

Oracle BI 11g Reports and Dashboards

Dashboard Prompts

PEAK
indicators

Dashboard Prompts

Agenda

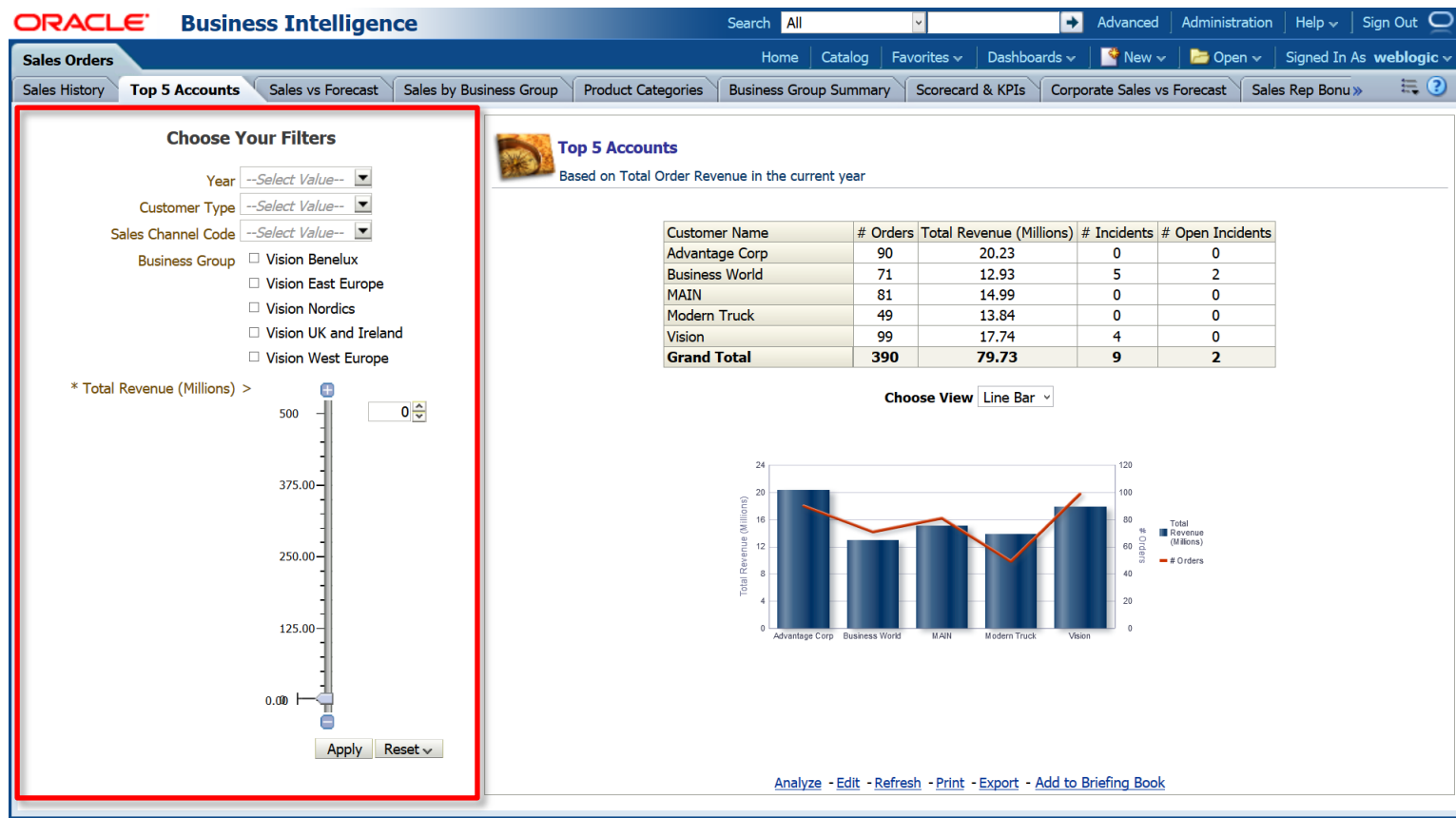
- Dashboards Prompts Overview
 - Is Prompted Filters
 - Best Practice
 - Types of Prompt
- Creating Dashboard Prompts
- Further Notes



Dashboard Prompts Overview

Overview

- Dashboard Prompts are naturally a very important feature - they allow a user to change the filter criteria being used across the Dashboard Pages



Overview

Is Prompted Filters

- It is important to appreciate that Dashboard Prompts will only apply a filter to an Analysis if:
 - The relevant columns are already filtered on the Analysis
 - or
 - The columns have “Is Prompted” filters on the Analysis

Year **is equal to / is in** 2007
AND Business Group **is prompted**
AND Organization Name **is prompted**

Edit Filter

Column Year

Operator is equal to / is in

Value 2007

Add More Options Clear All

☐ Protect Filter

☐ Convert to filter

A Dashboard Prompt can override this filter on the “Year” column as long as “Protect Filter” is not enabled

Edit Filter

Column Organization Name

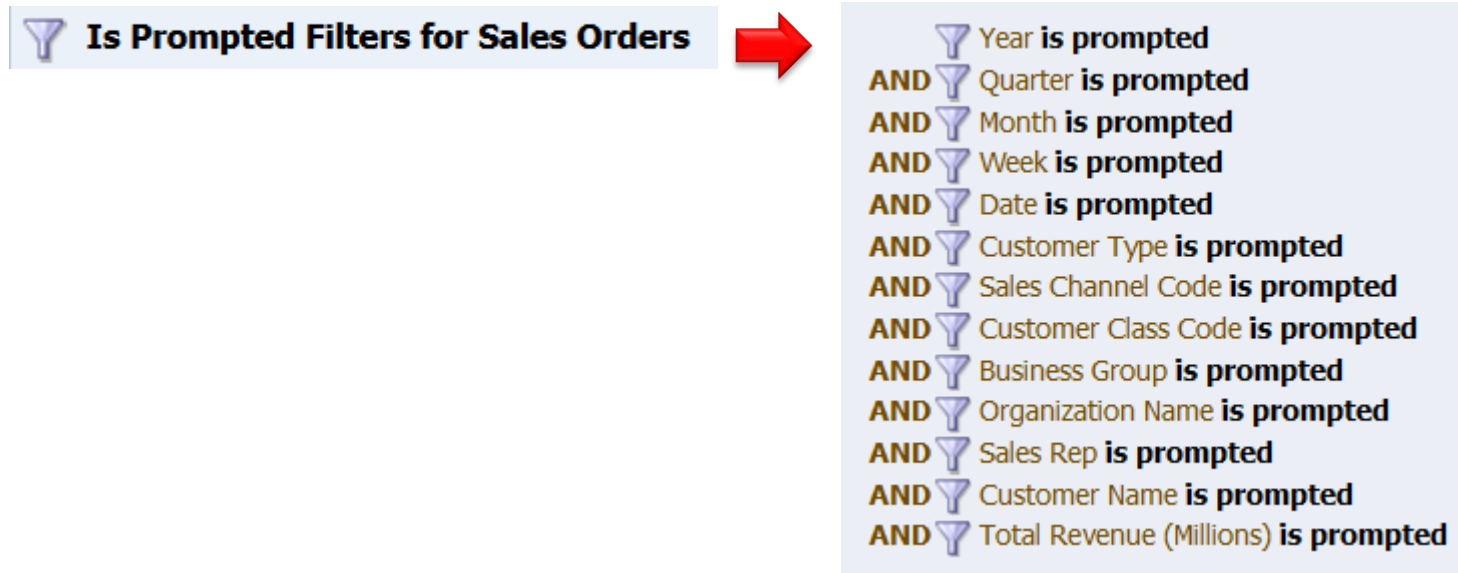
Operator is prompted

“Is Prompted” means that filter parameters can be passed in by Dashboard Prompts at run-time

Overview

Best Practice

- Why not create a “Saved Filter” containing all the general “Is Prompted” filters, and then just add this to every request that you create!

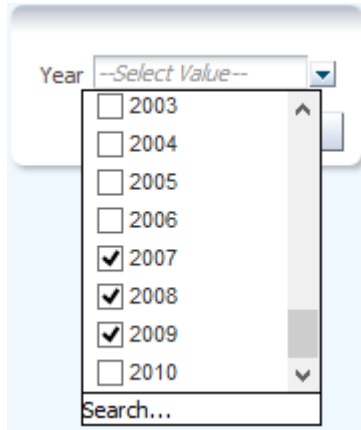


- If you ever add further columns to your dashboard prompts, you just need to modify this one saved filter and then the necessary “Is Prompted” filters will be automatically propagated to all the requests

Overview

Types of Prompts

Choice List



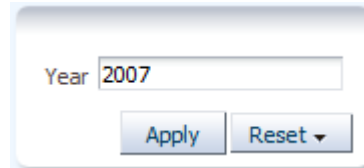
A choice list prompt for the 'Year' field. The dropdown menu is open, showing a list of years from 2003 to 2010. The years 2007, 2008, and 2009 are checked. A search bar is at the bottom.

