

Ad-hoc reporting with OTBI – No more pain or wasted time.

Remember to complete your evaluation for this session within the app!



COLLABORATE19

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Session ID:

10848

Prepared by:

Girish Kotecha


Consultant, AST Corporation

Room No. CC 3RD FL 301A


April 10, 2019

#C19TX


Applications Software Technology



**Straight
Talk
Real
Results**



**Strong Oracle
Partnership**




Platinum Partner
Cloud Premier
North America


**Pillar Partner
Go-To Partner
Cloud Marketplace**

24
Years of **Experience**


**Six Time
Oracle
Excellence
Award
Winner**




Focus on
12
Industries
Oracle Industry
Specializations



400+
Cloud-
Certified
Employees



**Global
Presence**




Off-shore Delivery
24x7 Support


30+ Specializations/CEI

- Cloud ERP
- Cloud HCM
- Cloud SCM
- CPQ
- Database
- Cloud EPM
- Analytics
- PaaS
- IDM
- WebCenter

**Autonomous
Cloud
Tester**



Automated testing solution



**Oracle University
Partner**



COLLABORATE 19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

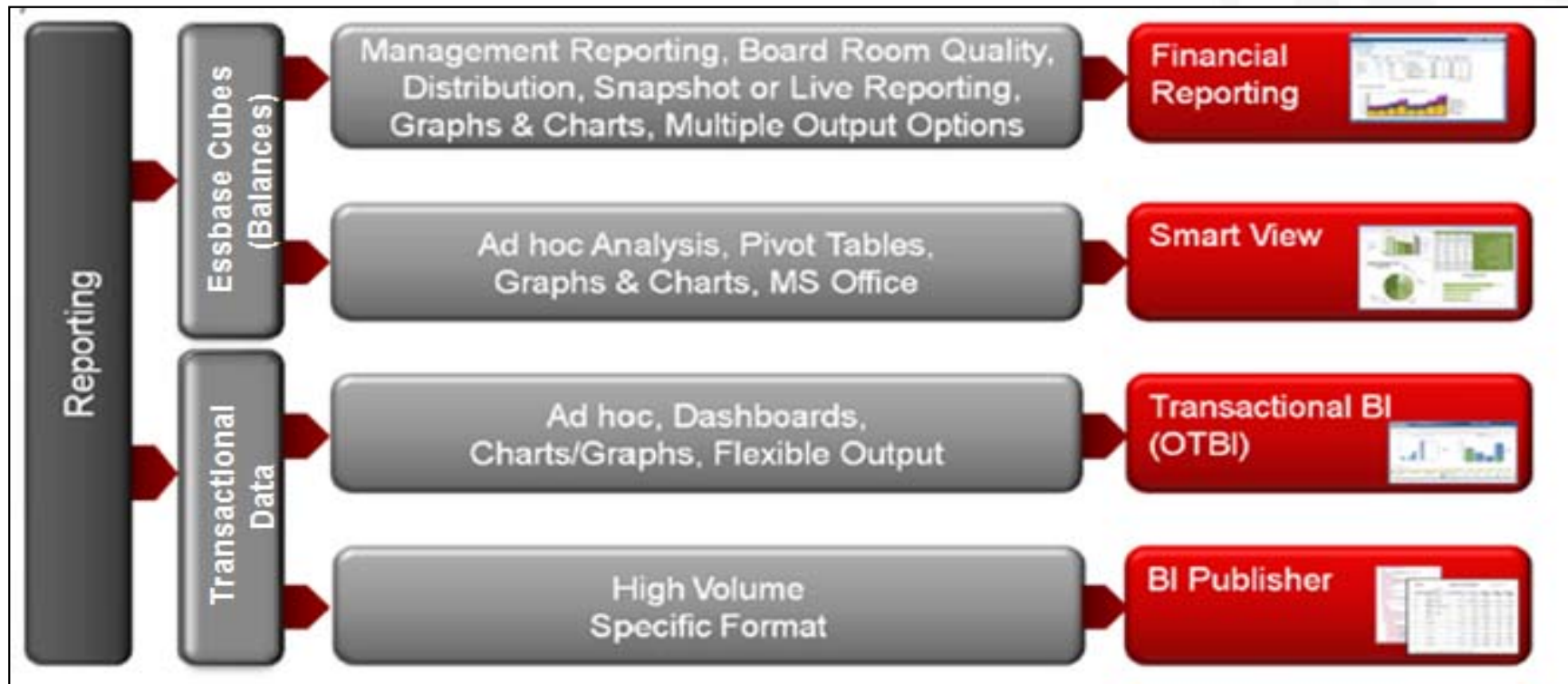
Agenda

- Overview of OTBI
- BI Composer
- BI Answers
- Infolets
- Q & A



COLLABORATE 19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Oracle Cloud Reporting Overview



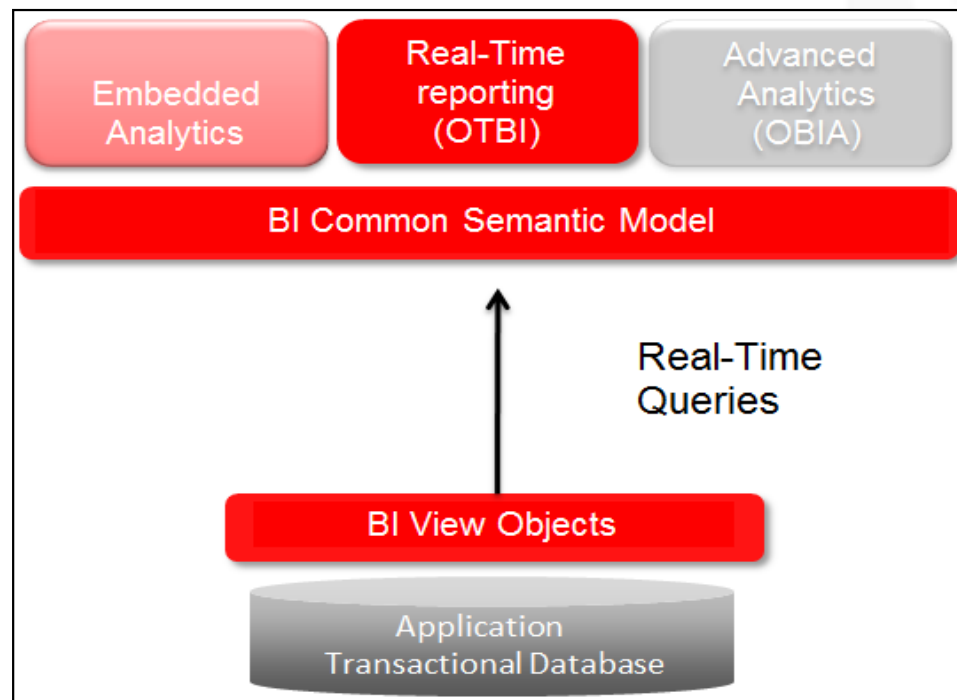
Oracle Transactional Business Intelligence

- OTBI is used to build reports :
 - Having Transactional Data – like invoices, payments, receipts etc.
 - For Ad hoc reports.
 - For Dashboards and Infolets
 - For charts and graph outputs
 - Flexible outputs



Oracle Transactional Business Intelligence

- Subject Areas
- Analysis
- Dashboards
- Infolets



Oracle Transactional Business Intelligence

Oracle Transaction Business Intelligence (OTBI)

Pre-defined Subject Areas Provided by Oracle

Create analysis

Easier tool for the end user to create analysis



COLLABORATE19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Oracle Transactional Business Intelligence

Real Time Business Intelligence

- No latency
- No persistent data store (other than OLTP)
- Ad hoc analysis using OBIEE platform

Highly Interactive

- Utilizes Best-in-Class OBIEE features like alerts, action framework
- Context passed between Fusion Application and BI

Ease of Use

- Folder structure similar to Fusion Apps
- UI labels propagated to Presentation layer
- Prebuilt calculated measures
- Minimal configuration

Extensible

- Architected to seamlessly leverage Fusion Apps concepts (flex, trees, security, MLS, ...)
- Easy to customize

Consistent Semantic Model

- Trees / hierarchies propagated to BI from Fusion Applications
- Unified definition of key entities (Customer, Invoice, Date, Account, etc.)
- Stars with Common dimensions

Seamlessly Integrated with Fusion Applications

- Single Sign on
- Embedded content
- Reads functional & data security from Applications



Oracle Transactional Business Intelligence

Pre-defined Transactional BI Subject Areas:

Select Subject Area X

- Benefits - Action Items Real Time
Real time information on action items for participants to enroll in a benefit or to designate coverage for a dependent or beneficiary.
- Benefits - Enrollment Opportunities Real Time
Real time information on eligible choices for a participant.
- Benefits - Enrollments Real Time
Real time enrollment information for plan participants.
- Benefits - Potential Life Events Real Time
Real time information on all life events for a person, including identification of which life event, if any, is currently in progress for the specified person.
- Benefits - Setup Real Time
Real time information on program, plan type, plan, option, and other object definitions for benefits.

Create Direct Database Query
Create a new SQL query that will be sent directly to the database.

501 Create Analysis from Simple Logical SQL
Create analysis by entering simple logical SQL to Oracle BI Server.

Expenses - Expense Transactions Real Time

- Time
- Fiscal Calendar
- Business Unit
- Legal Entity
- Ledger
- Ledger Set
- Manager
- Employee
- Expense Information
 - Expense Reports
- Expense Lines
 - Expense Line Details
 - Expense Line Amounts
- Expense Audit and Violations
- Expense Distributions

Expenses - Employee Expense Overview

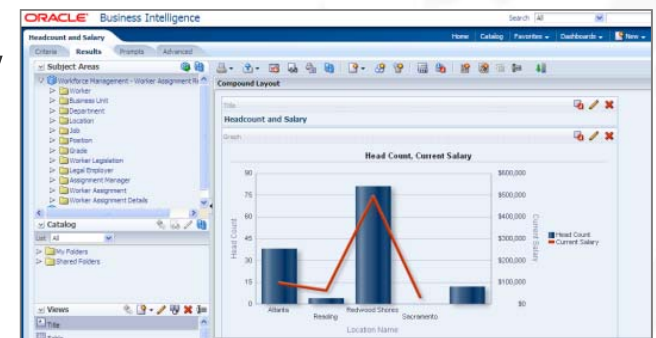
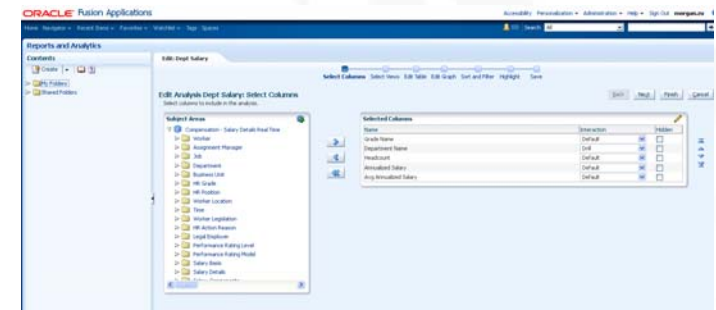
- Time
- Business Unit
- Legal Entity
- Ledger
- Ledger Set
- Balancing Segment
- Cost Center
- Project
- Task
- Manager
- Employee
- Expense Information
- Expense Amounts
 - Employee Expense Amounts
 - Employee Expense Count
 - Credit Card Expenses
 - Policy Violations
 - Late Filed Expenses



Oracle Transactional Business Intelligence

OTBI reports can be build using :

- BI Composer – Simple straight forward UI, walks you through the steps to create report
- BI Answers – Robust functionality for more advanced users.



