



COLLABORATE19

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

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

Session ID:
10848

Prepared by:
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Room No. CC 3RD FL 301A

April 10, 2019

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

#C19TX

Applications Software Technology



Straight
Talk
Real
Results



Strong Oracle
Partnership

ORACLE Platinum Partner
Cloud Premier
North America

Pillar Partner
Go-To Partner
Cloud Marketplace

24

Years of Experience



400+
Cloud-Certified
Employees

Six Time
Oracle
Excellence
Award
Winner



Focus on
12
Industries

Oracle Industry
Specializations



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

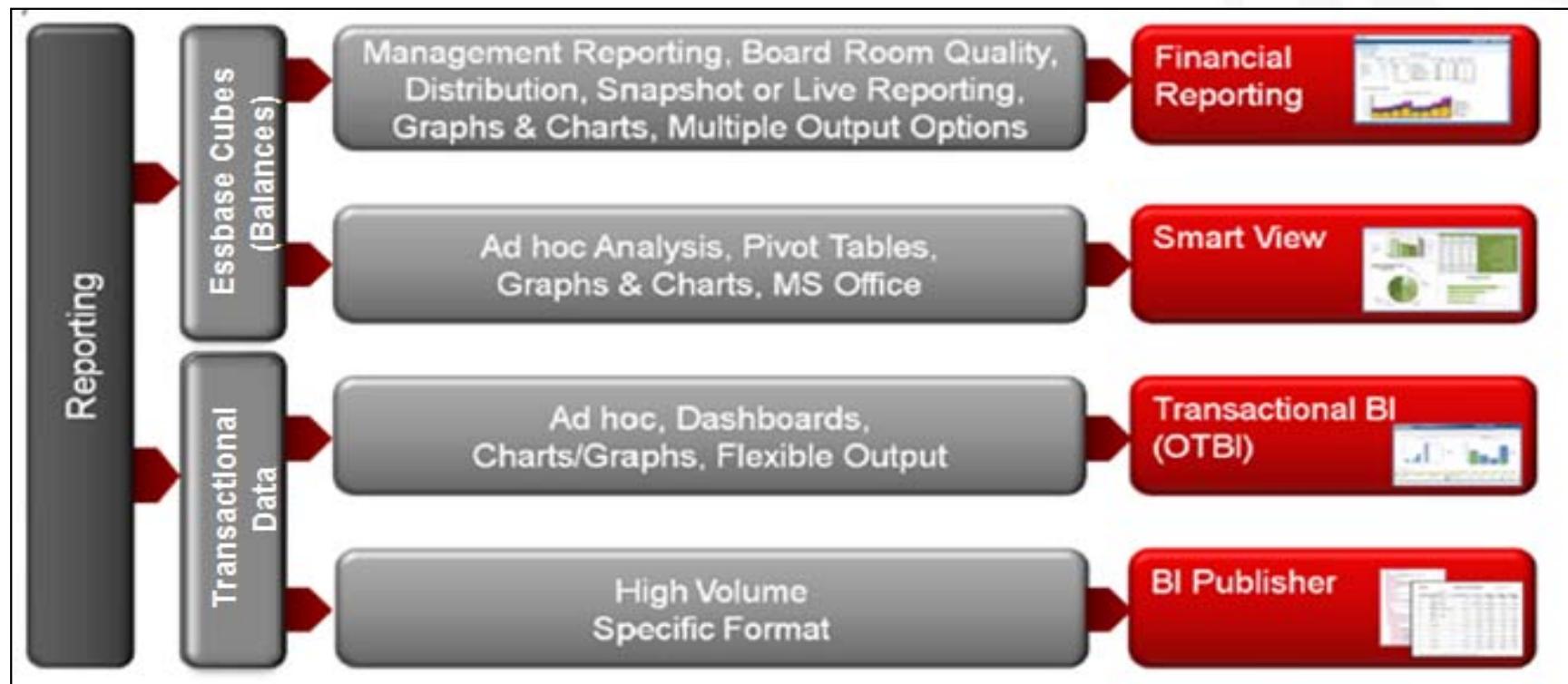


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Agenda

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

Oracle Cloud Reporting Overview

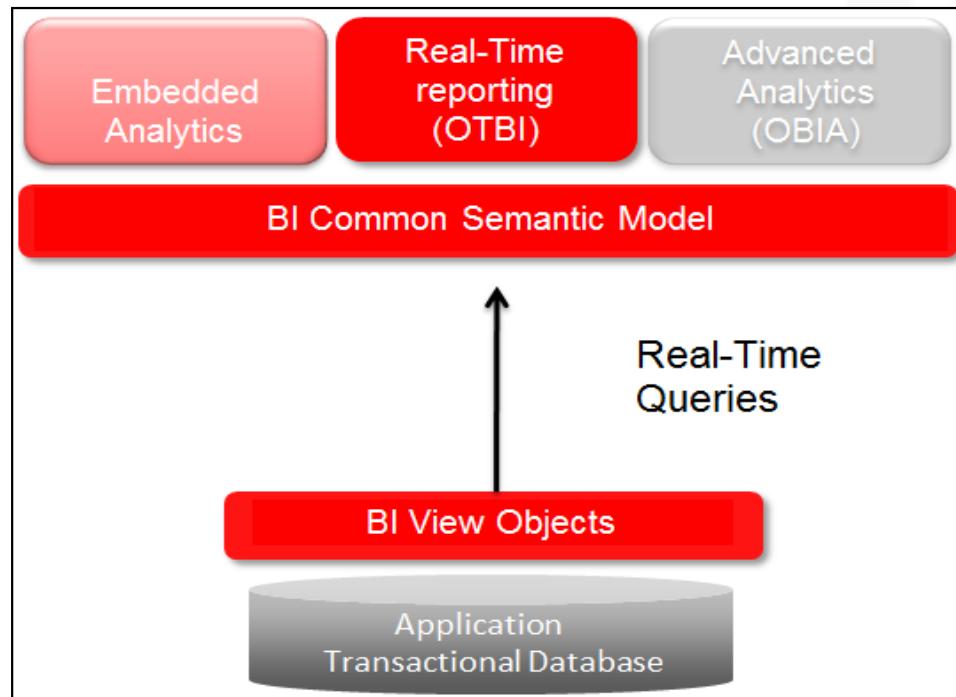


Oracle Transactional Business Intelligence

- 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



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.)
- Starts 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

- 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.

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

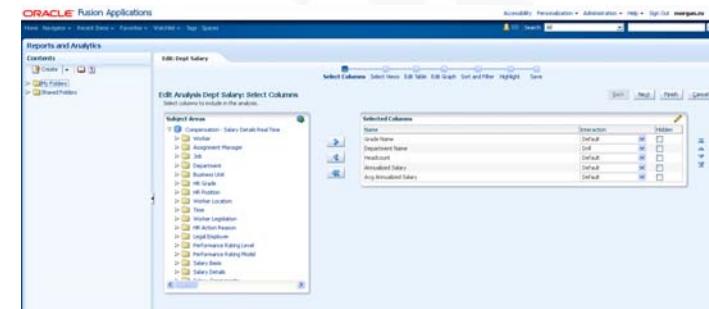
- Time
- Business Unit
- Legal Entity
- Ledger
- Ledger Set
- Balancing Segment
- Cost Center
- Project
- Task
- Manager
- Employee
- Expense Information
- Expense Amounts
 - Employee Expense Amounts
 - Employee Expense Count
 - Credit Card Expenses
 - Policy Violations
 - Late Filed Expenses



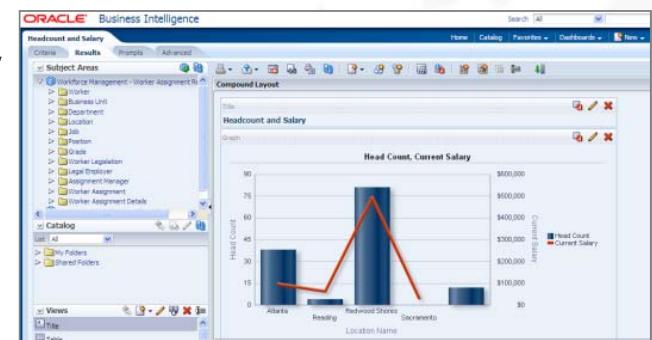
Oracle Transactional Business Intelligence

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 Report

Select Columns Select Views Edit Table Edit Graph Sort and Filter Highlight Save

Create Analysis: Select Columns

Select columns to include in the analysis.