Year --Select Value--

- ☐ 2003
- ☐ 2004
- ☐ 2005
- ☐ 2006
- ☒ 2007
- ☒ 2008
- ☒ 2009
- ☐ 2010

Search...

Text Field



A text field prompt for the 'Year' field. The field contains the value '2007'. There are 'Apply' and 'Reset' buttons below the field.

Year 2007

Apply Reset

Check Boxes



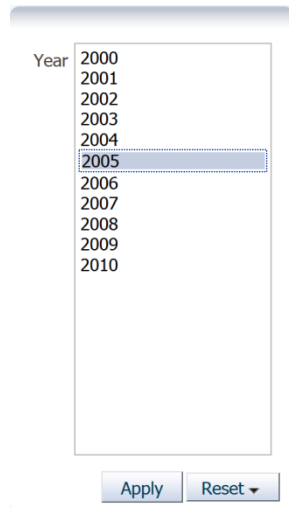
A check boxes prompt for the 'Year' field. The list shows years from 2000 to 2010. The years 2003, 2004, 2007, and 2008 are checked. There are 'Apply' and 'Reset' buttons at the bottom.

Year

- ☐ 2000
- ☐ 2001
- ☐ 2002
- ☒ 2003
- ☒ 2004
- ☐ 2005
- ☐ 2006
- ☒ 2007
- ☐ 2008
- ☐ 2009
- ☐ 2010

Apply Reset

List Box



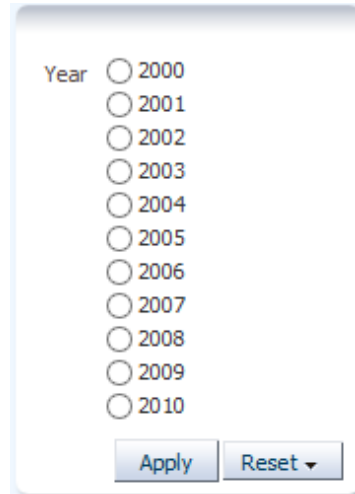
A list box prompt for the 'Year' field. The list shows years from 2000 to 2010. The year 2005 is selected. There are 'Apply' and 'Reset' buttons at the bottom.

Year

- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010

Apply Reset

Radio Buttons



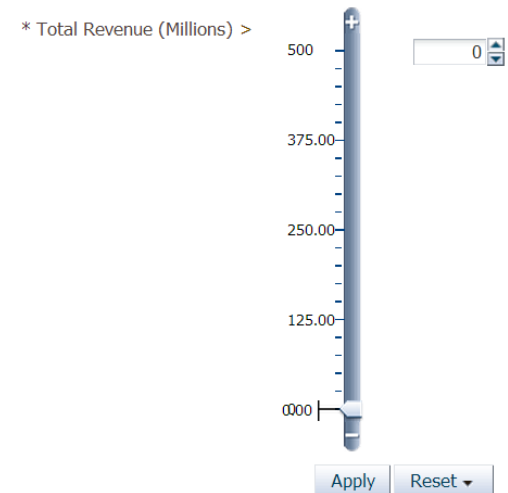
A radio buttons prompt for the 'Year' field. The list shows years from 2000 to 2010. No year is selected. There are 'Apply' and 'Reset' buttons at the bottom.

Year

- ☐ 2000
- ☐ 2001
- ☐ 2002
- ☐ 2003
- ☐ 2004
- ☐ 2005
- ☐ 2006
- ☐ 2007
- ☐ 2008
- ☐ 2009
- ☐ 2010

Apply Reset

Slider



A slider prompt for the '* Total Revenue (Millions)' field. The slider ranges from 0 to 500. The current value is 0. There are 'Apply' and 'Reset' buttons at the bottom.

* Total Revenue (Millions) >

500

375.00

250.00

125.00

000

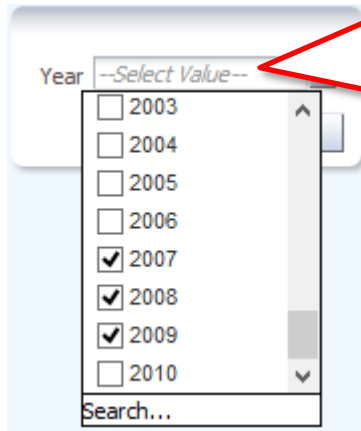
0

Apply Reset

Overview

Types of Prompts

Choice List



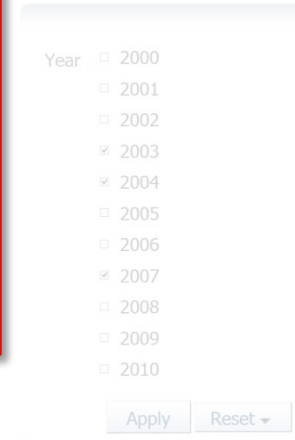
A UI element titled "Year" with a dropdown menu. The dropdown is open, showing a list of years from 2003 to 2010. The years 2007, 2008, and 2009 are checked. Below the list is a "Search..." input field.

A “**Choice List**” provides a drop-down list enabling the user to select one or more values

A search utility is available if the user does not want to scroll through the list

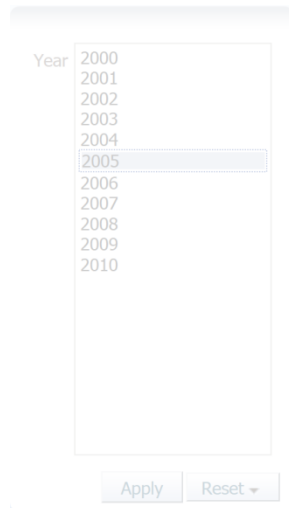
There is also an option to allow users to manually type in the values required

Check Boxes



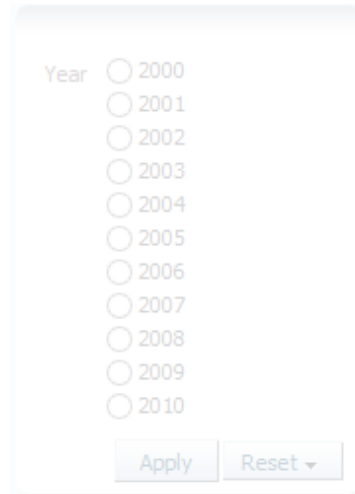
A UI element titled "Year" with a list of years from 2000 to 2010. Each year has a checkbox next to it. The years 2003, 2004, 2007, and 2008 are checked. At the bottom are "Apply" and "Reset" buttons.

List Box



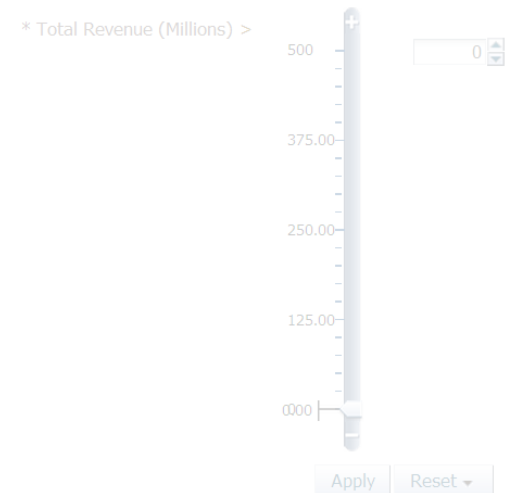
A UI element titled "Year" with a list box containing years from 2000 to 2010. The year 2005 is selected. At the bottom are "Apply" and "Reset" buttons.

Radio Buttons



A UI element titled "Year" with a list of years from 2000 to 2010. Each year has a radio button next to it. At the bottom are "Apply" and "Reset" buttons.

Slider

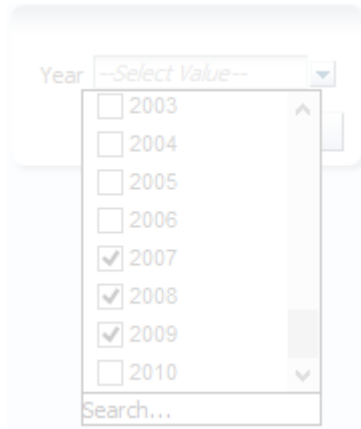


A UI element titled "* Total Revenue (Millions) >". It features a vertical slider with a range from 000 to 500. The current value is 0. At the bottom are "Apply" and "Reset" buttons.