Oracle Transactional Business Intelligence

BI Composer:

Reports and Analytics

Contents
+ Create ▾
▸ My Folders
▸ Shared Folders

Search **Create Report** x

Select Columns

Select Views

Edit Table

Edit Graph

Sort and Filter

Highlight

Save

Create Analysis: Select Columns
Select columns to include in the analysis.

Subject Areas
▸ Receivables - Transactions Real Time

Selected Columns

Name	Interaction	Hidden
------	-------------	--------

Back

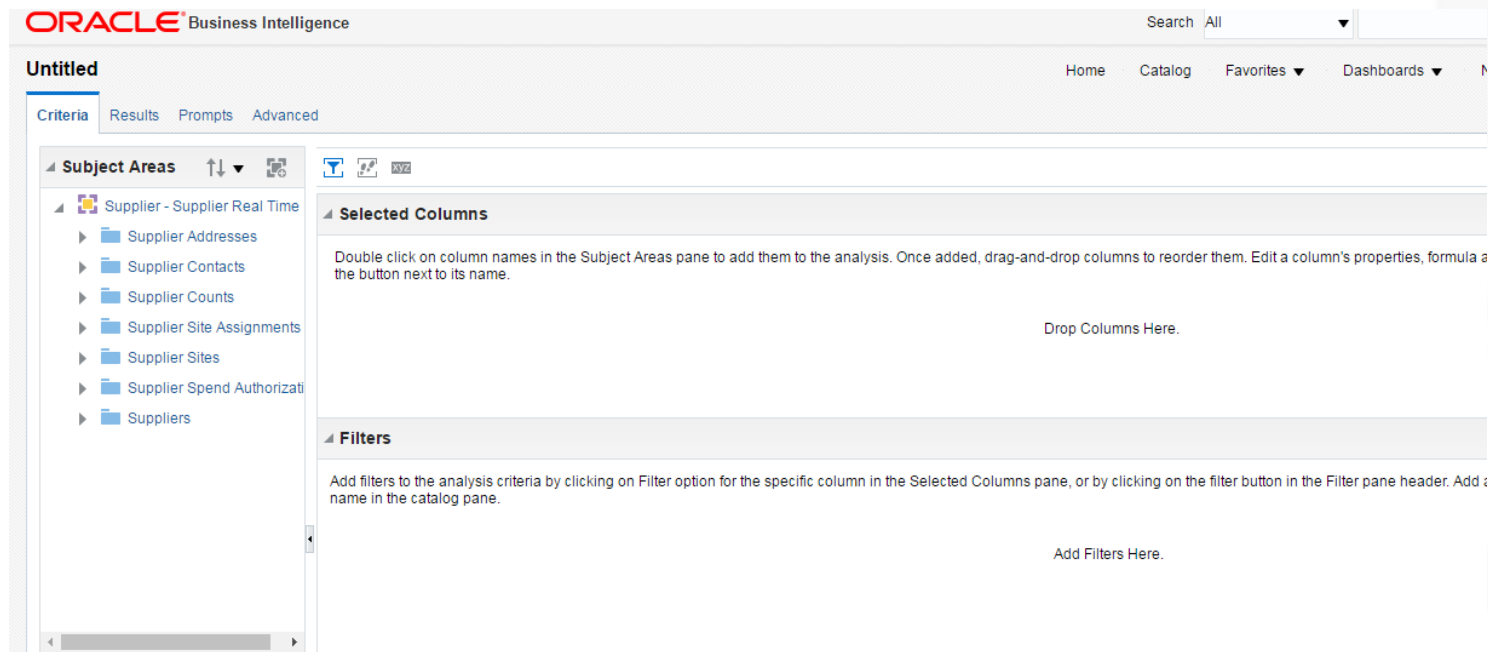
Next

Submit

Cancel

Oracle Transactional Business Intelligence

BI Answers:



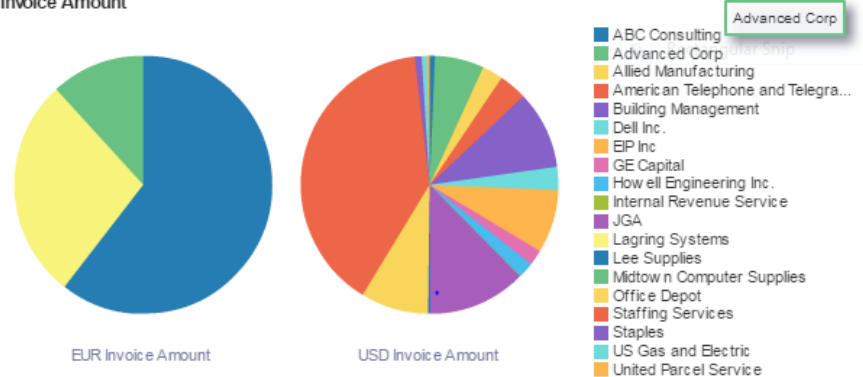
Oracle Transactional Business Intelligence

Demo - Invoices by Supplier and Currency

Demo - Invoices by Supplier and Currency



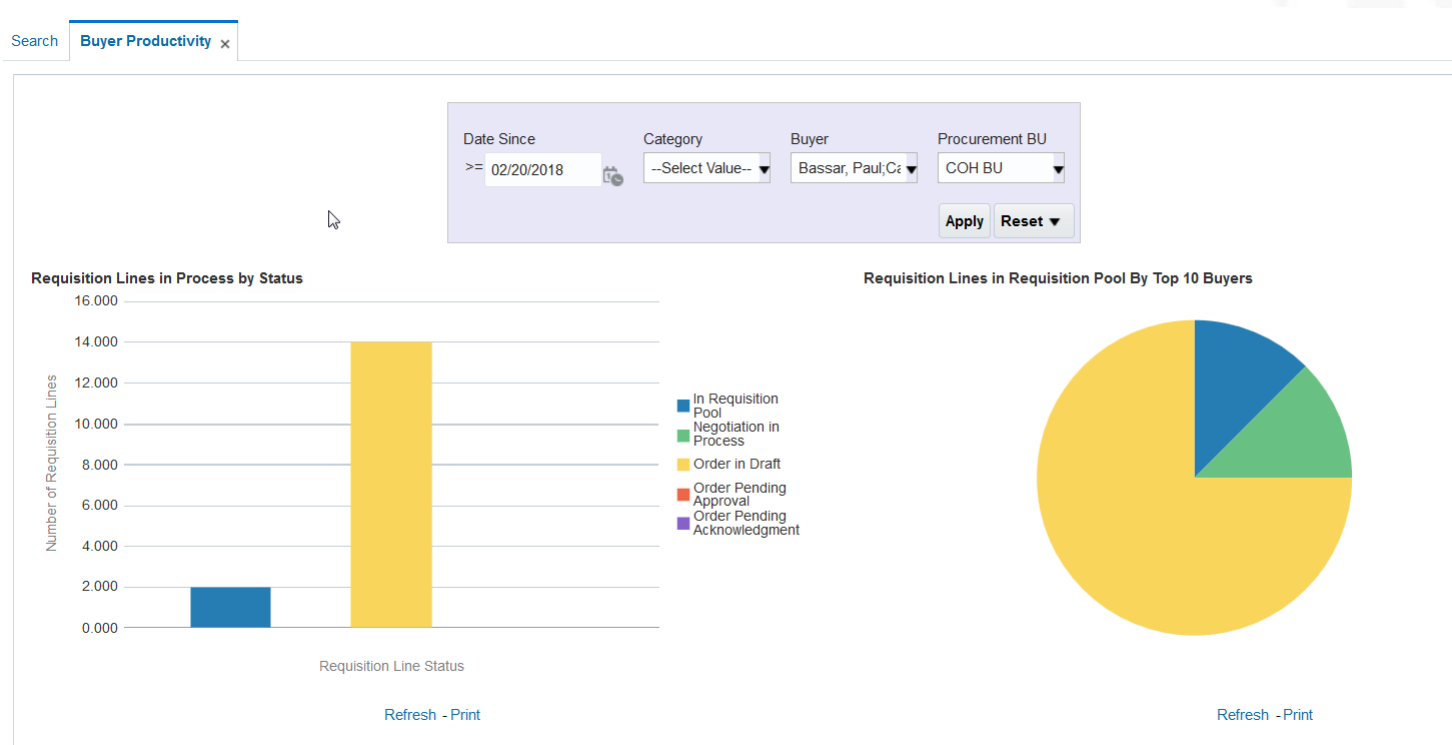
Invoice Amount



Calendar Month	Invoice Date	Invoice Number	Invoice Description	Payment Terms Name	Supplier or Party Name	Invoice Amount	Invoice Currency
2016 / 01	1/3/16 12:00 AM	09232-11		Net 30	Advanced Corp	3,652.07	USD
		42373	Freight Expenses on Sales	Net 30	Allied Manufacturing	11,508.45	USD
		AND-PRE-009	Printers and Cartridges purchase	Immediate	Office Depot	10,692.68	USD
		AND-PRE-010	Prepayment for printers	Immediate	Advanced Corp	8,019.78	USD
		SSDF-02913-03		Net 30	JGA	99.76	USD

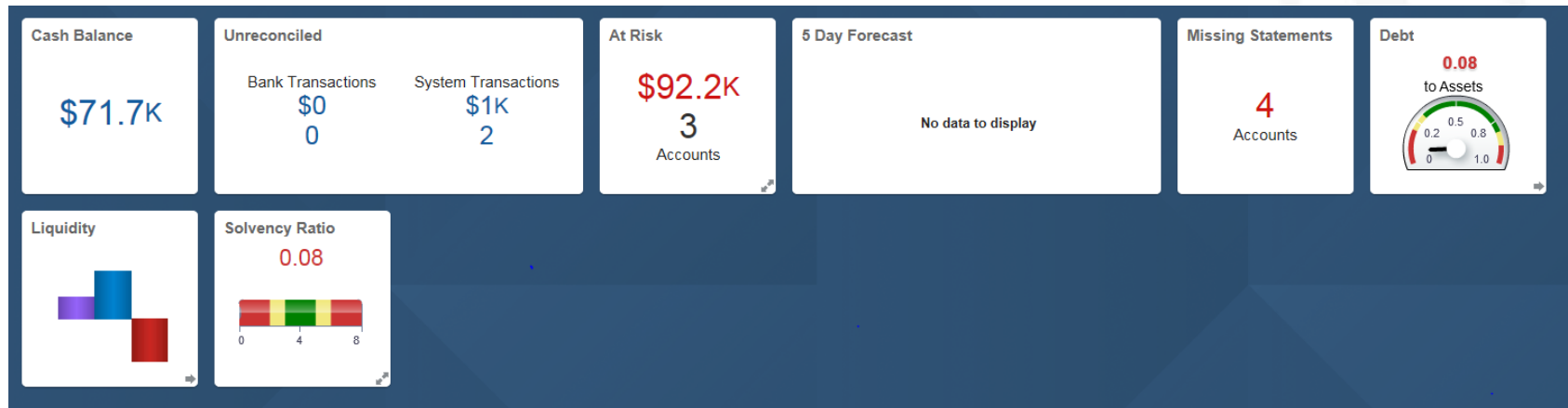
Title

Dashboards:



Title

Infolets:



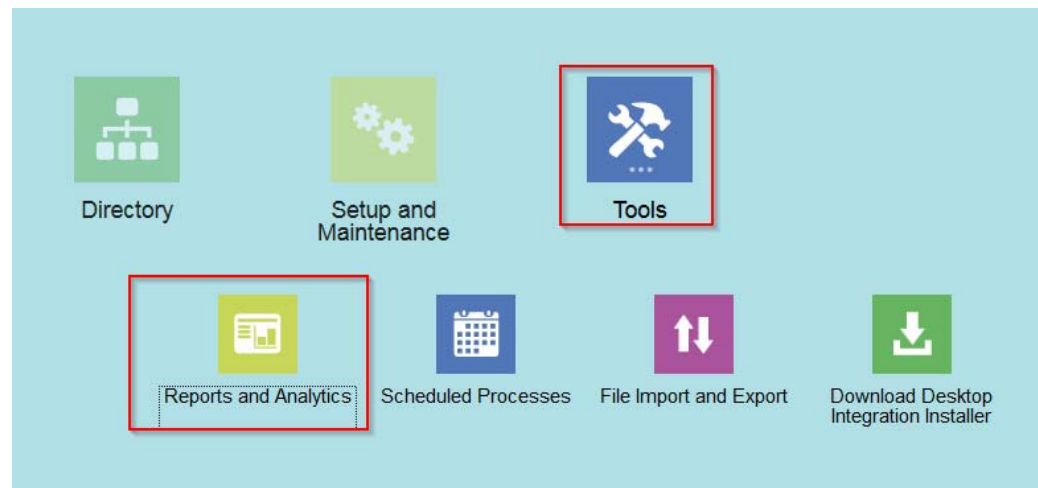
BI COMPOSER



COLLABORATE19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

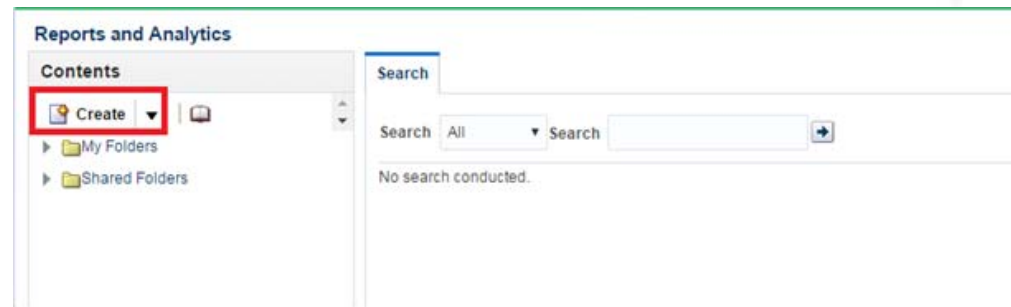
BI Composer:

- Navigate to Home > Tools > Reports and Analytics



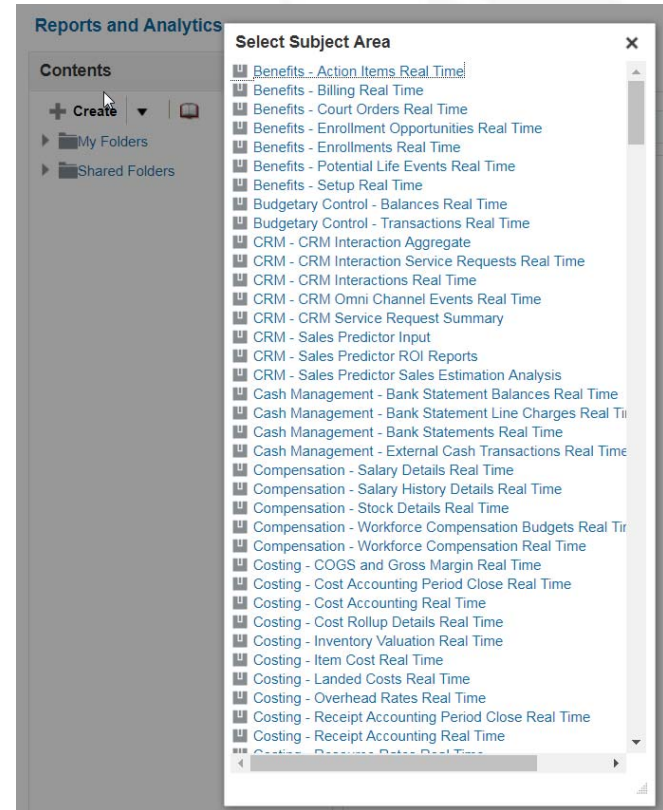
BI Composer:

- Navigate to Home > Tools > Reports and Analytics



BI Composer:

- Navigate to Home > Tools > Reports and Analytics



BI Composer:

■ Navigate to Home

- Expand the folders and choose the field(s)
- These fields will be displayed as columns
- Data Fields can be chosen from different folders
- Choose the following fields (Double click the field or drag and drop to the “Selected Columns” section)
 - Transaction Details > General Information > Transaction Number
 - Invoice Details > General Information > Transaction Date
 - Transaction Amounts > Transaction Entered Amount
 - Bill-to Customer > Bill-to Customer Details > Bill-to Customer Name
 - Bill-to Customer > Bill-to Customer Details > Bill-to Customer Number

BI Composer:

- **Select Columns** - Select data fields and click next

Create Analysis: Select Columns
Select columns to include in the analysis.

Subject Areas

- Receivables - Transactions Real Time
 - Bill-to Customer
 - Bill-to Customer Classification
 - Bill-to Customer Details
 - Bill-to Customer Identifying Address
 - Bill-to Customer Organization
 - Bill-to Customer Person
 - Bill-to Customer Account
 - Bill-to Customer Site
 - Business Unit
 - Fiscal Calendar
 - Inventory Catalog
 - Inventory Category
 - Item
 - Ledger

Selected Columns

Name	Interaction	Hidden
Transaction Number	Default	<input type="checkbox"/>
Transaction Date	Default	<input type="checkbox"/>
Transaction Source	Default	<input type="checkbox"/>
Bill-to Customer Name	Default	<input type="checkbox"/>
Bill-to Customer Number	Default	<input type="checkbox"/>
Transaction Entered Amount	Default	<input type="checkbox"/>

Navigation: Back, Next, Submit, Cancel

BI Composer:

- **Select View-** Select View, enter the title and select table or graph view and click next.

Progress bar: Select Columns, **Select Views**, Edit Table, Edit Graph, Sort and Filter, Highlight, Save

Create Analysis: Select Views

Select views to include in the analysis.

Buttons: Back, Next, Submit, Cancel

Title:

Table: ☒ Table (recommended) ▼

Graph: ☐ None ▼

Layout: Table above Graph ▼

☒ Preview

Transaction Number	Transaction Date	Transaction Source	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount
1	2/14/2018	ORA_RecurringBilling	DRS Test Customer (Org)	1029	400
10000	2/13/2018	Manual	DRS Test Customer (Org)	1029	500
10001	2/14/2018	Manual	DRS Test Customer (Org)	1029	-8
1001	2/20/2018	ORA_RecurringBilling	JOHN Doe	2045	300
11000	2/14/2018	Manual	DRS Test Customer (Org)	1029	333
11001	2/14/2018	Manual	DRS Test Customer (Org)	1029	400
11002	2/15/2018	Manual	DRS Test Customer (Org)	1029	50
12000	2/20/2018	Manual	John Doe	2043	500
12001	2/20/2018	Manual	JOHN Doe	2045	2,000
12002	2/21/2018	Manual	John Enterprises	1028	10,000
12003	2/21/2018	Manual	John Enterprises	1028	-200
12004	2/21/2018	Manual	DRS Org Customer	2050	100
13000	2/20/2018	Manual	John Enterprises	1028	600
13001	2/21/2018	Manual	John Enterprises	1028	10,000

BI Composer:

- **Sort and Filter** - Select the field to sort and set filters.

Progress bar: Select Columns, Select Views, Edit Table, Edit Graph, **Sort and Filter**, Highlight, Save

Create Analysis: Sort and Filter
Sort columns and apply filter.

Buttons: Back, Next, Submit, Cancel

Sort

Order	Column	Sort	Actions
Sort ...	Transaction Number	<input checked="" type="radio"/> Ascending <input type="radio"/> Descending	

+ Add Sort

Filter

Indicates Incomplete Filter (not applied to report)

Show: Data Satisfying All Filters

Statu	Column	Operator	Value	Action
	Transa...	is greater than		

+ Add Filter

Preview

Transaction Number	Transaction Source	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount	Transaction Date
12001	Manual	JOHN Doe	2045	2,000	2/20/2018
12002	Manual	John Enterprises	1028	10,000	2/21/2018
13000	Manual	John Enterprises	1028	600	2/20/2018
13001	Manual	John Enterprises	1028	10,000	2/21/2018
14000	Manual	SHARP BUSINESS SYSTEMS	1019	750	2/28/2018
14001	Manual	DRS Org Customer	2050	3,000	3/1/2018

BI Composer:

- **Highlight** - Enter the threshold values and click next

Progress bar: Select Columns, Select Views, Edit Table, Edit Graph, Sort and Filter, **Highlight**, Save

Create Analysis: Highlight
Apply conditional formatting highlights to table

Buttons: Back, Next, Submit, Cancel

Formatting

Indicates Incomplete Format (not applied to report)

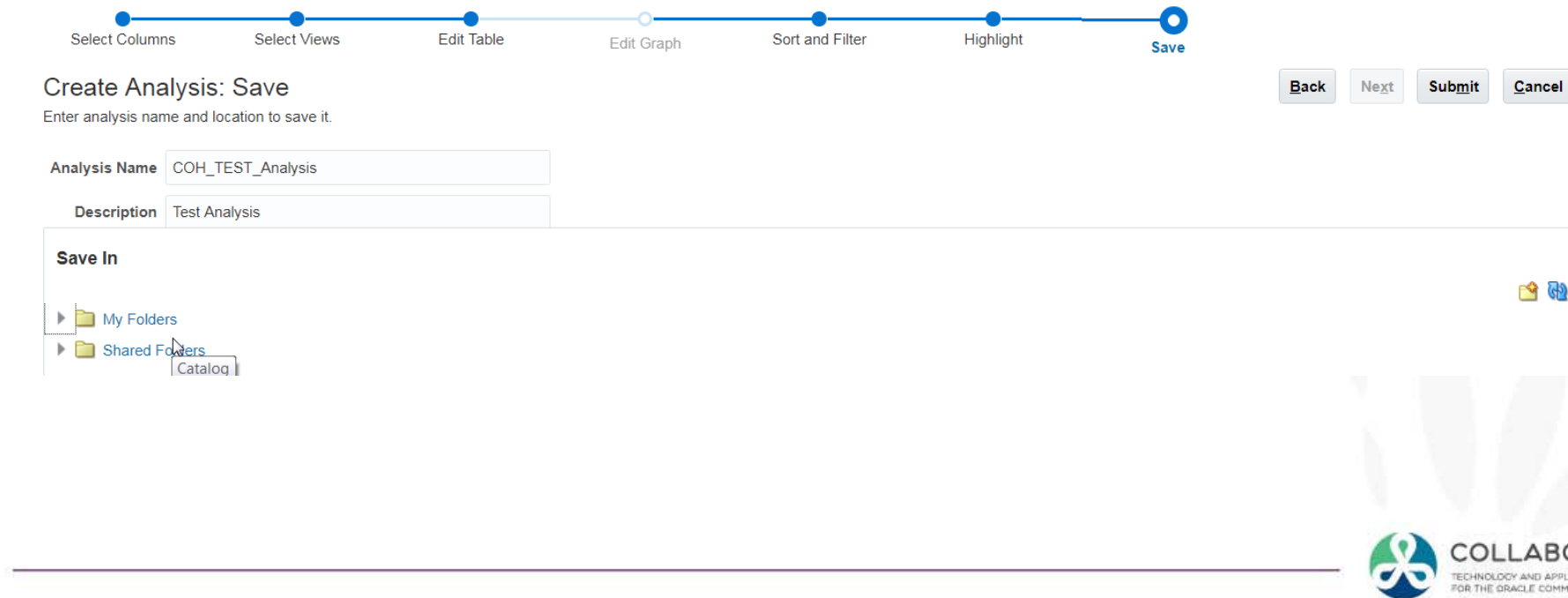
Column	Threshold	Color	Act
Transaction Ent...	500	Red	
	5,000	Yellow	
		Green	

