

Oracle BI 11g Reports and Dashboards

Dashboard Customizations

PEAK
indicators

Dashboard Customizations

Agenda

- Saved Customizations
- Bookmark Links
- Prompted Links



Dashboard Customizations

Saved Customizations

Saved Customizations

- **“Saved Customizations”** is a useful Dashboard feature that allows users to save not only their filter selections but also the selections made in Column/View Selectors
- They can also assign a Saved Customization as a default, so those selections are used whenever they visit the Dashboard Page

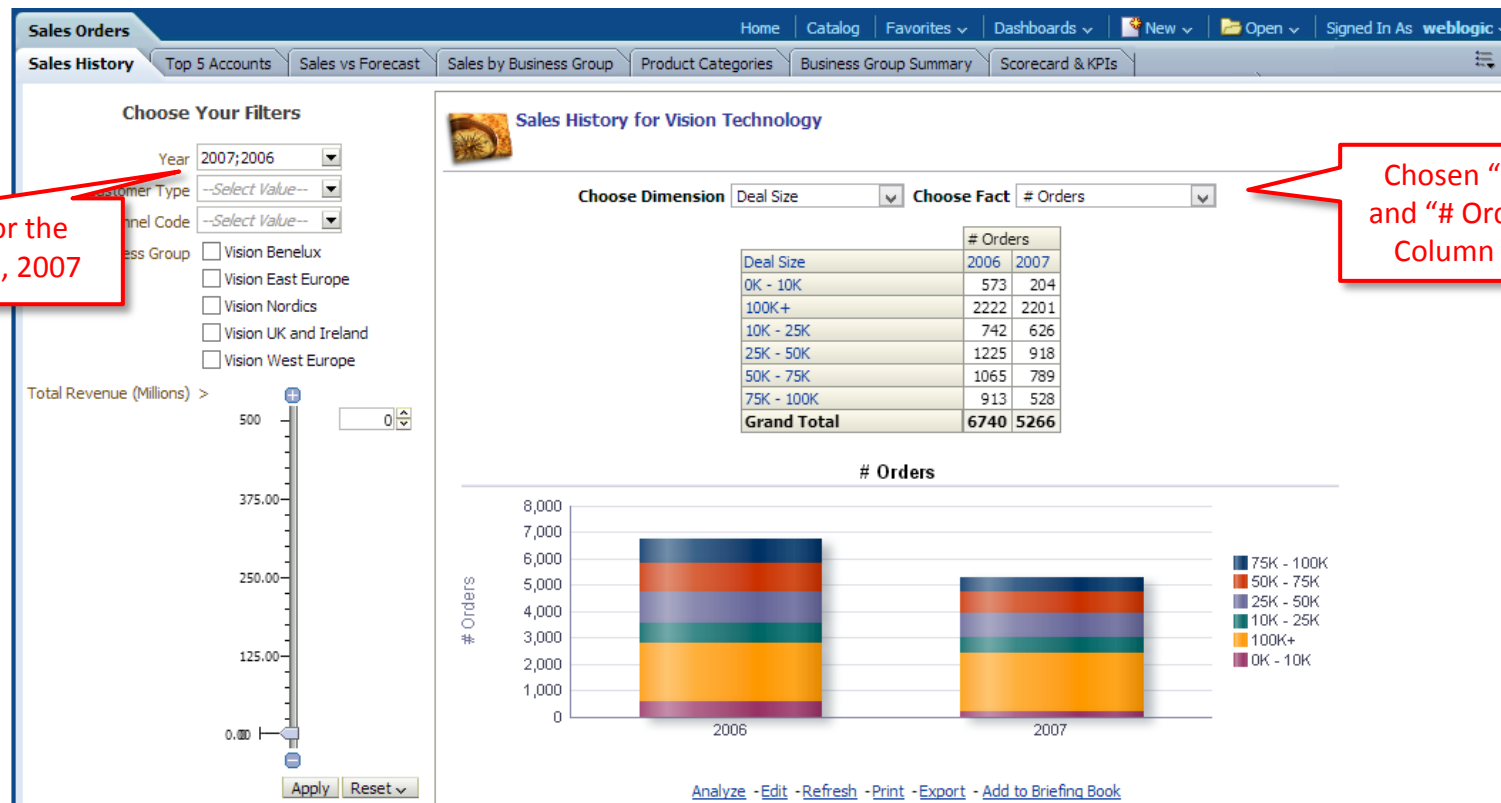
The screenshot shows a dashboard titled "Sales History for Vision Technology". It features a navigation bar with tabs: "Business Group Summary", "Scorecard & KPIs", "Corporate Sales vs Forecast", "Sales Rep Bonus Letters", and "Sales Performance". Below the navigation bar, there are two dropdown menus: "Choose Dimension" set to "Business Group" and "Choose Fact" set to "Total Revenue (Millions)". A table displays sales data for various business groups from 2001 to 2007. A context menu is open, showing options: "Edit Dashboard", "Print", "Export to Excel", "Refresh", "Add To Briefing Book", "Create Bookmark Link", "Create Prompted Link", "Apply Saved Customization", "Save Current Customization...", "Edit Saved Customizations...", and "Clear My Customization". A red box highlights the "Apply Saved Customization" option, and a red callout points to it with the text: "Options available to Save, Apply and Edit 'Customizations'". Another red callout points to the "Clear My Customization" option with the text: "The 'Clear' option will return the Dashboard to its default filter and Column/View Selector settings".