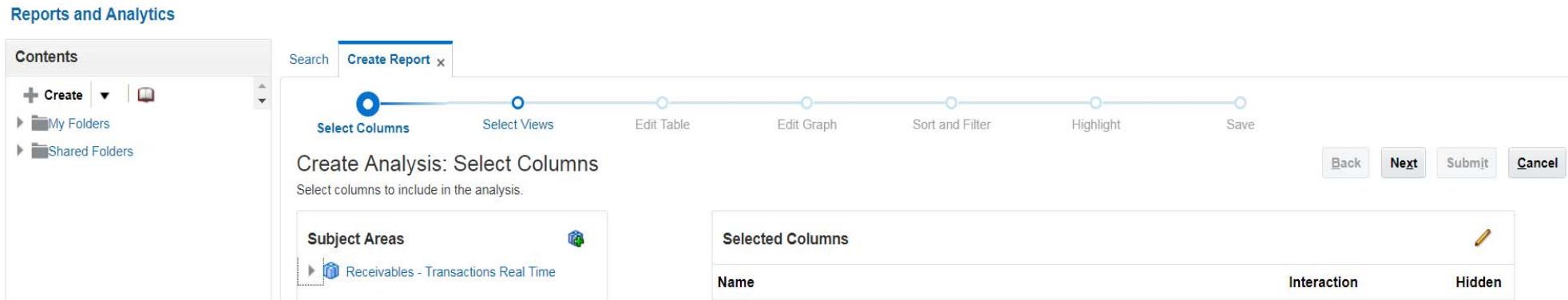
Subject Areas

Receivables - Transactions Real Time

Selected Columns

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

Back Next Submit Cancel



Oracle Transactional Business Intelligence

BI Answers:

The screenshot shows the Oracle BI Answers interface with the following components:

- Header:** ORACLE® Business Intelligence, Search All, Home, Catalog, Favorites, Dashboards.
- Panels:**
 - Subject Areas:** Supplier - Supplier Real Time (Supplier Addresses, Supplier Contacts, Supplier Counts, Supplier Site Assignments, Supplier Sites, Supplier Spend Authorizations, Suppliers).
 - Selected Columns:** A pane for selecting columns from the Subject Areas. It includes instructions: "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 or button next to its name." and a "Drop Columns Here" area.
 - Filters:** A pane for adding filters. It includes instructions: "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 name in the catalog pane." and a "Add Filters Here" area.

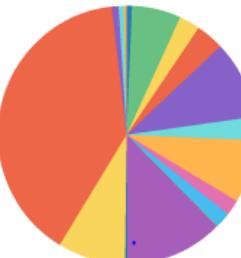
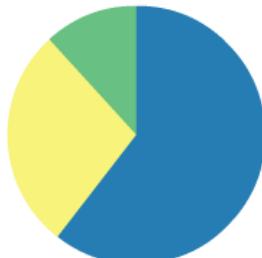
Oracle Transactional Business Intelligence

Demo - Invoices by Supplier and Currency

Demo - Invoices by Supplier and Currency



Invoice Amount



- Advanced Corp
- ABC Consulting
- Allegro Snip
- Allied Manufacturing
- American Telephone and Telegraph
- Building Management
- Dell Inc.
- EIP Inc
- GE Capital
- Hewlett Engineering Inc.
- Internal Revenue Service
- JGA
- Lagring Systems
- Lee Supplies
- Midtown Computer Supplies
- Office Depot
- Staffing Services
- Staples
- US Gas and Electric
- United Parcel Service

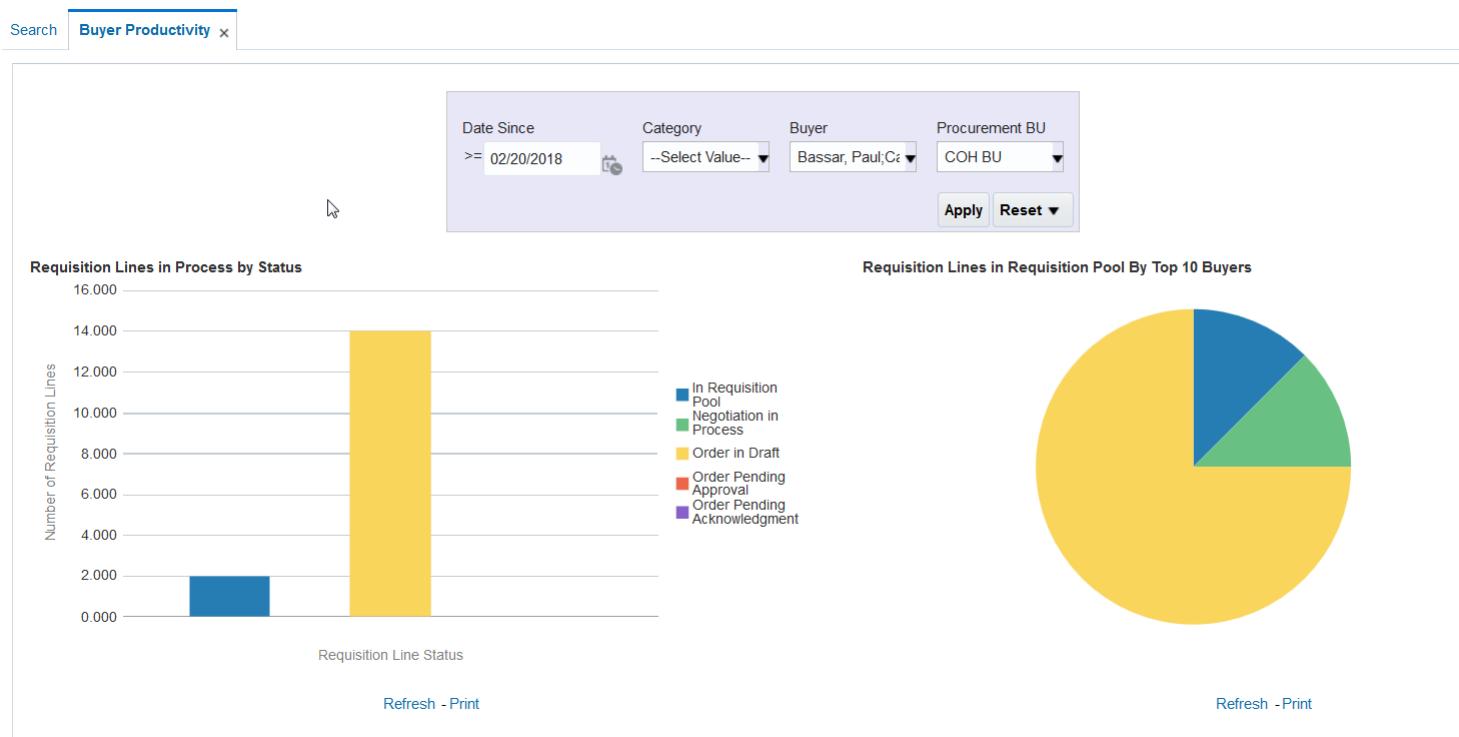
| Calendar Month | Invoice Date | Invoice Number | Invoice Description | Payment Terms Name | Supplier or Party Name | Invoice Amount | Invoice Currency |
|----------------|-----------------|----------------|----------------------------------|--------------------|------------------------|----------------|------------------|
| 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 |



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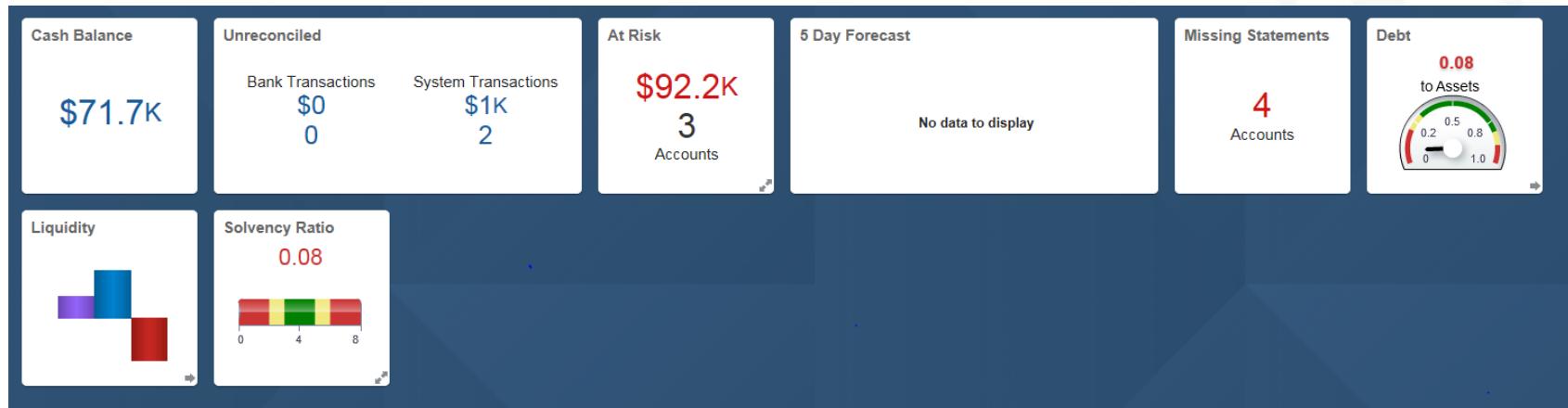
Title

Dashboards:



Title

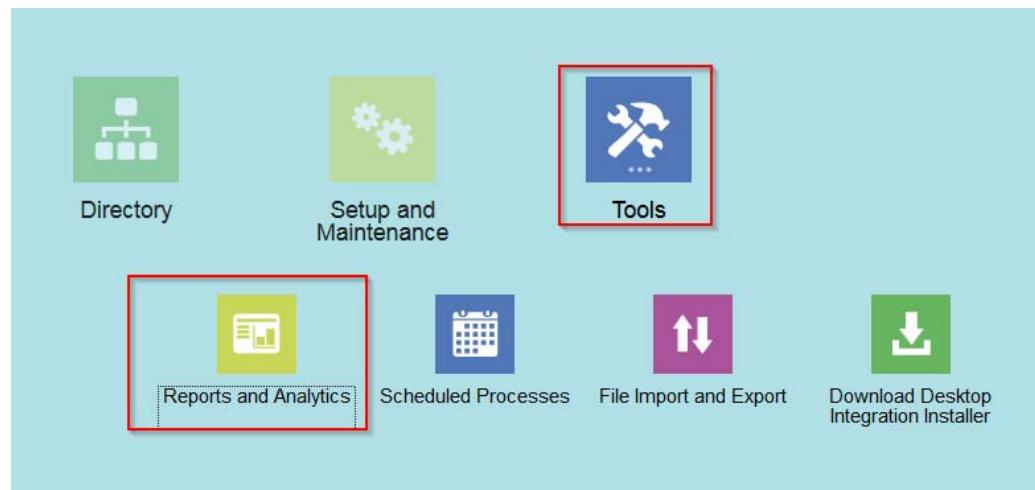
Infolets:



BI COMPOSER

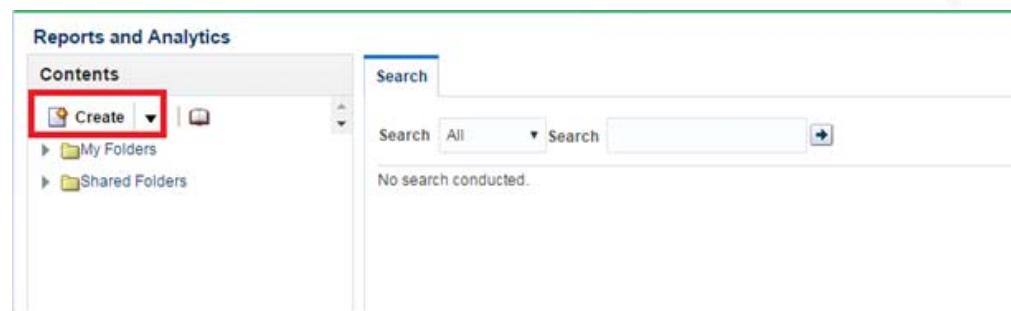
BI Composer:

- Navigate to Home > Tools > Reports and Analytics



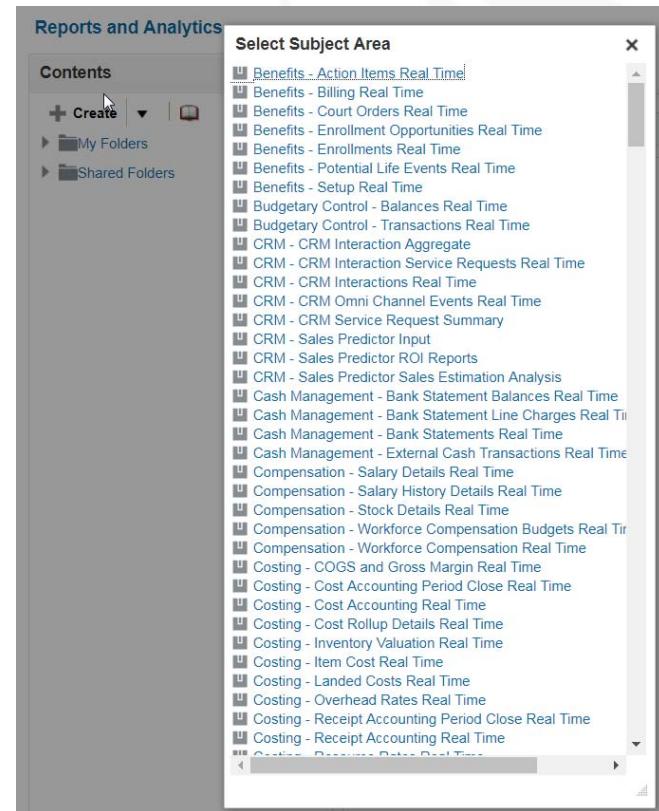
BI Composer:

- 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

The screenshot shows the 'Create Analysis: Select Columns' step in the BI Composer process. The top navigation bar includes steps: Select Columns, Select Views, Edit Table, Edit Graph, Sort and Filter, Highlight, and Save. Below the navigation is a toolbar with Back, Next, Submit, and Cancel buttons.

The main interface has two panels: 'Subject Areas' on the left and 'Selected Columns' on the right.

Subject Areas Panel:

- 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 Panel:

| 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"/> |

On the right side of the Selected Columns panel, there are four small icons: a pencil, a magnifying glass, a double arrow, and a double arrow with a minus sign.

BI Composer:

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

Select Columns **Select Views** Edit Table Edit Graph Sort and Filter Highlight Save

Create Analysis: Select Views
Select views to include in the analysis.

Title **Preview**

Table **Table (recommended)** ▾

Graph **None** ▾

Layout **Table above Graph** ▾

| 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 |

Back **Next** **Submit** **Cancel**

BI Composer:

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

The screenshot shows the 'Sort and Filter' step in the BI Composer process flow. The top navigation bar includes 'Select Columns', 'Select Views', 'Edit Table', 'Edit Graph', 'Sort and Filter' (which is highlighted in blue), 'Highlight', and 'Save'. Below the navigation are 'Back', 'Next', 'Submit', and 'Cancel' buttons.

The main area is titled 'Create Analysis: Sort and Filter' with the sub-instruction 'Sort columns and apply filter.' A 'Preview' checkbox is checked, showing a table with six columns: Transaction Number, Transaction Source, Bill-to Customer Name, Bill-to Customer Number, Transaction Entered Amount, and Transaction Date. The table contains six rows of transaction data.

The left sidebar contains two sections: 'Sort' and 'Filter'. The 'Sort' section allows sorting by 'Transaction Number' in ascending or descending order. The 'Filter' section shows a single incomplete filter: 'Transa... is greater than' with a dropdown menu open. There are also 'Add Sort' and 'Add Filter' buttons.

| 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

The screenshot shows the 'Create Analysis: Highlight' interface in BI Composer. At the top, a horizontal progress bar indicates the steps: Select Columns, Select Views, Edit Table, Edit Graph, Sort and Filter, **Highlight**, and Save. The 'Highlight' step is currently selected. Below the progress bar is a table titled 'Create Analysis: Highlight' with the sub-instruction 'Apply conditional formatting highlights to table'. The table has columns: Transaction Number, Transaction Source, Bill-to Customer Name, Bill-to Customer Number, Transaction Entered Amount, and Transaction Date. The 'Transaction Entered Amount' column uses conditional formatting where values less than 500 are red, between 500 and 5,000 are yellow, and greater than 5,000 are green. To the left of the table is a 'Formatting' panel titled 'Formatting' with a note 'Indicates Incomplete Format (not applied to report)'. It shows a grid for defining thresholds and colors for different columns. A preview icon is also present in the header.

| 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

Create Analysis: Save

Enter analysis name and location to save it.

Analysis Name: COH_TEST_Analysis

Description: Test Analysis

Save In:

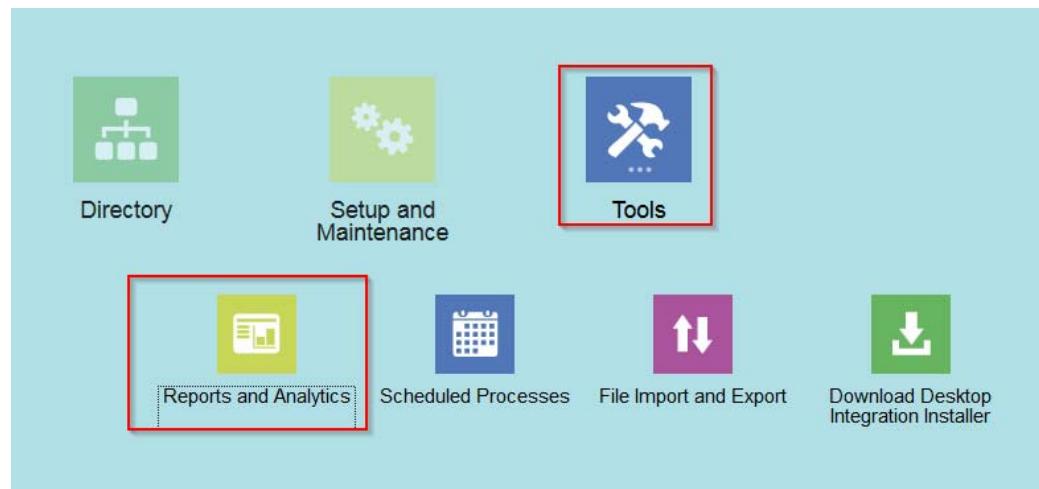
- My Folders
- Shared Folders
- Catalog

Back Next Submit Cancel

BI ANSWERS

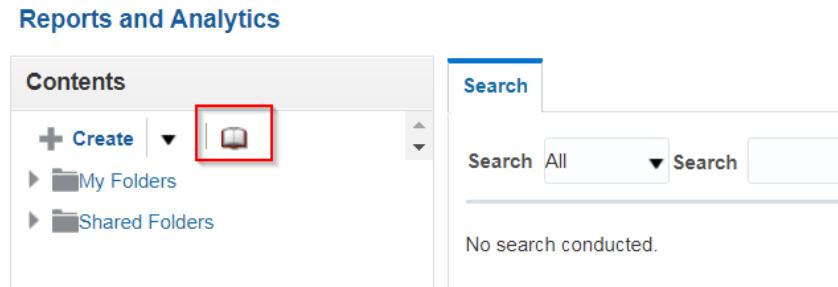
BI Answers:

- Navigate to Home > Tools > Reports and Analytics



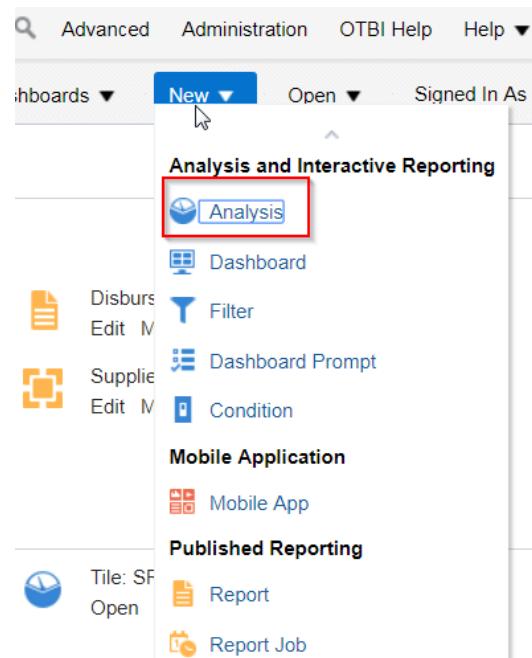
BI Answers:

- Click on Book/Catalog Icon.



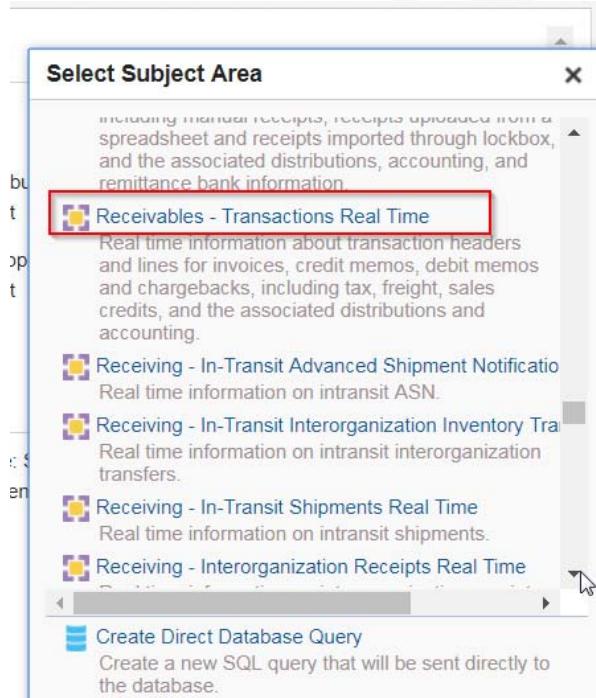
BI Answers:

- 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

The screenshot shows the Oracle BI Answers interface with the following components:

- Untitled**: The title bar.
- Criteria**: The active tab in the top navigation bar.
- Results**, **Prompts**, **Advanced**: Other tabs in the top navigation bar.
- Home**, **Catalog**, **F**: Buttons in the top right corner.
- Subject Areas**: A tree view under the Criteria tab showing various business entities:
 - Receivables - Transactions I
 - 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
 - Receivables Transaction
- Selected Columns**: A pane where users can drag-and-drop columns from the Subject Areas pane.

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

Drop Columns Here.
- Filters**: A pane where users can add filters to the analysis criteria.

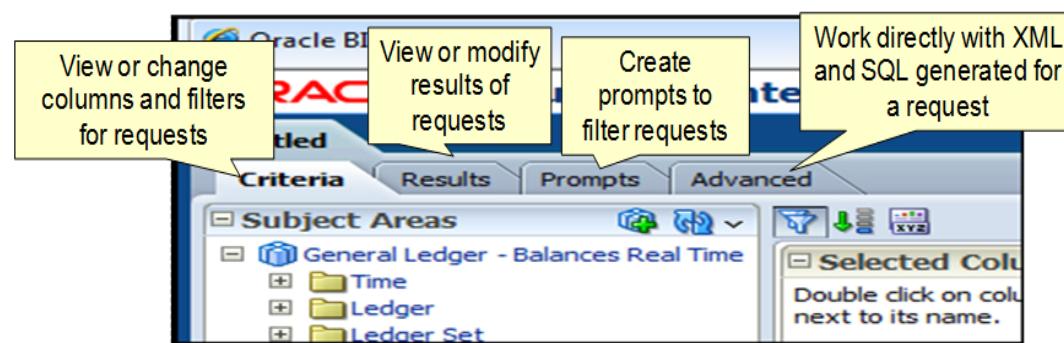
Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the its name in the catalog pane.

Add Filters Here.
- Catalog**: A button at the bottom left of the Subject Areas pane.



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 shows the Oracle BI Answers interface. At the top, there are tabs for Criteria, Results, Prompts, and Advanced. The Criteria tab is selected. Below the tabs is a toolbar with icons for search, sort, and refresh.

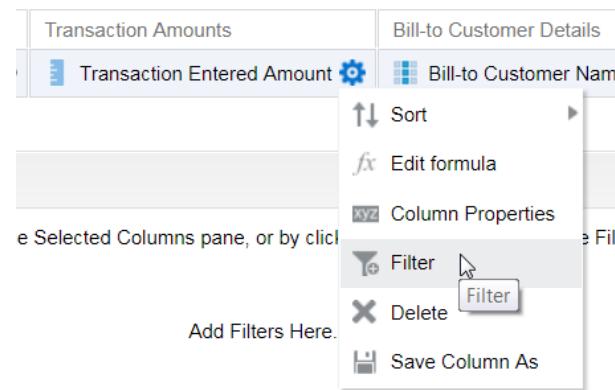
The main area is divided into sections:

- Subject Areas:** A tree view showing categories like Receivables - Transactions, Bill-to Customer, Bill-to Customer Account, etc.
- Selected Columns:** A table showing columns from General Information, Transaction Amounts, and Bill-to Customer Details. The columns listed are: Transaction Number, Transaction Date, Transaction Source, Transaction Entered Amount, Bill-to Customer Name, and Bill-to Customer Number.
- Filters:** A section for adding filters to the analysis criteria.

Instructions and buttons are provided for interacting with these sections.

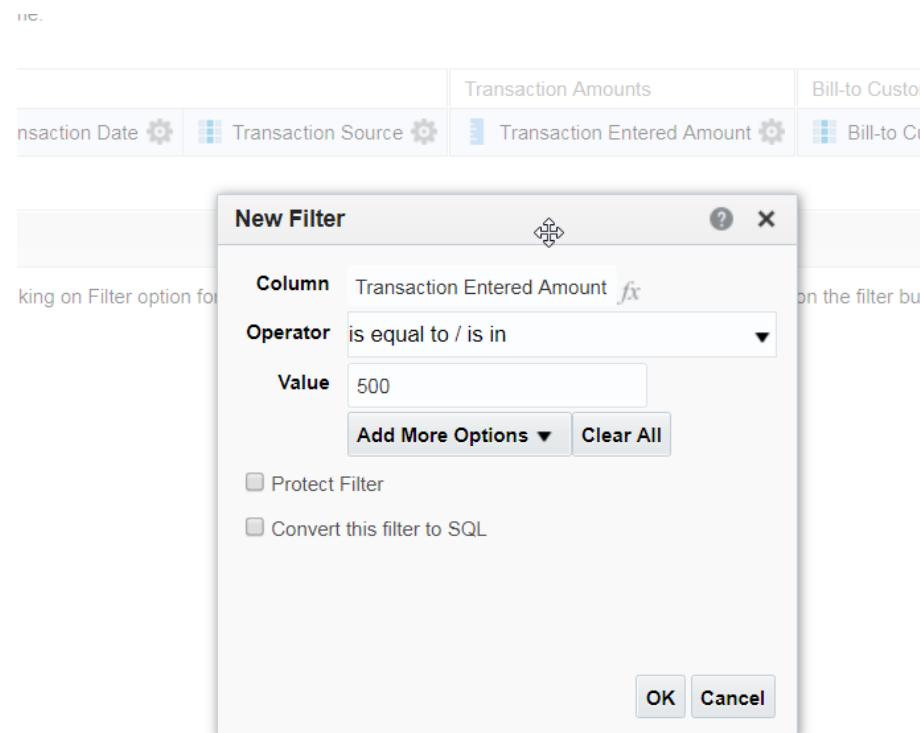
BI Answers:

Add filters



BI Answers:

- Enter the operator and Value to set filters.



BI Answers:

■ Filters and Conditions

The screenshot shows the Oracle BI Answers interface. At the top, there are tabs for Criteria, Results, Prompts, and Advanced. The Criteria tab is selected.

Subject Areas: A tree view showing categories like Receivables - Transactions I, Bill-to Customer, Bill-to Customer Account, etc.

