Oracle BI 11g Reports and Dashboards

Dashboard Prompts

PEAK indicators

Dashboard Prompts

Agenda

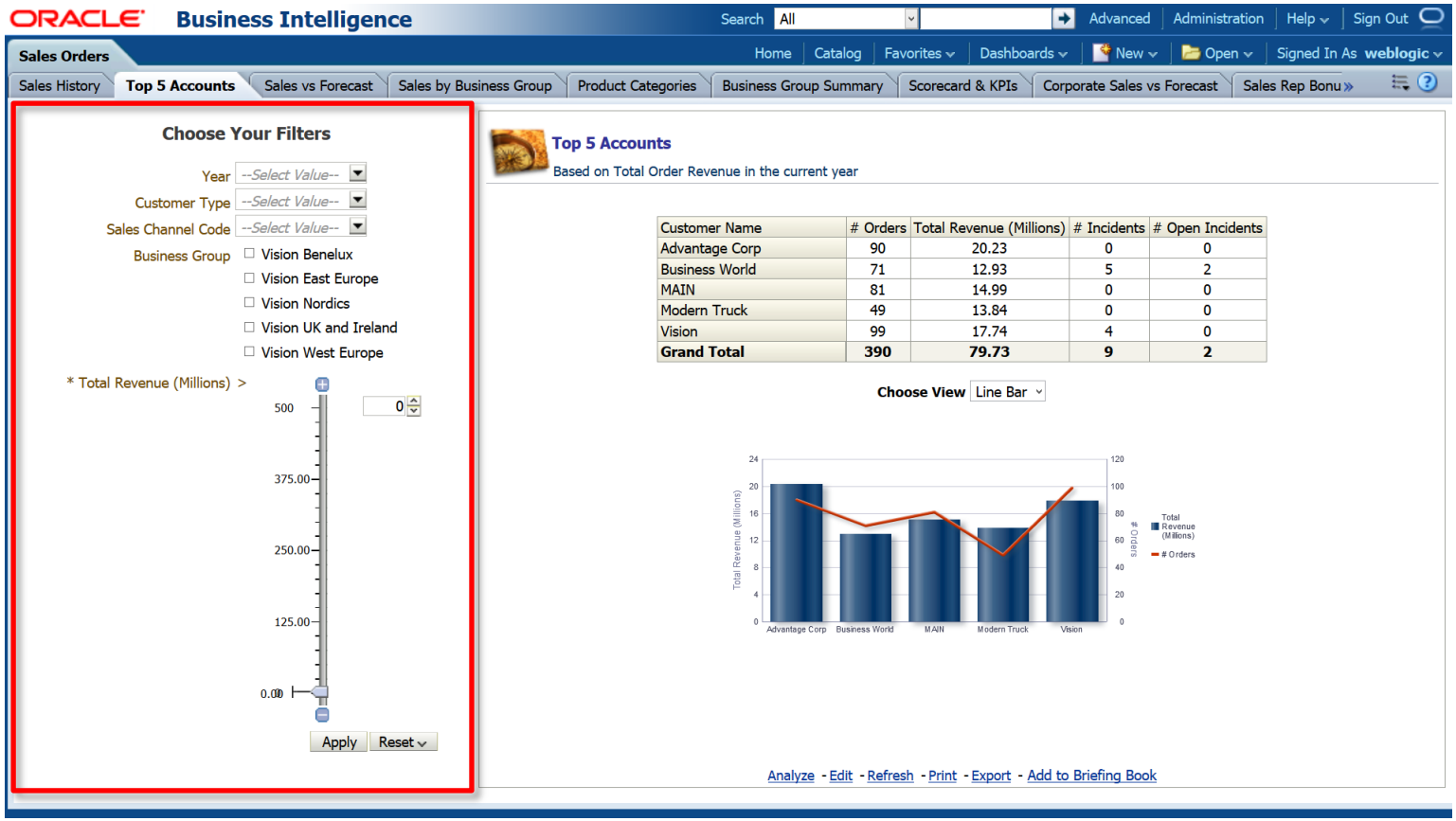
- Dashboards Prompts Overview
  - Is Prompted Filters
  - Best Practice
  - Types of Prompt
- Creating Dashboard Prompts
- Further Notes