Business Group	2001	2002	2003	2004	2005	2006	2007
Vision UK and Ireland	8.2	4.2	16.8	17.7	17.7	20.5	16.4
Vision Nordics	86.5	57.5	56.7	56.7	56.7	56.7	56.7
Vision West Europe	72.1	74.1	369.9	369.9	369.9	369.9	369.9
Vision East Europe	48.8	75.3	98.2	91.0	93.6	94.3	93.0
Vision Benelux	222.5	399.5	415.3	422.4	471.5	388.0	417.1
Grand Total	438.0	610.5	957.0	908.5	957.7	865.0	850.8

Saved Customizations

Example

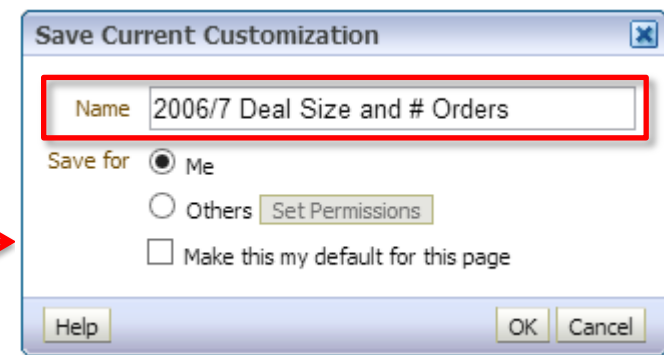
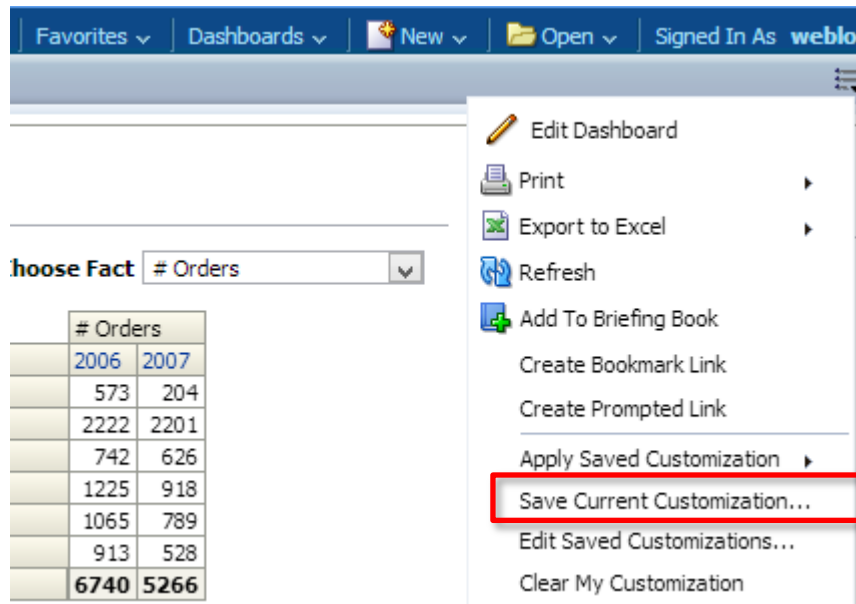
- On this Dashboard we have made some “customizations”:



Saved Customizations

Example

- We can now save the arrangement using the “Save Current Customization” menu option:
 - You just need to specify a name for the Customization
 - You can also set the Customization as default for this Dashboard Page



Saved Customizations

Example

- The user can now revert to this Saved Customization at any time using the “Apply Saved Customization” option:

The screenshot shows a dashboard titled "Sales History for Vision Technology". It features a table with columns for "Deal Size" and "# Orders" (2006, 2007). The table lists deal size ranges from "0K - 10K" to "75K - 100K", along with a "Grand Total". A context menu is open on the right, listing various actions. The "Apply Saved Customization" option is highlighted in blue. A red box highlights the "2006/7 Deal Size and # Orders" option in the table, and another red box highlights the "Apply Saved Customization" option in the menu.

