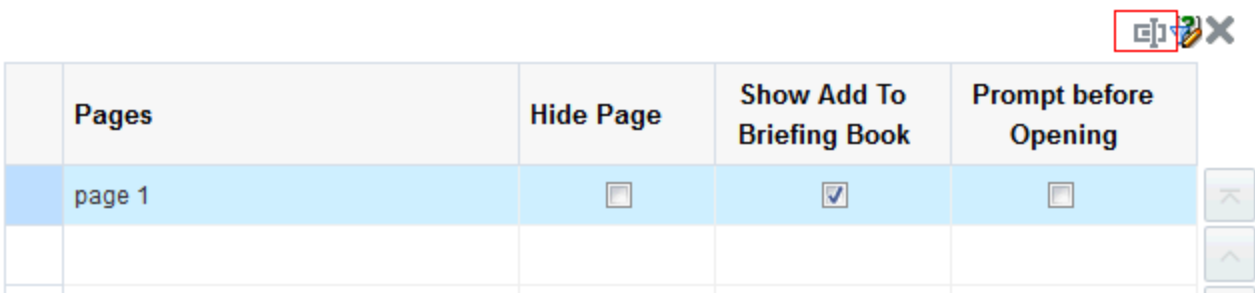
From this dialog box, you can do the following:

- Change the Styles—Styles control how dashboards and results are formatted for display, such as the color of text and links, the font and size of text, the borders in tables, the colors and attributes of graphs, and so on
- Add a description—Descriptions are displayed when Oracle BI Administrators use the Catalog Manager
- Add hidden prompts, filters, and variables
- Specify the links that will display with analyses on a dashboard page
- Rename, hide, reorder, set permissions for, and delete dashboard pages

4. Select page 1 in the Dashboard Pages section. The Dashboard Page Control toolbar is enabled. Using the toolbar, you can do the following:
 - Change the name of your dashboard page.
 - Add a hidden prompt. Hidden prompts are used to set default values for all corresponding prompts on a dashboard page.
 - Add permissions for the dashboard.
 - Delete the selected page. Dashboard pages are permanently deleted.
 - If more than one dashboard pages are in this dashboard, the arrange order icons are enabled (up and down arrow icons).
5. Click the Rename icon.

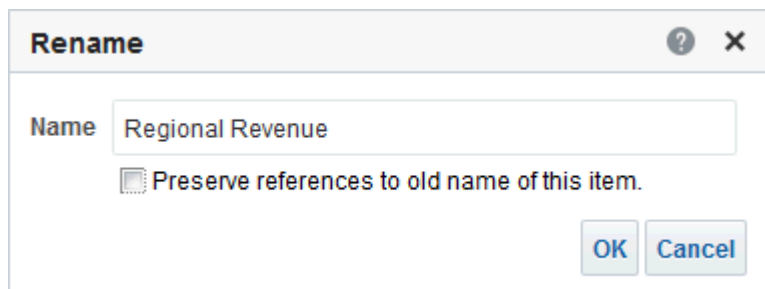
Dashboard Pages

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.



Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Enter Regional Revenue in the Name text box and click OK.



Rename ? ×

Name

☐ Preserve references to old name of this item.

7. Click the the Edit icon for Dashboard Report Links to set the report links at the dashboard level. Report links can be set at the dashboard, dashboard page (click Page Options > Page Report Links), or analysis level (click the properties icon for the specific analysis within the Dashboard Builder and then select Report Links).

Dashboard Properties

?

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Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

General Properties

/My Folders/My Dashboard

Style

Default (Alta) ▼

Description

Page Size

☒ Fit Content
☐ Fill Browser Window

Filters and Variables

Dashboard Report Links

Prompts Apply Buttons

Use page settings ▼

Prompts Reset Buttons

Use page settings ▼

Dashboard Pages

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
Regional Revenue	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Verify the settings match the image below. Click OK and then click OK again to return to the Dashboard Builder.

Report Links

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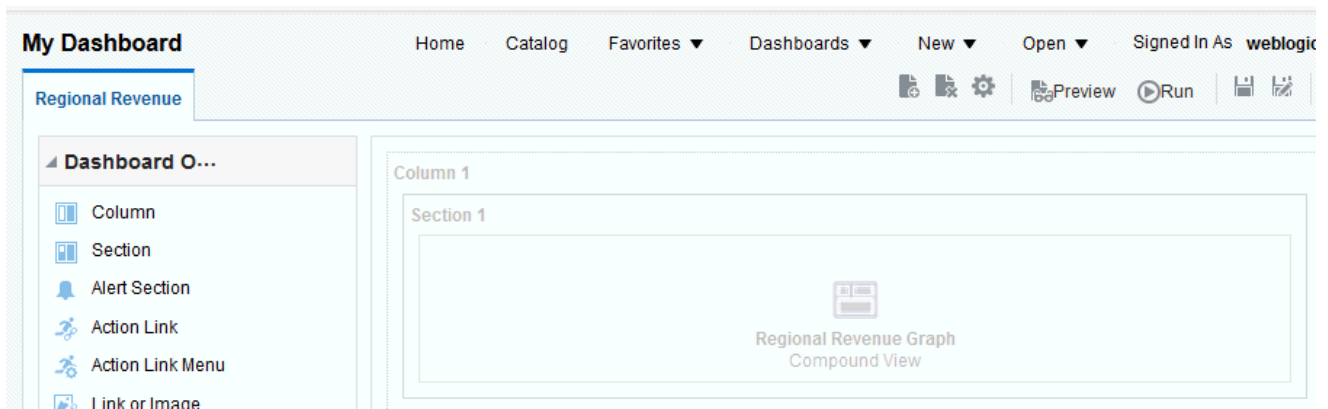
Set report links for this dashboard

☒ Analyze
☒ Edit
☒ Refresh
☒ Print
☐ Export
☒ Add to Briefing Book
☐ Copy

OK

Cancel

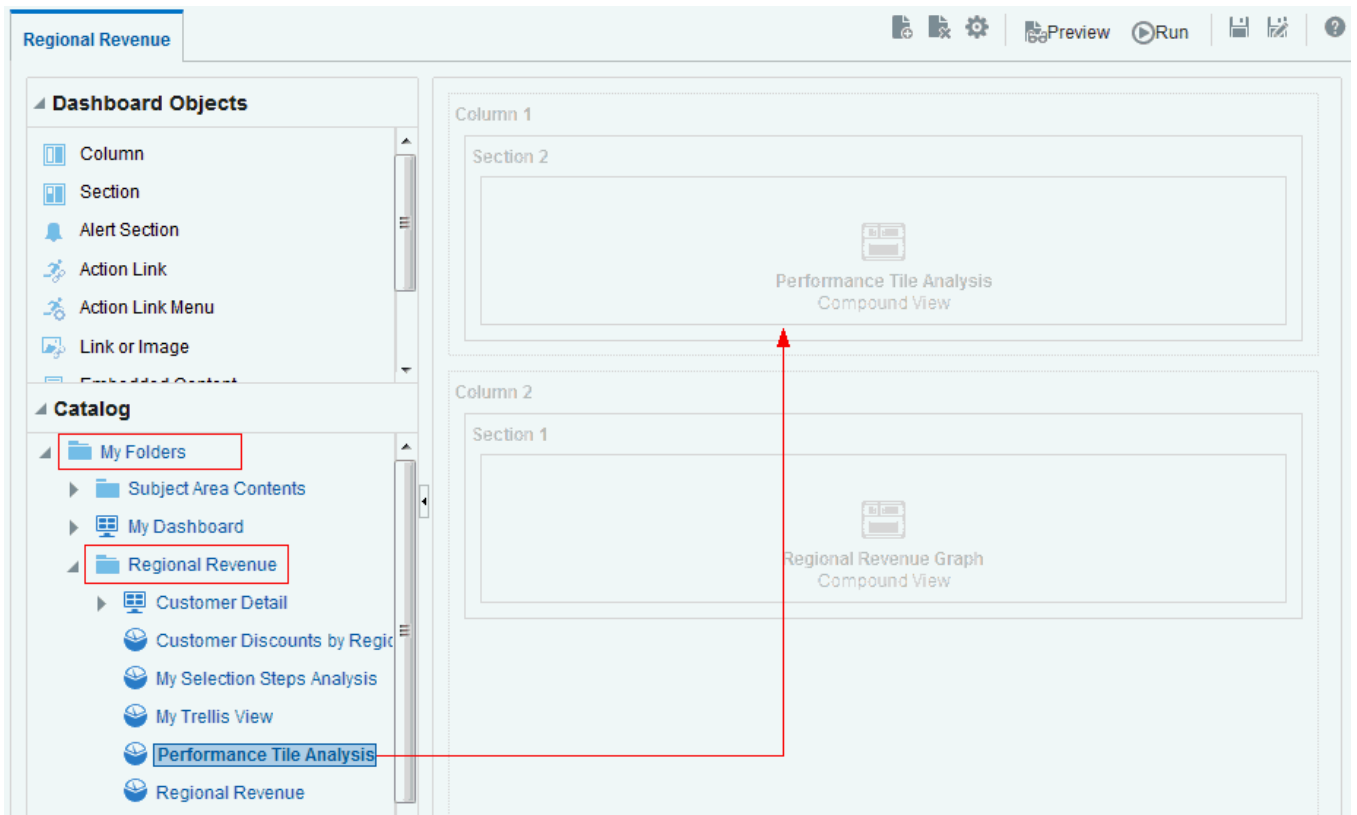
Page 1 has been renamed Regional Revenue.



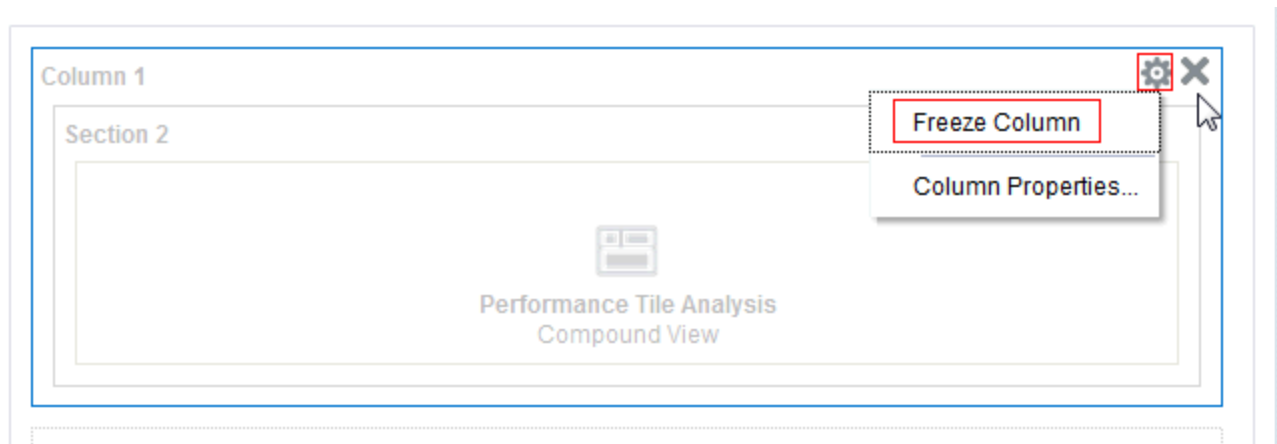
9. Drag a column object from the Dashboard Objects pane and drop the new column just above the existing column in the Page Layout pane.



10. In the Catalog pane, navigate to the Performance Tile Analysis and drag it to the area for the new column in the Page Layout pane.

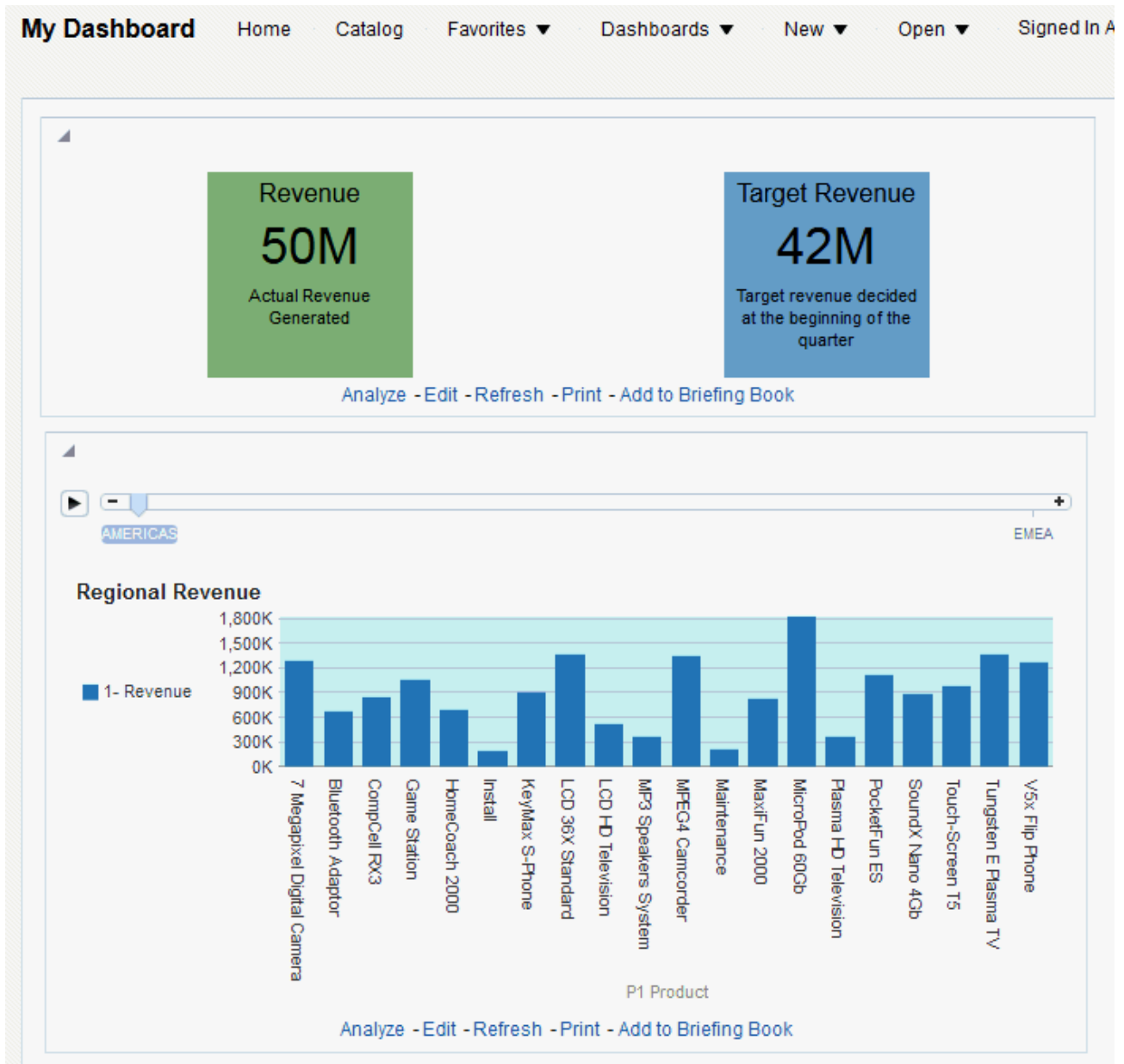


11. In this release, you can freeze a column at an edge (top or left) of a dashboard page layout. Click the Column Properties icon and select Freeze Column. If, as in this dashboard, columns are lying one above the other, frozen column will be anchored at the top of the page layout.