Overview

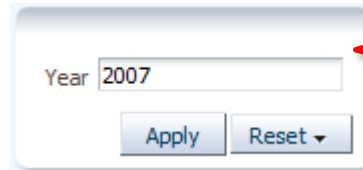
Types of Prompts

Choice List



A Choice List prompt for the 'Year' field. It features a dropdown menu with the text '--Select Value--'. The list is open, showing years from 2003 to 2010. The years 2007, 2008, and 2009 are selected, indicated by checkmarks. A search bar at the bottom is labeled 'Search...'.

Text Field

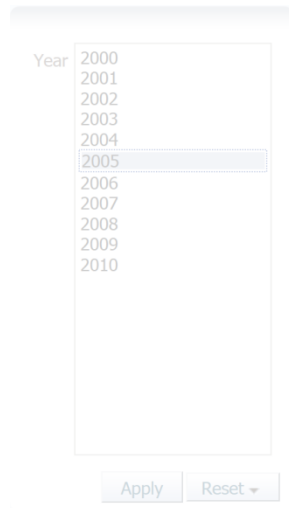


A Text Field prompt for the 'Year' field. It shows a text input box containing the value '2007'. Below the input box are two buttons: 'Apply' and 'Reset'.

A **“Text Field”** simply allows the user to type in a custom string of text

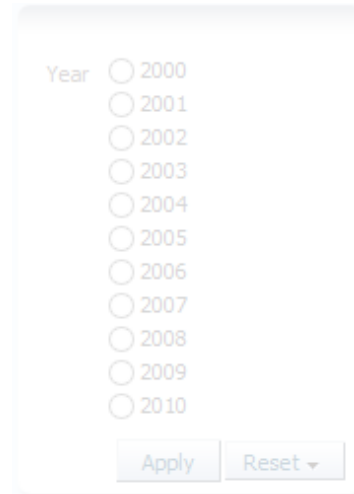
You can make it mandatory for the user to enter a value

List Box



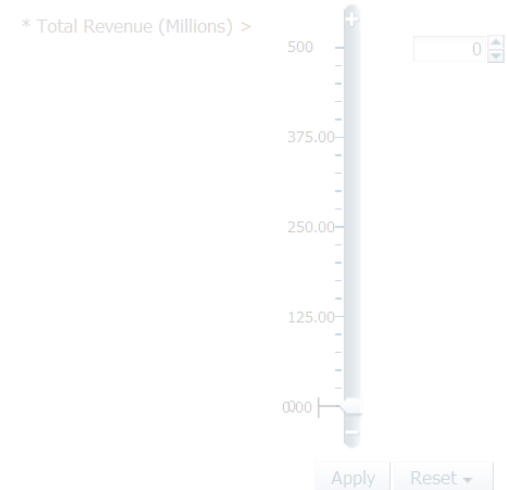
A List Box prompt for the 'Year' field. It shows a list of years from 2000 to 2010. The year 2005 is selected and highlighted. At the bottom are 'Apply' and 'Reset' buttons.

Radio Buttons



A Radio Buttons prompt for the 'Year' field. It shows a list of years from 2000 to 2010. Each year is preceded by an unselected radio button. At the bottom are 'Apply' and 'Reset' buttons.

Slider

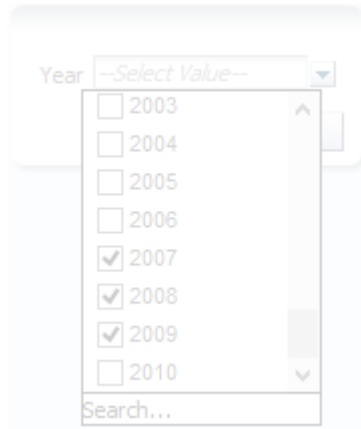


A Slider prompt for the '* Total Revenue (Millions) >' field. It features a vertical slider with a range from 0 to 500. The current value is 0. At the bottom are 'Apply' and 'Reset' buttons.

Overview

Types of Prompts

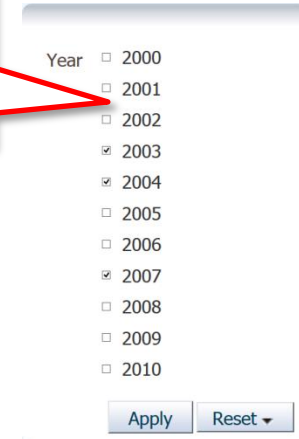
Choice List



A choice list prompt for the 'Year' field. It features a dropdown menu with a placeholder text '--Select Value--'. The list contains years from 2003 to 2010. The years 2007, 2008, and 2009 are selected, indicated by checkmarks. A search bar is located at the bottom of the list.

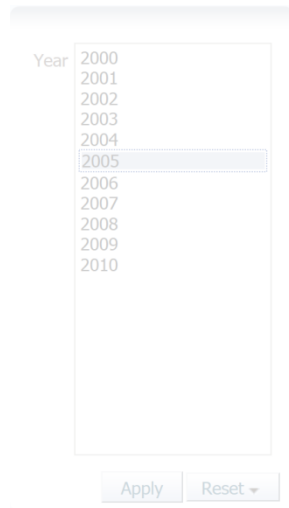
“Check Boxes” allow users to select one or more values from a list

Check Boxes



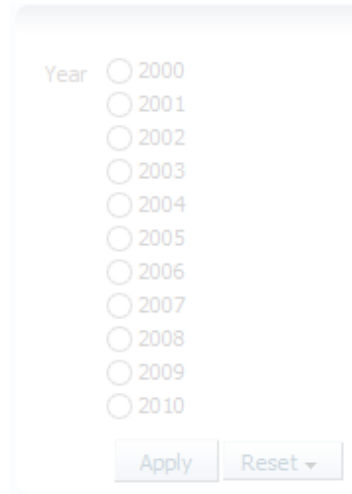
A check boxes prompt for the 'Year' field. It displays a list of years from 2000 to 2010. The years 2003, 2004, and 2007 are selected, indicated by checkmarks. At the bottom, there are 'Apply' and 'Reset' buttons.

List Box



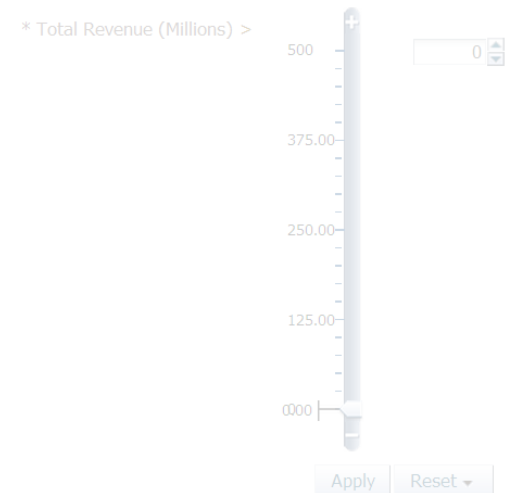
A list box prompt for the 'Year' field. It displays a list of years from 2000 to 2010. The year 2005 is selected, indicated by a highlight. At the bottom, there are 'Apply' and 'Reset' buttons.

Radio Buttons



A radio buttons prompt for the 'Year' field. It displays a list of years from 2000 to 2010. No year is selected. At the bottom, there are 'Apply' and 'Reset' buttons.

Slider

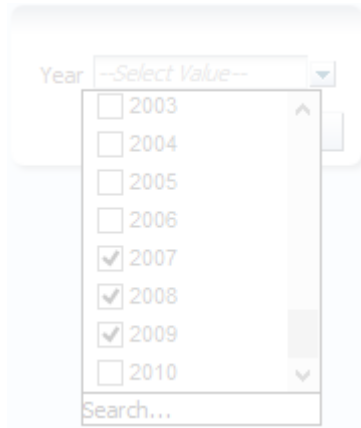


A slider prompt for the '* Total Revenue (Millions) >' field. The slider ranges from 0 to 500. The current value is 0. At the bottom, there are 'Apply' and 'Reset' buttons.

Overview

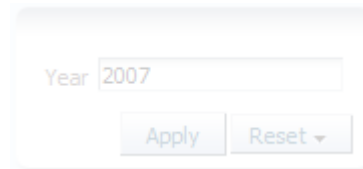
Types of Prompts

Choice List



A Choice List prompt for the 'Year' field. It features a dropdown menu with the placeholder text '--Select Value--'. The dropdown is open, showing a list of years from 2003 to 2010. The years 2007, 2008, and 2009 are checked with small square icons. A search bar is located at the bottom of the list.