Scorecard & KPIs Corporate Sales vs Forecast Sales Rep Bonus Letters Sales Performance

Sales History for Vision Technology

Choose Dimension Deal Size Choose Fact # Orders

Deal Size	2006	2007
0K - 10K	573	204
10K - 25K	2222	2221
25K - 50K	2006/7 Deal Size and # Orders	
50K - 75K	Bus Group / Revenue	
75K - 100K		
Grand Total	6740	5266

2006/7 Deal Size and # Orders

Bus Group / Revenue

2006 # Orders

2007 # Orders

Apply Saved Customization

Save Current Customization...

Edit Saved Customizations...

Clear My Customization

Edit Dashboard

Print

Export to Excel

Refresh

Add To Briefing Book

Create Bookmark Link

Create Prompted Link



Dashboard Customizations

Bookmark Links

Bookmark Links

- Using “Bookmark Links” is a convenient way to snapshot a Dashboard Page (or Analysis) with all its “Customizations” and send it to others:
 - A URL is provided which can be copied and sent to other users
 - Other users can invoke the URL, subject to their permissions and data-visibility rules

The screenshot shows the Oracle Business Intelligence web interface. The browser address bar displays the URL: 25.20.211.243:7001/analytics/saw.dll?Dashboard&PortalPath=%2Fshared%2FSales Orders%2F... A red arrow points from the address bar to the 'Create Bookmark Link' option in the context menu. The context menu is open, showing options like 'Edit Dashboard', 'Print', 'Export to Excel', 'Refresh', 'Add To Briefing Book', 'Create Bookmark Link', 'Create Prompted Link', 'Apply Saved Customization', 'Save Current Customization...', 'Edit Saved Customizations...', and 'Clear My Customization'. The 'Create Bookmark Link' option is highlighted with a red box. A red text box on the left contains the following text:

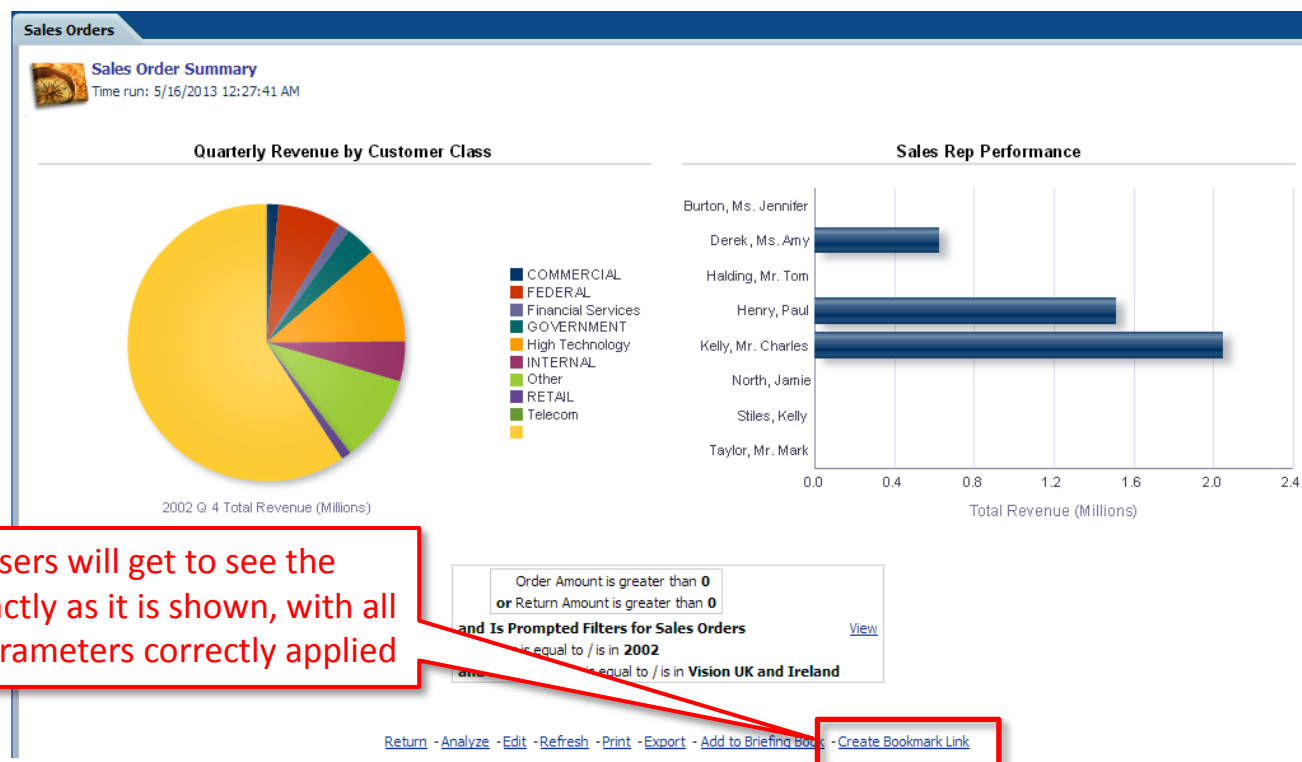
You can now copy the URL and send it to others users.