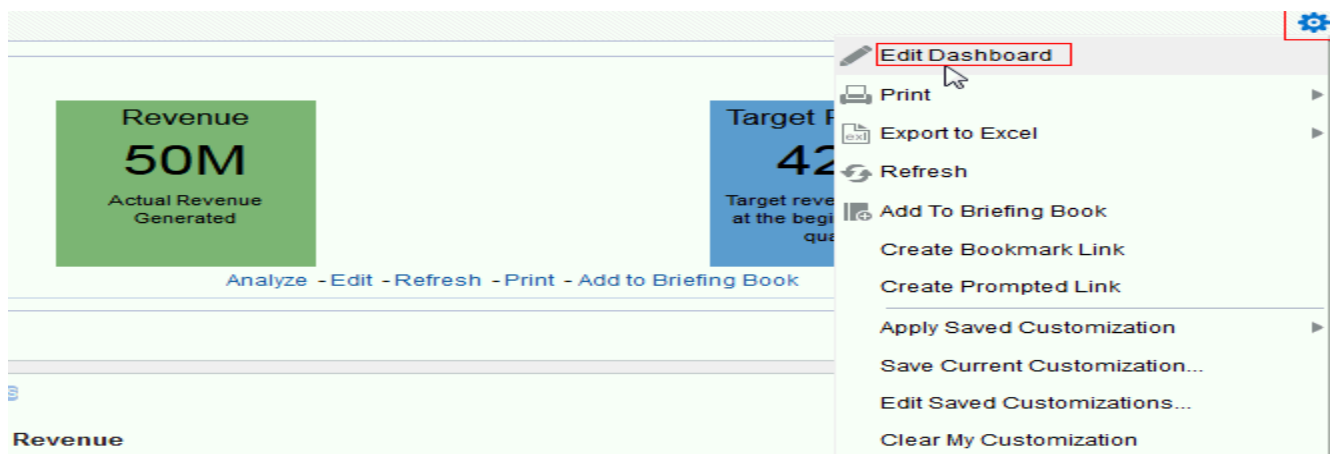


12. Click the Save icon () to save the dashboard page and then click the Run icon ().

My Dashboard appears with the column containing Performance Tile Analysis anchored at the top of the page layout. It will not scroll off the page as you scroll the content in the other column.



13. Click the Page Options icon, and select Edit Dashboard to return to the Dashboard Builder.

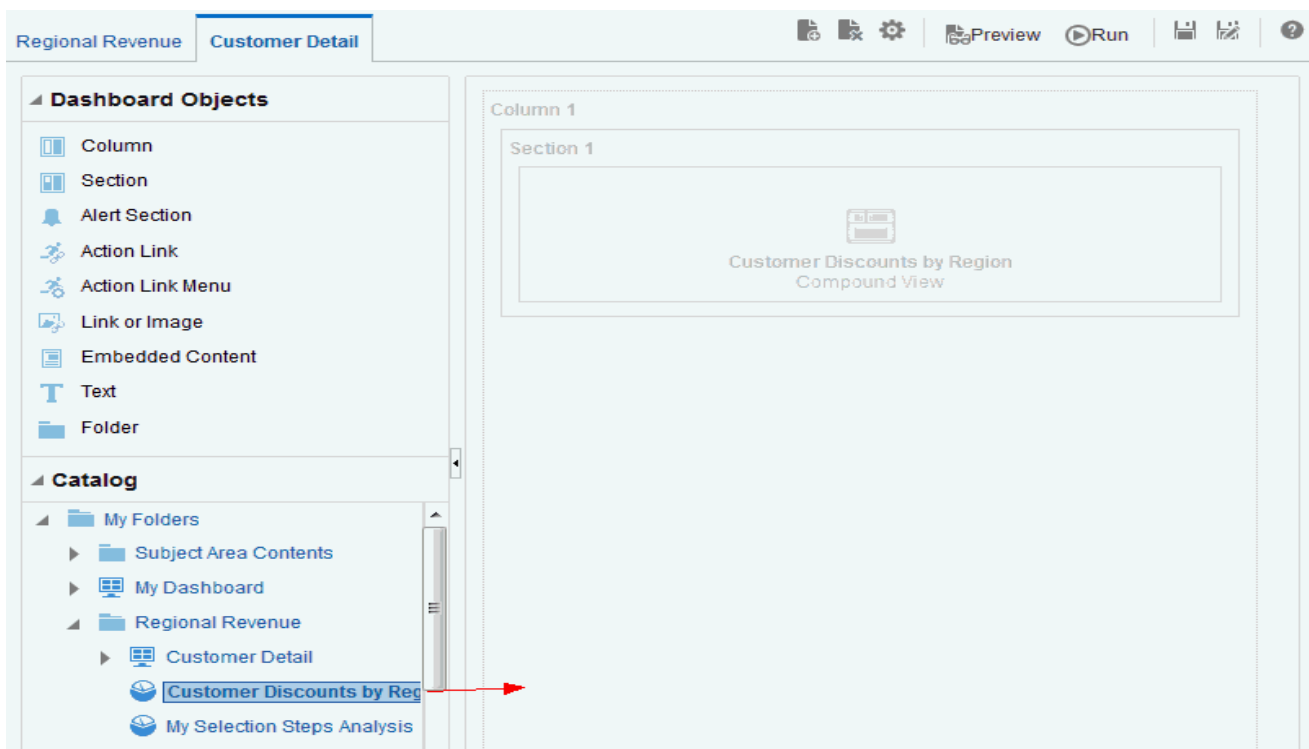


14. Click the Add Dashboard Page icon.



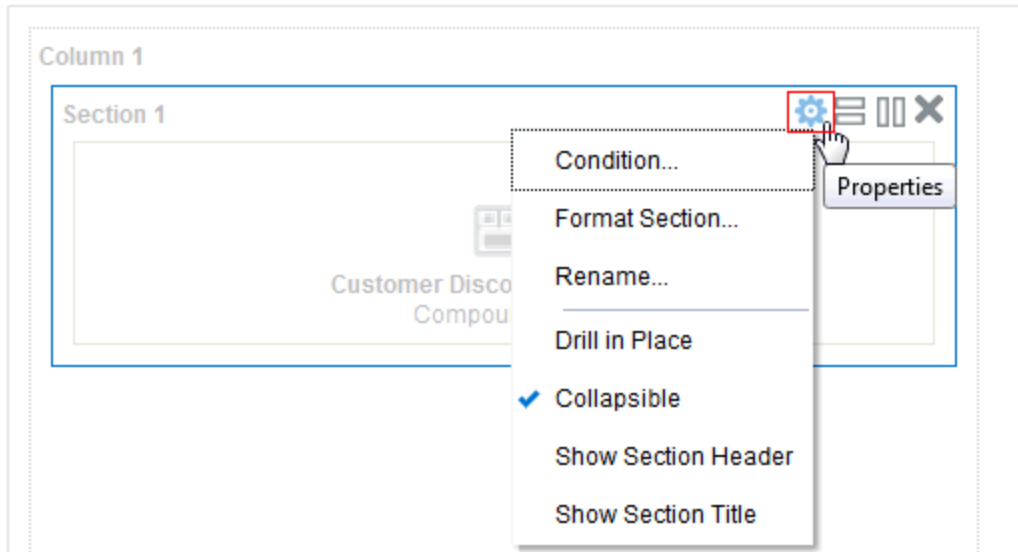
15. In the Name field, enter `Customer Detail` and click OK.

16. In the Catalog pane, navigate to the `Customer Discounts by Region` analysis and drag it to the Page Layout pane on the right. In the next topic, you add a condition and a title to the section.



Adding Conditions and a Title to a Section

1. Click the Properties icon for Section 1.



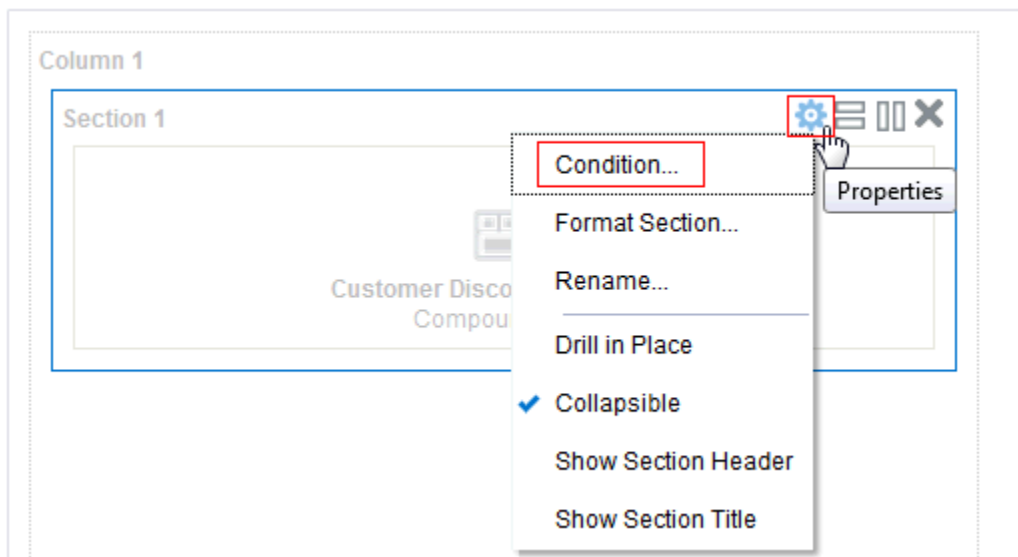
You use the Section Properties drop-down list to do numerous tasks:

Format Section:	Use this option to display the Section Properties dialog, where you specify the properties for the section, such as cell alignment and border color.
Rename:	Use this option to display the Rename dialog box, which allows you to rename the section.
Drill in Place:	Use this option to specify how the results appear when a user drills in an analysis. If a check mark appears in front of the “Drill in Place” option, the original analysis is replaced when the user drills (the section will automatically resize to fit the new analysis). If the check mark is not present in front of “Drill in Place,” the entire dashboard content is replaced. Use this option for prompts that are created for hierarchical columns. Note: You can use the back button in the browser to view the original analysis.
Collapsible:	Use this option to specify whether the user can expand and collapse this section on a dashboard page or whether the section is always expanded. If a check mark appears in front of the Collapsible option, you can expand and collapse the section.
Show Section Header:	Use this option to specify whether to display the header for the section, which initially includes the title of the section. You can hide the title using the Show Section Title option.
Show Section Title:	Use this option to specify whether to display the title of the section.

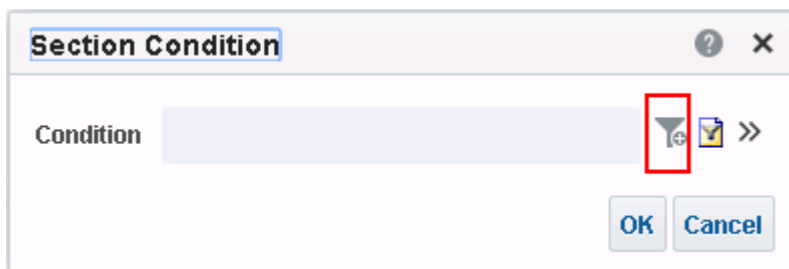
You can have conditions on the sections. You use conditions to determine: whether sections and their content appear on the dashboard page; agents deliver their content and execute their actions; and action links

appear on dashboard pages. Conditions are evaluated based on a Boolean expression; in other words, the condition is either True or False.