Selected Columns: A grid of columns with headers: General Information, Transaction Amounts, and Bill-to Customer Details. The columns listed are Transaction Number, Transaction Date, Transaction Source, Transaction Entered Amount, Bill-to Customer Name, and Bill-to Customer Number.

Filters: A section where filters can be applied to specific columns. One filter is shown: Transaction Entered Amount is equal to / is in 500.

BI Answers:

- Click on the Results tab

| 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 a BI application interface with the "Results" tab selected. On the left, there's a navigation pane with a tree view under "Subject Area" and a "Catalog" section. The main area displays a "Compound Layout" with a grid of transaction data. The columns are: Transaction Number, Transaction Source, Transaction Date, Bill-to Customer Name, Bill-to Customer Number, and Transaction Entered Amount. A cursor is hovering over the "Transaction Date" column header. The data in the grid is as follows:

| 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 shows the Oracle BI Analysis workspace interface. On the left, the Subject Areas pane lists various subject areas like Receivables - Transactions, Bill-to Customer, etc. The Selected Columns pane contains a table with columns: Transaction Number, Transaction Date, Transaction Source, and Transaction Entered. A context menu is open over the 'Transaction Source' column, with the 'Column Properties' option highlighted. Other options in the menu include Sort, Edit formula, Filter, Delete, and Save Column As.

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

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.

Filters

Add filters to the analysis criteria by clicking on Filter c its name in the catalog pane.

Sort
Edit formula
Column Properties
Filter
Delete
Save Column As



BI Answers:

■ Column properties : Custom Headings

The screenshot illustrates the configuration of a column's properties and its selection in a report.

Column Properties Dialog:

- Tab: Column Format
- Section: Headings
- Sub-section: Column Heading
- Value: Trx Date
- Custom Headings
- Contains HTML Markup

Subject Areas Interface:

- Criteria Tab: Results, Prompts, Advanced
- Subject Areas Tree:
 - Receivables - Transactions
 - Bill-to Customer
 - Bill-to Customer Account
 - Bill-to Customer Site
 - Business Unit
 - Fiscal Calendar
 - Inventory Catalog
- Selected Columns List:
 - 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 shows the Oracle BI Answers interface. The top navigation bar includes 'Criteria', 'Results', 'Prompts', and 'Advanced'. The 'Subject Areas' pane on the left lists various business areas like Receivables - Transactions, Bill-to Customer, etc. The 'Selected Columns' pane displays 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 'Sort' button for the 'Transaction Entered Amount' column, with 'Sort Ascending' highlighted. Other options in the menu include 'Sort Descending', 'Add Ascending Sort', 'Add Descending Sort', 'Clear Sort', and 'Clear All Sorts in All Columns'.

BI Answers:

■ Sorting multiple columns

The screenshot shows the Oracle BI Answers interface. In the top navigation bar, the 'Criteria' tab is selected. The main area is divided into two panes: 'Subject Areas' on the left and 'Selected Columns' on the right.

Subject Areas pane: Shows a tree structure under 'Receivables - Transactions'. Nodes include 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, and Receivables Transaction.

Selected Columns pane: Displays a grid of columns from the 'General Information' section. The columns are: Transaction Number, Trx Date, Transaction Source, Transaction Entered Amount, Bill-to Customer Name, and Bill-to Customer Number. Each column has a 'Sort' button next to it, which is currently set to 'Sort Ascending'. A context menu is open over the 'Sort' button for the first column ('Transaction Number'). The menu options are: Sort Ascending (selected), Sort Descending, Add Ascending Sort (highlighted with a blue border), Add Descending Sort, Clear Sort, and Clear All Sorts in All Columns.

BI Answers:

- Suppress/Un-suppress a data field.

The screenshot shows the Oracle BI Answers interface. At the top, there are tabs for Criteria, Results (which is selected), Prompts, and Advanced. Below the tabs is a navigation bar with various icons for search, sort, filter, and export. On the left, there's a sidebar titled "Subject Areas" containing a tree view of business entities like Business Unit, Fiscal Calendar, Inventory Catalog, etc. Below that is a "Catalog" section with "List All" and links to "My Folders" and "Shared Folders". The main area is titled "Compound Layout" and contains a "Table" component. 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 shows several transactions, mostly from "ORA_RecurringBilling" source on various dates, with amounts ranging from -8 to 500. A watermark for "ABORATE19" is visible on the right side of the screen.

| 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 | |
| 1 | ORA_RecurringBilling | 2/14/2018 | DRS Test Customer (Org) | 1029 | 500 | |
| 10001 | Manual | | DRS Test Customer (Org) | 1029 | 0 | |
| 11000 | Manual | | DRS Test Customer (Org) | 1029 | -8 | |
| 11001 | Manual | | DRS Test Customer (Org) | 1029 | 0 | |
| 11002 | Manual | 2/15/2018 | DRS Test Customer (Org) | 1029 | 333 | |
| 1001 | ORA_RecurringBilling | 2/20/2018 | JOHN Doe | 2045 | 0 | |



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

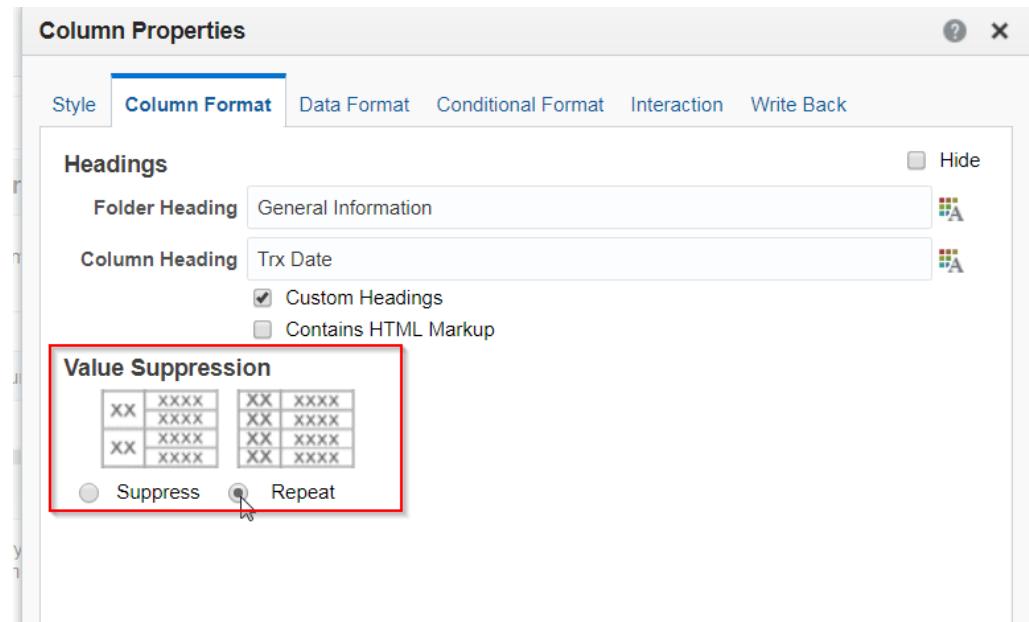
Change the “Value Suppression” option to Repeat

Click OK



BI Answers:

- Suppress/Un-Suppress a Data Field



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:

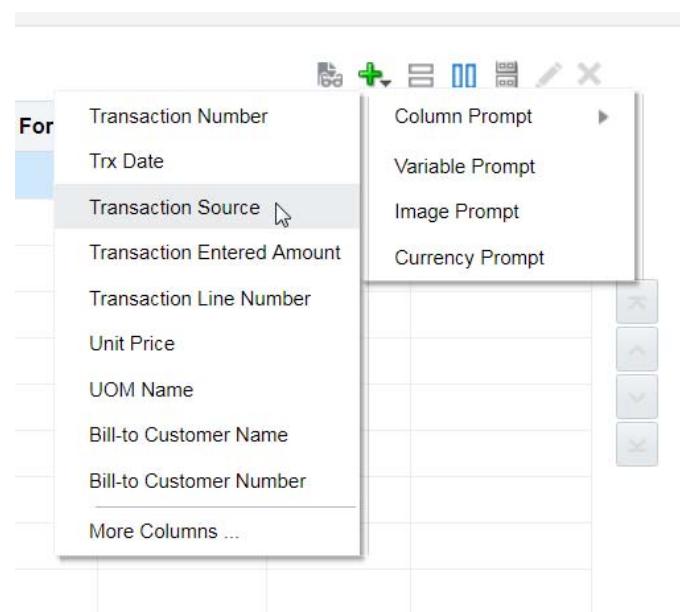
- Prompts/User Input

The screenshot shows a user interface for defining prompts. At the top, there is a navigation bar with four tabs: 'Criteria', 'Results', 'Prompts' (which is highlighted with a blue underline and a cursor icon), and 'Advanced'. Below the navigation bar, there is a section titled 'Definition' with a subtitle 'Add prompts for users when they run this analysis.' A table is present with a single row labeled 'Prompt Label' containing the value 'Page 1'.