PEAK indicators

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

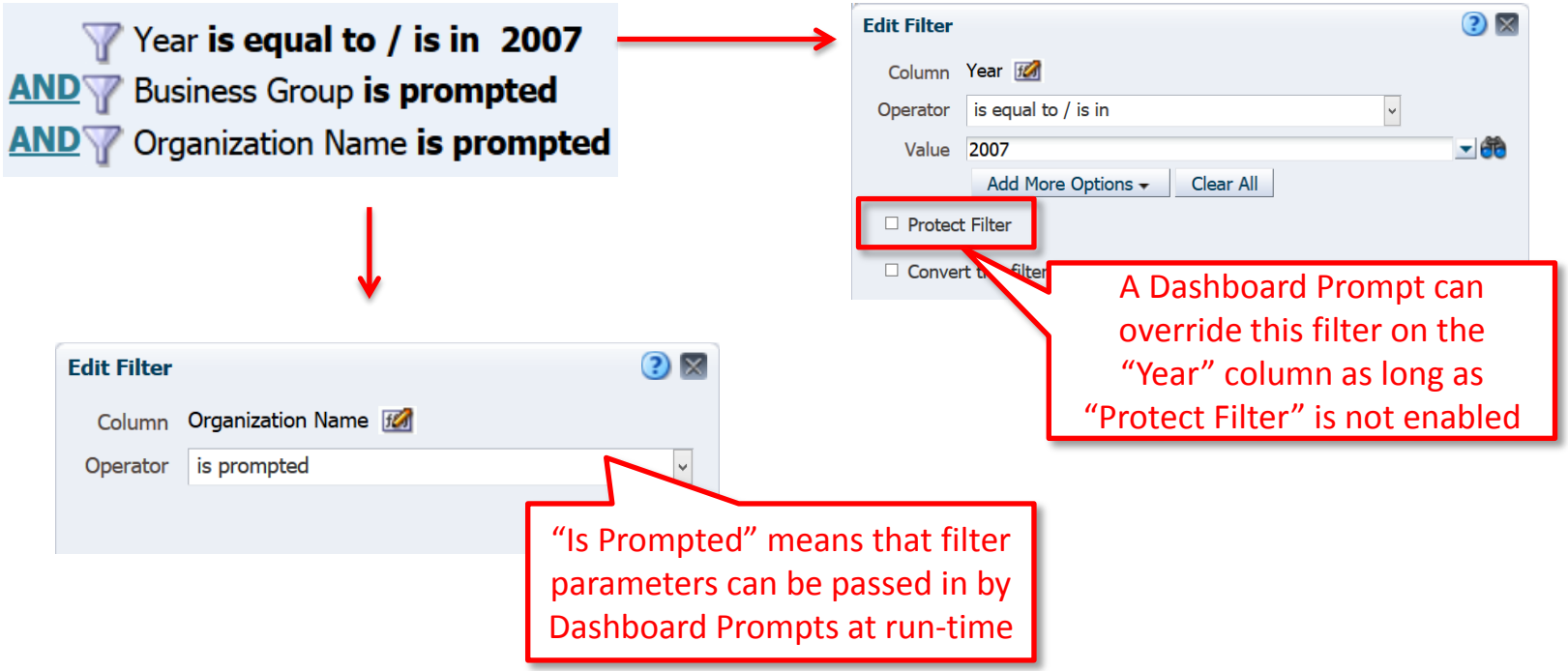


Overview

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

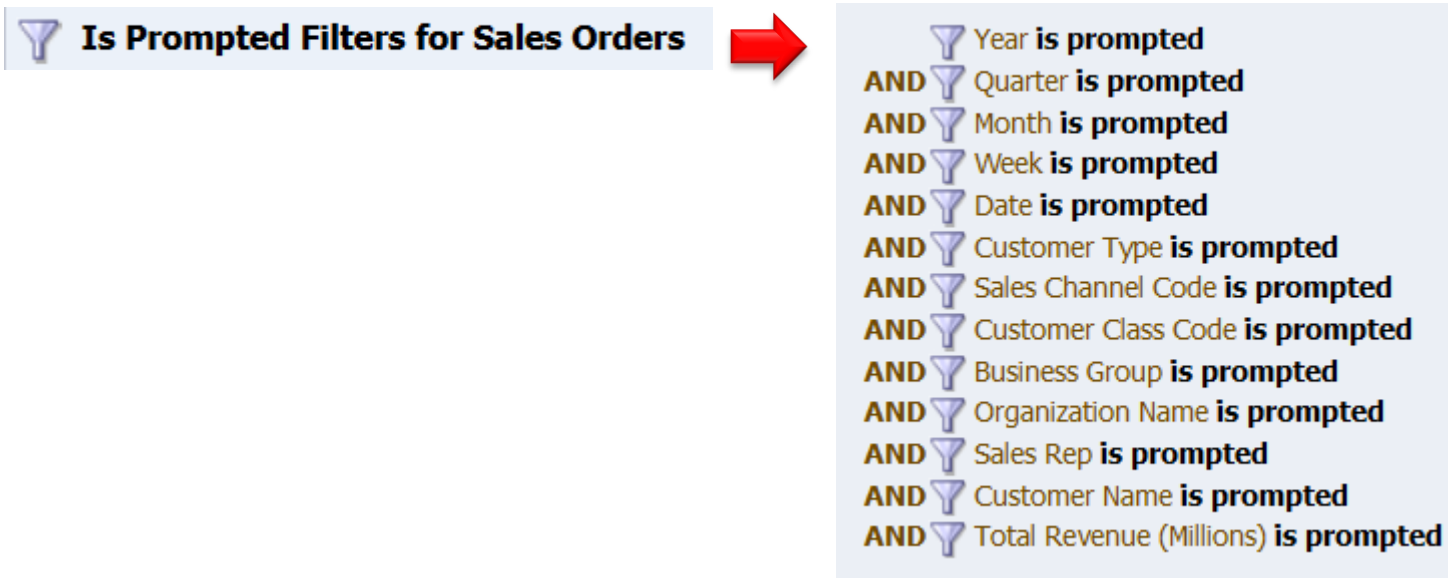
    or
  - The columns have "Is Prompted" filters on the Analysis



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!

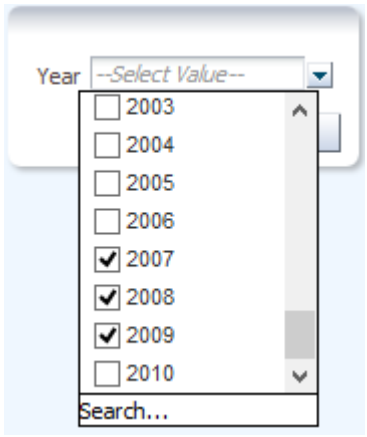


- If you ever add further columns to your dashboard prompts, you just need to modify this one saved filter and then the necessary “Is Prompted” filters will be automatically propagated to all the requests

