

Using Drill Down Feature in an OTBI Analysis - A Worked Example

By: Ashish Harbhajanka

Introduction

Oracle Fusion Cloud Application doesn't have an inbuilt validation where it restricts assigning a National ID which has already been allocated to another person. As such there could be multiple individuals (some dummy users, test users .. etc.) which might have the same national identifier values attached with their records.

Business would like to know how many such National Identifiers exist in the system and what the person records who are having such ambiguity.

While the solution would also have been achieved by writing a SQL query, but for this example we would use OTBI to achieve the same.

In a broad level we would need to perform the following steps:

- a) Create another OTBI Analysis which will have Person Details like Person Number, Display Name and National ID. (Lets say we call this as PersonNationalIDListAnalysis)
- b) Create a OTBI Analysis which would list all the National Identifiers that have more than one occurrence. (Lets say we call this as DuplicateNationalIDListAnalysis)
- c) Use the OTBI Drill Down Feature where in PersonNationalIDListAnalysis will have NationalID as a prompted field and would be called as an Action when user clicks on NationalId field of DuplicateNationalIDListAnalysis. Sounds complicated ?. It isn't will get clarity when we go through creation of same.

So let us get started.

Creating PersonNationalIDListAnalysis

We would be using three columns namely Person Number, Display Name and National ID for this Analysis. Details about the same are as below:

PersonNationalIDListAnalysis	
Subject Area Used: Workforce Management Person Real Time	
Column Name	Column Value
Person Number	"Person Details"."Person Number"
Display Name	"Person Names"."Display Name"
National ID	"Person National Identifiers"."National Identifier Number"
Filter Criteria: National ID is prompted	

The following details when entered into application the screen would appear as:

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And the results would appear as:

Person Number	Display Name	National ID
10	Mandy Steward	854-22-4015
100	Brian Joseph	454-32-1120
1006	Antonio Santos	574-29-0482
1007	Christelle Stevenson	011-87-8744
1009	Daryl Reese	012-66-4512
101	Curtis Feitly	454-32-1073
1010	Edmund Donohue	047-99-6633
1011	Mei Lee	036-87-1544
1012	Shawn Quilligan	047-66-3214
1013	Vicki Zinn	032-99-7847
1014	Jordin Cook	222-00-5555
1015	Scott Grace	222-00-5554
1016	Tom Velez	231-22-6666
1017	Jake Ladet	231-55-9000
1018	Chris Ford	014-99-7744
1019	Amy Fowler	022-88-7744
400	Donald Penn	054-33-4423

That's it for the first analysis. Now let us move to the second analysis

Creating DuplicateNationalIDListAnalysis

We will have 5 different columns in this analysis namely National Identifier Type, National ID, National Identifier Type-National ID(custom heading),Is Duplicate (Yes/No). Details about the same are below:

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DuplicateNationalIDListAnalysis	
Subject Area Used: Workforce Management Person Real Time	
Column Name	Column Value
National Identifier Type	"Person National Identifiers"."National Identifier Type"
National ID	"Person National Identifiers"."National Identifier Number"
National Identifier Type-National ID	CONCAT(CONCAT("Person National Identifiers"."National Identifier Type",'-'),"Person National Identifiers"."National Identifier Number")
Count(National ID)	COUNT(CONCAT(CONCAT("Person National Identifiers"."National Identifier Type",'-'),"Person National Identifiers"."National Identifier Number"))
Is Duplicate (Yes/No)	CASE WHEN COUNT(CONCAT(CONCAT("Person National Identifiers"."National Identifier Type",'-'),"Person National Identifiers"."National Identifier Number")) = 1 THEN 'No' ELSE 'Yes' END
Filter Criteria: COUNT(CONCAT(CONCAT("Person National Identifiers"."National Identifier Type",'-'),"Person National Identifiers"."National Identifier Number")) is greater than 1	

These details when entered in application the analysis would look as:

And the results would appear as:

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National Identifier Type	National ID	National Identifier Type	National ID	Count(National ID)	Is Duplicate (Yes/No)
National Identifier	01234567 - ZA3	National Identifier	01234567 - ZA3	3	Yes
Social Security Number	032-12-2111	Social Security Number	032-12-2111	2	Yes
Tax Filing Number	1111111111	Tax Filing Number	1111111111	2	Yes
National Identifier	178013310090281	National Identifier	178013310090281	2	Yes
Social Security Number	212-41-5012	Social Security Number	212-41-5012	3	Yes
Social Security Number	223-55-2387	Social Security Number	223-55-2387	2	Yes
Social Security Number	224-70-6000	Social Security Number	224-70-6000	2	Yes
Social Security Number	234-45-6777	Social Security Number	234-45-6777	2	Yes
Social Security Number	255-39-9219	Social Security Number	255-39-9219	2	Yes
National Identifier	272036201421231	National Identifier	272036201421231	2	Yes
National Identifier	274054202317380	National Identifier	274054202317380	2	Yes
National Identifier	279121302008436	National Identifier	279121302008436	2	Yes
Social Insurance Number	346 339 740	Social Insurance Number	346 339 740	2	Yes
Social Insurance Number	357 221 225	Social Insurance Number	357 221 225	2	Yes
National Identifier	3674056909860006	National Identifier	3674056909860006	2	Yes
Foreigner ID	38873276X	Foreigner ID	38873276X	2	Yes

We would now move to the third and most important step.