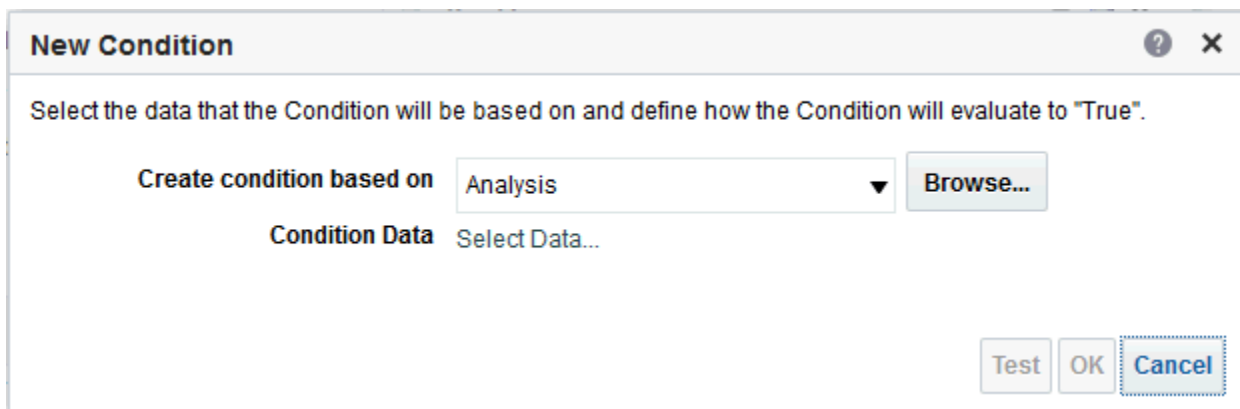
2. You will create a condition to display the section only if the analysis has less than 25 rows. From Properties list for the section, select Condition.



3. Click the New Condition icon.



4. In the Create condition based on list, select Analysis, then click Browse and select the Customer Discounts by Region analysis.



5. In the True If Row Count list, select is less than and enter 25 in the text box to the right. Click Test

New Condition ? X

Select the data that the Condition will be based on and define how the Condition will evaluate to "True".

Create condition based on Analysis Browse...

Condition Data /My Folders/Regional Revenue/Customer Discounts by Region

True If Row Count is less than 25

Test OK Cancel

6. Previously, your analysis returned more than 25 records, therefore this test should evaluate to False.

New Condition ? X

Select the data that the Condition will be based on and define how the Condition will evaluate to "True".

Create condition based on A Browse...

Condition Data /My Folders/Regional Revenue/Customer Discounts by Region

True If Row Count is less than 25

Test OK Cancel

Test X

The condition evaluates to False

OK

7. Your results are verified. Click OK.
8. To further verify your results, click OK and click OK again to return to the Dashboard Builder. Click Preview to preview the dashboard page now. The Preview window is empty. Close the Preview window.
9. To remove the condition, click the Properties icon for the section and select Condition. In the Section Condition dialog box, click the More icon and select Remove Condition. Click OK.

null X

Condition ROWCOUNT('Customer Discounts by R

OK Cancel

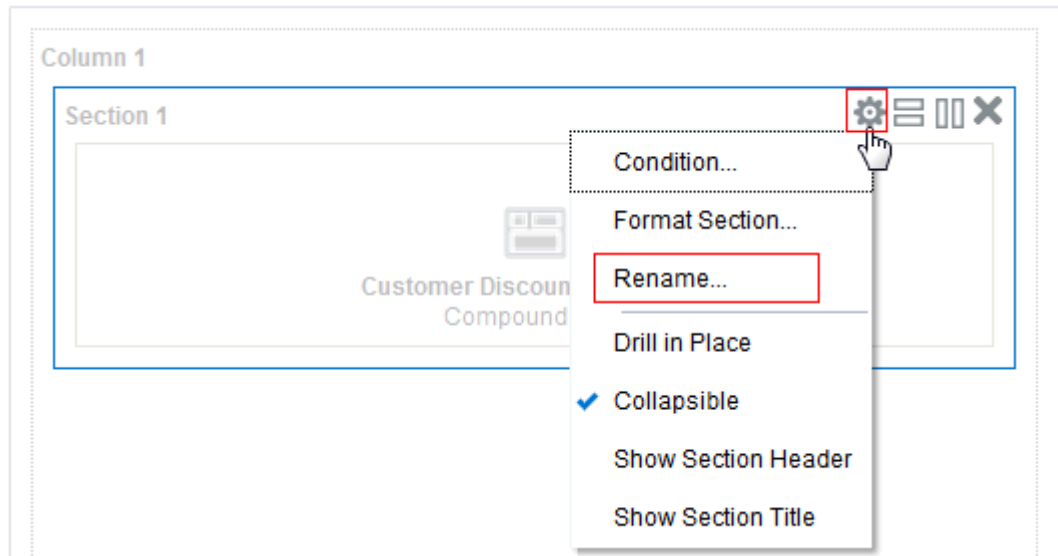
Test Condition

Edit Condition

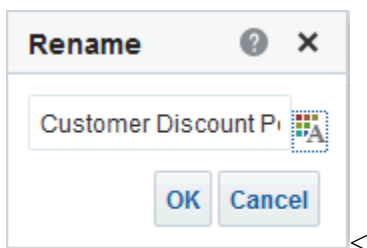
Remove Condition

Save Condition As...

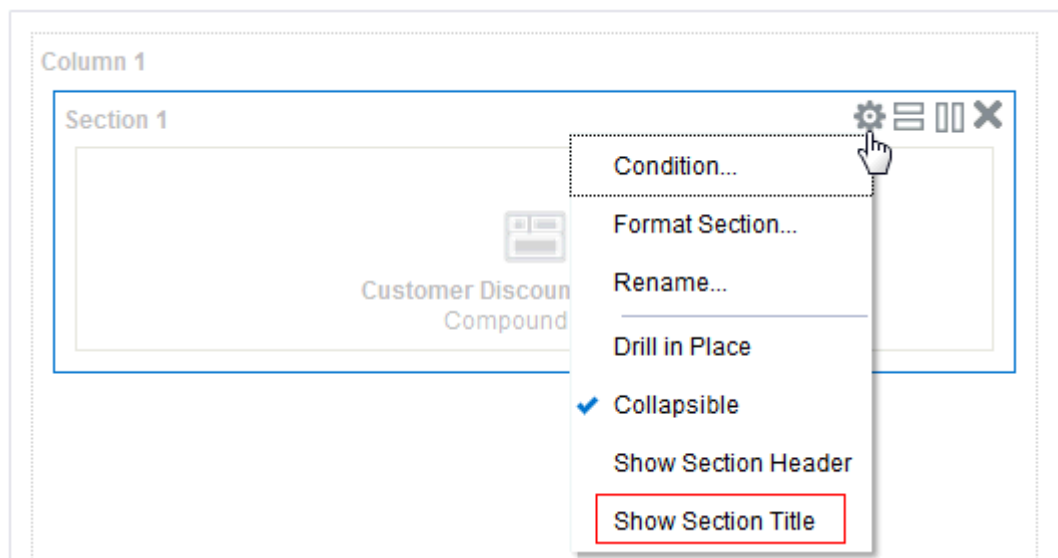
10. Next you will rename the section and display a title. Click the Properties icon for the section, then select Rename



11. Enter Customer Discount Percentage in the Rename text box and click OK.



12. Click the Properties icon for the section and select Show Section Title.



13. Preview the dashboard page once again to see your changes.

Oracle BI Interactive Dashboards - My Dashboard - Mozilla Firefox

adc00oqd.us.oracle.com:9502/analytics/saw.dll?Dashboard&DashboardPreview=true&Done=close

Customer Discount Percentage

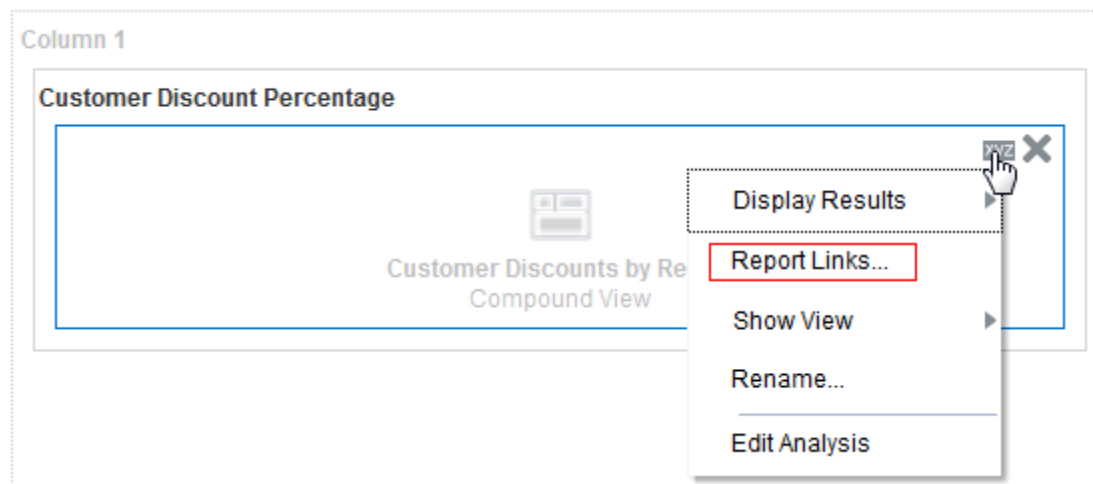
This analysis shows the discount percentage for each customer within the **AMERICAS** region.

C0 Customer Number	C1 Customer Name	4- Paid Amount	3- Discount Amount	Discnt Pct to Paid Amount
4	Tamara Aaron	\$60,290.45	\$1,659.00	2.75%
5	Stacy Kidder	\$33,677.37	\$948.00	2.81%
9	Diego Link	\$28,500.30	\$680.00	2.39%
14	Sue Yamamoto	\$61,532.29	\$2,406.00	3.91%
16	Lauren Green	\$33,605.66	\$755.00	2.25%
18	Elaine Hsieh	\$54,850.16	\$1,726.00	3.15%
21	Rachel Coles	\$32,295.54	\$1,130.00	3.50%
22	Elaine Hazleton	\$29,550.31	\$1,083.00	3.66%
23	M Brown	\$43,683.62	\$1,533.00	3.51%
27	Robin Fisher	\$42,390.96	\$1,361.00	3.21%
28	Howard Buckley	\$44,672.72	\$1,819.00	4.07%
30	Illa Ames	\$58,049.19	\$1,545.00	2.66%
33	Farinaz Farsai	\$34,341.56	\$1,087.00	3.17%
36	Heidi Burgdorf	\$25,859.94	\$926.00	3.58%
42	Meredith Aaron	\$88,128.99	\$3,253.00	3.69%
48	Joan McNulty	\$27,000.22	\$1,027.00	3.70%

14. Save the dashboard.

Editing Report Links

- To override the default dashboard report links at the analysis level, click the **Properties** icon for the Customer Discounts by Region Compound View, and select **Report Links**.



Report Links

Inherit Page Settings

Customize

Analyze

Edit

Export

Refresh

Add to Briefing Book

Print

Copy

OK

Cancel

- Select **Customize**, and then select all check boxes. Click **OK**.
- Save and run the dashboard page. The Report Links display at the bottom of the analysis. You now have options to export and copy this analysis from the dashboard.

Regional Revenue

Customer Detail

Customer Discount Percentage

This analysis shows the discount percentage for each customer within the **AMERICAS** region.

C0 Customer Number	C1 Customer Name	4- Paid Amount	3- Discount Amount	Discnt Pct to Paid Amount
4	Tamara Aaron	\$60,290.45	\$1,659.00	2.75%
5	Stacy Kidder	\$33,677.37	\$948.00	2.81%
9	Diego Link	\$28,500.30	\$680.00	2.39%
14	Sue Yamamoto	\$61,532.29	\$2,406.00	3.91%
16	Lauren Green	\$33,605.66	\$755.00	2.25%
18	Elaine Hsieh	\$54,850.16	\$1,726.00	3.15%
21	Rachel Coles	\$32,295.54	\$1,130.00	3.50%
22	Elaine Hazleton	\$29,550.31	\$1,083.00	3.66%
23	M Brown	\$43,683.62	\$1,533.00	3.51%
27	Robin Fisher	\$42,390.96	\$1,361.00	3.21%
28	Howard Buckley	\$44,672.72	\$1,819.00	4.07%
30	Illa Ames	\$58,049.19	\$1,545.00	2.66%
33	Farinaz Farsai	\$34,341.56	\$1,087.00	3.17%
36	Heidi Burgdorf	\$25,859.94	\$926.00	3.58%

Analyze

- Edit

- Refresh

- Print

- Export

- Add to Briefing Book

- [Copy](#)

- Open the dashboard in the Dashboard Builder again.
- Click the **Properties** icon for the Customer Discount Percentage section and select **Drill in Place**. Drilling allows you to view additional levels of detail for the specific column. Drill in Place means that the current browser is

refreshed with the new data. To return to the previous view, simply click the back button on your browser.

Column 1

Customer Discount Percentage

Customer Discounts by Re
Compound View

Condition...

Format Section...

Rename...

✓ Drill in Place

✓ Collapsible

Show Section Header

✓ Show Section Title

- Save and run the dashboard page.
- In the C1 Customer Name column, click **Diego Link** to drill down.

The Order Status and Order Type detail for Diego Link are displayed.

My Dashboard

HomeCatalogFavorites ▼Dashboards ▼New ▼Open ▼Signed In As

Regional Revenue

Customer Detail

Customer Discount Percentage

This analysis shows the discount percentage for each customer within the **AMERICAS** region.