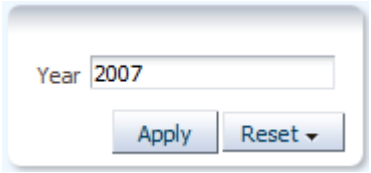
Overview

Types of Prompts

Choice List

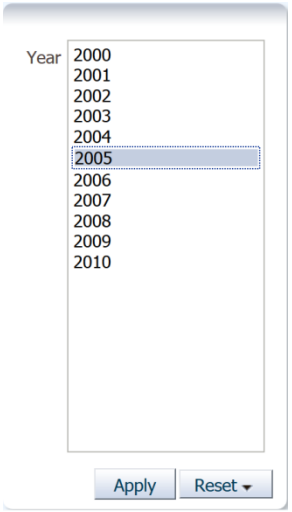


Text Field



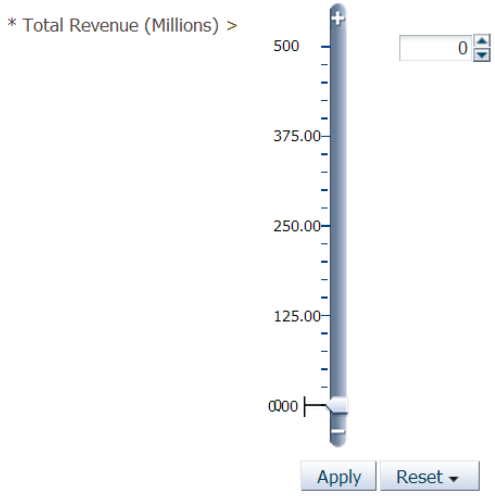
Check Boxes

List Box



Radio Buttons

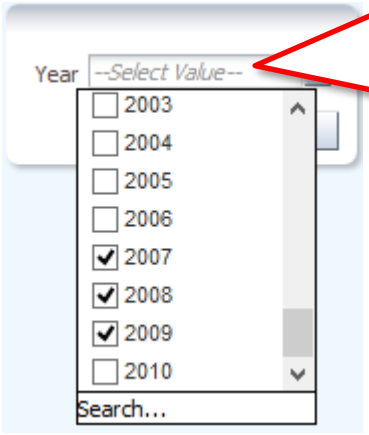
Slider



Overview

Types of Prompts

Choice List



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

List Box

Radio Buttons

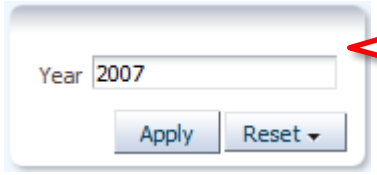
Slider

Overview

Types of Prompts

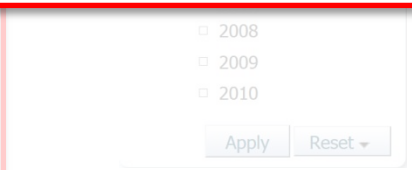
Choice List

Text Field



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

Radio Buttons

Slider

Overview

Types of Prompts

Choice List

Check Boxes

"**Check Boxes**" allow users to select one or more values from a list

List Box

Radio Buttons

Slider

Overview

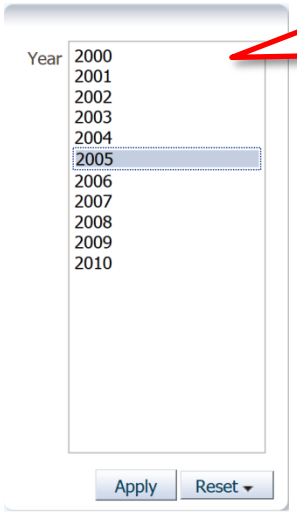
Types of Prompts

Choice List

Text Field

Check Boxes

List Box



A "**List Box**" is simply a box containing a list of values.

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

Slider

Overview

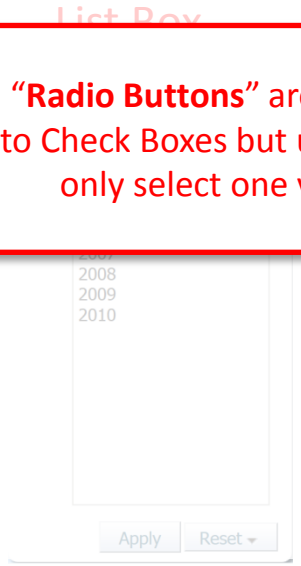
Types of Prompts

Choice List

Text Field

Check Boxes

List Box



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

Radio Buttons

Slider

Overview

Types of Prompts

Choice List

Text Field

Check Boxes

List Box

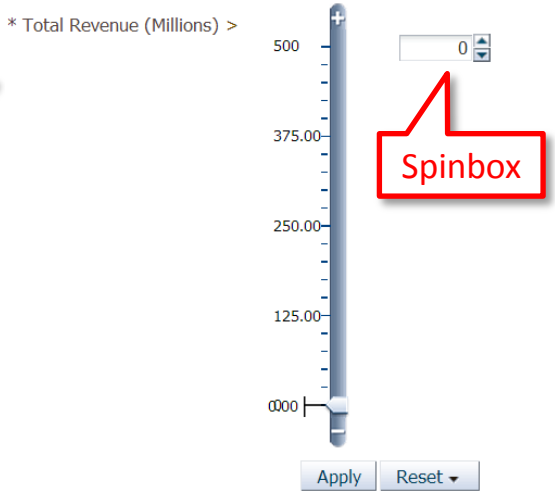
"**Sliders**" are for numeric data types only and allow the user to choose values using a slider bar.

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



PEAK indicators

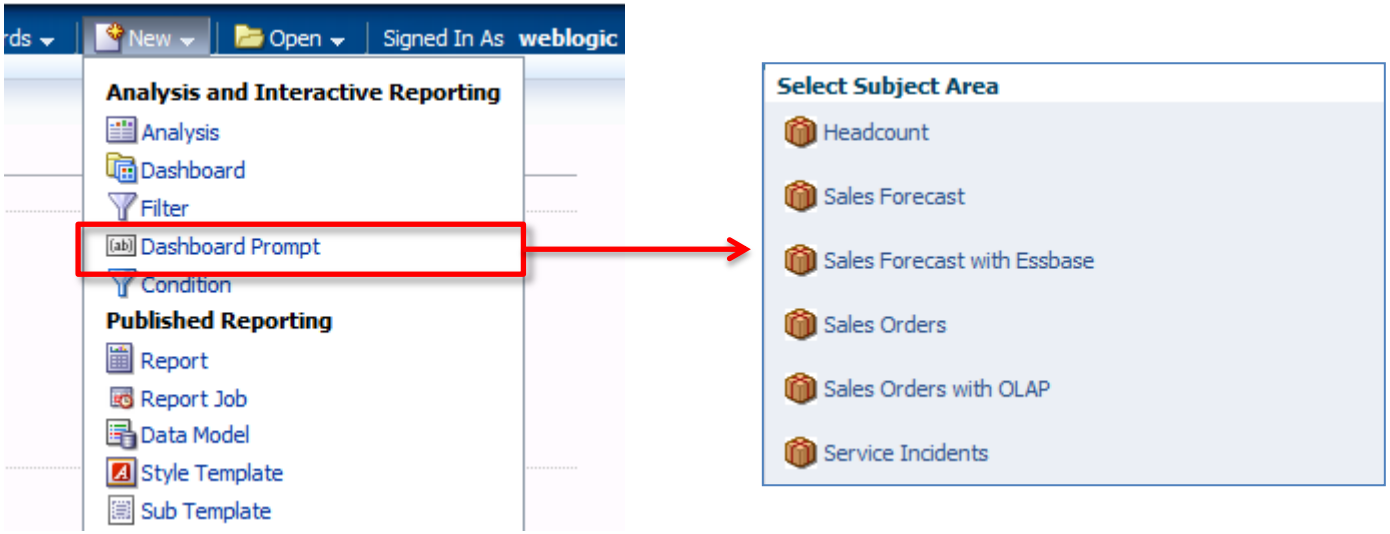
Dashboard Prompts

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:

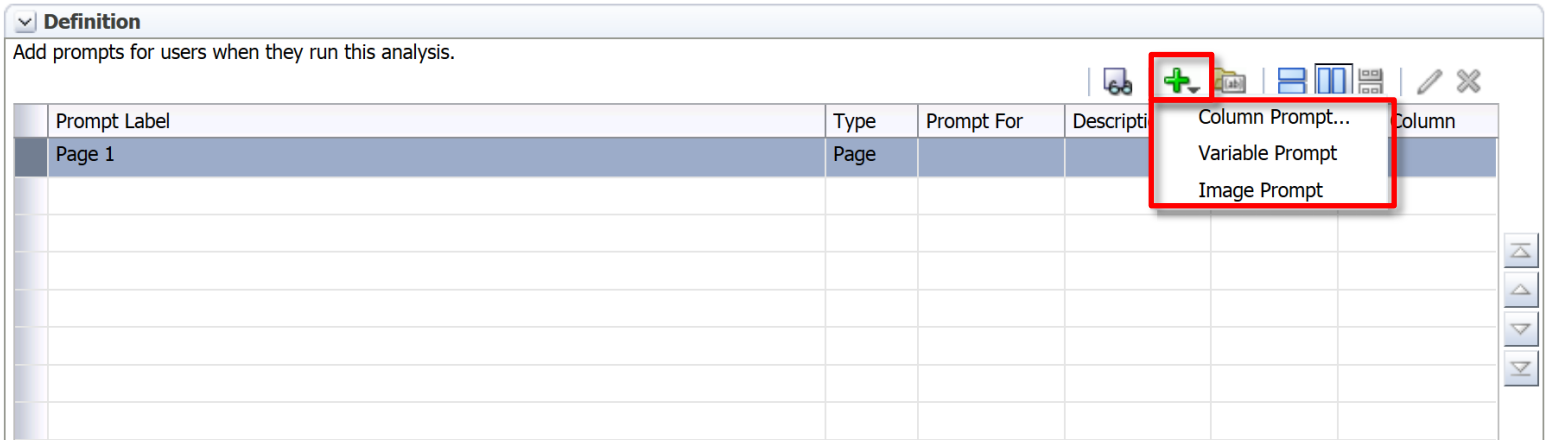


- NOTE: A Dashboard Prompt can be used for Analyses coming from other Subject Areas as long as the columns present in the Dashboard Prompt have the exact same name across all the Subject Areas

Creating Dashboard Prompts

2) Add Prompts

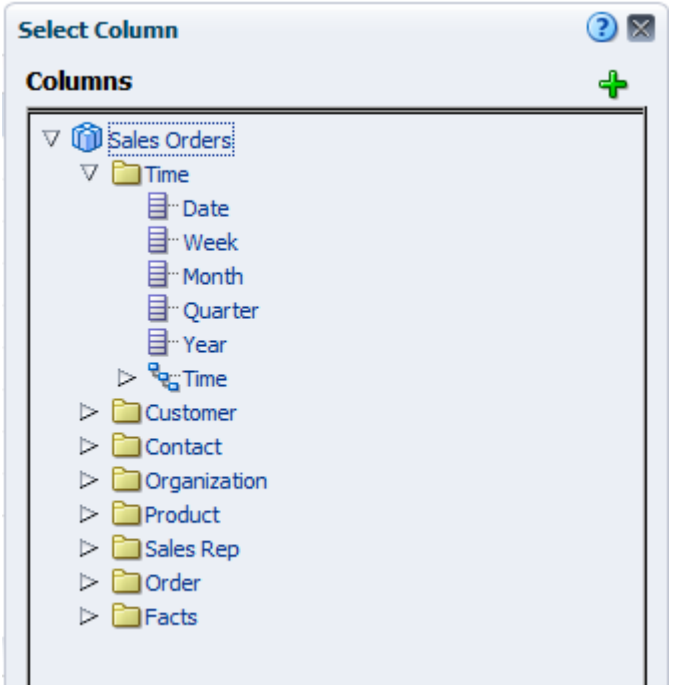
- Click the button to add a new Prompt, you have 3 choices:
  - **Column Prompt** - Obtain list of values from a Subject Area column
  - **Variable Prompt** - Provide a custom list of values to populate a variable
  - **Image Prompt** - Allow the user to select values using an "HTML image map"



Creating Dashboard Prompts

3) Choose Column

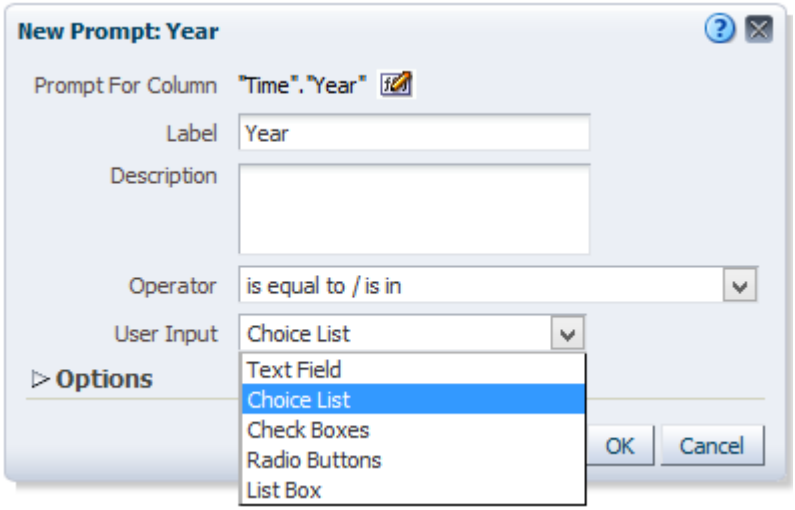
- Assuming you chose a “Column Prompt”, you will then need to choose a Subject Area column:



Creating Dashboard Prompts

4) Standard Settings

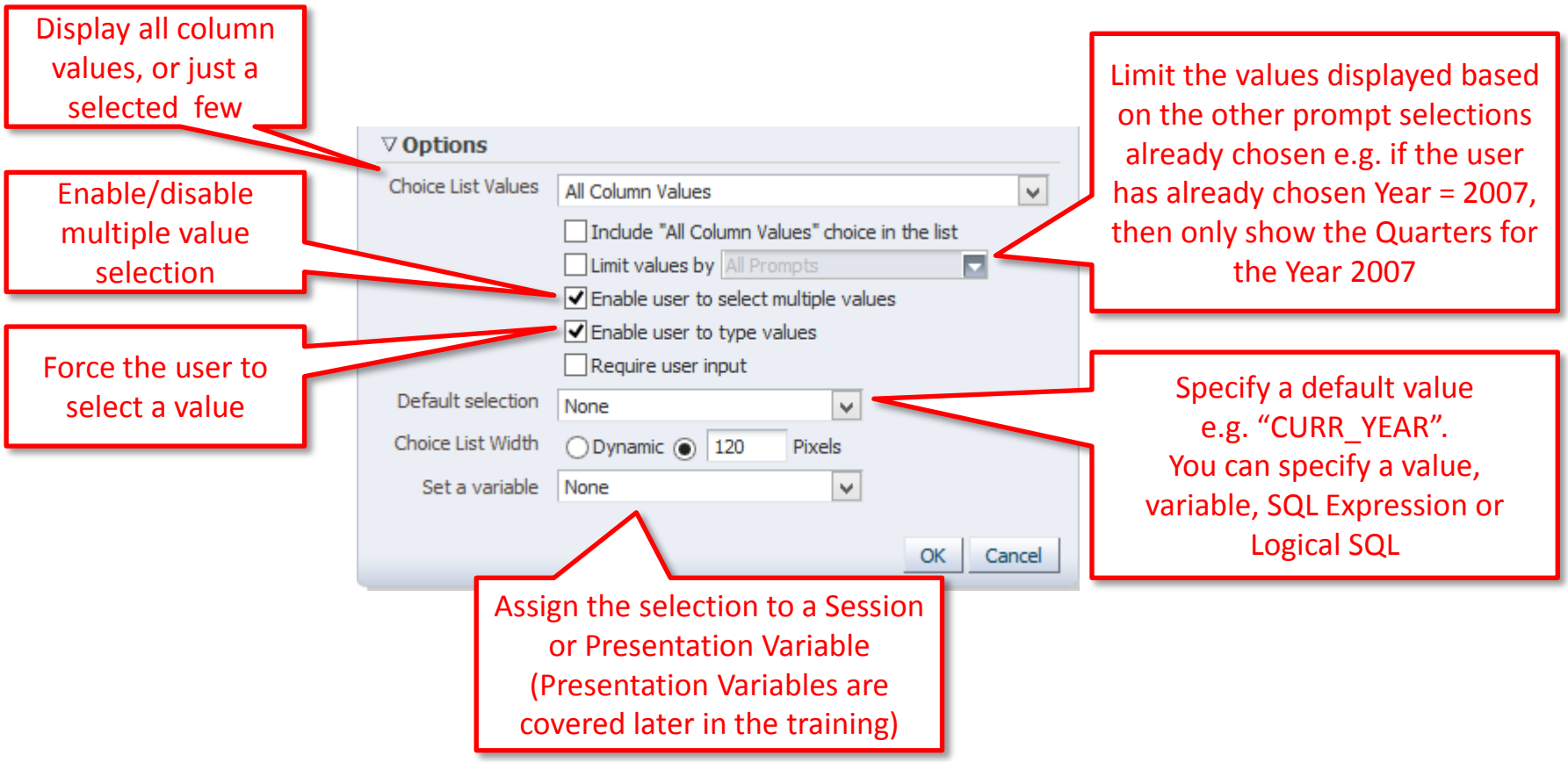
- Now that you have chosen the column, you then need to specify the following:
  - Label - Label to display to user
  - Operator - e.g. “is equal to / is in” or “is greater than”
  - User Input - Choose from the various types of Prompt available



Creating Dashboard Prompts

5) Further Options

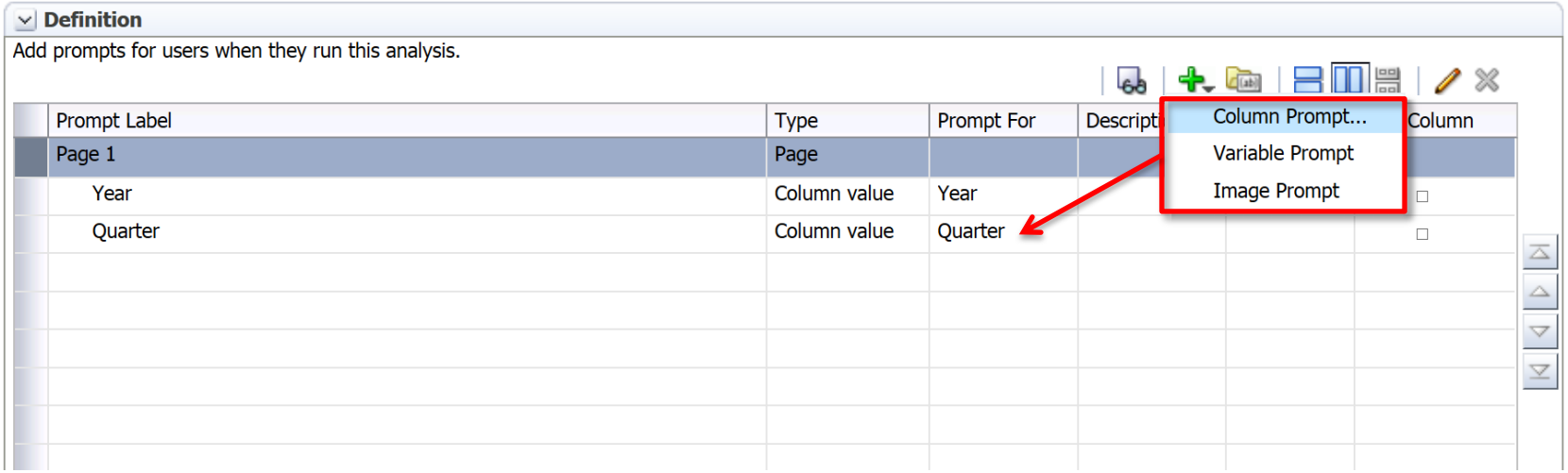
- Depending on the type of prompt, you will then be able to set various other options. For example:



Creating Dashboard Prompts

6) Add Further Prompts

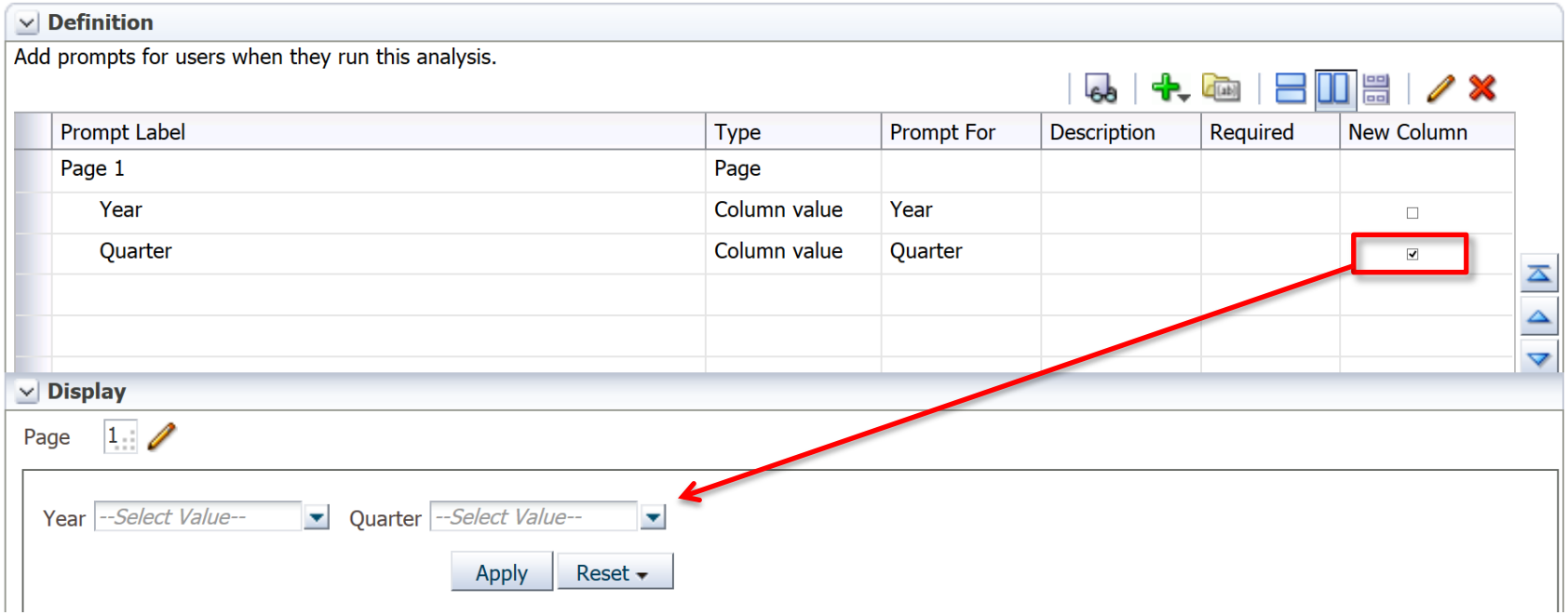
- Add further Prompts as necessary



Creating Dashboard Prompts

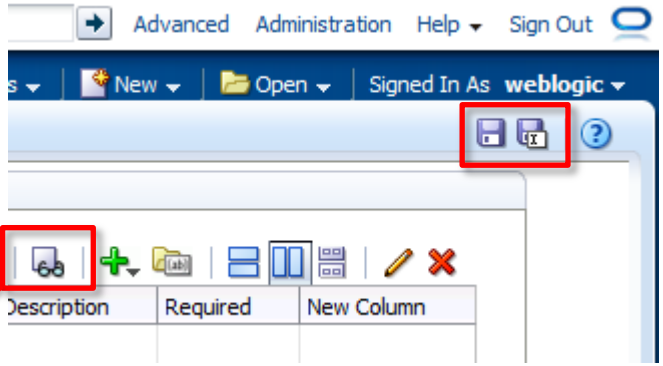
7) New Column

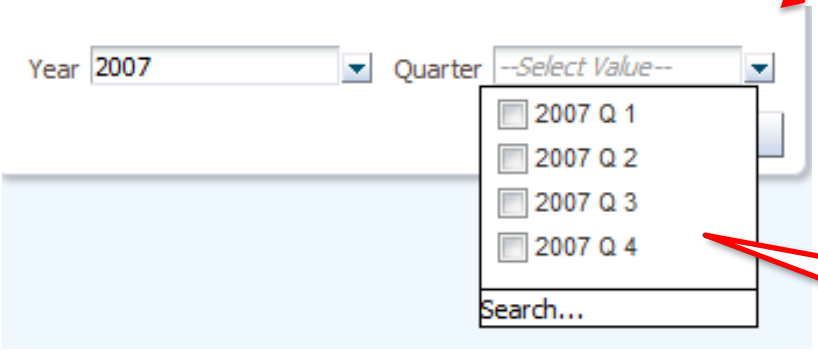
- The Prompts will, by default, be listed vertically. If you wish them to appear side-by-side then check the "**New Column**" option



Creating Dashboard Prompts

8) Save and Preview



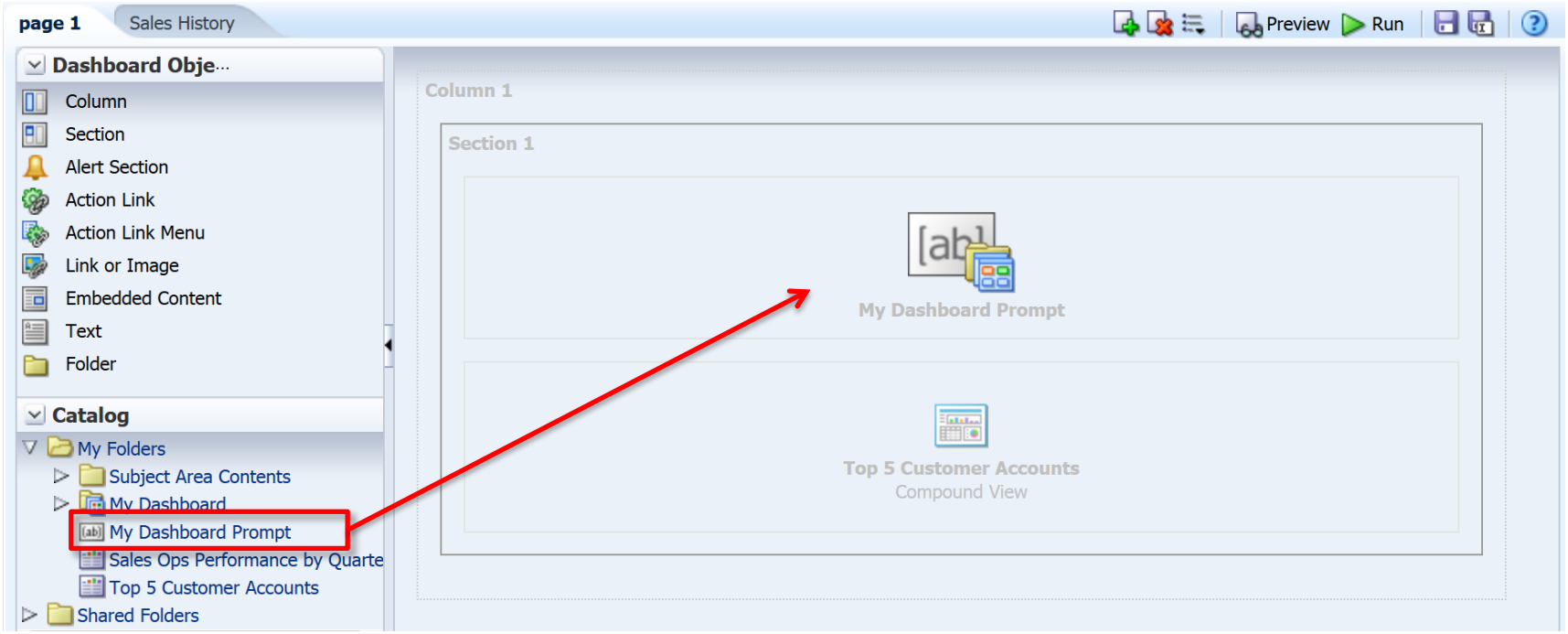


Note that the "Quarters" Prompt is *limited* to display values only for the Year selected