| Prompt Label |
|--------------|
| Page 1 |

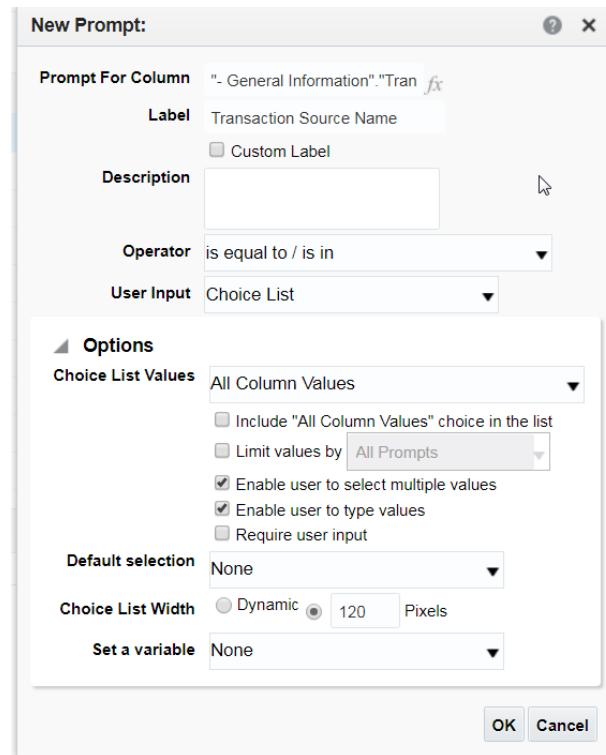
BI Answers:

- Select the column for prompt



BI Answers:

- Set the prompt properties



BI Answers:

- Set prompt properties and save analysis

Screenshot of the BI Answers Prompts tab interface.

The top navigation bar includes tabs: Criteria, Results, **Prompts**, and Advanced.

The main area is titled "Definition" and contains the instruction: "Add prompts for users when they run this analysis."

A toolbar with various icons is located at the top right of the table area.

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

Page 1

Transaction Source

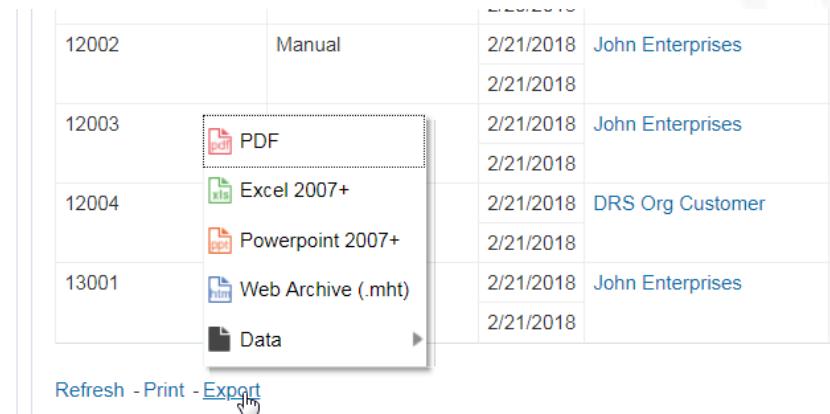
BI Answers:

| 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



BI Answers:

■ Functions

The screenshot shows a user interface for managing columns in a report. At the top, there are two main sections: "Transaction Amounts" and "Line Information". Under "Transaction Amounts", there are three columns: "Transaction Source" (with a gear icon), "Transaction Entered Amount" (with a gear icon), and "Transaction Line Number" (with a gear icon). Below these, there is a "Sort" button with up and down arrows, followed by a "Edit formula" button with a cursor hovering over it. A context menu is open at the bottom of the "Edit formula" button, containing the following options: "Edit formula", "Column Properties", "Filter", "Delete", and "Save Column As". Below the "Edit formula" button, there is a note: "for the specific column in the Selected Columns pane, or by clicking the Edit formula button in the Filter pane header". At the bottom left, there is a "Add Filters" button.