C0 Customer Number	C1 Customer Name	R1 Order Status	R2 Order Type	4- Paid Amount	3- Discount Amount	Discnt Pct to Paid Amount
9	Diego Link	2-Fulfilled	Secure	\$1,853.70	\$36.00	1.94%
			Standard	\$2,894.70	\$22.00	0.76%
		3-Shipped	Express	\$1,489.40	\$72.00	4.83%
			Standard	\$3,479.76	\$142.00	4.08%
		4-Billed	Express	\$2,959.20	\$143.00	4.83%
		5-Paid	Express	\$4,870.83	\$0.00	0.00%
			Secure	\$3,906.19	\$38.00	0.97%
			Standard	\$5,500.26	\$227.00	4.13%
		9-On Hold	Standard	\$1,546.26	\$0.00	0.00%

Return - Analyze - Edit - Refresh - Print - Export - Add to Briefing Book - [Copy](#)

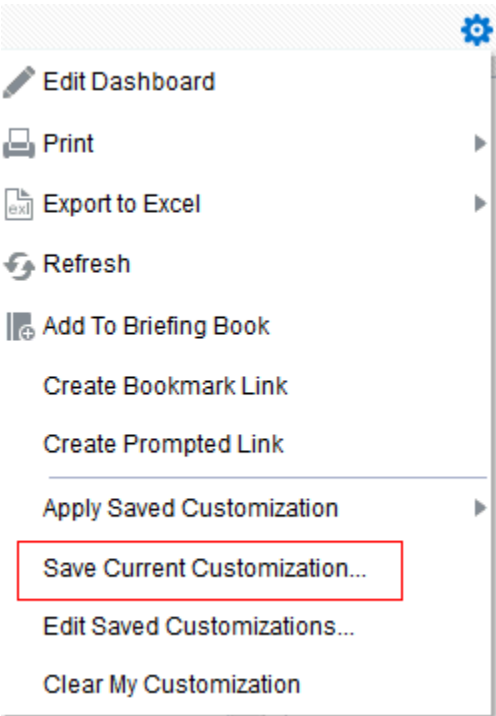
My Dashboard: Regional Revenue > My Dashboard: Customer Detail > My Dashboard: Customer Detail

The bottom of the page displays breadcrumbs. Breadcrumbs help you understand your current location within Oracle BI content and the path that you have used to navigate Oracle BI content. Breadcrumbs are active links that you can click to return to the place from which you navigated and to the state of the content when you left it. Blue text in italics indicates links to visited locations. Black text indicates your current location in Dashboard Editor.

Saving a Customized Dashboard and Setting Preferences

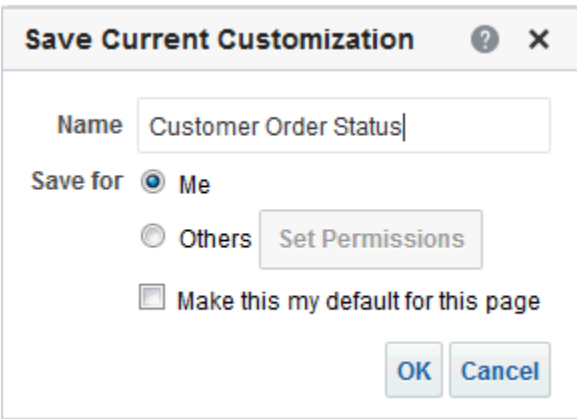
Saved customizations allow you to save and view dashboard pages with your most frequently used or favorite preferences for items such as filters, prompts, column sorts, drills in analyses, and section expansion and collapse. By saving customizations, you do not need to make these choices manually each time you access the dashboard page.

1. **Run My Dashboard. Click Page Options > Save Current Customizations.**

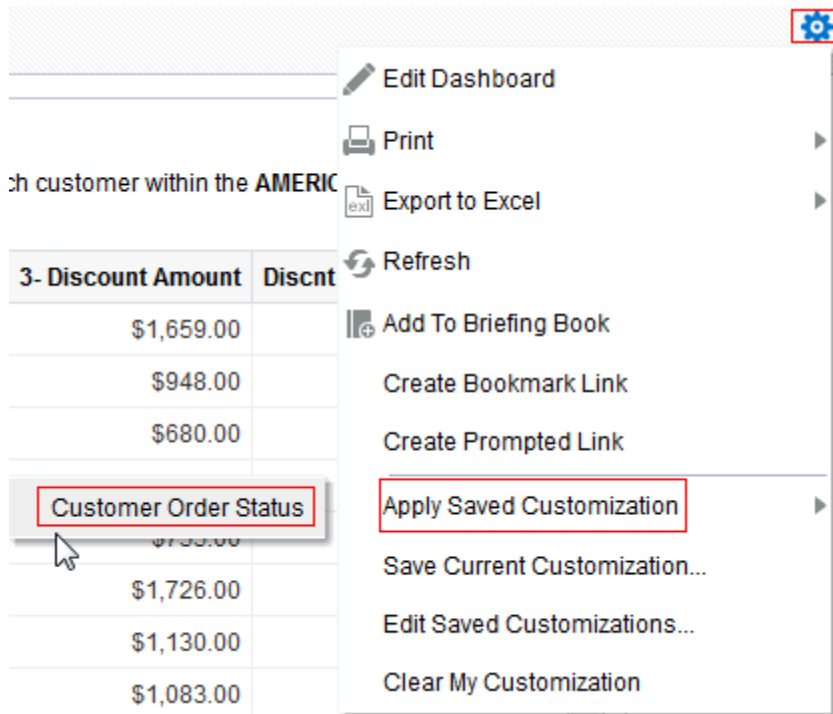


The Save Current Customization dialog box appears.

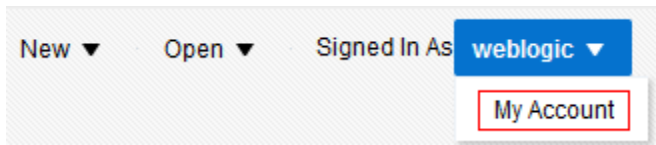
2. **Name your customization Customer Order Status and click OK.**



3. You can apply the saved customization to a dashboard page. Click Page Options > Apply Saved Customization > Customer Order Status.



4. You use the Preferences tab in the My Account dialog box to specify your personal preferences, such as dashboard starting page, locale, and time zone. The available options depend upon your privileges. Click your User ID on the global header and then select My Account.



5. In the My Account dialog box, select the Starting Page list and scroll to view the available pages. Only the dashboard pages to which you have privileges appear in this list. Select My Dashboard from the list. Set the Locale, User Interface Language, Time Zone, Currency, and Accessibility Mode appropriately for your own needs

The screenshot shows a 'My Account' dialog box with a title bar containing a question mark icon and a close button. Below the title bar, the user's ID and display name are listed: 'User ID: weblogic' and 'Display Name: weblogic'. A tabbed interface follows, with 'Preferences' selected. Other tabs include 'BI Publisher Preferences', 'Mobile Preferences', 'Delivery Options', and 'Roles and Catalog Groups'. The 'Preferences' tab contains several settings: 'Starting Page' is set to 'My Dashboard'; 'Locale (location)' is 'Default - English - United States'; 'User Interface Language' is 'Default - English'; 'Time Zone' is '(GMT-05:00) Eastern Time (US & Canada)'; 'Subject Area Sort Order' is 'Default - Sort in Saved Order'; 'Analysis Editor' has 'Full Editor' selected with a sub-menu open showing 'Default - Start on Results tab when editing Analysis' and 'Wizard (limited functionality)'; and 'Accessibility Mode' has 'Off' selected among 'Default', 'On', and 'Off'. 'OK' and 'Cancel' buttons are at the bottom right.

My Account ? X

User ID: weblogic
Display Name: weblogic

Preferences BI Publisher Preferences Mobile Preferences Delivery Options Roles and Catalog Groups

Starting Page My Dashboard ▼

Locale (location) Default - English - United States ▼

User Interface Language Default - English ▼

Time Zone (GMT-05:00) Eastern Time (US & Canada) ▼

Subject Area Sort Order Default - Sort in Saved Order ▼

Analysis Editor ☒ Full Editor Default - Start on Results tab when editing Analysis ▼
☐ Wizard (limited functionality)

Accessibility Mode ☐ Default ☐ On ☒ Off

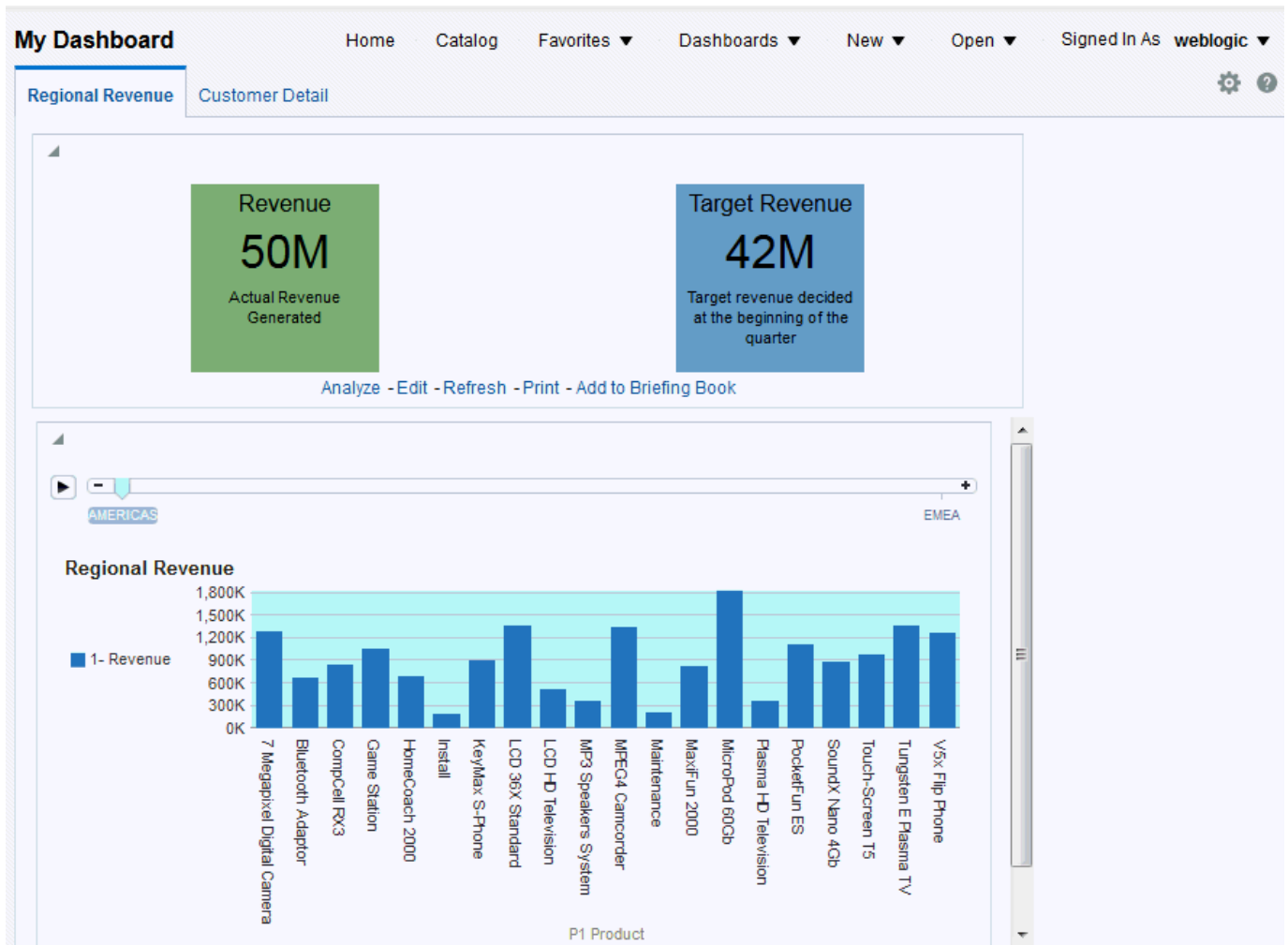
OK Cancel

Other tabbed pages in the My Account dialog box include the following:

- **BI Publisher Preferences**—Use this tabbed page to view the default profile for BI Publisher.
- **Delivery Options**—Use this tabbed page to configure your delivery profiles for the delivery of alerts by agents.
- **Roles and Catalog Groups**—Use this tabbed page to view a list of the roles to which you have been assigned by the Oracle BI Administrator.