Creating Dashboard Prompts

9) Add to Dashboard

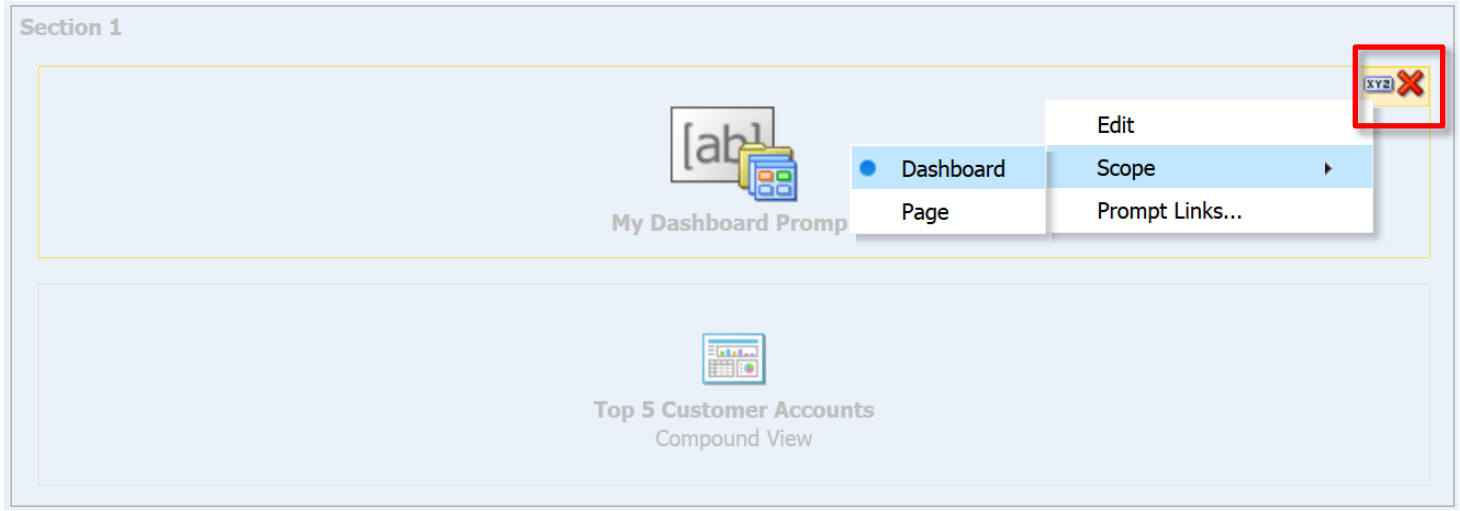
- You can now add your Dashboard Prompt to the Dashboard Page



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

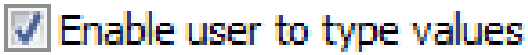
- You can now save your Dashboard Page and test!

PEAK indicators

Dashboard Prompts
Further Notes

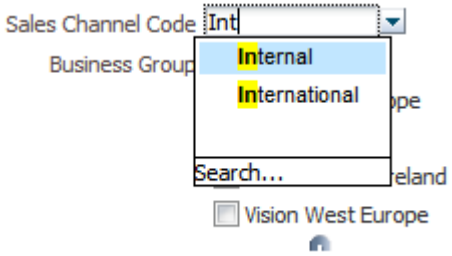
Further Notes

Auto-Complete

- If you enable the 

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

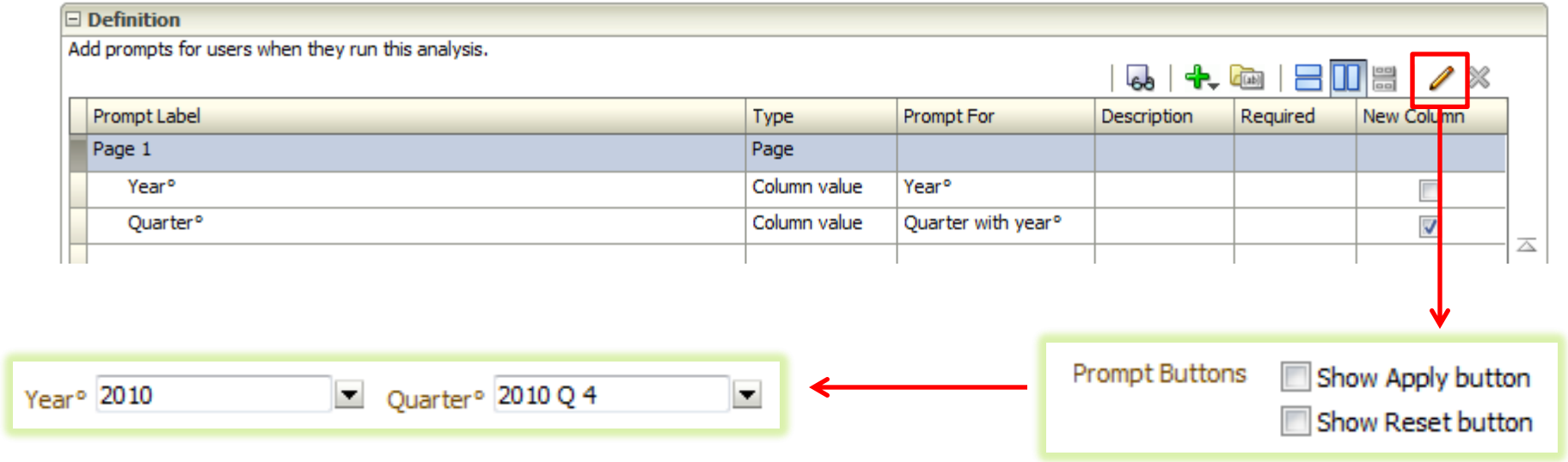
- This means that relevant values are shown to the user as they type in the prompt!