+ Add Column Format

Transaction Number	Transaction Source	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount	Transaction Date
1	ORA_RecurringBilling	DRS Test Customer (Org)	1029	400	2/14/2018
10000	Manual	DRS Test Customer (Org)	1029	500	2/13/2018
10001	Manual	DRS Test Customer (Org)	1029	-8	2/14/2018
1001	ORA_RecurringBilling	JOHN Doe	2045	300	2/20/2018
11000	Manual	DRS Test Customer (Org)	1029	333	2/14/2018
11001	Manual	DRS Test Customer (Org)	1029	400	2/14/2018
11002	Manual	DRS Test Customer (Org)	1029	50	2/15/2018
12000	Manual	John Doe	2043	500	2/20/2018
12001	Manual	JOHN Doe	2045	2,000	2/20/2018
12002	Manual	John Enterprises	1028	10,000	2/21/2018
12003	Manual	John Enterprises	1028	-200	2/21/2018
12004	Manual	DRS Org Customer	2050	100	2/21/2018
13000	Manual	John Enterprises	1028	600	2/20/2018
13001	Manual	John Enterprises	1028	10,000	2/21/2018
14000	Manual	SHARP BUSINESS SYSTEMS	1019	750	2/28/2018

BI Composer:

- **Save** – Save the analysis to My Folder or Shared Folder



The screenshot displays the 'Save' step in the BI Composer workflow. At the top, a progress bar shows seven steps: 'Select Columns', 'Select Views', 'Edit Table', 'Edit Graph', 'Sort and Filter', 'Highlight', and 'Save'. The 'Save' step is the final one, indicated by a blue circle. Below the progress bar, the title 'Create Analysis: Save' is followed by the instruction 'Enter analysis name and location to save it.' To the right of this text are four buttons: 'Back', 'Next', 'Submit', and 'Cancel'. The 'Analysis Name' field contains 'COH_TEST_Analysis' and the 'Description' field contains 'Test Analysis'. Below these fields is a 'Save In' section with a tree view showing 'My Folders' and 'Shared Folders'. Under 'Shared Folders', a 'Catalog' folder is highlighted with a mouse cursor. In the top right corner of the 'Save In' section, there are icons for a folder and a share symbol. At the bottom right of the slide, there is a logo for 'COLLABORATE19' with the text 'TECHNOLOGY AND APPLICATIONS FORUM FOR THE ORACLE COMMUNITY'.

Progress bar steps: Select Columns, Select Views, Edit Table, Edit Graph, Sort and Filter, Highlight, **Save**

Create Analysis: Save
Enter analysis name and location to save it.

Buttons: Back, Next, Submit, Cancel

Analysis Name: COH_TEST_Analysis
Description: Test Analysis

Save In

- My Folders
- Shared Folders
 - Catalog

COLLABORATE19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

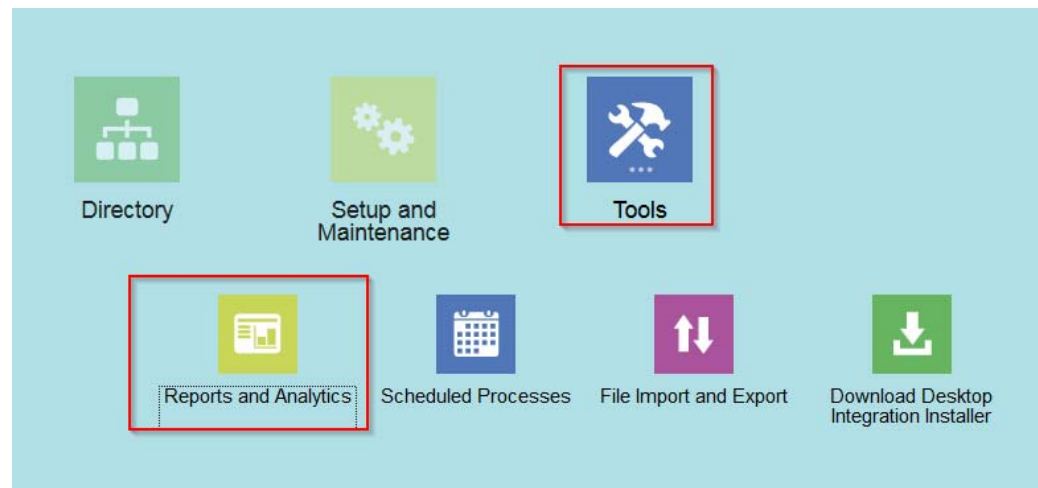
BI ANSWERS



COLLABORATE19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

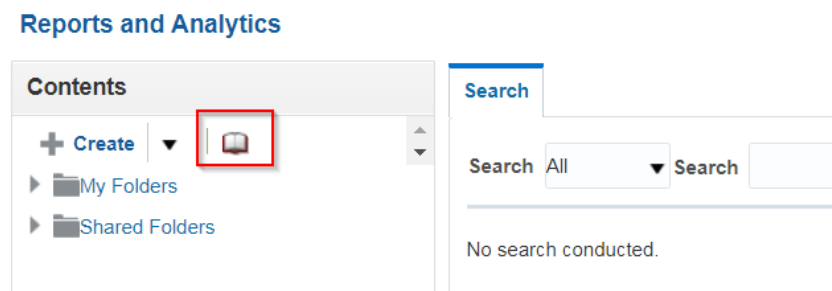
BI Answers:

- Navigate to Home > Tools > Reports and Analytics



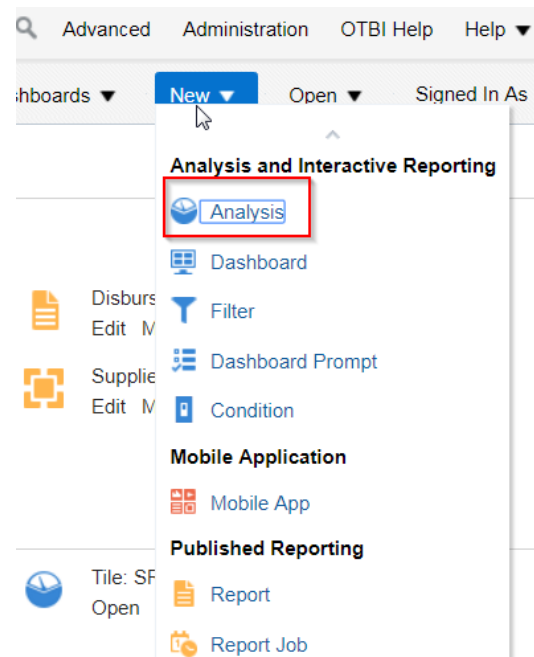
BI Answers:

- Click on Book/Catalog Icon.



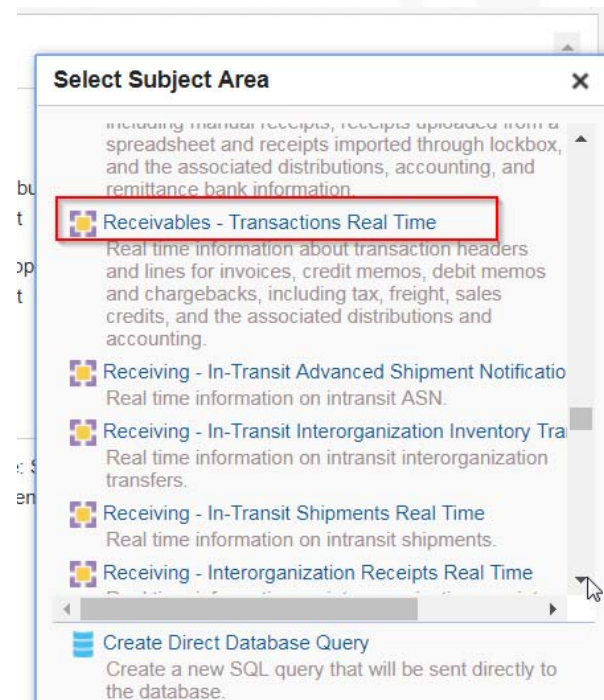
BI Answers:

- Creating new Analysis
 - Click on New > Analysis



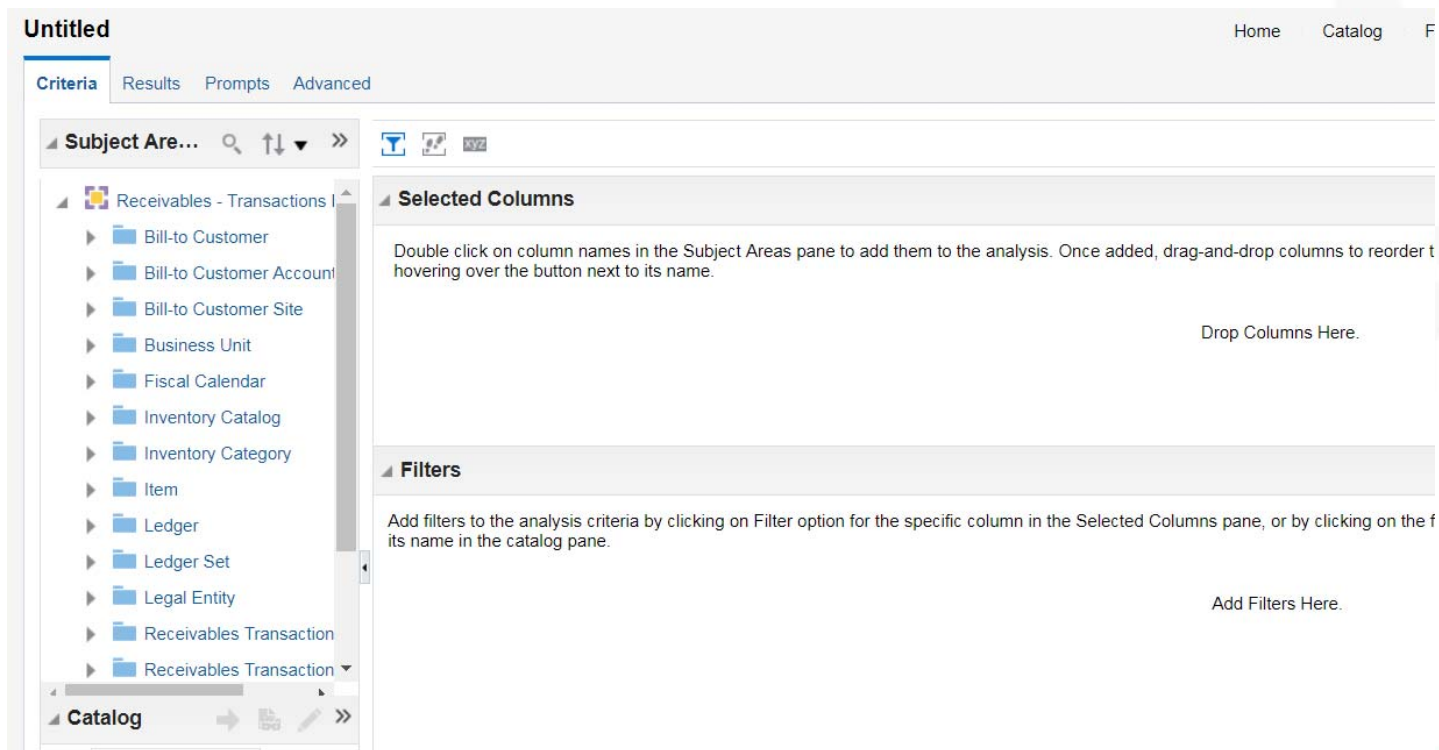
BI Answers:

- Select Subject Area
 - Close Real Time Subject Areas only.