6. **Click OK.**

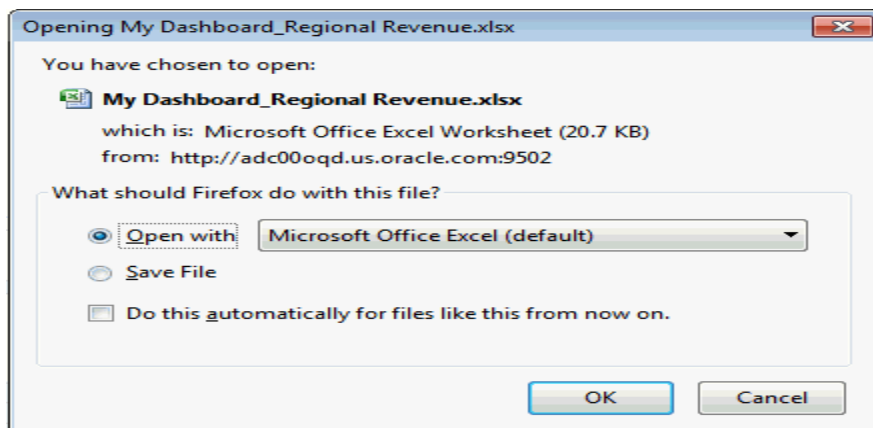
7. **To verify that your starting page is now set to the My Dashboard dashboard page, log out and log back in. Your start page should display My Dashboard.**



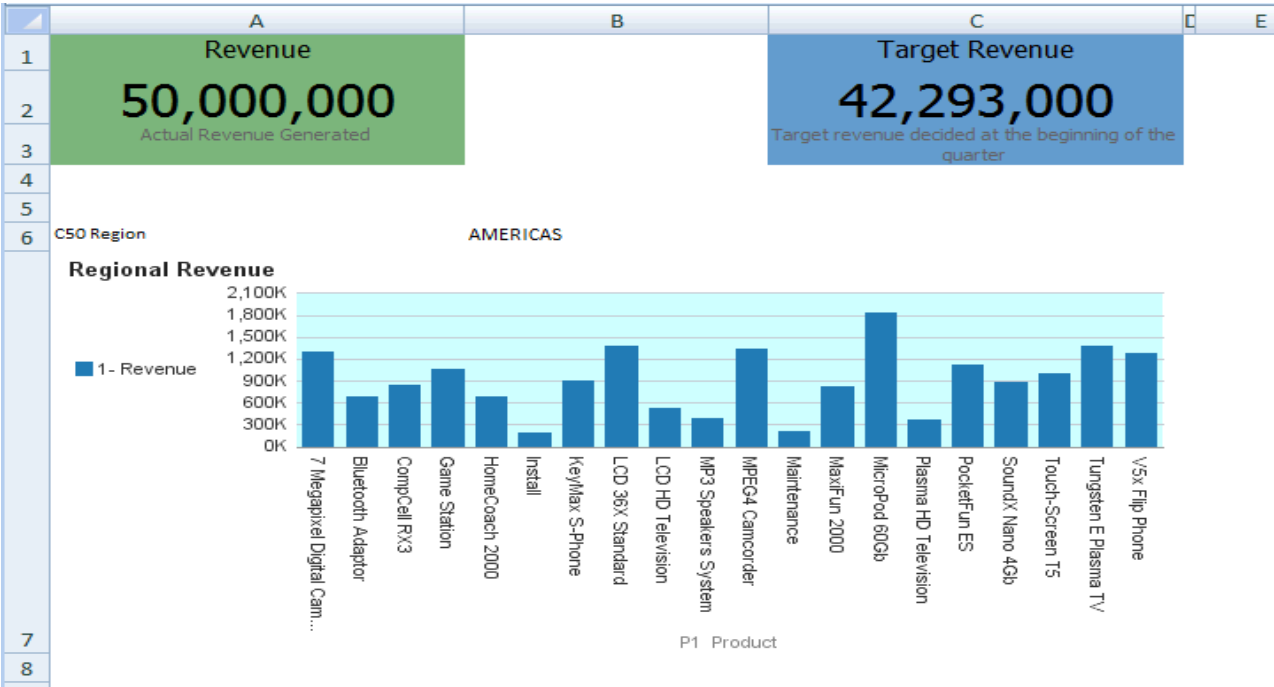
Exporting the Dashboard to a Spreadsheet

You can export an entire dashboard or a single dashboard page to a Microsoft Excel 2007+ spreadsheet.

1. From My Dashboard click Page Options, then select Export to Excel, and then Export Current Page..
2. Select whether to save the spreadsheet to a folder, or open it in your spreadsheet program, and click OK.



The following example shows the Regional Revenue page of My Dashboard exported to a spreadsheet:



-Adding Prompts to Filter an Analysis-

A dashboard prompt is a special filter that filters analyses embedded in a dashboard. There are two prompt types, Named and Inline. You will learn to create a Named Prompt in your dashboard.

Prompts created at the dashboard level and stored in the catalog as prompt objects are called Named prompts. Named prompts can be applied to any dashboard or dashboard page that contains the columns specified in the prompt. They can filter one or any number of analysis embedded on the same dashboard page. You can create and save named prompts to a private folder or a shared folder.

- A named prompt is interactive and will always appear on the dashboard page so that the user can select different values without having to rerun the dashboard.
- A named prompt can also interact with selection steps. You can specify a dashboard prompt to override a specific selection step. The step will be processed against the dashboard column with the user-specified data values collected by the dashboard column prompt, whereas all other steps will be processed as originally specified.

Inline prompts are embedded in an analysis and are not stored in the Catalog for reuse. An Inline prompt provides general filtering of a column within the analysis, and depending on how it is configured, can work independently from a dashboard filter, which determines values for all matching columns on the dashboard. An inline prompt is an initial prompt. When the user selects the prompt value, the prompt field disappears from the analysis. To select different prompt values, the user must rerun the analysis. The user's choices determine the content of the analysis embedded in the dashboard.

1. Creating a Named Dashboard Column prompt

2. Creating a Named Dashboard Variable Prompt

Creating a Named Dashboard Column prompt

Named Dashboard Prompts in the Catalog can be applied to any dashboard or dashboard page that contains the columns specified in the prompt.

1. Create a new analysis for the A - Sample Sales subject area with the following columns:

Folder	Column
Time	T05 Per Name Year
Sales Person	E1 Sales Rep Name
Base Facts	1-Revenue

Selected Columns

Time	Sales Person	Base Facts
T05 Per Name Year	E1 Sales Rep Name	1- Revenue

2. Add a prompt for T05 Per Name Year: Click the More icon for the T05 Per Name Year column, then in the New Filter dialog box, select is prompted from the Operator list. Click OK.

New Filter?×

Column

T05 Per Name Year *fx*

Operator

is prompted ▼

OK

Cancel

3. Add a prompt for E1 Sales Rep Name: Click the More icon for the E1 Sale Rep Name column, then in the New Filter dialog box, select is prompted from the Operator list. Click OK.
- Your analysis should look like this:

Selected Columns

Time	Sales Person	Base Facts
T05 Per Name Year	E1 Sales Rep Name	1- Revenue

Filters

T05 Per Name Year is prompted

AND T05 Per Name Year is prompted

- Save the analysis as **My Sales Rep Stats**.
- To create a named dashboard prompt for year and sales rep, click **New** in the global header, then select **Dashboard Prompt**. Select the **A - Sample Sales** subject area.

New

Open

Signed In

Data Exploration & Discovery

Visual Analyzer Projects

Analysis and Interactive Reporting

Analysis

Dashboard

Filter

Dashboard Prompt

Condition

Mobile Application

Mobile App

Published Reporting

Report

Report Job

The Definition and Display panes appear. The Definition pane allows you to add, organize, and manage a named prompt's columns. You can use column prompts, image prompts (maps), currency prompts, and variable prompts. The Definition table lets you view high-level information about the prompt's columns. You can also use this table to select columns for editing or deleting, arrange the order in which the prompts appear to the user, or insert row or column breaks between prompt items.

The Display pane is a preview pane that allows you to view the prompt's layout and design.

Definition

Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				

Add prompts for users when they run this analysis.

[illegible]

Display

Page 1

6. In the Definition pane, click the New prompt icon (), and select Column Prompt.

Definition

Add prompts for users when they run this analysis.

+

Column Prompt...

Variable Prompt

Image Prompt

Add prompts for users when they run this analysis.

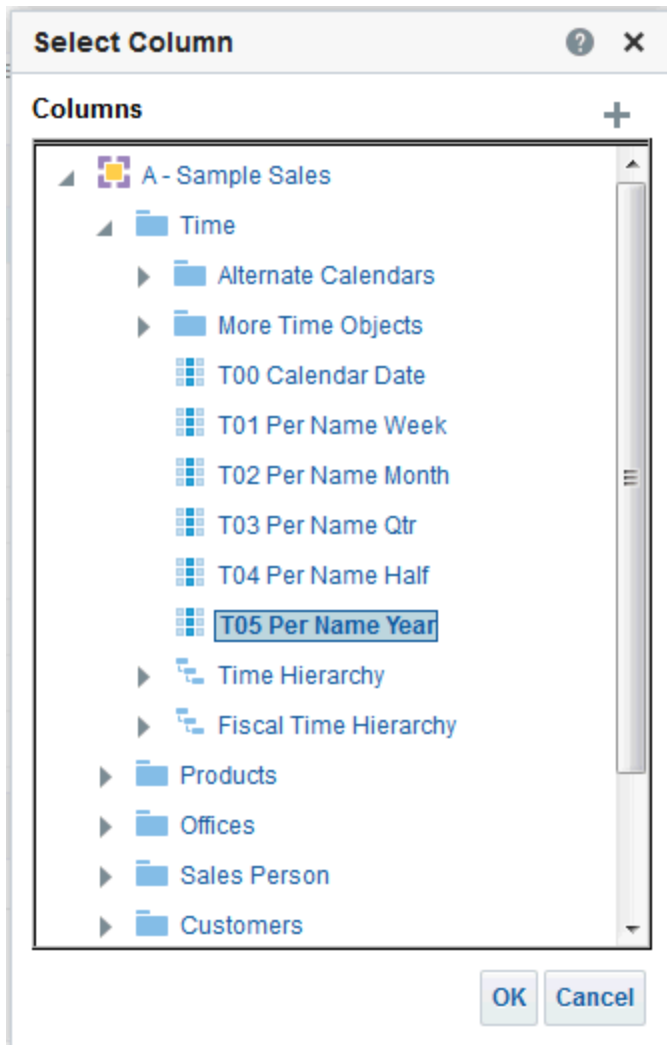
Prompt Label	Type	Prompt For	Description	Relevance	Column Prompt
Page 1	Page				

Column Prompt...

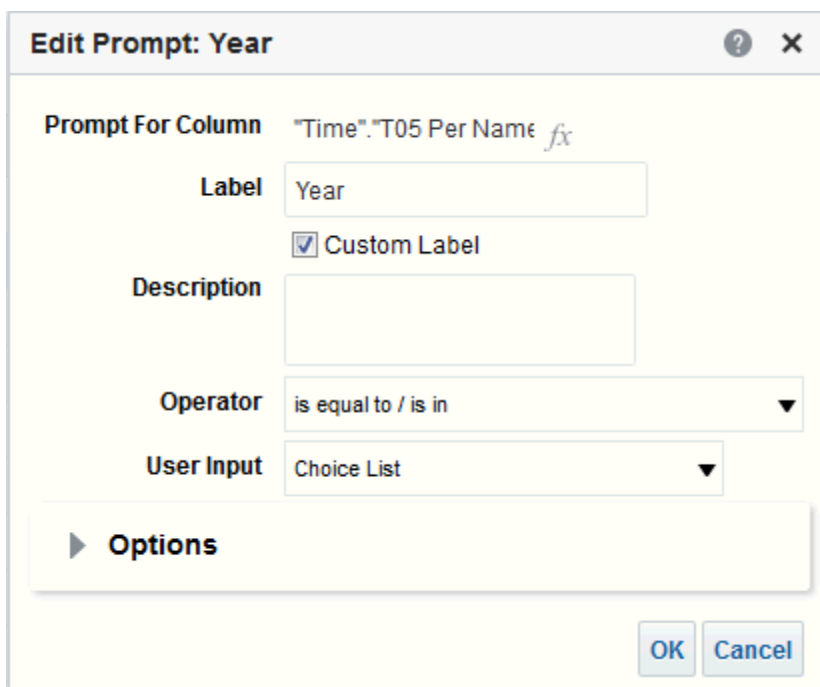
Variable Prompt

Image Prompt

- 7. Select T05 Per Name Year from the Time folder, and click OK.**



8. Select Custom Label and then enter `year` in the the Label text box. In the Operator list, select the default value: is equal to / is in. In the User Input list, verify that Choice List is selected.



The User Input list appears for column and variable prompts and provides you with the option to determine the User Input method for the user interface. The user will see one of the following: check boxes, radio buttons, a choice list, or a list box. You use this item in conjunction with the Choice List Values item to specify which data values appear for selection. For example, if you selected the User Input method of Choice List and the Choice List Values item of All Column Values, the user will select the prompt's data value from a list that contains all of the data values contained in the data source.

9. **Expand the Options section. Because you selected Choice List for the User Input field, you must now indicate the values for the list. Some of your choices include All Column Values, Specific Column Values (where you supply those values), SQL Results (choose a list of values based on a SQL statement). Accept the default, All Column Values.**
10. **Verify that Enable user to select multiple values and Enable user to type values are selected. Select Require user input. Allowing multiple selection of values lets you choose more than one value (region for example), and requiring input forces you to enter at least one value. "Default selection" allows you to selection an initial value and "Set a variable" allows you to create a new variable that this column prompt will populate. Accept the default, None, for both of these fields.**

The New Prompt dialog box should look like this:

Edit Prompt: Year

Prompt For Column: "Time".T05 Per Name *fx*

Label: Year
☒ Custom Label

Description:

Operator: is equal to / is in

User Input: Choice List

Options

General More

Choice List Values: All Column Values

☐ Include "All Column Values" choice in the list

☒ Enable user to select multiple values

☒ Enable user to type values

☒ Require user input

☐ Limit values by: All Prompts

Auto Fill: ☒ None ☐ First Available Value

Default selection: None

Set a variable: None

OK Cancel

11. Click OK.
12. The prompt is added to the Definition pane.

Definition
Add prompts for users when they run this analysis.

	Prompt Label	Type	Prompt For	Description	Required	New Column
	Page 1	Page				
	Year	Column value	T05 Per Name Year		✓	

13. Repeat steps 6 to 12 to add another prompt for the E1 Sales Rep Name column. In the New Filter dialog box, label the prompt `Sales Rep Name`: You should now have two prompts in the Definition page.

Definition
Add prompts for users when they run this analysis.

	Prompt Label	Type	Prompt For	Description	Required	New Row
	Page 1	Page				
	Year	Column value	T05 Per Name Year		✓	
	Sales Rep Name	Column value	E1 Sales Rep Name		✓	

14. Click the row-based icon in the toolbar and notice that in the Display pane the prompts are laid out horizontally.

Definition
Add prompts for users when they run this analysis.