Text Field



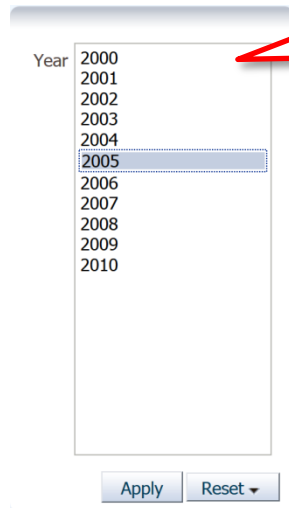
A Text Field prompt for the 'Year' field. It shows a text input box containing the value '2007'. Below the input box are two buttons: 'Apply' and 'Reset' with a dropdown arrow.

Check Boxes



A Check Boxes prompt for the 'Year' field. It displays a list of years from 2000 to 2010, each preceded by a checkbox. The years 2003, 2004, 2007, and 2008 are checked. At the bottom, there are 'Apply' and 'Reset' buttons with a dropdown arrow.

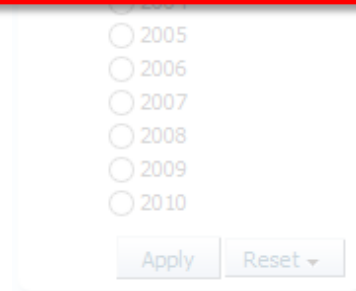
List Box



A List Box prompt for the 'Year' field. It shows a list of years from 2000 to 2010. The year 2005 is highlighted with a blue background. At the bottom, there are 'Apply' and 'Reset' buttons with a dropdown arrow.

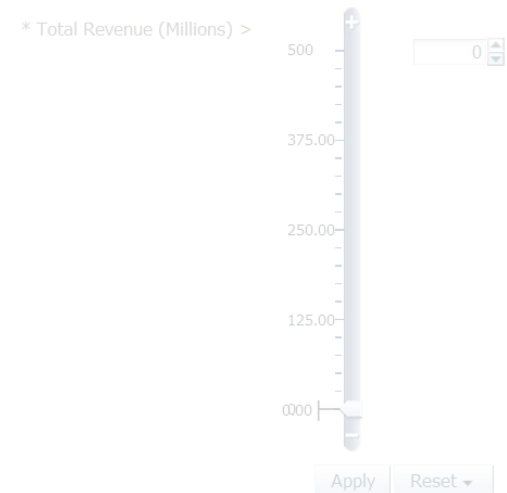
A “List Box” is simply a box containing a list of values.

It is possible to enable/disable the selections of multiple values



A List Box prompt for the 'Year' field, showing a list of years from 2005 to 2010. Each year is preceded by a radio button, indicating that only one value can be selected. At the bottom, there are 'Apply' and 'Reset' buttons with a dropdown arrow.

Slider

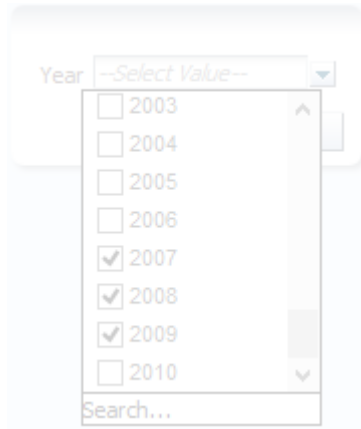


A Slider prompt for the '* Total Revenue (Millions) >' field. It features a vertical slider bar with a range from 0.00 to 500.00. The current value is set to 0.00. To the right of the slider is a text input box containing '0'. At the bottom, there are 'Apply' and 'Reset' buttons with a dropdown arrow.

Overview

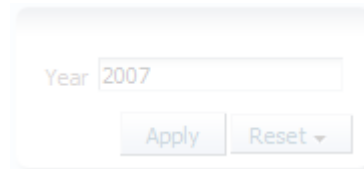
Types of Prompts

Choice List



A choice list prompt for the year. It features a dropdown menu with the text "--Select Value--". Below the dropdown is a list of years from 2003 to 2010, each preceded by a checkbox. The years 2007, 2008, and 2009 are checked. At the bottom of the list is a search bar with the text "Search...".

Text Field



A text field prompt for the year. It features a text input field with the value "2007". Below the input field are two buttons: "Apply" and "Reset" with a dropdown arrow.

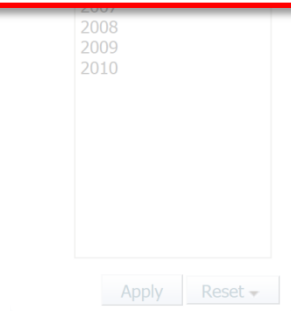
Check Boxes



A check boxes prompt for the year. It features a list of years from 2000 to 2010, each preceded by a checkbox. The years 2003, 2004, 2007, and 2008 are checked. At the bottom of the list are two buttons: "Apply" and "Reset" with a dropdown arrow.

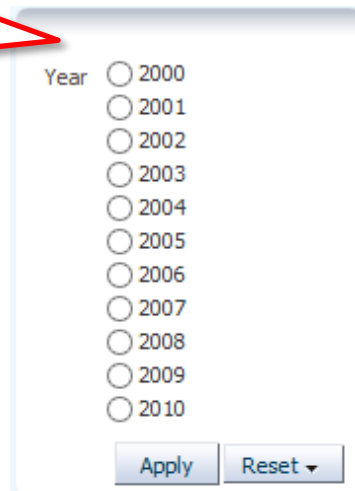
List Box

"Radio Buttons" are similar to Check Boxes but users can only select one value



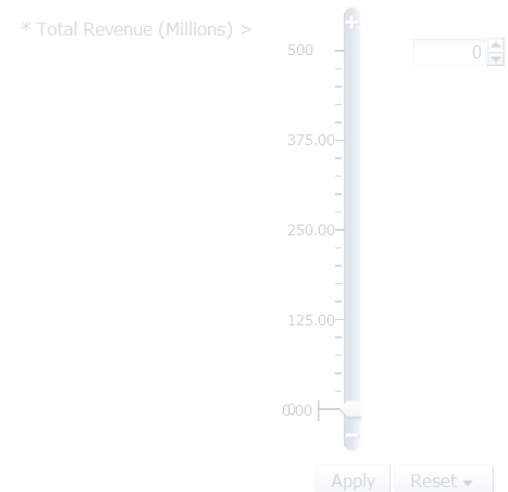
A list box prompt for the year. It features a list of years from 2007 to 2010. The year 2007 is selected. At the bottom of the list are two buttons: "Apply" and "Reset" with a dropdown arrow.

Radio Buttons



A radio buttons prompt for the year. It features a list of years from 2000 to 2010, each preceded by a radio button. The year 2007 is selected. At the bottom of the list are two buttons: "Apply" and "Reset" with a dropdown arrow.

Slider

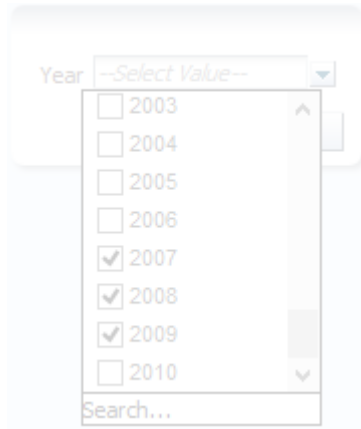


A slider prompt for the total revenue. It features a vertical slider with a range from 0 to 500. The current value is 0. To the right of the slider is a text input field with the value "0". Below the slider are two buttons: "Apply" and "Reset" with a dropdown arrow.

Overview

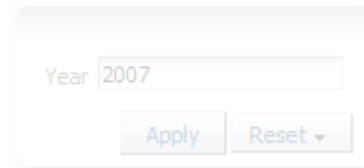
Types of Prompts

Choice List



A choice list prompt for the 'Year' field. It features a dropdown menu with the text '--Select Value--'. The dropdown is open, showing a list of years from 2003 to 2010. The years 2007, 2008, and 2009 are selected, indicated by checkmarks. A search bar is located at the bottom of the list.

Text Field




A text field prompt for the 'Year' field. It shows a text input box containing the value '2007'. Below the input box are two buttons: 'Apply' and 'Reset'.

Check Boxes



A check boxes prompt for the 'Year' field. It shows a list of years from 2000 to 2010. The years 2003, 2004, 2007, and 2008 are selected, indicated by checkmarks. Below the list are two buttons: 'Apply' and 'Reset'.

List Box



A list box prompt for the 'Year' field. It shows a list of years from 2000 to 2010. The year 2005 is selected. Below the list are two buttons: 'Apply' and 'Reset'.