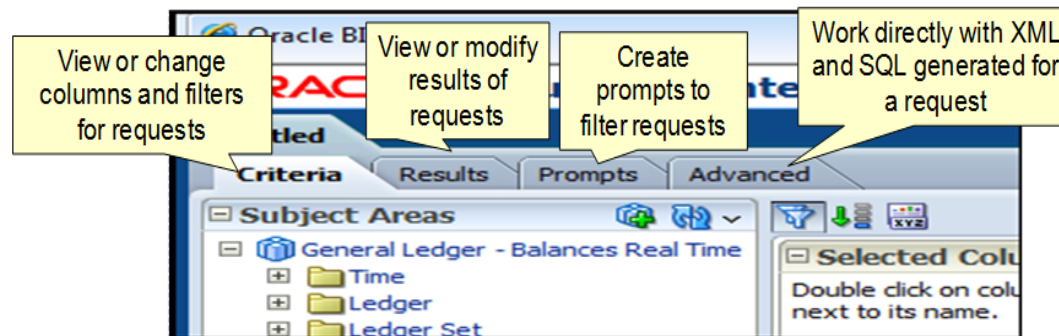
BI Answers:

- Select one or more data fields



BI Answers:

- Select one or more data fields



BI Composer:

■ Select data Fields

- Expand the folders and choose the field(s)
- These fields will be displayed as columns
- Data Fields can be chosen from different folders
- Choose the following fields (Double click the field or drag and drop to the “Selected Columns” section)

- Transaction Details > General Information > Transaction Number
- Invoice Details > General Information > Transaction Date
- Transaction Amounts > Transaction Entered Amount
- Bill-to Customer > Bill-to Customer Details > Bill-to Customer Name
- Bill-to Customer > Bill-to Customer Details > Bill-to Customer Number

BI Answers:

■ Select Data Fields

The screenshot displays the 'Criteria' tab in the BI Answers interface. The 'Subject Areas' pane on the left shows a tree structure under 'Receivables - Transactions', including 'Bill-to Customer', 'Bill-to Customer Account', 'Bill-to Customer Site', 'Business Unit', 'Fiscal Calendar', 'Inventory Catalog', 'Inventory Category', 'Item', 'Ledger', 'Ledger Set', and 'Legal Entity'. The 'Selected Columns' pane on the right contains a table with columns grouped under 'General Information', 'Transaction Amounts', and 'Bill-to Customer Details'. The 'Filters' pane below it is currently empty, with a placeholder text 'Add Filters Here.'

Criteria Results Prompts Advanced

Subject Areas [Search] [Up/Down] [Add]

- Receivables - Transactions
 - Bill-to Customer
 - Bill-to Customer Account
 - Bill-to Customer Site
 - Business Unit
 - Fiscal Calendar
 - Inventory Catalog
 - Inventory Category
 - Item
 - Ledger
 - Ledger Set
 - Legal Entity

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete hovering over the button next to its name.

General Information			Transaction Amounts	Bill-to Customer Details	
Transaction Number	Transaction Date	Transaction Source	Transaction Entered Amount	Bill-to Customer Name	Bill-to Customer Number

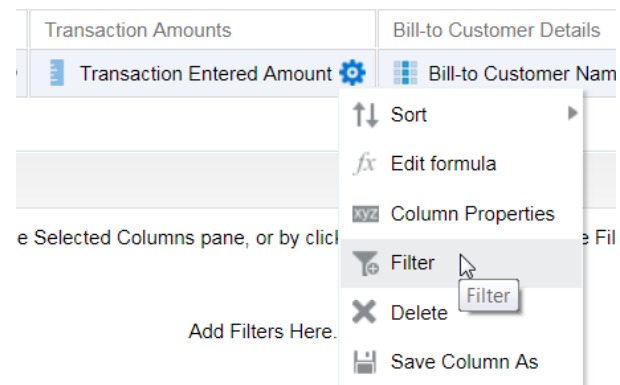
Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add b its name in the catalog pane.

Add Filters Here.

BI Answers:

Add filters



BI Answers:

- Enter the operator and Value to set fileters.

The screenshot shows a 'New Filter' dialog box overlaid on a BI tool interface. The dialog box has the following fields and options:

- Column:** Transaction Entered Amount *fx*
- Operator:** is equal to / is in
- Value:** 500
- Buttons:** Add More Options ▼, Clear All
- Checkboxes:**
 - ☐ Protect Filter
 - ☐ Convert this filter to SQL
- Footer Buttons:** OK, Cancel

The background interface shows a table with columns: Transaction Date, Transaction Source, Transaction Entered Amount, and Bill-to Customer. The 'Transaction Entered Amount' column is highlighted.

BI Answers:

■ Filters and Conditions

The screenshot displays the BI Answers 'Criteria' configuration window. It features a left-hand 'Subject Areas' pane with a tree view under 'Receivables - Transactions'. The main area is divided into three sections: 'Selected Columns', 'Filters', and a 'Results' tab. The 'Selected Columns' section includes a table with columns for General Information, Transaction Amounts, and Bill-to Customer Details. The 'Filters' section shows a single filter: 'Transaction Entered Amount is equal to / is in 500'.

Criteria Results Prompts Advanced

Subject Areas

Receivables - Transactions

- Bill-to Customer
- Bill-to Customer Account
- Bill-to Customer Site
- Business Unit
- Fiscal Calendar
- Inventory Catalog
- Inventory Category
- Item
- Ledger
- Ledger Set
- Legal Entity
- Receivables Transaction

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete a column by hovering over the button next to its name.

General Information			Transaction Amounts		Bill-to Customer Details	
Transaction Number	Transaction Date	Transaction Source	Transaction Entered Amount	Bill-to Customer Name	Bill-to Customer Number	

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on a filter name in the catalog pane.

Transaction Entered Amount is equal to / is in 500

BI Answers:

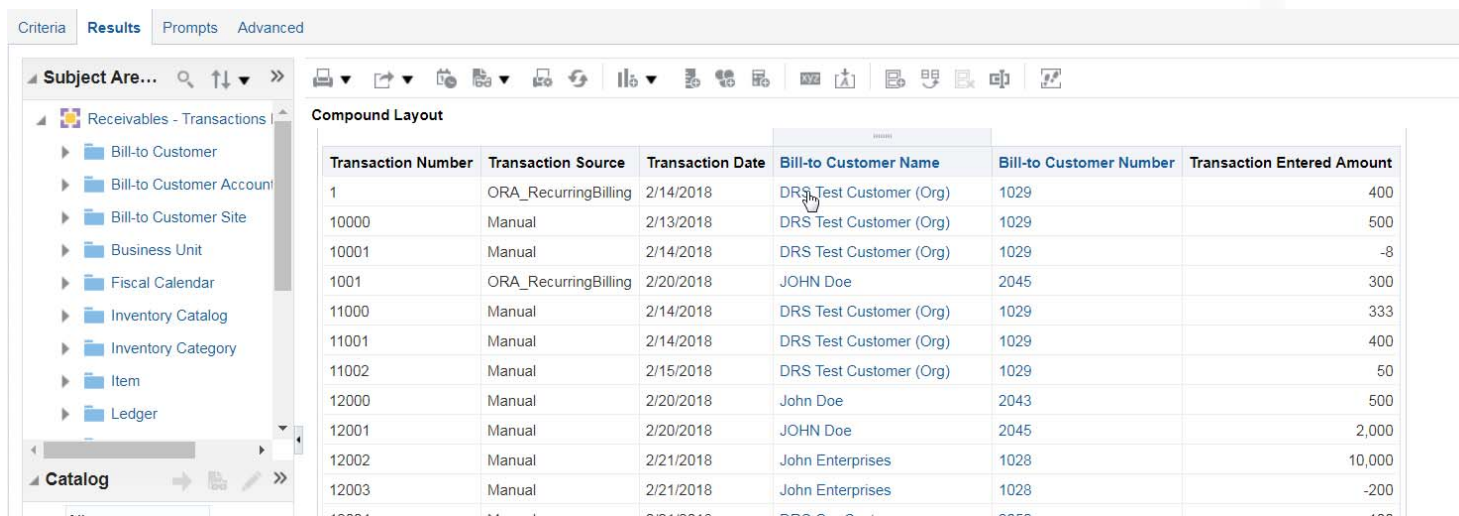
- Click on the Results tab

The screenshot displays the BI Answers web interface. At the top, there are tabs for 'Criteria', 'Results' (which is selected), 'Prompts', and 'Advanced'. Below the tabs, a 'Subject Area' tree on the left shows a hierarchy: 'Receivables - Transactions' > 'Bill-to Customer' > 'Bill-to Customer Account' > 'Bill-to Customer Site' > 'Business Unit' > 'Fiscal Calendar' > 'Inventory Catalog'. The main area is titled 'Compound Layout' and contains a table with the following data:

Transaction Number	Transaction Source	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount	Transaction Date
10000	Manual	DRS Test Customer (Org)	1029	500	2/13/2018
12000	Manual	John Doe	2043	500	2/20/2018

BI Answers:

- Re-order Columns – On the “Results” tab, click on the “Transaction Date” column and drag and place it after the “Transaction Source” column.



The screenshot shows the Oracle BI Answers interface. The 'Results' tab is active. On the left, the 'Subject Area' pane shows a tree structure under 'Receivables - Transactions' including 'Bill-to Customer', 'Bill-to Customer Account', 'Bill-to Customer Site', 'Business Unit', 'Fiscal Calendar', 'Inventory Catalog', 'Inventory Category', 'Item', and 'Ledger'. The 'Catalog' pane is also visible. The main area displays a table titled 'Compound Layout' with the following data:

Transaction Number	Transaction Source	Transaction Date	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount
1	ORA_RecurringBilling	2/14/2018	DRS Test Customer (Org)	1029	400
10000	Manual	2/13/2018	DRS Test Customer (Org)	1029	500
10001	Manual	2/14/2018	DRS Test Customer (Org)	1029	-8
1001	ORA_RecurringBilling	2/20/2018	JOHN Doe	2045	300
11000	Manual	2/14/2018	DRS Test Customer (Org)	1029	333
11001	Manual	2/14/2018	DRS Test Customer (Org)	1029	400
11002	Manual	2/15/2018	DRS Test Customer (Org)	1029	50
12000	Manual	2/20/2018	John Doe	2043	500
12001	Manual	2/20/2018	JOHN Doe	2045	2,000
12002	Manual	2/21/2018	John Enterprises	1028	10,000
12003	Manual	2/21/2018	John Enterprises	1028	-200

BI Answers:

■ Formatting Options

The screenshot displays the BI Answers web interface. On the left, the 'Subject Areas' pane shows a tree structure under 'Receivables - Transactions', with 'Receivables Transaction' selected. The main area is divided into two panes: 'Selected Columns' and 'Filters'. The 'Selected Columns' pane contains a table with two tabs: 'General Information' and 'Transaction Amounts'. The 'General Information' tab is active, showing columns: 'Transaction Number', 'Transaction Date', 'Transaction Source', and 'Transaction Entered'. A context menu is open over the 'Transaction Source' column, listing options: 'Sort', 'Edit formula', 'Column Properties' (highlighted), 'Filter', 'Delete', and 'Save Column As'. The 'Filters' pane is currently empty.