	Prompt Label	Type	Prompt For	Description	Required	New Row
	Page 1	Page				
	Year	Column value	T05 Per Name Year		✓	
	Sales Rep Name	Column value	E1 Sales Rep Name		✓	

Display
Page 1

* Year --Select Value-- * Sales Rep Name --Select Value--

Apply Reset

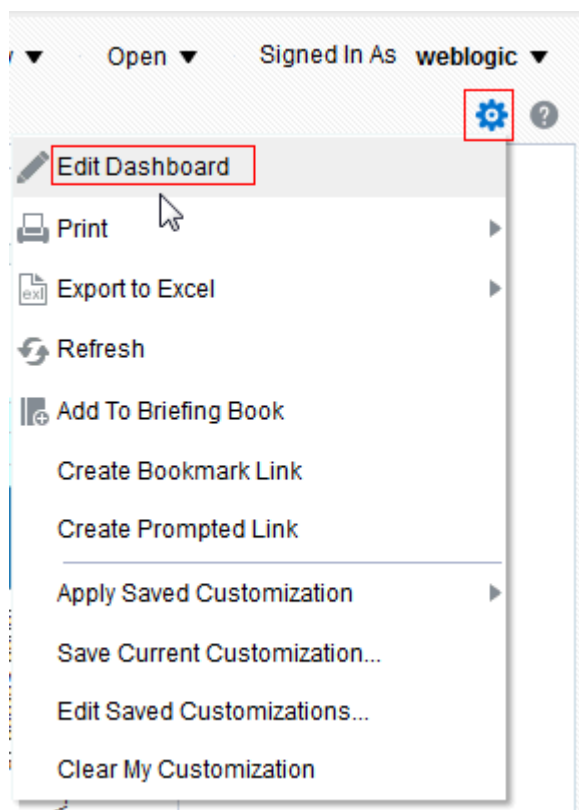
15. Save the prompt in the Regional Revenue folder as My prompt.

You can manage prompts with different options.

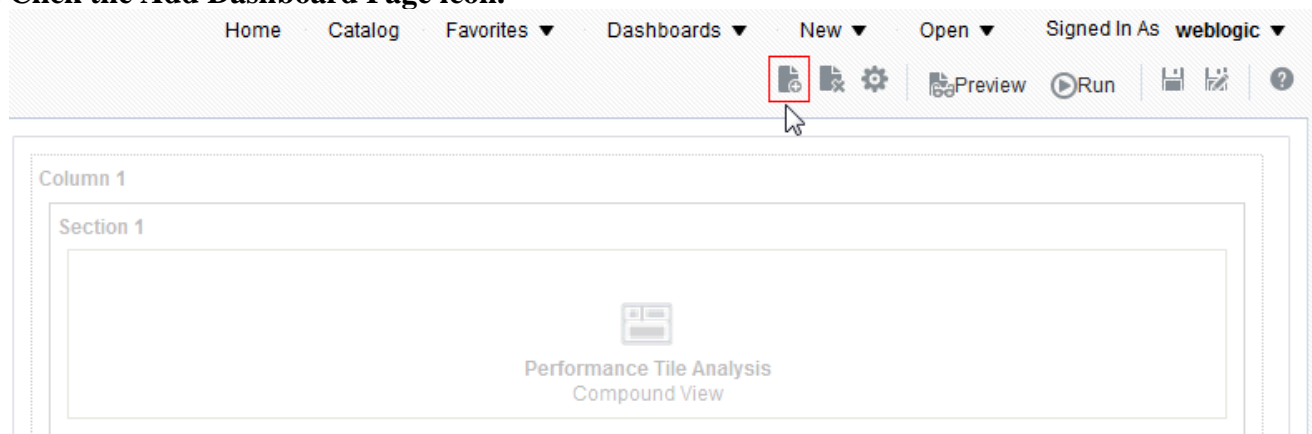
- You can choose to show or hide a prompt's apply and reset buttons. If the designer chooses to hide the apply button, then the specified prompt value is immediately applied to the dashboard or analysis.
- The prompt Reset button now provides three reset options: Reset to last applied values, Reset to default values, and Clear All.
- The row-based layout prompt option is added to the prompt editor's Definition pane. You can display your prompts in a row or in a column.

16. To test the prompt, in the global header, click Dashboards, and then select My Dashboard.

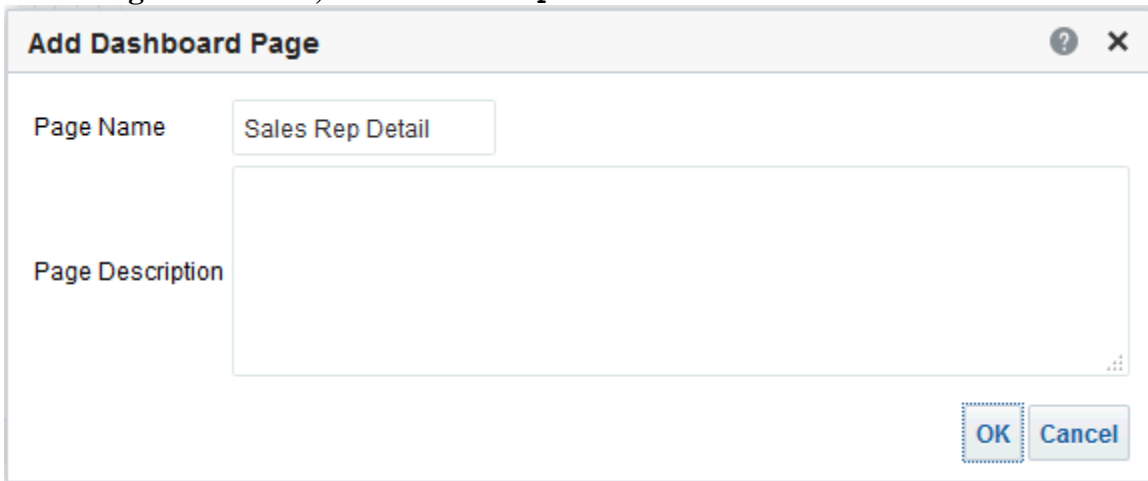
17. Click the Page Options icon and select Edit Dashboard.



18. Click the Add Dashboard Page icon.

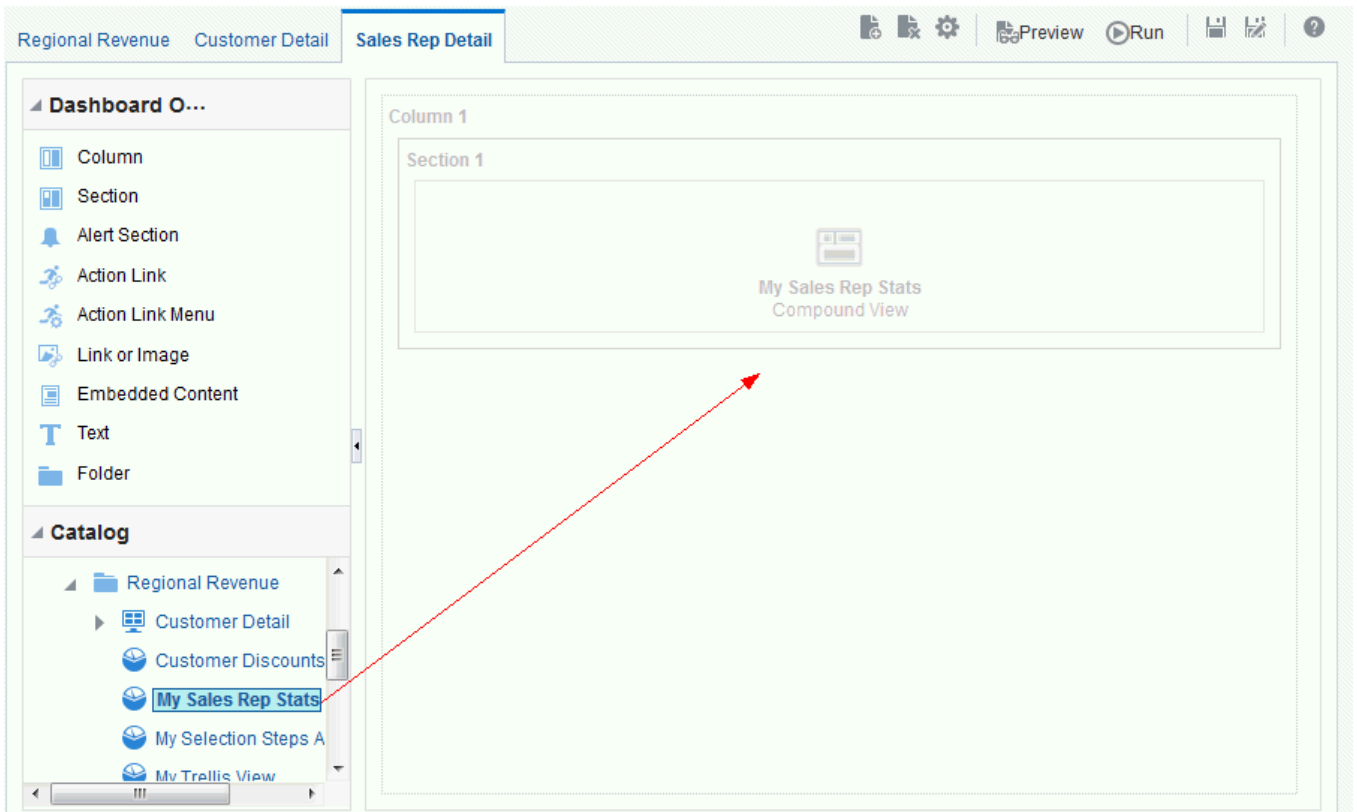


19. In the Page Name field, enter Sales Rep Detail and click OK.

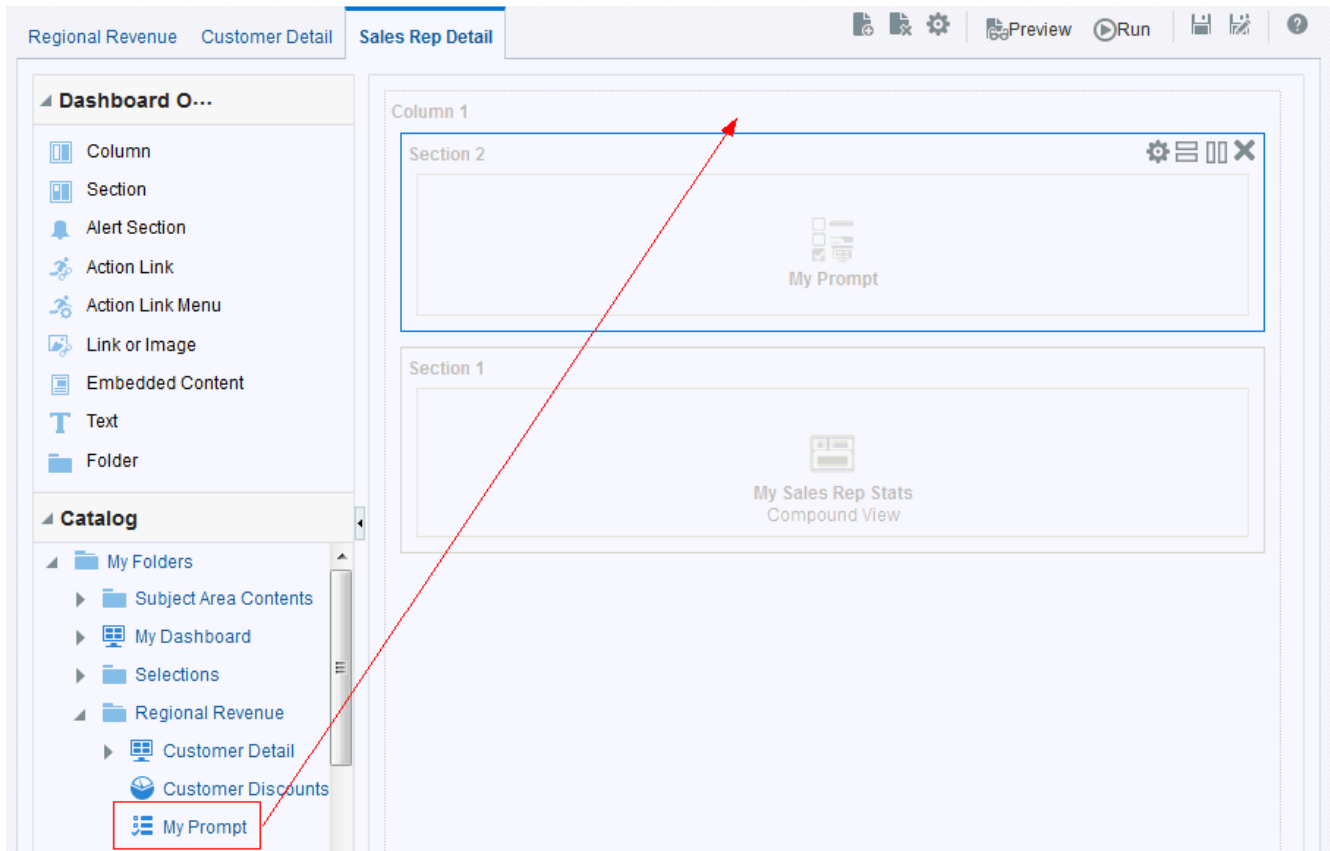


The 'Add Dashboard Page' dialog box has a title bar with a question mark and a close button. It contains two main fields: 'Page Name' and 'Page Description'. The 'Page Name' field is a text box containing the text 'Sales Rep Detail'. The 'Page Description' field is a larger, empty text area. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

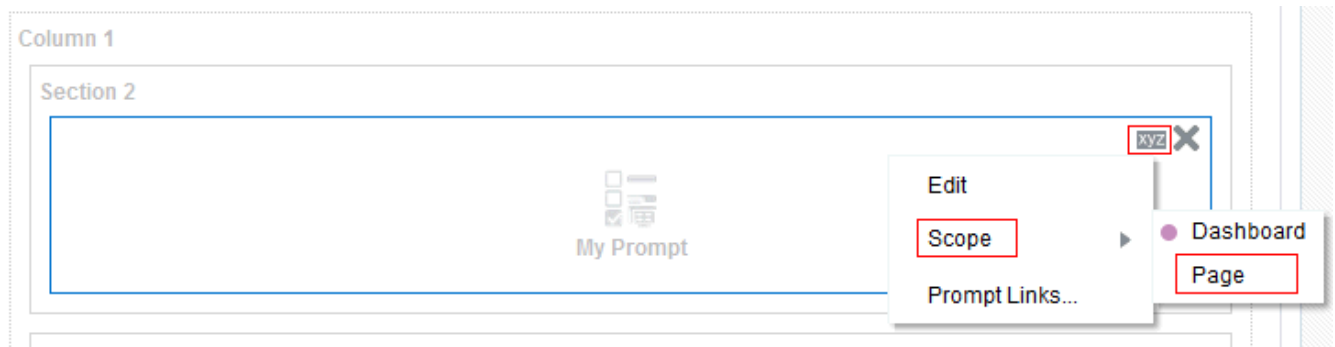
20. In the Catalog pane, navigate to select My Sales Rep Stats from the Regional Revenue folder and drag it to Sales Rep Detail dashboard page.