Using OTBI Drill Down Feature

We need to select the ‘National ID’ column of ‘DuplicateNationalIDListAnalysis’ and use following navigation.

National ID -> Column Properties -> Interaction and fill following details

Attribute	Value
Column Heading -> Primary Interaction	Default (Drill)
Value -> Primary Interaction	Action Links
Action Links -> Link Text	Navigate to PersonNationalIDListAnalysis
Action Links -> Action	PersonNationalIDListAnalysis
Action Links -> Show Link	Always Enabled

And the screen will appear as:

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The screenshot shows the 'Column Properties' dialog for the 'National ID' column. The 'Interaction' tab is selected. Under 'Primary Interaction', 'Default (Drill)' is chosen. In the 'Action Links' section, there is one entry: 'PersonNationalIDListAnalysis' under 'Action' and 'PersonNationalIDListAnalysis' under 'Show Link'. Both are set to 'Always Enabled'. There are also two unchecked checkboxes at the bottom: 'Do not display in a popup if only one action link is available at runtime' and 'Enable on Totals'.

Once we click on OK and go to results tab we could see that the National ID column is highlighted (in blue color) and when we click on any of the values it shows ‘Navigate to PersonNationalIDListAnalysis’

The screenshot shows the OTBI interface with the 'Results' tab selected. The analysis title is 'DuplicateNationalIDListAnalysis'. The results table displays data with columns: National Identifier Type, National ID, National Identifier Type-National ID, Count(National ID), and Is Duplicate (Yes/No). One row is highlighted in blue, showing 'National Identifier' and '01234567 - ZA3' in the first two columns. The 'Is Duplicate (Yes/No)' column shows 'Yes' with a count of 3. Below the table, a 'Selection Steps' panel is visible.

National Identifier Type	National ID	National Identifier Type-National ID	Count(National ID)	Is Duplicate (Yes/No)
National Identifier	01234567 - ZA3	National Identifier-01234567 - ZA3	3	Yes
Social Security Number	032-12-2111	National Identifier-01234567 - ZA3	2	Yes
Tax Filing Number	1111111111	Tax Filing Number-1111111111	2	Yes
National Identifier	178013310090281	National Identifier-178013310090281	2	Yes
Social Security Number	212-41-5012	Social Security Number-212-41-5012	3	Yes
Social Security Number	223-55-2387	Social Security Number-223-55-2387	2	Yes
Social Security Number	224-70-6000	Social Security Number-224-70-6000	2	Yes
Social Security Number	234-45-6777	Social Security Number-234-45-6777	2	Yes
Social Security Number	255-39-9219	Social Security Number-255-39-9219	2	Yes
National Identifier	272036201421231	National Identifier-272036201421231	2	Yes
National Identifier	274054202317380	National Identifier-274054202317380	2	Yes
National Identifier	279121302008436	National Identifier-279121302008436	2	Yes
Social Insurance Number	346 339 740	Social Insurance Number-346 339 740	2	Yes
Social Insurance Number	357 221 225	Social Insurance Number-357 221 225	2	Yes
National Identifier	3674056909860006	National Identifier-3674056909860006	2	Yes
Foreigner ID	38873276X	Foreigner ID-38873276X	2	Yes

We could also see that the record we have selected says that it is associated with 3 different person numbers. So when we would navigate to the Analysis (PersonNationalIDListAnalysis) it should display 3 person numbers.

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The screenshot shows the Oracle Business Intelligence interface. At the top, there's a navigation bar with links for Home, Catalog, Favorites, Dashboards, New, Open, Signed In As (HCM_IMPL), and Sign Out. Below the navigation bar, the main content area displays a table titled "PersonNationalIDListAnalysis". The table has three columns: Person Number, Display Name, and National ID. The data in the table is as follows:

Person Number	Display Name	National ID
3056	José Pedro Vasconcelos	01234567 - ZA3
3067	Luis Oliveira	01234567 - ZA3
3073	Luis Oliveira	01234567 - ZA3

Below the table, there are links for Edit, Refresh, Print, Export, Add to Briefing Book, and Copy.

Which is what the analysis says too.

So thus we have accomplished what we were looking for by making use of 2 OTBI Analysis and Drill Down feature.