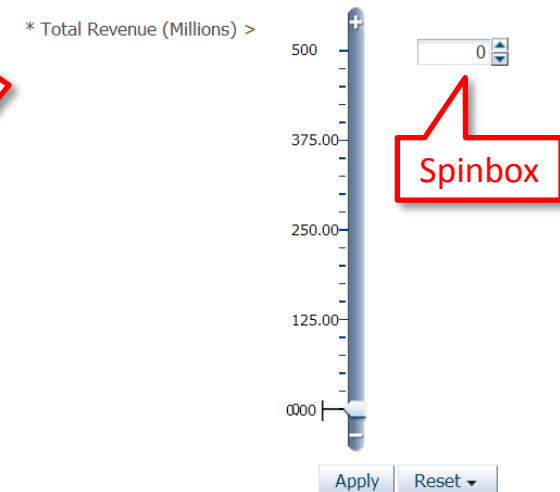
“Sliders” are for numeric data types only and allow the user to choose values using a slider bar.

Best when using “Greater Than”, “Less Than” or “Between” operators.

The bar can be of various sizes and configured to display horizontally or vertically.

A “Spinbox” can be added to allow the user to enter values manually

Slider



A slider prompt for the '* Total Revenue (Millions) >' field. It shows a vertical slider bar with a range from 0 to 500. The current value is 0. A spinbox is attached to the slider, allowing manual entry of values. Below the slider are two buttons: 'Apply' and 'Reset'.

Spinbox



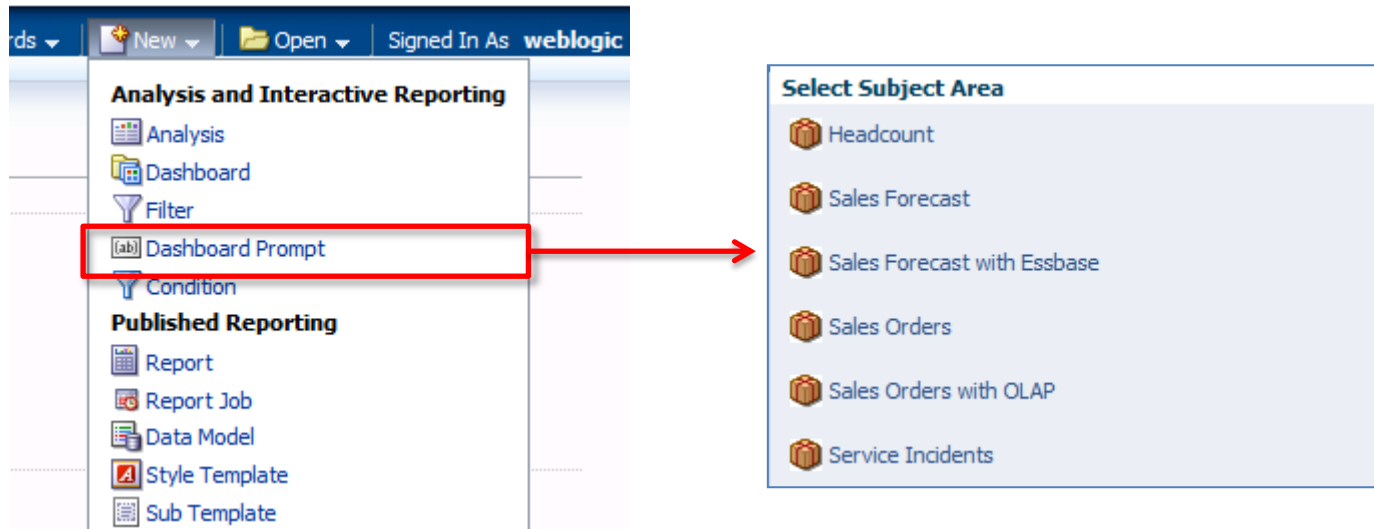
Dashboard Prompts

Creating Dashboard Prompts

Creating Dashboard Prompts

1) Choose Subject Area


- You can create a Dashboard Prompt via the “New” menu
- The first thing you’ll need to do is choose a Subject Area:

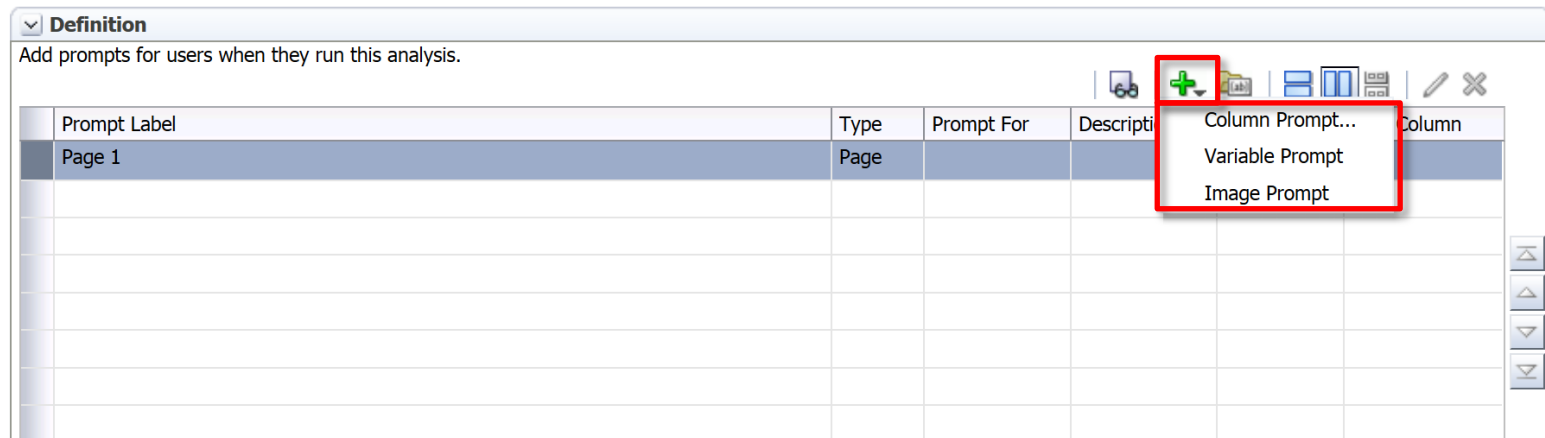


- **NOTE:** A Dashboard Prompt can be used for Analyses coming from other Subject Areas as long as the columns present in the Dashboard Prompt have the exact same name across all the Subject Areas

Creating Dashboard Prompts

2) Add Prompts

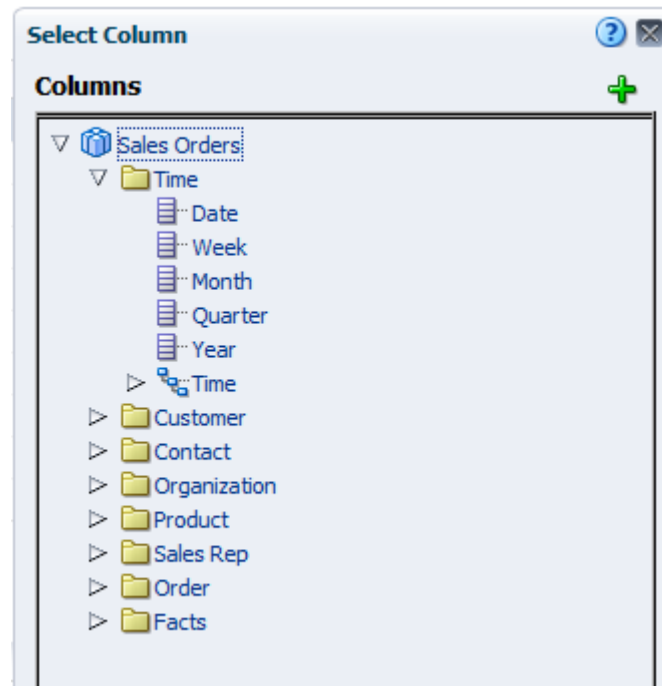
- Click the  button to add a new Prompt, you have 3 choices:
 - Column Prompt** - Obtain list of values from a Subject Area column
 - Variable Prompt** - Provide a custom list of values to populate a variable
 - Image Prompt** - Allow the user to select values using an “HTML image map”