Subject Areas [Search] [Up/Down] [Add]

- Receivables - Transactions
 - Bill-to Customer
 - Bill-to Customer Account
 - Bill-to Customer Site
 - Business Unit
 - Fiscal Calendar
 - Inventory Catalog
 - Inventory Category
 - Item
 - Ledger
 - Ledger Set
 - Legal Entity
 - Receivables Transaction

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop hovering over the button next to its name.

General Information			Transaction Amounts
Transaction Number	Transaction Date	Transaction Source	Transaction Entered

Filters

Add filters to the analysis criteria by clicking on Filter icon in the Selected Columns pane, or its name in the catalog pane.

Sort
Edit formula
Column Properties
Filter
Delete
Save Column As

Add Filter

BI Answers:

■ Column properties : Custom Headings

Column Properties

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

Headings ☐ Hide

Folder Heading General Information

Column Heading Trx Date

☒ Custom Headings
☐ Contains HTML Markup

Value Suppression

Criteria Results Prompts Advanced

Subject Areas

Receivables - Transactions

- Bill-to Customer
- Bill-to Customer Account
- Bill-to Customer Site
- Business Unit
- Fiscal Calendar
- Inventory Catalog

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply : hovering over the button next to its name.

General Information		Transaction Amounts		Bill-to Customer Details	
Transaction Number	Trx Date	Transaction Source	Transaction Entered Amount	Bill-to Customer Name	Bill-to Customer Number

BI Answers:

■ Sorting Date

The screenshot displays the BI Answers web interface. The top navigation bar includes tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. The left sidebar, titled 'Subject Areas', shows a tree structure under 'Receivables - Transactions' with various categories like 'Bill-to Customer', 'Business Unit', and 'Fiscal Calendar'. The main area is divided into 'Selected Columns' and 'Filters'. The 'Selected Columns' section contains a table with columns: 'General Information' (Transaction Number, Trx Date, Transaction Source), 'Transaction Amounts' (Transaction Entered Amount), and 'Bill-to Customer Details' (Bill-to Customer Name, Bill-to Customer Number). A context menu is open over the 'Trx Date' column, offering options: 'Sort' (with a sub-menu showing 'Sort Ascending' and 'Sort Descending'), 'Edit formula', 'Column Properties', 'Filter', 'Delete', and 'Save Column As'. The 'Sort Ascending' option is highlighted in the sub-menu. The 'Filters' section below is currently empty.

General Information			Transaction Amounts	Bill-to Customer Details	
Transaction Number	Trx Date	Transaction Source	Transaction Entered Amount	Bill-to Customer Name	Bill-to Customer Number

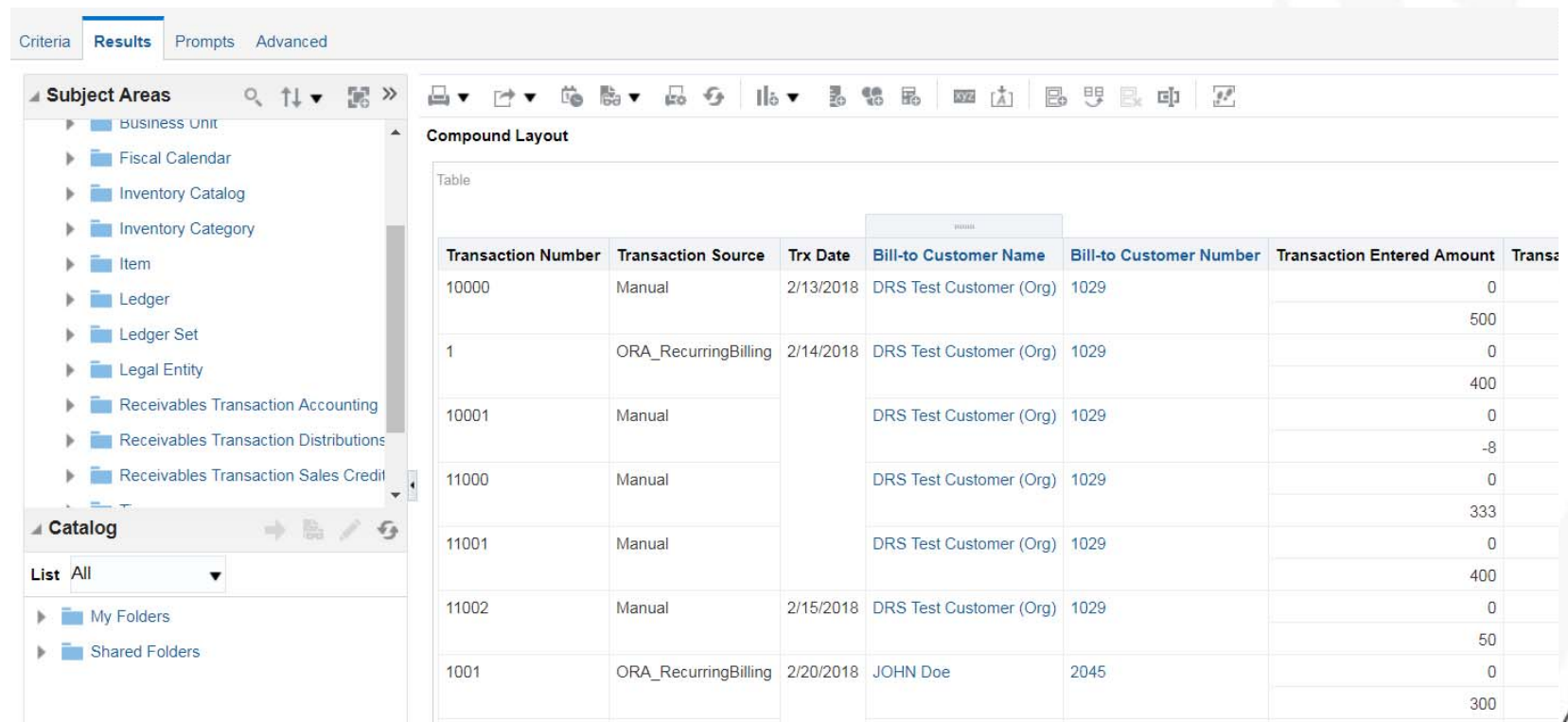
BI Answers:

■ Sorting multiple columns

The screenshot displays the Oracle BI Answers 'Criteria' tab. On the left, the 'Subject Areas' pane shows a tree structure under 'Receivables - Transactions'. The 'Selected Columns' pane on the right shows a table with columns: General Information, Transaction Amounts, and Bill-to Customer Details. A context menu is open over the 'Transaction Source' column, showing options like 'Sort', 'Edit formula', 'Column Properties', 'Filter', 'Delete', and 'Save Column As'. The 'Sort' option is selected, and a sub-menu is open showing 'Sort Ascending', 'Sort Descending', 'Add Ascending Sort' (checked), 'Add Descending Sort', 'Clear Sort', and 'Clear All Sorts in All Columns'.

BI Answers:

- Suppress/Un-suppress a data field.



The screenshot displays the Oracle BI Answers interface. The 'Results' tab is active, showing a table of transaction data. The table has columns for Transaction Number, Transaction Source, Trx Date, Bill-to Customer Name, Bill-to Customer Number, Transaction Entered Amount, and Transaction Entered Date. The data is grouped by Transaction Source and Trx Date. The 'Subject Areas' pane on the left shows a hierarchy of folders including Business Unit, Fiscal Calendar, Inventory Catalog, Inventory Category, Item, Ledger, Ledger Set, Legal Entity, Receivables Transaction Accounting, Receivables Transaction Distributions, and Receivables Transaction Sales Credit. The 'Catalog' pane at the bottom shows a list of folders including My Folders and Shared Folders.

Transaction Number	Transaction Source	Trx Date	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount	Transaction Entered Date
10000	Manual	2/13/2018	DRS Test Customer (Org)	1029	0	
					500	
1	ORA_RecurringBilling	2/14/2018	DRS Test Customer (Org)	1029	0	
					400	
10001	Manual		DRS Test Customer (Org)	1029	0	
					-8	
11000	Manual		DRS Test Customer (Org)	1029	0	
					333	
11001	Manual		DRS Test Customer (Org)	1029	0	
					400	
11002	Manual	2/15/2018	DRS Test Customer (Org)	1029	0	
					50	
1001	ORA_RecurringBilling	2/20/2018	JOHN Doe	2045	0	
					300	



LABORATE19

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

BI Answers:

- Suppress/Un-Suppress a Data Field

Click on the “Criteria” tab

Click on “Properties” for Trx Date column

Click on “Column Format” tab

Change the “Value Suppression” option to Repeat

Click OK



BI Answers:

- Suppress/Un-Suppress a Data Field

Column Properties

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

Headings ☐ Hide

Folder Heading General Information

Column Heading Trx Date

☒ Custom Headings

☐ Contains HTML Markup

Value Suppression

XX	xxxx	XX	xxxx
	xxxx	XX	xxxx
	xxxx	XX	xxxx
XX	xxxx	XX	xxxx
	xxxx	XX	xxxx

☐ Suppress ☒ Repeat

BI Answers:

- Click on “Results” tab to see the data output
- Invoice Date is repeated

Transaction Number	Transaction Source	Trx Date	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount	Tr
10000	Manual	2/13/2018	DRS Test Customer (Org)	1029	0	
		2/13/2018			500	
1	ORA_RecurringBilling	2/14/2018	DRS Test Customer (Org)	1029	0	
		2/14/2018			400	
10001	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	
		2/14/2018			-8	
11000	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	
		2/14/2018			333	
11001	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	
		2/14/2018			400	
11002	Manual	2/15/2018	DRS Test Customer (Org)	1029	0	
		2/15/2018			50	
1001	ORA_RecurringBilling	2/20/2018	JOHN Doe	2045	0	
		2/20/2018			300	
12000	Manual	2/20/2018	John Doe	2043	0	
		2/20/2018			500	

BI Answers:

- Prompts/User Input

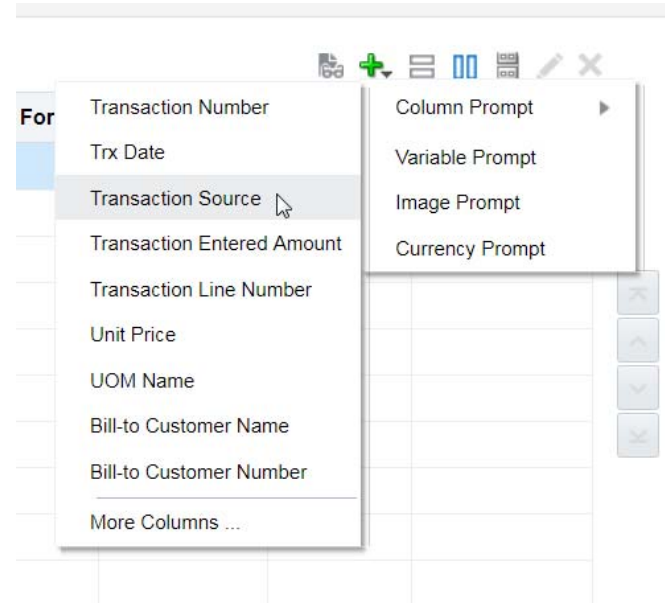
Criteria	Results	Prompts	Advanced
----------	---------	----------------	----------

Definition
Add prompts for users when they run this analysis.