21. Navigate to the Regional Revenue folder and drag My Prompt to Column 1, above My Sales Rep Stats analysis.



22. Click the **My Prompt** properties icon and select **Scope**, and then **Page**. Scope determines whether the prompt applies to the entire dashboard or just this page.



23. Save and run the dashboard page. Because you did not specify default values for the prompts, the initial run includes all values.

* Year --Select Value-- ▼
 * Sales Rep Name --Select Value-- ▼

Apply
 Reset ▼

My Sales Rep Stats

T05 Per Name Year	E1 Sales Rep Name	1- Revenue
2008	Angela Richards	295,608
	Anne Green	2,636,543
	Aurelio Miranda	710,044
	Bob Grant	1,183,228
	Charles Brooks	1,396,383
	Chris Jones	2,634,747
	Edilberto Mandani	1,238,364
	Fred Webster	366,677
	Helen Mayes	3,062,284
	Jack Benetti	589,172
	James Dowel	1,470,219
	Jean-Michel Beauvis	995,746

24. From the Year list, select 2010. From the Sales Rep Name list, select Angela Richards and Anne Green. Click Apply.

* Year 2010 ▼
 * Sales Rep Name Angela Richards; ▼

Apply
 Reset ▼

The analysis is filtered by your selections.

My Dashboard

HomeCatalogFavorites

Regional RevenueCustomer DetailSales Rep Detail

* Year2010

* Sales Rep NameAngela Richards;

ApplyReset

My Sales Rep Stats

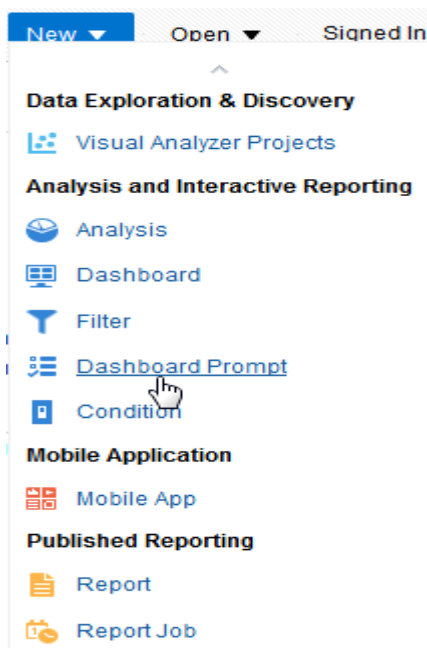
T05 Per Name Year	E1 Sales Rep Name	1- Revenue
2010	Angela Richards	449,699
	Anne Green	2,861,202

Analyze -Edit -Refresh -Print - Add to Briefing Book

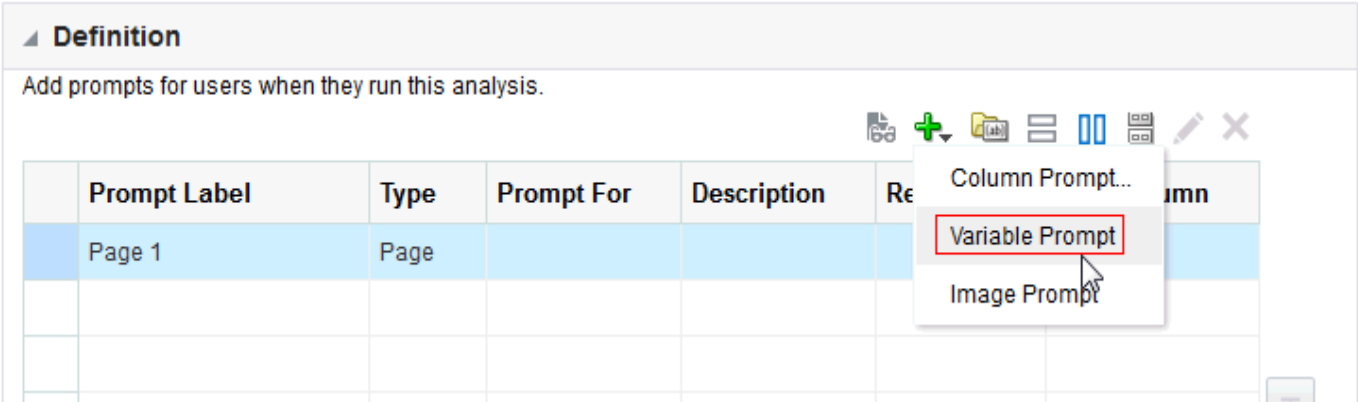
Creating a Named Dashboard Variable Prompt

Variable prompts allow you to make a selection from a list of custom values and pass the selection to a *Presentation Variable*. You can use the presentation variable in your analysis. In this topic you create a variable prompt for Revenue Projection.


1. In the global header, click New and select Dashboard Prompt. Select the A - Sample Sales subject area.

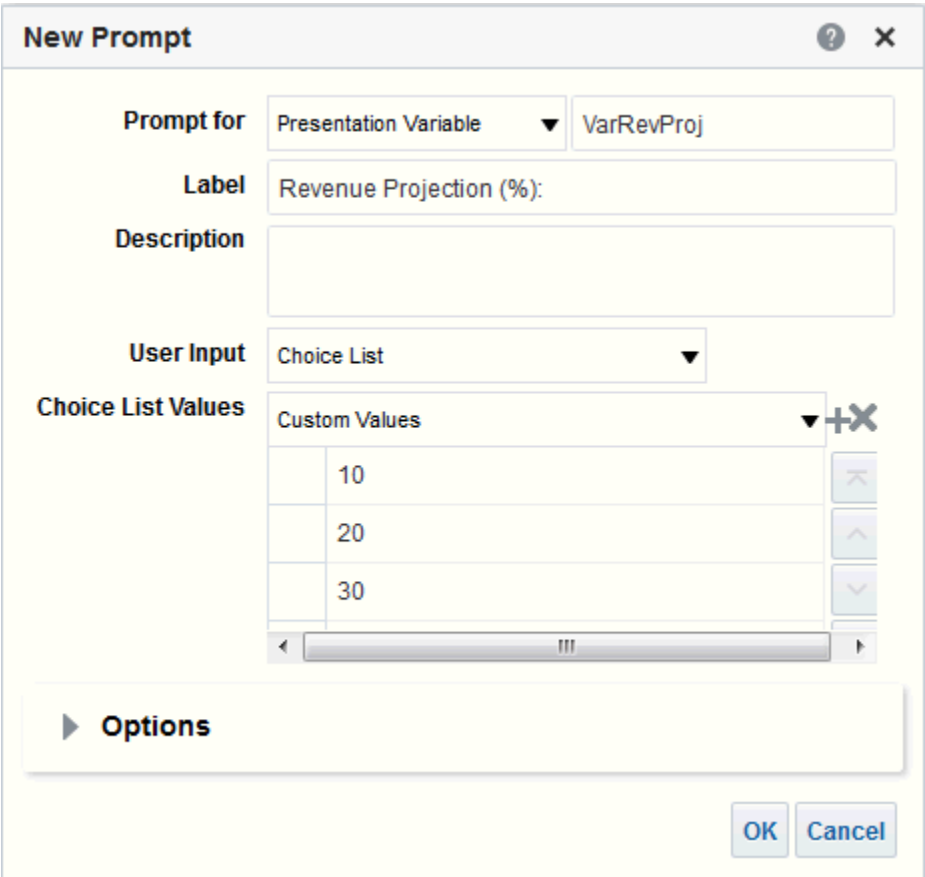




2. In the Definition pane, click the New prompt icon (), and select Variable Prompt.



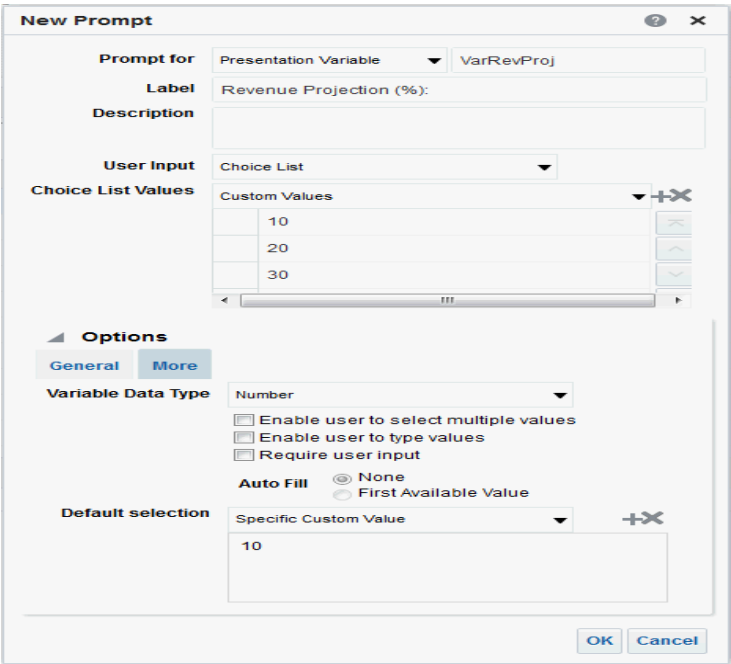
3. Make the following selections in the New Prompt dialog:.

- The Prompt for field allows you to name a Presentation Variable or Request Variable whose value will change as per the selection made in the variable prompt. Accept the default value of **Presentation Variable**. In the text box next to Prompt for field, enter VarRevProj for the variable name.
- The Label text box allows you to enter a meaningful label that appears on the dashboard next to the prompt. Enter Revenue Projection (%) : (add a space following the colon).
- In the Choice List Values area, you add the values that you want to display in the variable prompt choice list. Add three values, **10**, **20**, and **30**. To add the values, click the **Select Values** icon () icon, enter a value, and click **OK**.



4. Expand the Options section, and in the Variable Data Type list, select Number  In the Default selection list, select Specific Custom Value, then click the Select Values icon(), select 10, and click OK .

The New Prompt dialog box should match the following:



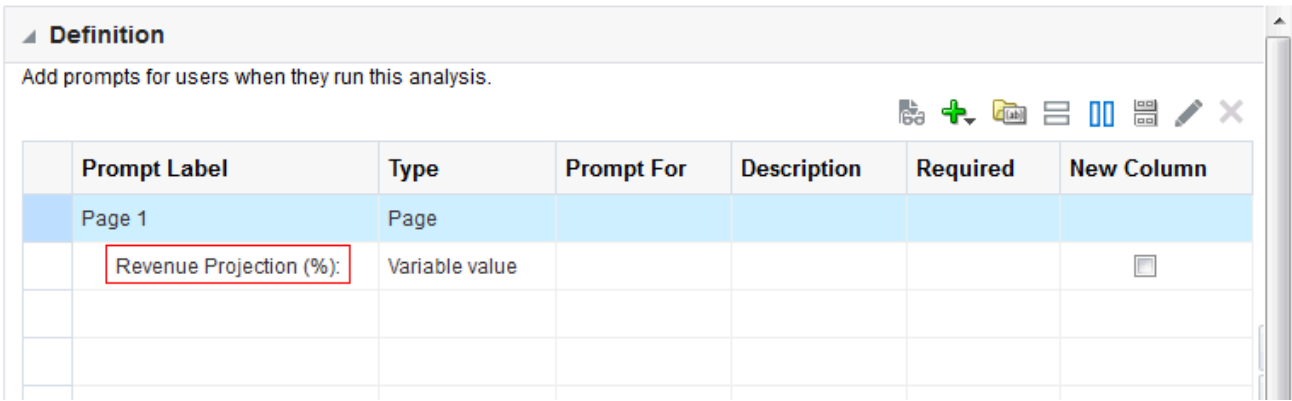
The 'New Prompt' dialog box is shown with the following settings:

- Prompt for:** Presentation Variable (dropdown), VarRevProj
- Label:** Revenue Projection (%):
- Description:** (empty text box)
- User Input:** Choice List (dropdown)
- Choice List Values:** Custom Values (dropdown), 10, 20, 30 (list)
- Options:**
 - General:** Variable Data Type: Number (dropdown); Enable user to select multiple values (checkbox); Enable user to type values (checkbox); Require user input (checkbox); Auto Fill: None (radio), First Available Value (radio)
 - More:** Default selection: Specific Custom Value (dropdown), 10 (text box)


Buttons: OK, Cancel

5. Click OK.

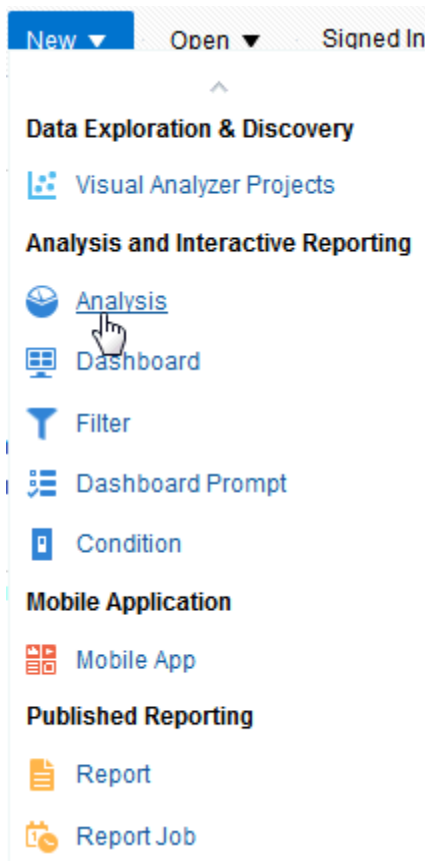
The prompt is added to the Definition pane.