Creating Dashboard Prompts

3) Choose Column

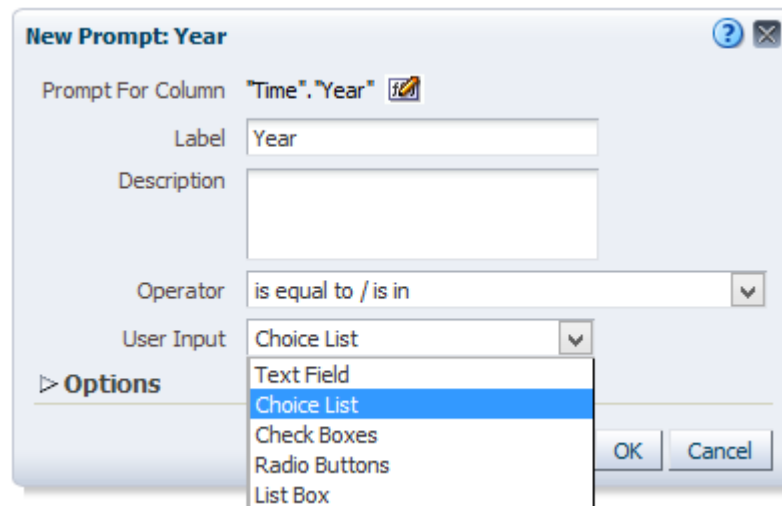
- Assuming you chose a “Column Prompt”, you will then need to choose a Subject Area column:



Creating Dashboard Prompts

4) Standard Settings

- Now that you have chosen the column, you then need to specify the following:
 - Label - Label to display to user
 - Operator - e.g. “is equal to / is in” or “is greater than”
 - User Input - Choose from the various types of Prompt available



Creating Dashboard Prompts

5) Further Options

- Depending on the type of prompt, you will then be able to set various other options. For example:

The screenshot shows the 'Options' dialog box for a dashboard prompt. The dialog has several sections and options:

- Choice List Values:** A dropdown menu set to 'All Column Values'.
 - ☐ Include "All Column Values" choice in the list
 - ☐ Limit values by **All Prompts** (dropdown)
- ☒ Enable user to select multiple values
- ☒ Enable user to type values
- ☐ Require user input
- Default selection:** A dropdown menu set to 'None'.
- Choice List Width:** Radio buttons for 'Dynamic' and '120' (selected), followed by 'Pixels'.
- Set a variable:** A dropdown menu set to 'None'.
- Buttons:** 'OK' and 'Cancel' at the bottom right.

Callouts explain the following options:

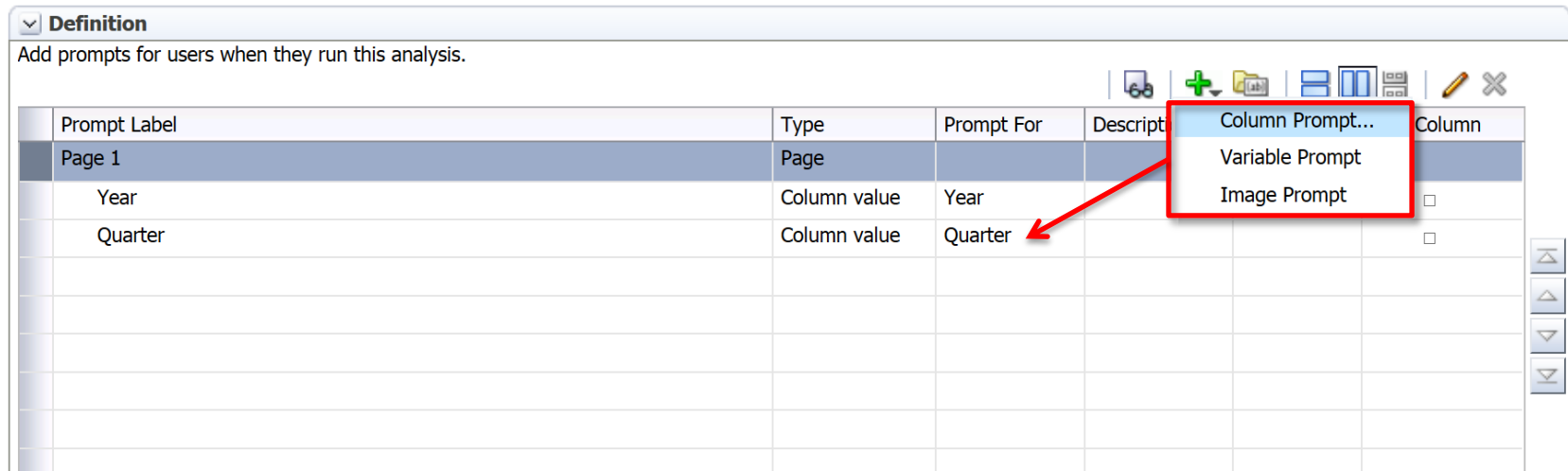
- Display all column values, or just a selected few:** Points to the 'Choice List Values' dropdown.
- Enable/disable multiple value selection:** Points to the 'Enable user to select multiple values' checkbox.
- Force the user to select a value:** Points to the 'Require user input' checkbox.
- Limit the values displayed based on the other prompt selections already chosen e.g. if the user has already chosen Year = 2007, then only show the Quarters for the Year 2007:** Points to the 'Limit values by' dropdown.
- Specify a default value e.g. "CURR_YEAR". You can specify a value, variable, SQL Expression or Logical SQL:** Points to the 'Default selection' dropdown.
- Assign the selection to a Session or Presentation Variable (Presentation Variables are covered later in the training):** Points to the 'Set a variable' dropdown.

Creating Dashboard Prompts

6) Add Further Prompts

- Add further Prompts as necessary

Definition
Add prompts for users when they run this analysis.



Prompt Label	Type	Prompt For	Description	Column
Page 1	Page			
Year	Column value	Year		<input type="checkbox"/>
Quarter	Column value	Quarter		<input type="checkbox"/>

Creating Dashboard Prompts

7) New Column

- The Prompts will, by default, be listed vertically. If you wish them to appear side-by-side then check the “**New Column**” option

Definition

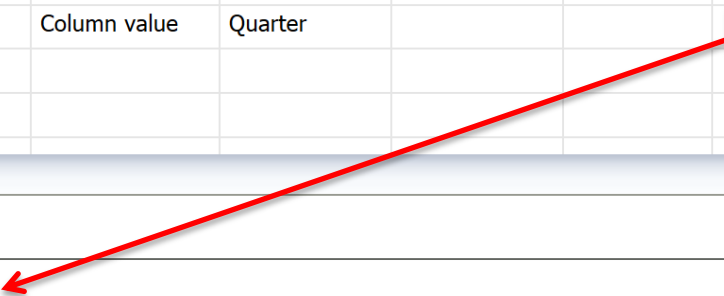
Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Year	Column value	Year			<input type="checkbox"/>
Quarter	Column value	Quarter			<input checked="" type="checkbox"/>