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 Sequence
- Transaction Document Sequence
- 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")
```

OK Cancel

CONCAT(Transaction Source, Transaction Number)

Manual10000

ORA_RecurringBilling1

Manual10001

Manual11000

Manual11001

Manual11002

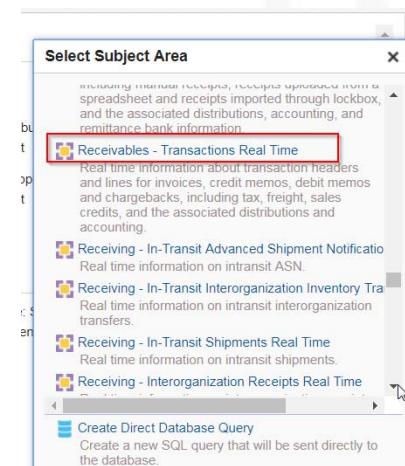
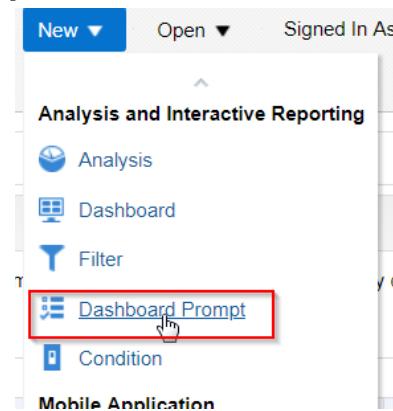


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DASHBOARD

Dashboard:

Dashboard Prompt

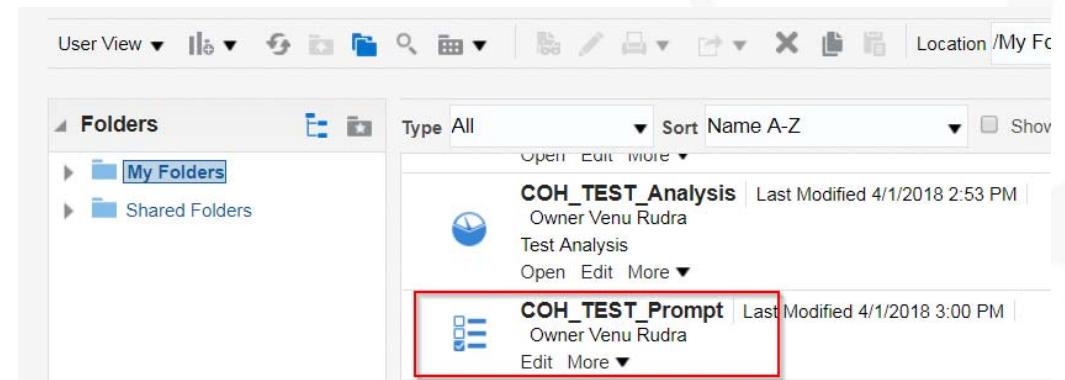
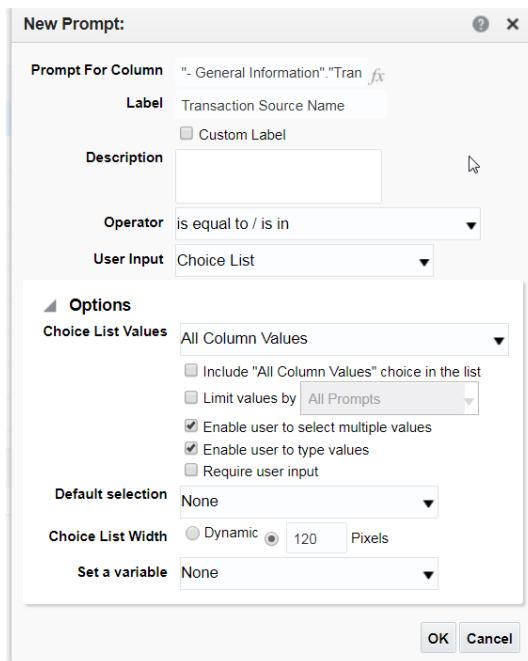


Definition
Add prompts for users when they run this analysis.

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

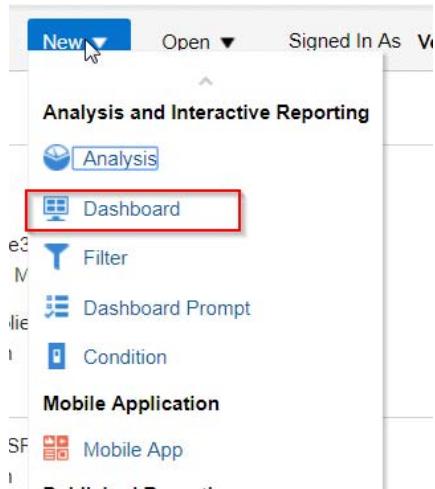
Dashboard:

Set prompt properties and save



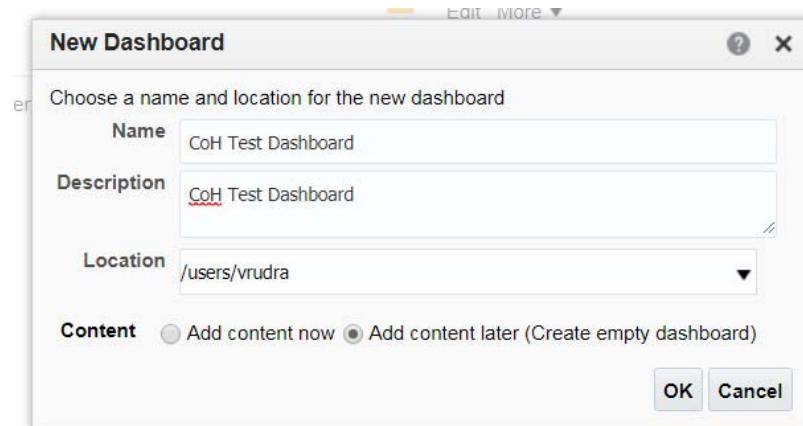
Dashboard:

New -> Dashboard



Dashboard:

- Enter the name and location



Dashboard:

Dashboard

Catalog

User View ▾ Location /My Folders

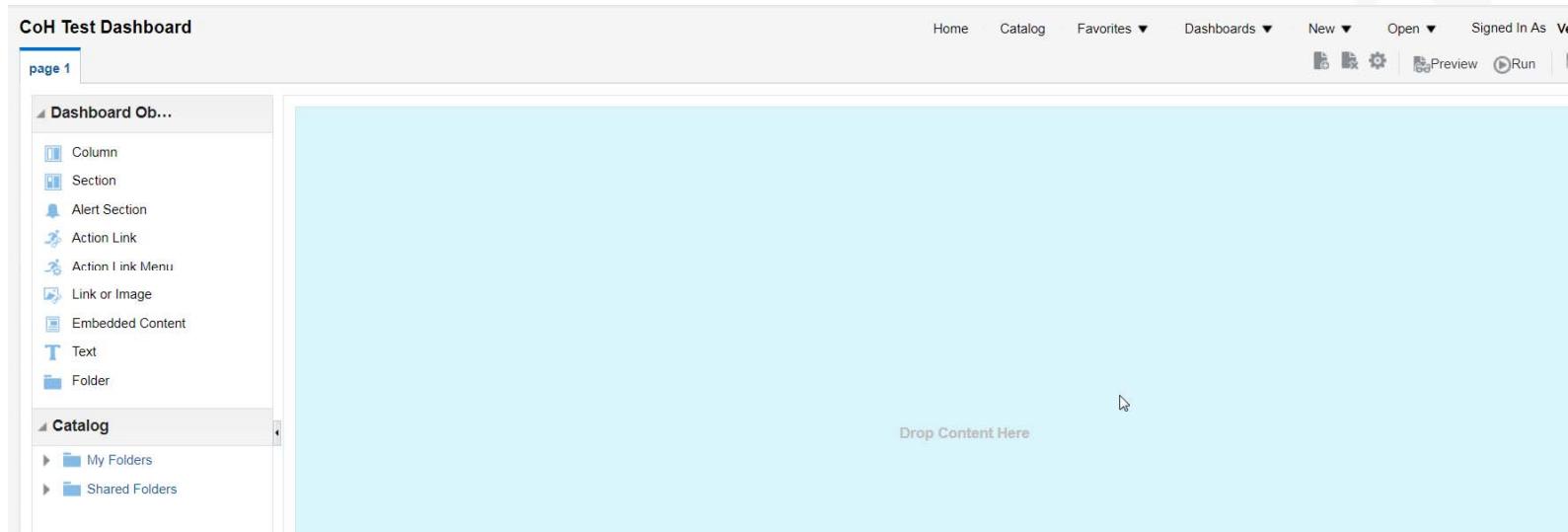
Folders

Type All Sort Name A-Z Show More Details

| | CoH Test Dashboard Last Modified 3/30/2018 2:06 PM Owner Venu Rudra | Expand Open Edit More ▾ |
|--|--|---|
| | Drafts Last Modified 2/7/2018 1:10 PM | |

Dashboard:

- Enter the threshold values and click next



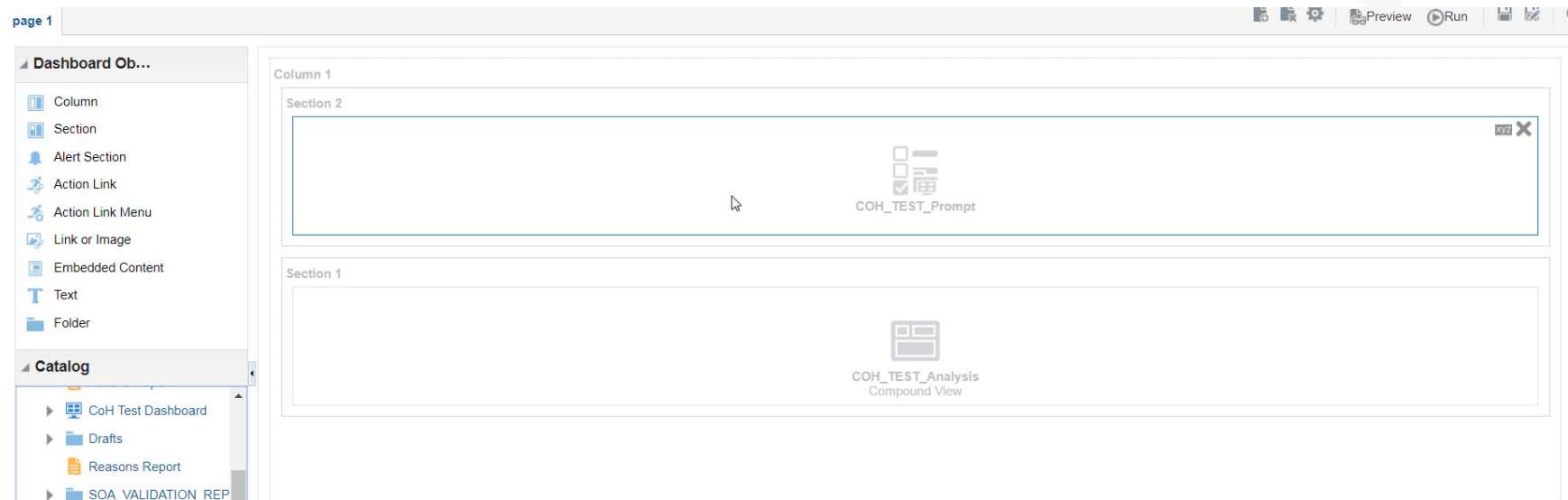
Dashboard:

- Drag and drop sections

The screenshot shows the Oracle CoH Test Dashboard interface. At the top, there's a navigation bar with links for Home, Catalog, Favorites, Dashboards, and New, along with some icons. Below the navigation is a sidebar titled "Dashboard Obj..." containing icons for Column, Section, Alert Section, Action Link, Action Link Menu, Link or Image, Embedded Content, and Text. The main area features a single column with a section titled "Section 1".

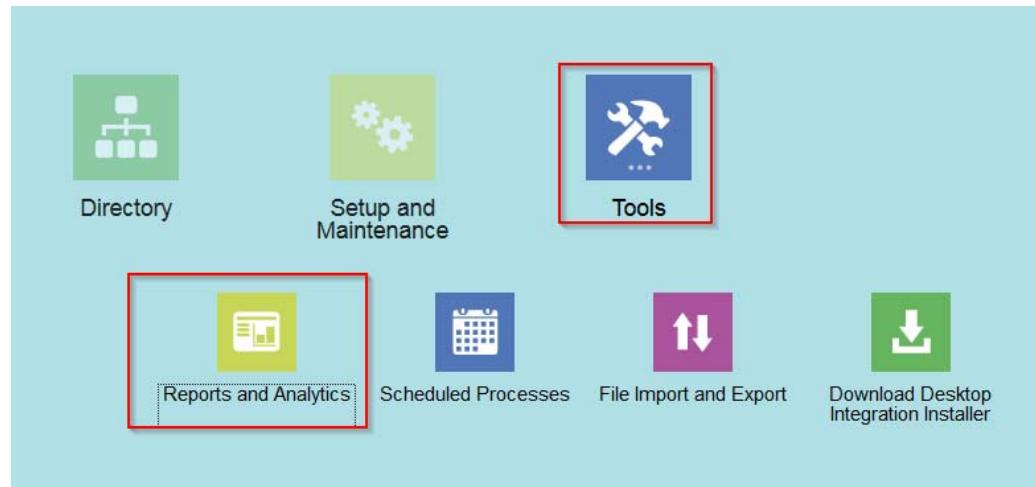
Dashboard:

- Navigate and add the Prompts and Analysis to dashboard



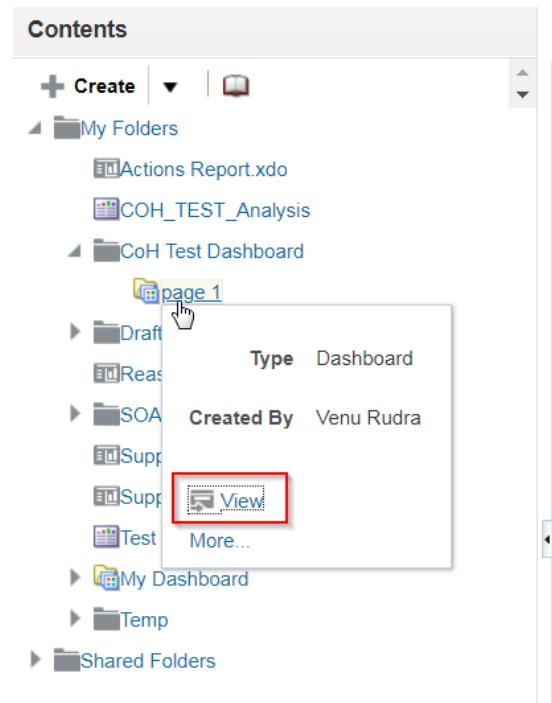