NOTE: If the other users have not already logged in to Oracle BI then they will be directed to the login screen first

Bookmark Links

Navigation

- If you navigate from one to another Analysis from a Dashboard Page, you will get a “Create Bookmark Link” which will generate a URL that will enable another user to see the exact same navigate path as you:



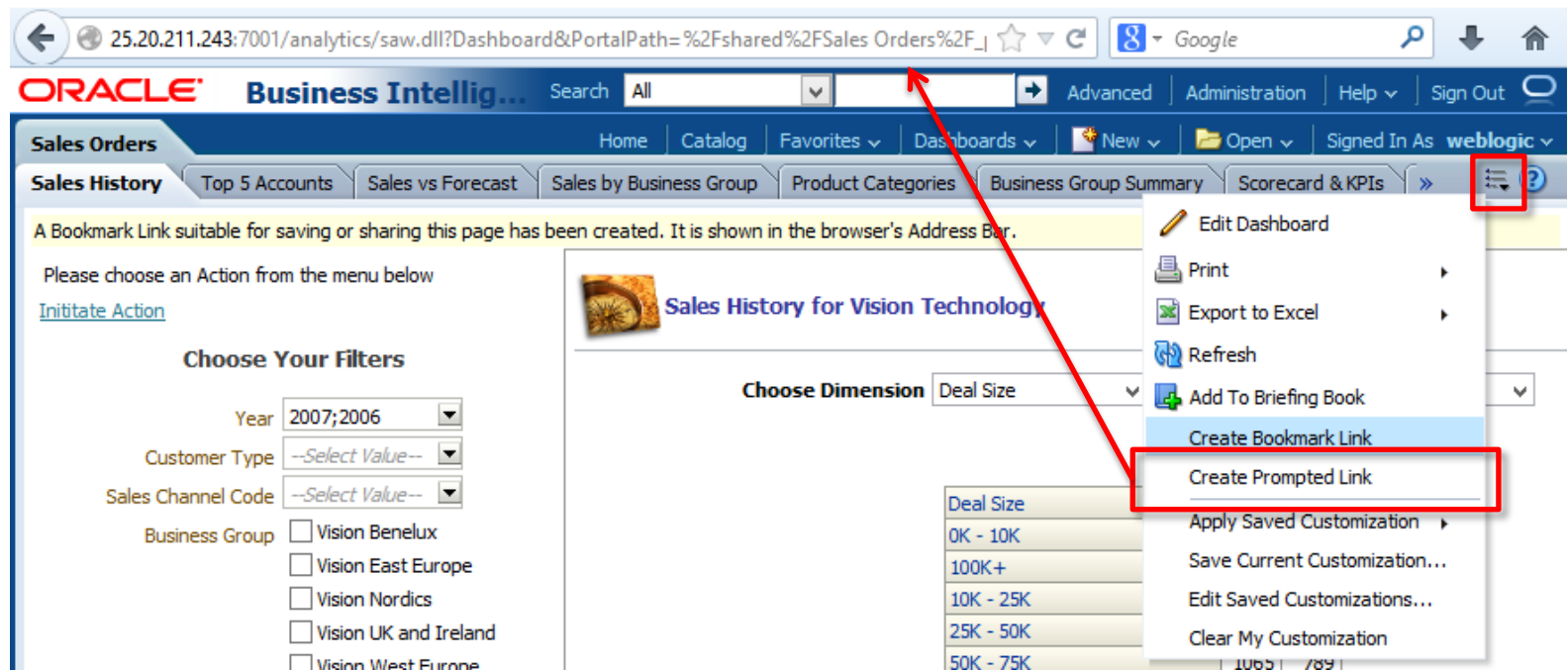
Other users will get to see the Analysis exactly as it is shown, with all the filter parameters correctly applied