	Prompt Label
	Page 1

BI Answers:

- Select the column for prompt



BI Answers:

- Set the prompt properties

The screenshot shows the 'New Prompt' dialog box with the following settings:

- Prompt For Column:** "- General Information"."Tran fx
- Label:** Transaction Source Name
 - ☐ Custom Label
- Description:** (Empty text box)
- Operator:** is equal to / is in
- User Input:** Choice List
- Options:**
 - Choice List Values:** All Column Values
 - ☐ Include "All Column Values" choice in the list
 - ☐ Limit values by: All Prompts
 - ☒ Enable user to select multiple values
 - ☒ Enable user to type values
 - ☐ Require user input
 - Default selection:** None
 - Choice List Width:** Dynamic ☒ 120 Pixels
 - Set a variable:** None

Buttons: OK, Cancel

BI Answers:

- Set prompt properties and save analysis

Criteria

Results

Prompts

Advanced

Definition

Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Transaction Source Name	Column value	"- General Information"."Transaction Source Name"			<input type="checkbox"/>

Page 1

Transaction Source

--Select Value--

Apply

Reset

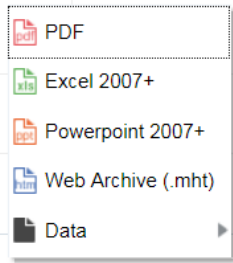
BI Answers:

Transaction Number	Transaction Source	Trx Date	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount	Transaction Line Number	Unit Price
10000	Manual	2/13/2018	DRS Test Customer (Org)	1029	0	1	500
		2/13/2018			500		
10001	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	1	400
		2/14/2018			-8		
11000	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	1	333
		2/14/2018			333		
11001	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	1	400
		2/14/2018			400		
11002	Manual	2/15/2018	DRS Test Customer (Org)	1029	0	1	50
		2/15/2018			50		
12000	Manual	2/20/2018	John Doe	2043	0	1	500
		2/20/2018			500		
12001	Manual	2/20/2018	JOHN Doe	2045	0	1	2,000
		2/20/2018			2,000		
13000	Manual	2/20/2018	John Enterprises	1028	0	1	600
		2/20/2018			600		
12002	Manual	2/21/2018	John Enterprises	1028	0	1	10,000

BI Answers:

- Export output to different formats

12002	Manual	2/21/2018	John Enterprises
12003		2/21/2018	John Enterprises
12004		2/21/2018	DRS Org Customer
13001		2/21/2018	John Enterprises



- PDF
- Excel 2007+
- Powerpoint 2007+
- Web Archive (.mht)
- Data

[Refresh](#) - [Print](#) - [Export](#)

BI Answers:

■ Functions

Transaction Amounts | Line Information

Transaction Source	Transaction Entered Amount	Transaction Line Number	Unit F

for the specific column in the Selected Columns pane, or b

Add Filters

Context menu options:

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

BI Answers:

■ Functions

Edit Column Formula

Column Formula | Bins

Folder Heading: General Information

Column Heading: Transaction Source

☐ Custom Headings

☐ Contains HTML Markup

Aggregation Rule (Totals Row): Default (None)

Available

Subject Areas

- Transaction Document Sequen
- Transaction Document Sequen
- Transaction Number**
- Transaction Source
- Transaction Type Description
- Transaction Type Name
- Miscellaneous
- Payment
- Reference Information

Column Formula

CONCAT("Receivables - Transactions Real Time",- General Information","Transaction Source Name", "- General Information","Transaction Number")

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

OK Cancel

CONCAT(Transaction Source, Transaction Number)

Manual10000

ORA_RecurringBilling1

Manual10001

Manual11000

Manual11001

Manual11002



COLLABORATE 19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

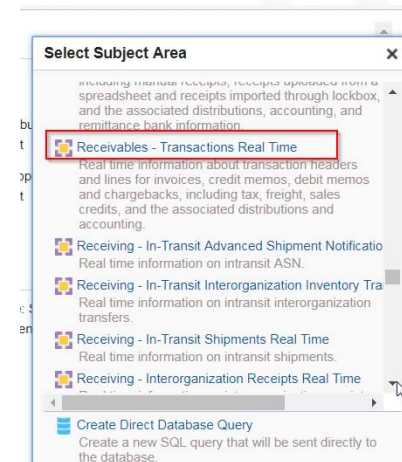
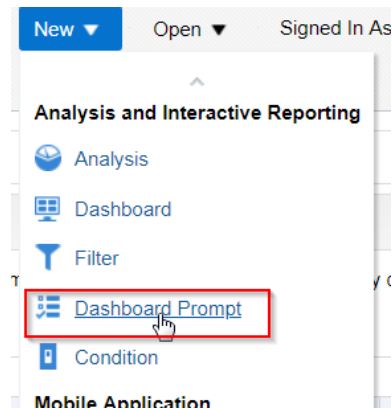
DASHBOARD



COLLABORATE19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Dashboard:

Dashboard Prompt



Definition

Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Transaction Source	Column value	Transaction Source			<input type="checkbox"/>

Dashboard:

Set prompt properties and save

New Prompt:

Prompt For Column "- General Information" "Tran" *fx*

Label Transaction Source Name

☐ Custom Label

Description

Operator is equal to / is in

User Input Choice List

Options

Choice List Values All Column Values

☐ Include "All Column Values" choice in the list

☐ Limit values by All Prompts

☒ Enable user to select multiple values

☒ Enable user to type values

☐ Require user input

Default selection None

Choice List Width ☐ Dynamic ☒ 120 Pixels

Set a variable None

OK Cancel

User View Location /My Fc

Folders Type All Sort Name A-Z ☐ Show

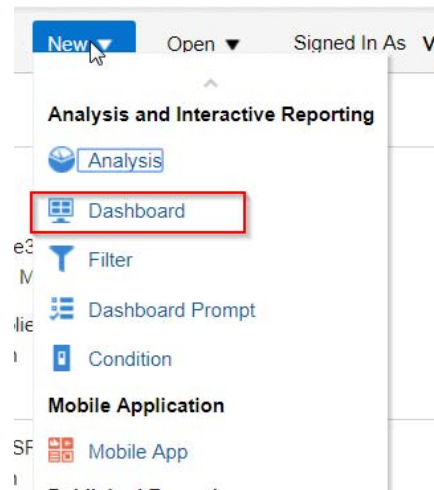
My Folders
Shared Folders

COH_TEST_Analysis Last Modified 4/1/2018 2:53 PM
Owner Venu Rudra
Test Analysis
Open Edit More

COH_TEST_Prompt Last Modified 4/1/2018 3:00 PM
Owner Venu Rudra
Edit More

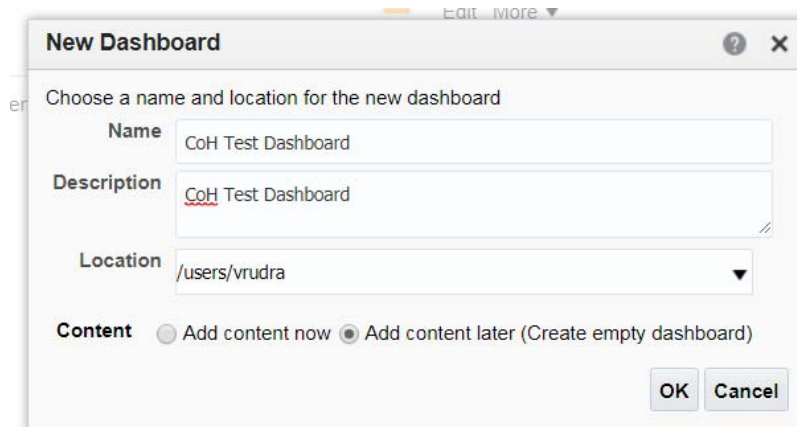
Dashboard:

New -> Dashboard



Dashboard:

- Enter the name and location

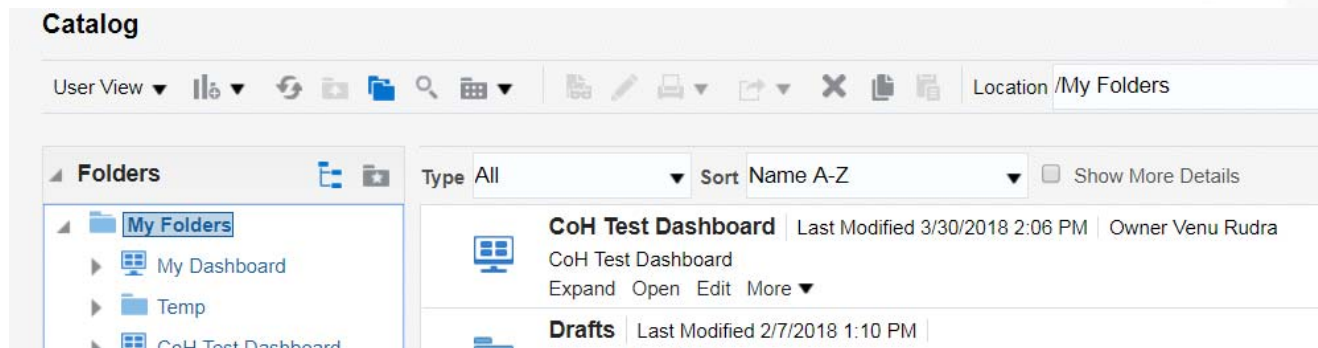


The screenshot shows a 'New Dashboard' dialog box with the following fields and options:

- Name:** CoH Test Dashboard
- Description:** CoH Test Dashboard
- Location:** /users/vrudra
- Content:** ☐ Add content now ☒ Add content later (Create empty dashboard)
- Buttons:** OK, Cancel

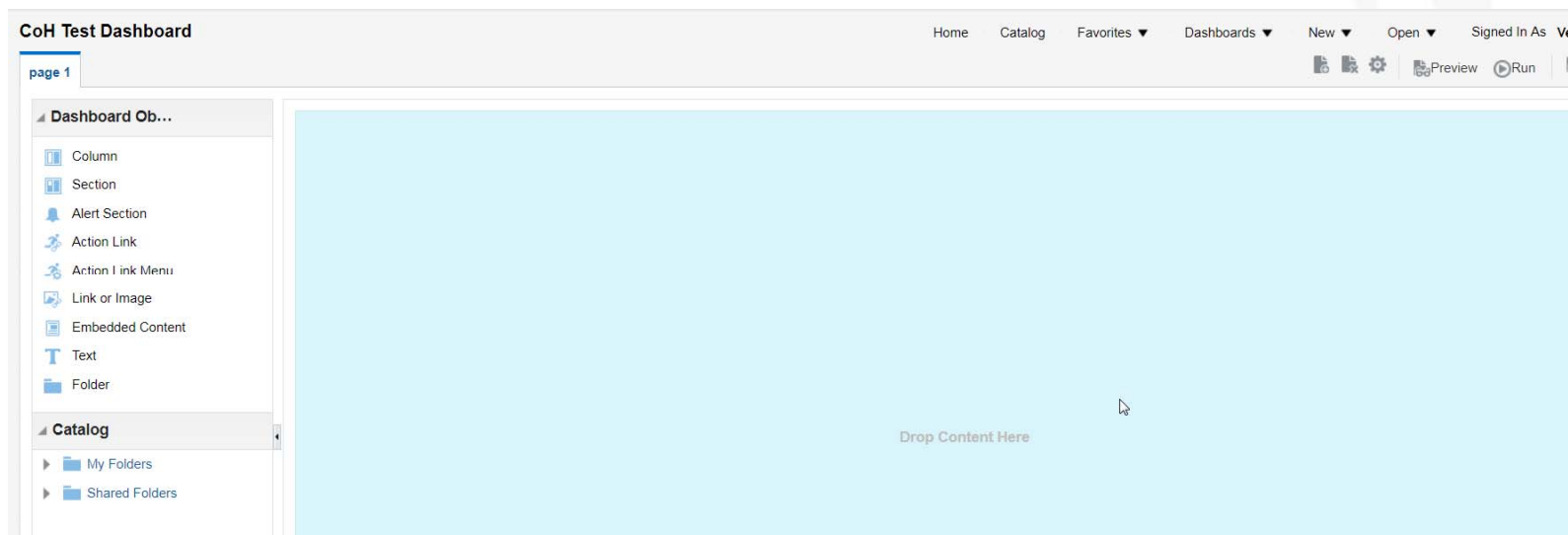
Dashboard:

Dashboard



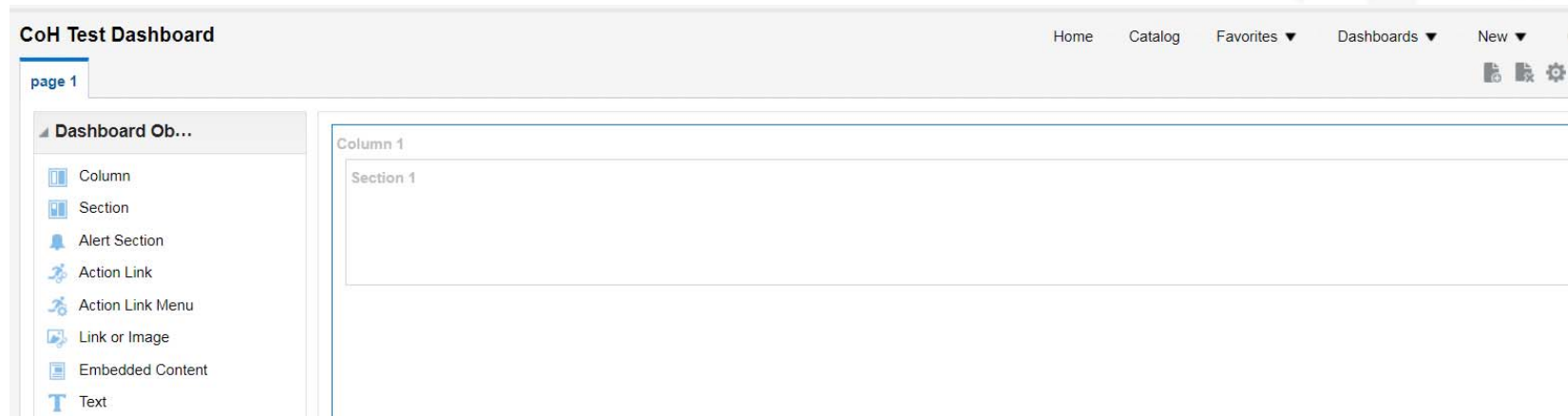
Dashboard:

- Enter the threshold values and click next



Dashboard:

- Drag and drop sections



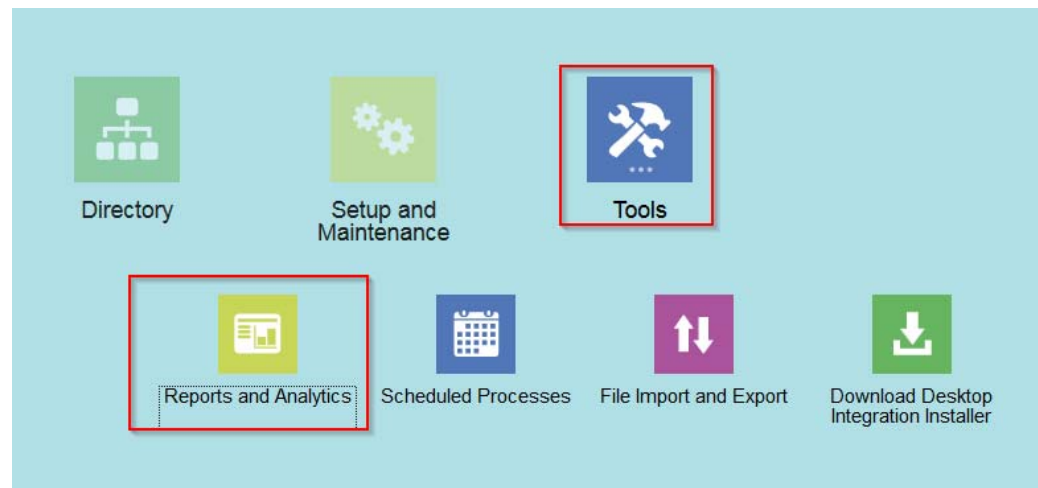
Dashboard:

- Navigate and add the Prompts and Analysis to dashboard

The screenshot displays a dashboard builder interface. On the left, a sidebar contains a 'Dashboard Ob...' section with icons for Column, Section, Alert Section, Action Link, Action Link Menu, Link or Image, Embedded Content, Text, and Folder. Below this is a 'Catalog' section with a tree view showing 'CoH Test Dashboard', 'Drafts', 'Reasons Report', and 'SOA_VALIDATION_REP'. The main workspace is titled 'Column 1' and contains two sections: 'Section 2' at the top and 'Section 1' at the bottom. 'Section 2' contains a component labeled 'COH_TEST_Prompt' with a small icon. 'Section 1' contains a component labeled 'COH_TEST_Analysis Compound View' with a small icon. The top of the interface has a toolbar with icons for Preview, Run, and other functions.

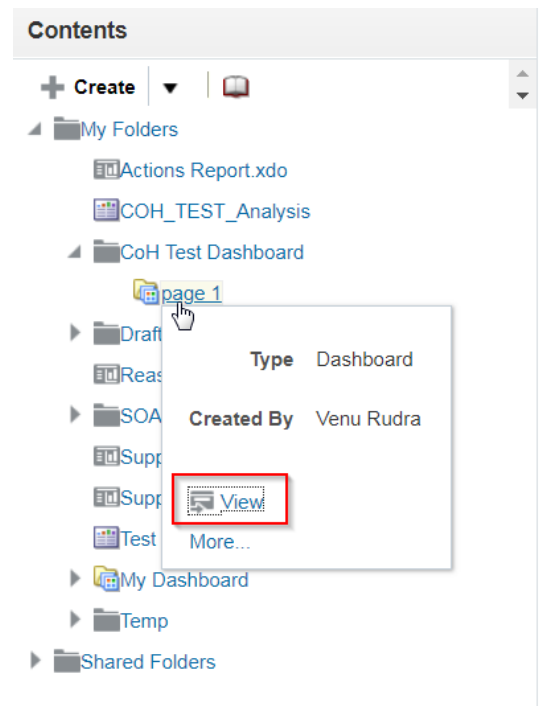
Dashboard:

- To Run dashboard Navigate to Home > Tools > Reports and Analytics



Dashboard:

- Navigate to the dashboard and click view



Dashboard:

Transaction Source Manual ▼							
Apply Reset ▼							
Transaction Number	Transaction Source	Trx Date	Bill-to Customer Name	Bill-to Customer Number	Transaction Entered Amount	Transaction Line Number	Unit Price
10000	Manual	2/13/2018	DRS Test Customer (Org)	1029	0	1	500
		2/13/2018			500		
10001	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	1	400
		2/14/2018			-8		
11000	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	1	333
		2/14/2018			333		
11001	Manual	2/14/2018	DRS Test Customer (Org)	1029	0	1	400
		2/14/2018			400		
11002	Manual	2/15/2018	DRS Test Customer (Org)	1029	0	1	50
		2/15/2018			50		
12000	Manual	2/20/2018	John Doe	2043	0	1	500
		2/20/2018			500		
12001	Manual	2/20/2018	John Doe	2045	0	1	500

Dashboard:

- Enter the threshold values and click next

Search **page 1** ×

Invoices Arun

Invoice Number	Invoice Date	Supplier Number	Supplier Name	Invoice Amount
22	6/1/16	1122032	BOULEVARD HOLDINGS LLC	64,375
472DDC0916	6/1/16	12539	STATE OF MICHIGAN	677,216.66
99928001CRETRO-JUN-16	6/1/16	1082484	LAW OFFICES OF MARK S DEMOREST ATTYS	3,800

[Return](#)

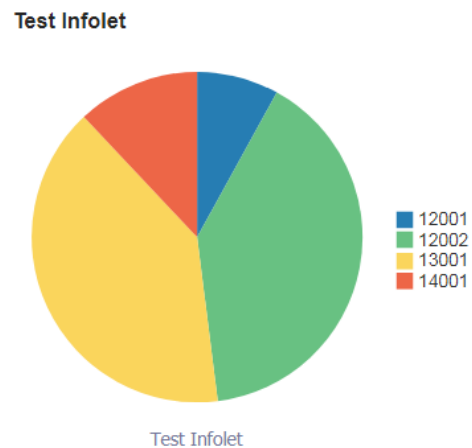
INFOLETS



COLLABORATE19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Infolets:

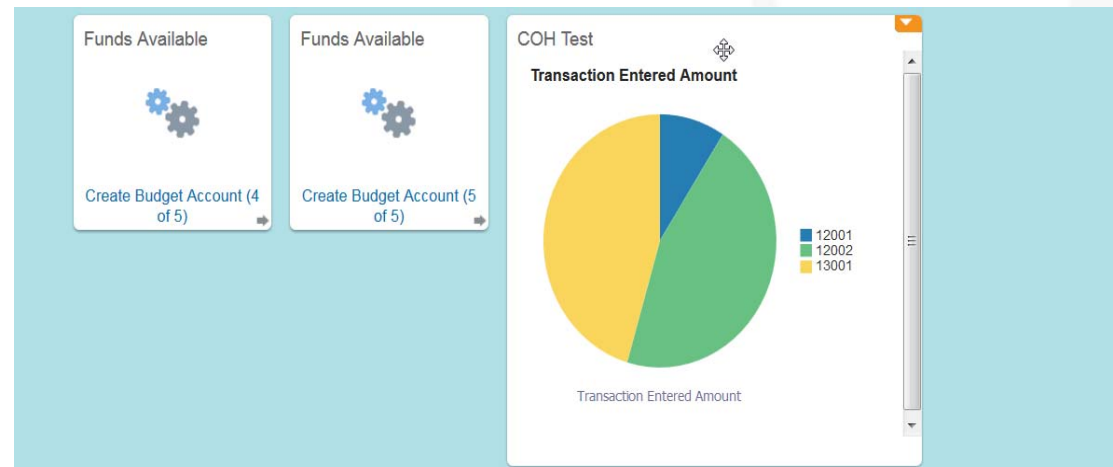
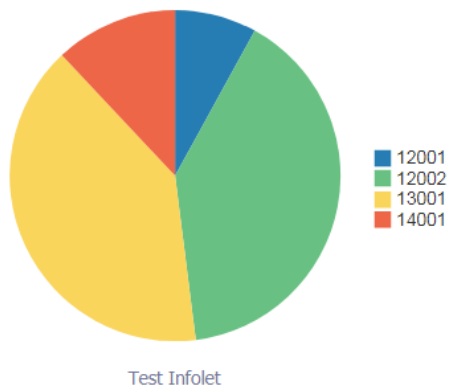
- Create a graph using analysis



Infolets:

- Custom analysis can be added to the infolets page.

Test Infolet





COLLABORATE19

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

gkotecha@astcorporation.com

Session ID:

10848

Remember to complete your evaluation for this session within the app!

#C19TX