Display

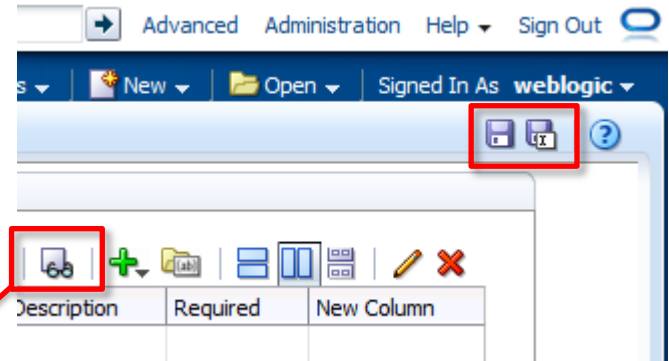
Page 1

Year Quarter



Creating Dashboard Prompts

8) Save and Preview



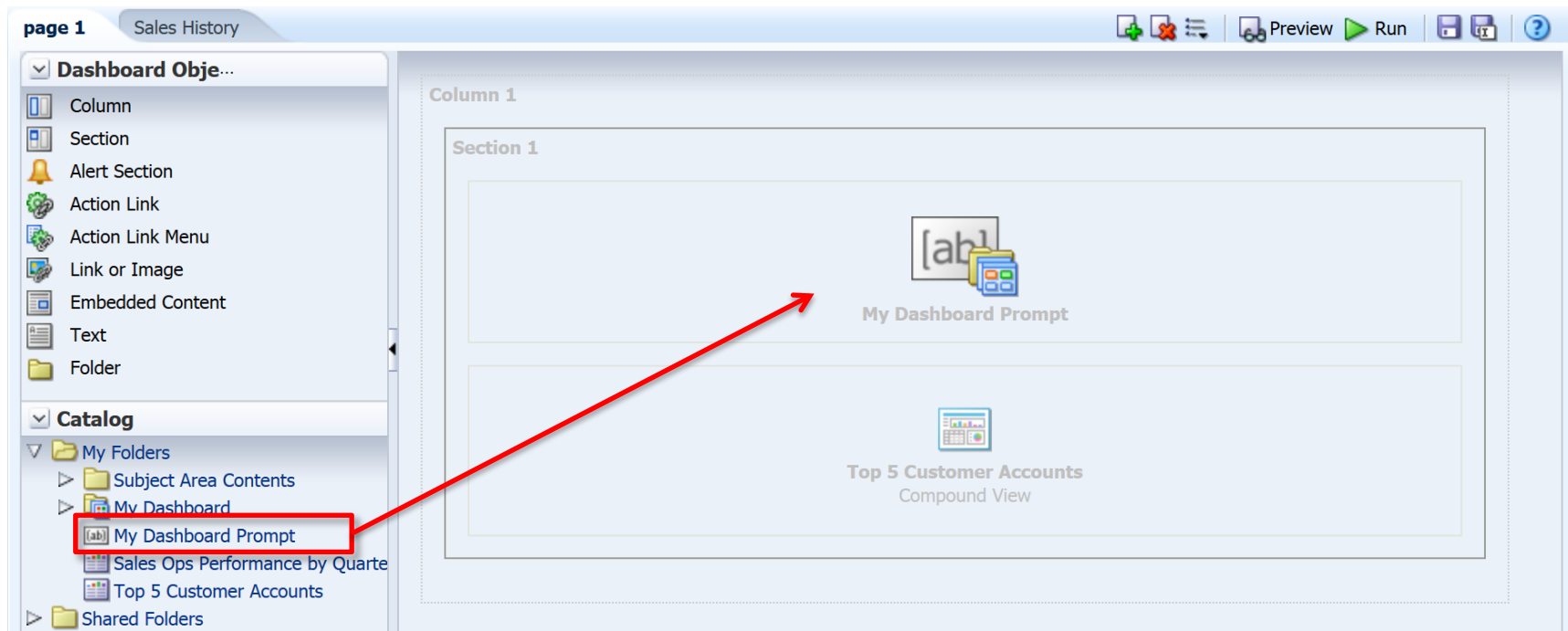
This screenshot shows two prompts: 'Year' and 'Quarter'. The 'Year' prompt has a dropdown menu with '2007' selected. The 'Quarter' prompt has a dropdown menu with '--Select Value--' selected. A red arrow points from the 'Preview' button in the screenshot above to the 'Quarter' prompt. The 'Quarter' dropdown menu is open, showing four options: '2007 Q 1', '2007 Q 2', '2007 Q 3', and '2007 Q 4'. A red box highlights these four options, and a red arrow points from this box to a text box below.

Note that the “Quarters” Prompt is *limited* to display values only for the Year selected

Creating Dashboard Prompts

9) Add to Dashboard

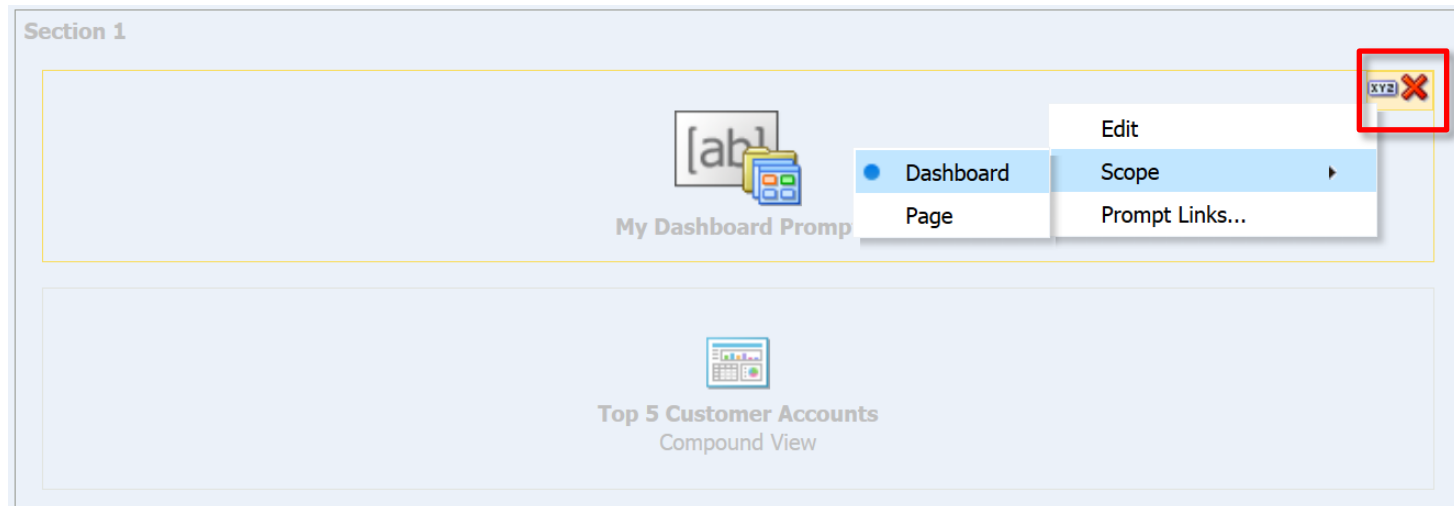
- You can now add your Dashboard Prompt to the Dashboard Page



Creating Dashboard Prompts

10) Set Dashboard Scope

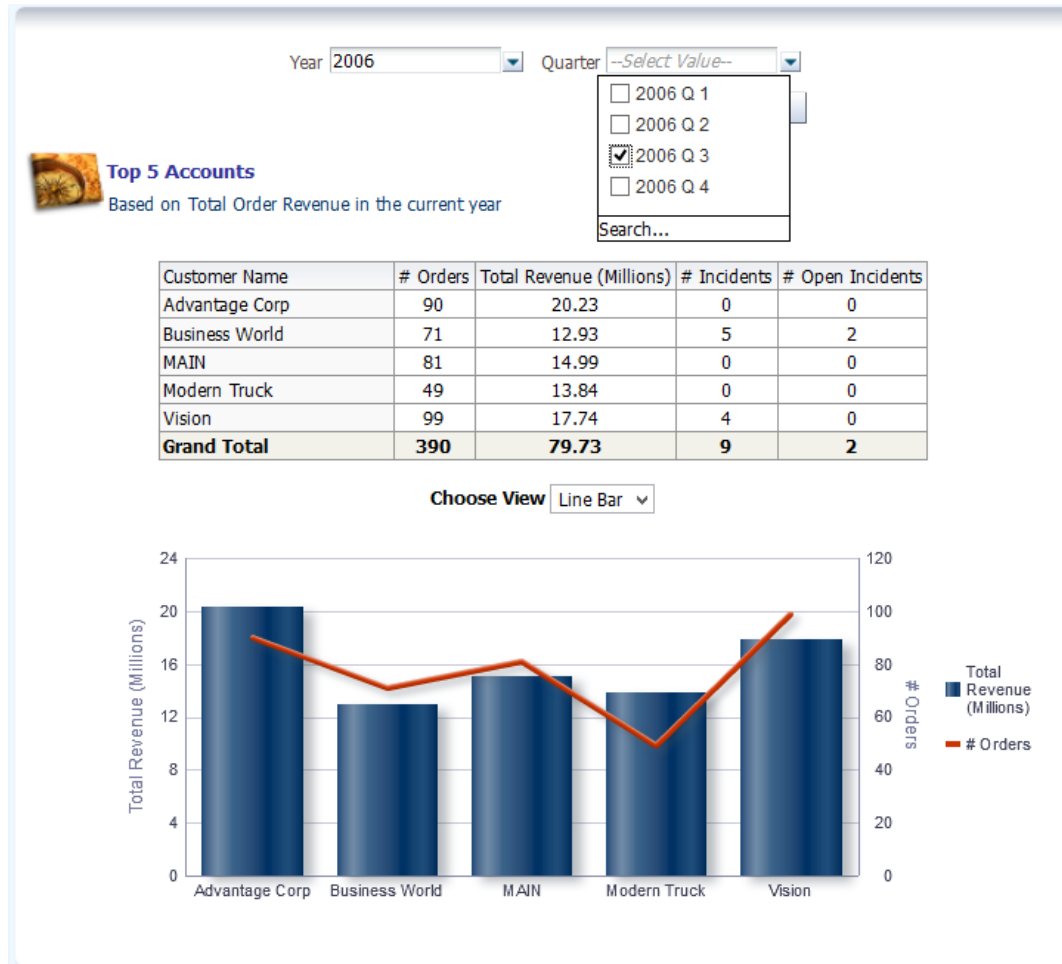
- By default, the “scope” of the Dashboard Prompt will be set to **“Dashboard”**
- This means that once you have made your selections, those selections will be remembered as you move to other Pages within the same Dashboard
- However, by setting the scope to “Page”, your selections will not be remembered as you move from one Dashboard Page to another



Creating Dashboard Prompts

11) Save and Test

- You can now save your Dashboard Page and test!