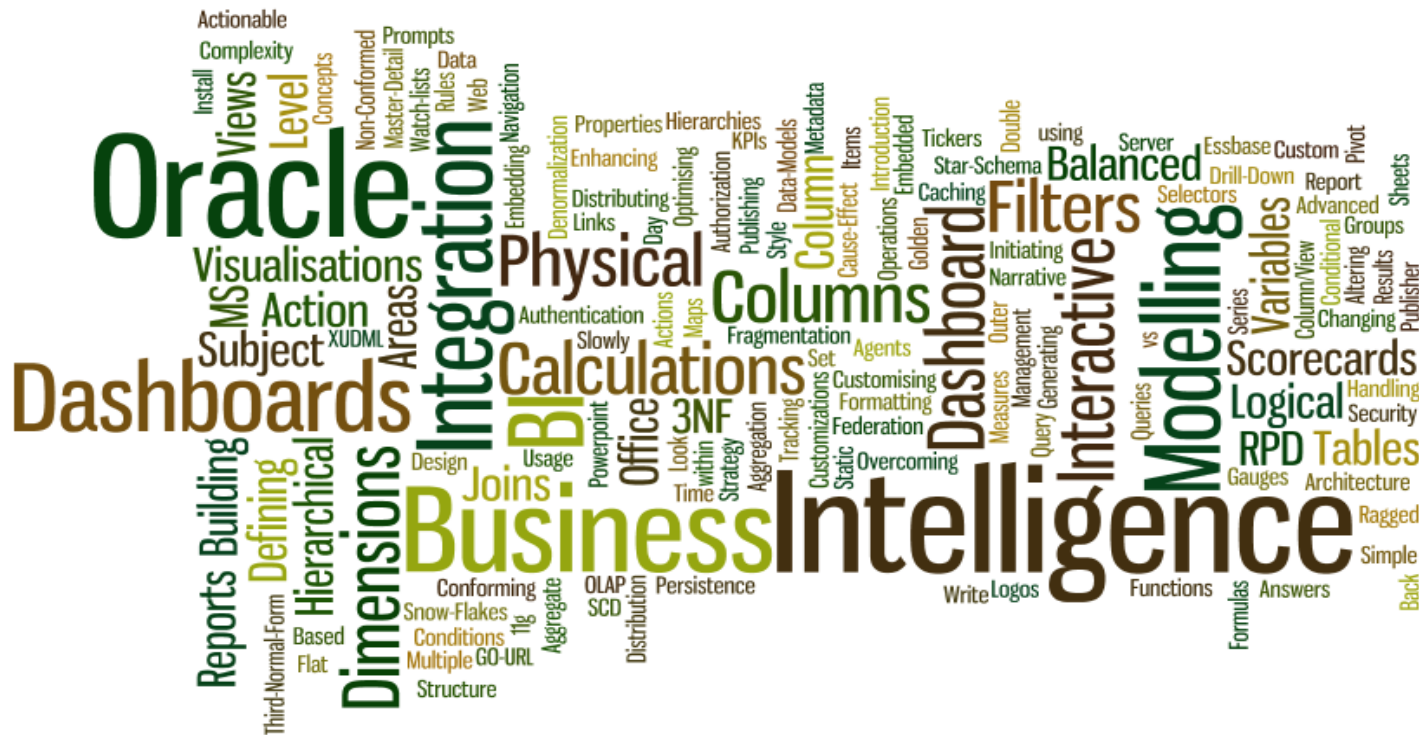
Dashboard Customizations Prompted Links

Prompted Links

- “Prompted Links” are essentially exactly the same as Bookmark Links although the URL generated will only take into account the filter selections made on the Dashboard Page
 - Column/View Selectors are not taken into account



Questions?



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Helping Your Business
Intelligence Journey