Dashboard:

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

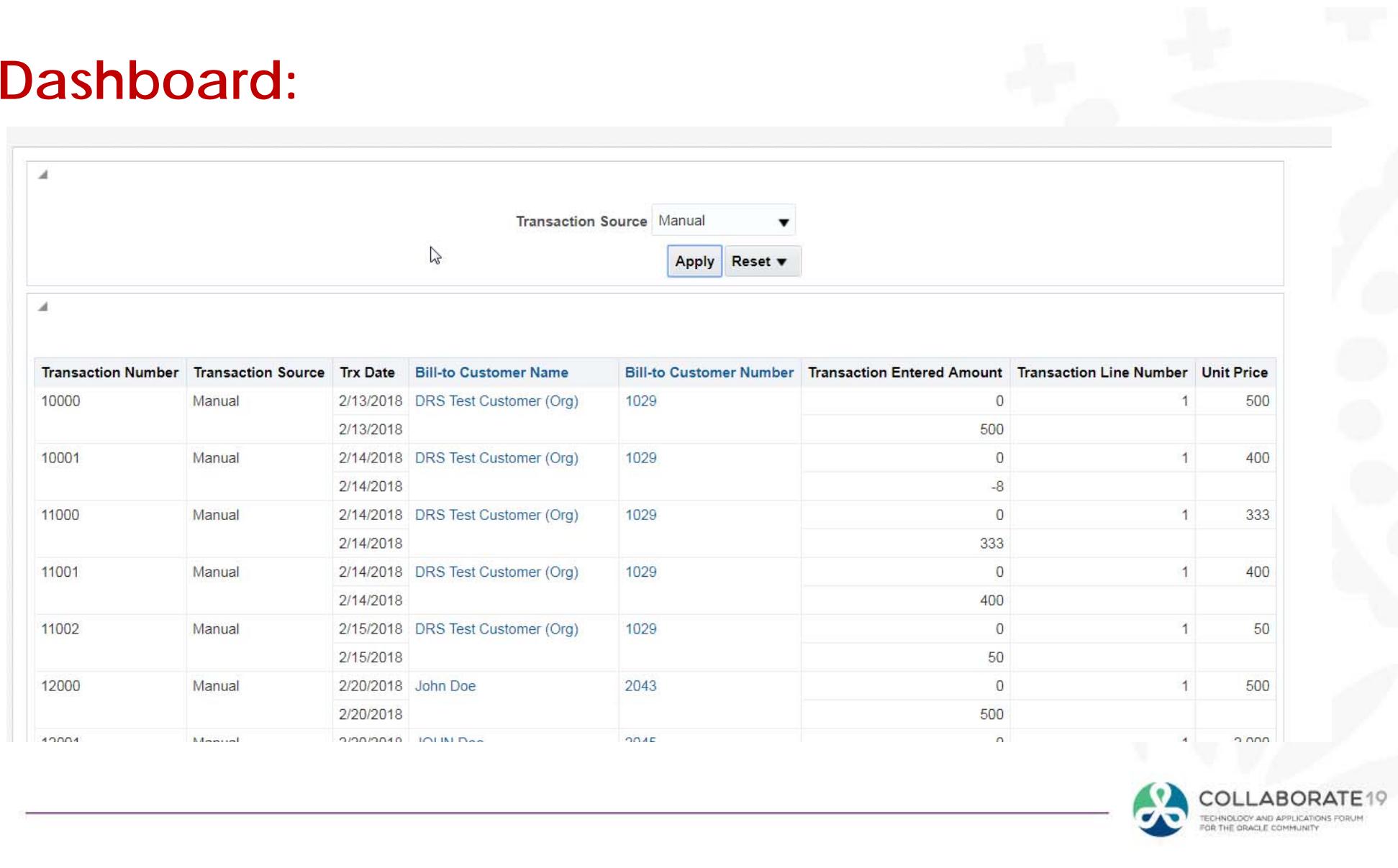


Dashboard:

- Navigate to the dashboard and click view



Dashboard:



| Dashboard: Transaction Overview | | | | | | | | |
|---------------------------------|--------------------|-----------|-------------------------|-------------------------|----------------------------|-------------------------|------------|--------------|
| Transaction Number | Transaction Source | Trx Date | Bill-to Customer Name | Bill-to Customer Number | Transaction Entered Amount | Transaction Line Number | Unit Price | Total Amount |
| 10000 | Manual | 2/13/2018 | DRS Test Customer (Org) | 1029 | 0 | 1 | 500 | 500 |
| | | 2/13/2018 | | | 500 | | | |
| 10001 | Manual | 2/14/2018 | DRS Test Customer (Org) | 1029 | 0 | 1 | 400 | 400 |
| | | 2/14/2018 | | | -8 | | | |
| 11000 | Manual | 2/14/2018 | DRS Test Customer (Org) | 1029 | 0 | 1 | 333 | 333 |
| | | 2/14/2018 | | | 333 | | | |
| 11001 | Manual | 2/14/2018 | DRS Test Customer (Org) | 1029 | 0 | 1 | 400 | 400 |
| | | 2/14/2018 | | | 400 | | | |
| 11002 | Manual | 2/15/2018 | DRS Test Customer (Org) | 1029 | 0 | 1 | 50 | 50 |
| | | 2/15/2018 | | | 50 | | | |
| 12000 | Manual | 2/20/2018 | John Doe | 2043 | 0 | 1 | 500 | 500 |
| | | 2/20/2018 | | | 500 | | | |
| 10004 | Manual | 2/20/2018 | John Doe | 2045 | 0 | 1 | 500 | 500 |



Dashboard:

- Enter the threshold values and click next

| 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 |

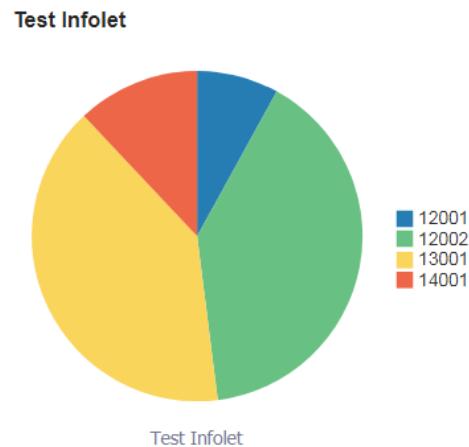
[Return](#)



INFOLETS

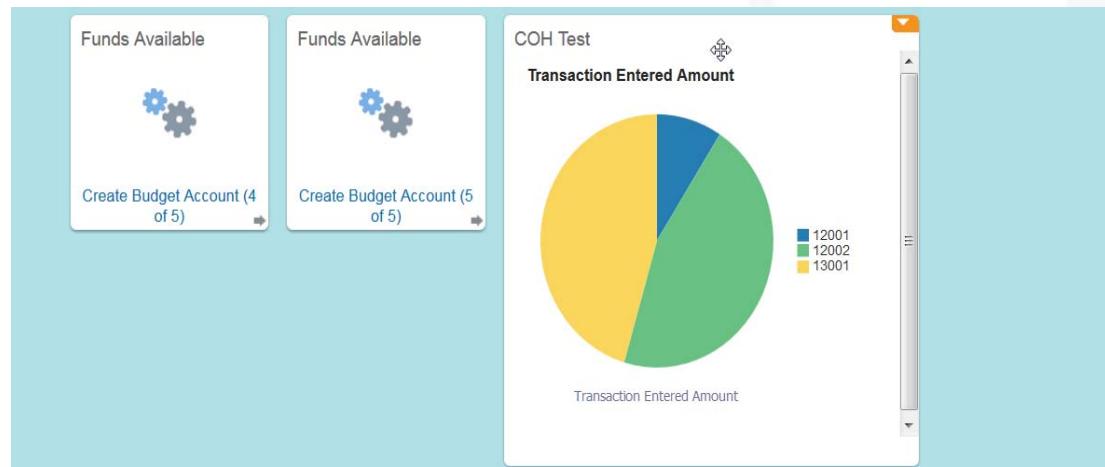
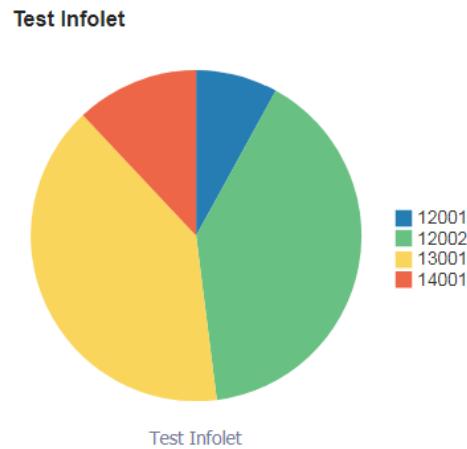
Infolets:

- Create a graph using analysis



Infolets:

- Custom analysis can be added to the infolets page.





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gkotecha@astcorporation.com

Session ID:

10848

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

#C19TX