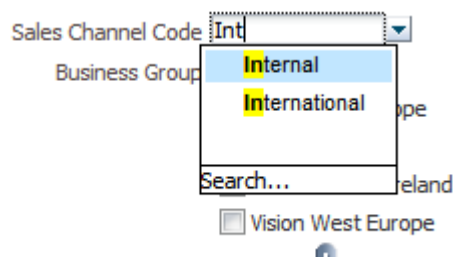


Dashboard Prompts Further Notes

Further Notes


Auto-Complete

- If you enable the ☒ Enable user to type values option for a prompt, then it will provide the user with “auto-complete” functionality
 - Configuration required in instanceconfig.xml to enable
 - User should also enable feature via My Account settings
- This means that relevant values are shown to the user as they type in the prompt!




Further Notes

Go-Less Prompts

- Within the Dashboard Prompt properties  screen you can disable the “Apply” and “Reset” buttons
- The result is that the dashboard queries are executed automatically as soon as you make a selection in a dashboard prompt
- NOTE: It is advisable only to enable this option if your dashboard queries return data very quickly

Definition
Add prompts for users when they run this analysis.



Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Year°	Column value	Year°			<input type="checkbox"/>
Quarter°	Column value	Quarter with year°			<input checked="" type="checkbox"/>

Year° 2010 ▾ Quarter° 2010 Q 4 ▾

Prompt Buttons ☐ Show Apply button
☐ Show Reset button

Further Notes

Defining Your Own Logical SQL

- As discussed earlier in this topic, it is possible to define your own “Logical SQL” statement to state which values are returned by a Dashboard Prompt
- But how do you know how to write the Logical SQL?

Example

- We have a dashboard prompt on the “Year” column, but by default it lists all possible values starting from “1980”:

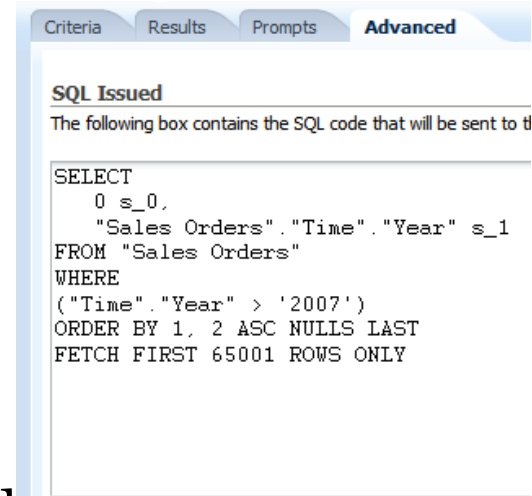
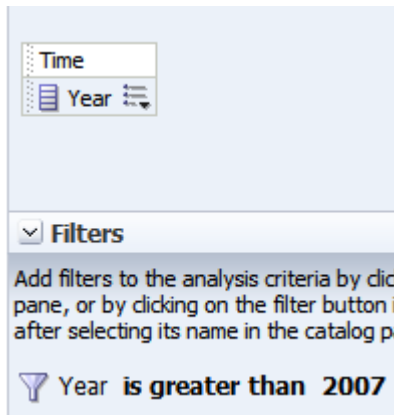
The image shows two parts of a dashboard configuration interface. On the left, under the heading "Choice List Values", there is a dropdown menu currently showing "SQL Results". Below this is a text area with the instruction "Enter a SQL statement to generate the list of values." and a text box containing the SQL query: `SELECT "- Start Date", "Year" FROM "Sales Analysis"`. On the right, there is a prompt labeled "Year" with a dropdown menu showing "--Select Value--". The dropdown is open, displaying a list of years from 1980 to 1986, each preceded by an unchecked checkbox. At the bottom of the dropdown is a "Search..." input field.

- How do you write the Logical SQL statement that only returns the “Year” values when there is some fact data.

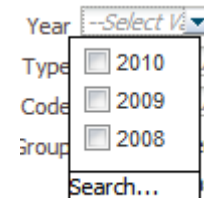
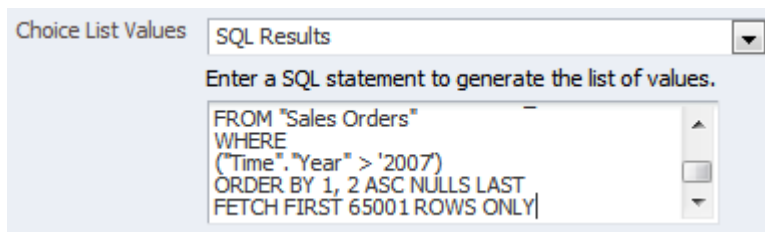
Further Notes

Defining Your Own Logical SQL

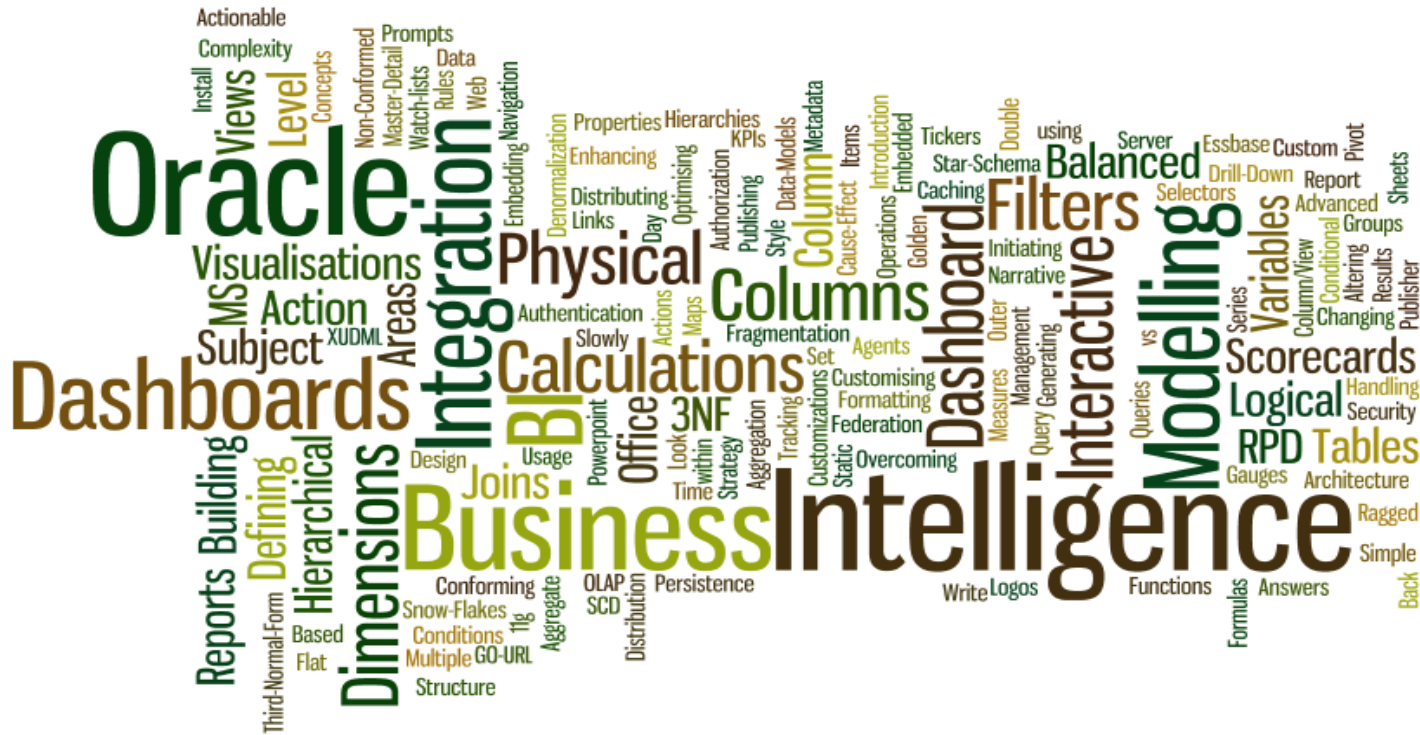
- It is simple! You just build the required query using Answers and then copy the Logical SQL from the “Advanced” tab:



- Then add the code to your dashboard prompt and test the result – you should now see only the “Year” values which have some corresponding fact data!



Questions?



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