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



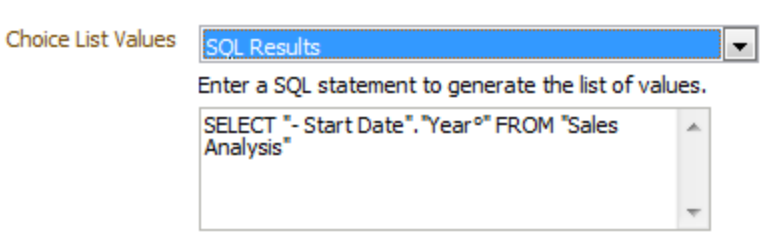
Further Notes

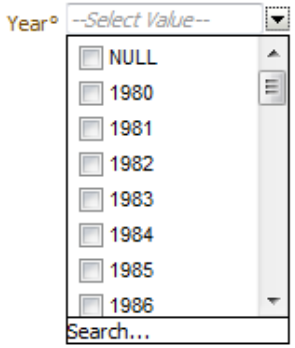
Defining Your Own Logical SQL

- 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":



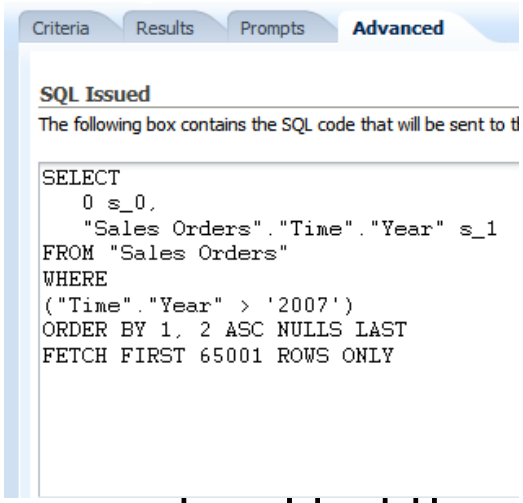


- How do you write the Logical SQL statement that only returns the "Year" values when there is some fact data.

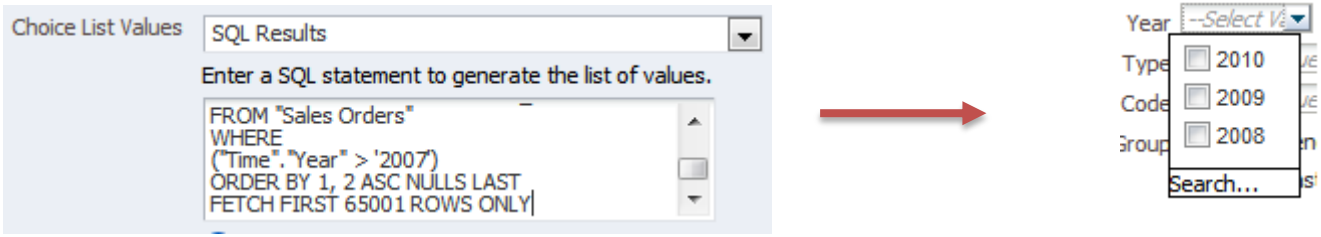
Further Notes

Defining Your Own Logical SQL

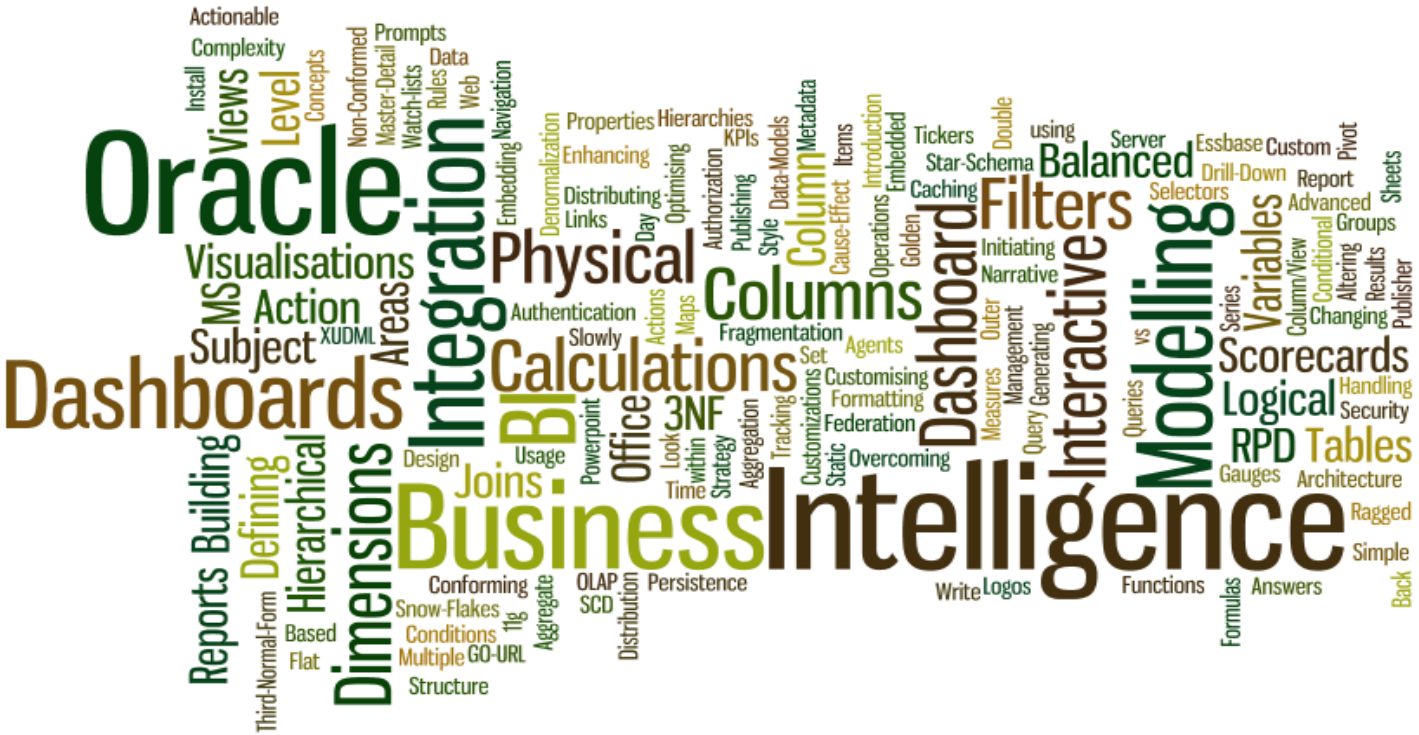
- It is simple! You just build the required query using Answers and then copy the Logical SQL from the "Advanced" tab:



- 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?



PEAK indicators

PEAK indicators

Helping Your Business Intelligence Journey