The 'Definition' pane shows a table of prompts. The 'Revenue Projection (%)' prompt is highlighted with a red box.

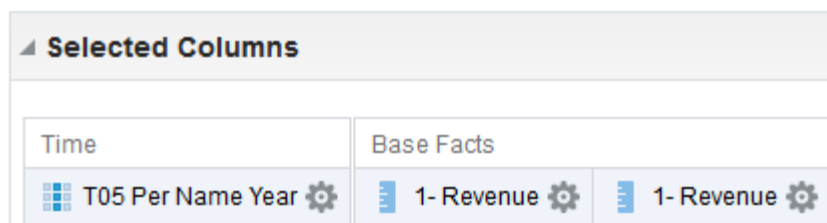
Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Revenue Projection (%):	Variable value				

6. Save the prompt in the Regional Revenue folder as Revenue Projection Prompt.
7. Next you will create an analysis that uses the VarRevProj presentation variable. In the global header, click New and select Analysis, then select the A - Sample Sales subject area.



8. In the Criteria tab, add the following columns to the analysis:

Folder	Column
Time	T05 Per Name Year
Base Facts	1-Revenue
Base Facts	1-Revenue



- 9.
10. For the T05 Per Name Year column, click More and select Filter. In the New Filter dialog box, select 2010 in the Value list and click OK.

New Filter

Column T05 Per Name Year *fx*

Operator is equal to / is in ▼

Value 2010 ▼ 🔍

[Add More Options ▼](#) [Clear All](#)

☐ Protect Filter

☐ Convert this filter to SQL

[OK](#) [Cancel](#)

11. For the second 1- Revenue column, click More and select Edit Formula.

Selected Columns

Time	Base Facts
T05 Per Name Year ⚙️	1- Revenue ⚙️ 1- Revenue ⚙️

Filters

T05 Per Name Year is equal to / is in 2010

⚙️

- Sort
- Edit formula**
- Column Properties
- Filter
- Delete
- Save Column As

12. Select Custom Headings. In the Column Heading field, enter Projected Revenue. Enter the following text in the Column Formula field: `((@{VarRevProj}*0.01)+1)*"Base Facts"."1- Revenue"`

Column Formula

Bins

Folder Heading

Base Facts

Column Heading

Revenue Projection

☒ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row)

Default

Available

Subject Areas

A - Sample Sales

Time

Products

Offices

Sales Person

Customers

Orders

Other Objects

Facts

Column Formula

$$((@{VarRevProj}*0.01)+1)*\text{"Base Facts"."1- Revenue"}$$

f(...)

Filter...

Column

Variable

+

-

x

/

%

(

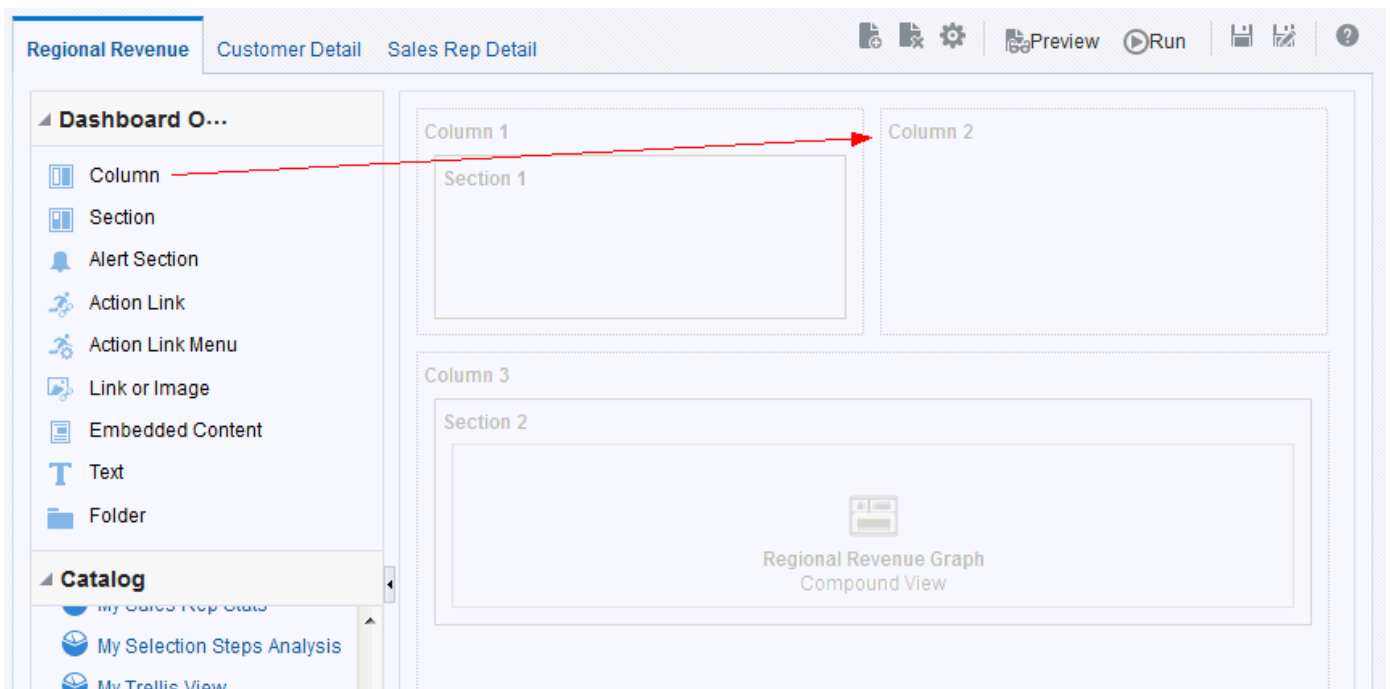
)

||

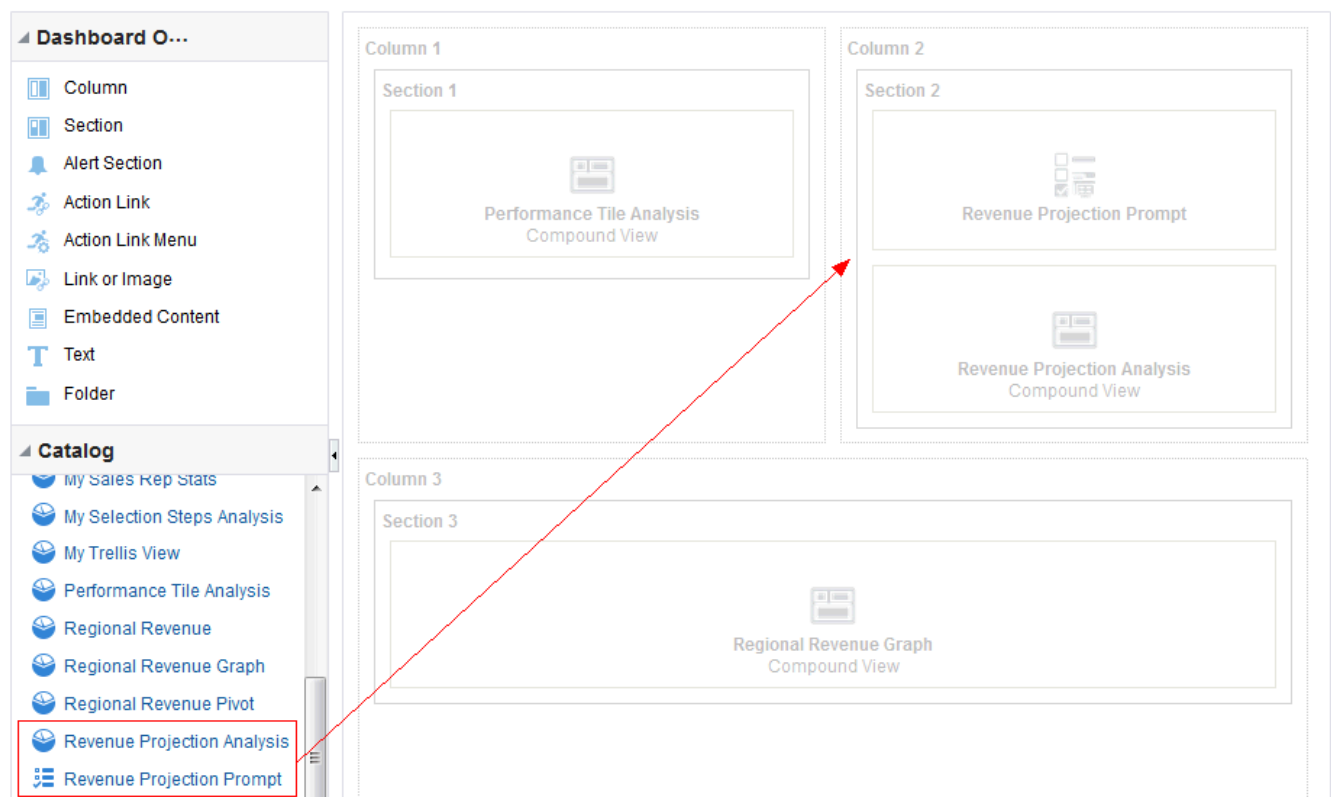
☐ Treat as an attribute column

The purpose of this formula is to calculate the projected revenue based on the value of the presentation variable VarRevProj. The value of VarRevProj varies with the user selection for the Revenue Projection prompt.

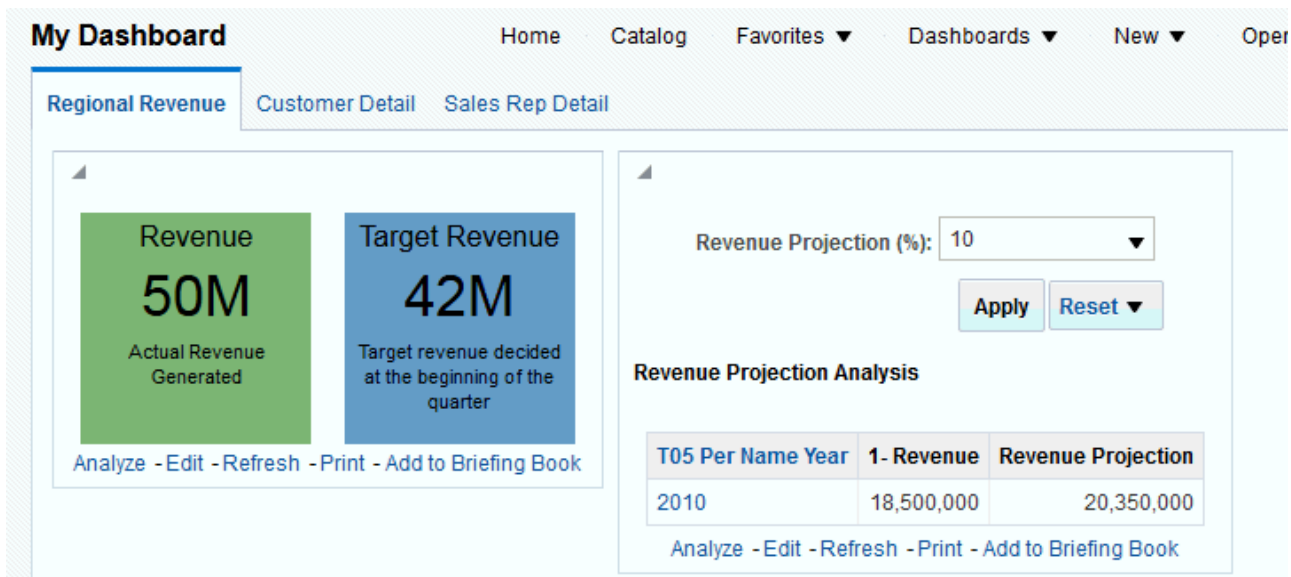
13. Click OK.
14. Save the analysis as Revenue Projection Analysis.
15. To test the prompt, navigate to My Dashboard and open it in the Dashboard builder. Drag a column from Dashboard Objects pane and drop it to the right of Column 1.



16. From the Catalog pane, drag Revenue Projection Prompt and Revenue Projection Analysis into the new column.



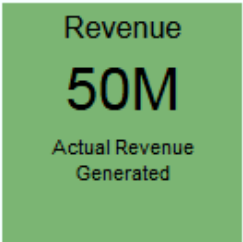
17. Save and run the dashboard. The default selection for Revenue Projection Prompt will be 10.



18. Select 30 from the Revenue Projection (%) list and click Apply.

The dashboard is updated to show 30%.

Regional Revenue Customer Detail Sales Rep Detail



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Revenue Projection (%): 30

Apply Reset

Revenue Projection Analysis

T05 Per Name Year	1- Revenue	Revenue Projection
2010	18,500,000	24,050,000

Analyze - Edit - Refresh - Print - Add to Briefing Book