Oracle BI 11g Reports and Dashboards

Drill-Down and Navigation

PEAK indicators

Drill-Down and Navigation

Agenda

- Drill-Down
  - Overview
  - On Column Headings
  - On Graphs
  - Answers Results Tab
  - Within Dashboards
- Navigate to BI Content
  - About Actions
  - “Is Prompted” Filters
  - Creating Actions
  - Example
  - Conditions
  - Multiple Action Links, with Conditions
  - With Confirmation Messages
- Disabling Interactions

PEAK indicators

Drill-Down and Navigation

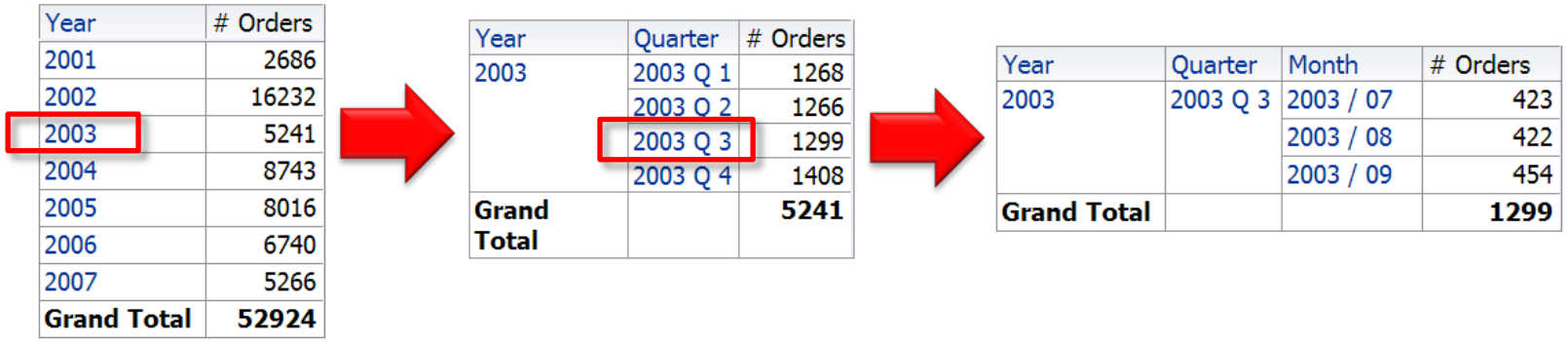
Drill-Down

Drill-Down

Overview

- Certain Dimension columns are configured to allow users to “drill-down” from one hierarchy level to another. A good example of this is with “Time”:
  - Year > Quarter > Month > Date

- The drill-down functionality is implemented by the “BI Development Team” when producing the Subject Areas, this means that no effort is needed from the report developers as the capability exists automatically:



Year	# Orders
2001	2686
2002	16232
2003	5241
2004	8743
2005	8016
2006	6740
2007	5266
Grand Total	**52924**

Year	Quarter	# Orders
2003	2003 Q 1	1268
	2003 Q 2	1266
	2003 Q 3	1299
	2003 Q 4	1408
Grand Total		**5241**

Year	Quarter	Month	# Orders
2003	2003 Q 3	2003 / 07	423
		2003 / 08	422
		2003 / 09	454
Grand Total			**1299**

Drill-Down

On Column Headings

- You can also “drill-down” on the column heading, this will have the effect of drilling down to all the child values that occur at the next hierarchy level down:

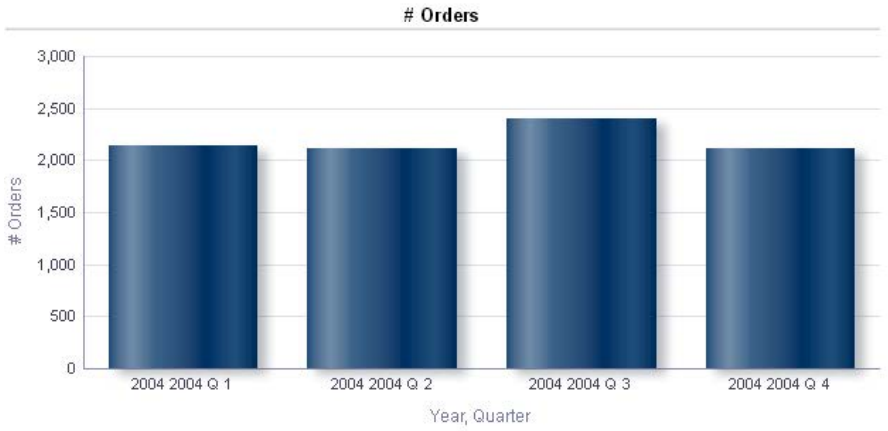
Year	# Orders
2001	2686
2002	16232
2003	5241
2004	8743
2005	8016
2006	6740
2007	5266
Grand Total	**52924**

Year	Quarter	# Orders
2001	2001 Q 1	1131
	2001 Q 2	1212
	2001 Q 3	28
	2001 Q 4	315
2002	2002 Q 1	1325
	2002 Q 2	7086
	2002 Q 3	6700
	2002 Q 4	1121
2003	2003 Q 1	1268
	2003 Q 2	1266
	2003 Q 3	1299
	2003 Q 4	1408
2004	2004 Q 1	2129
	2004 Q 2	2113
	2004 Q 3	2391
	2004 Q 4	2110
2005	2005 Q 1	2129
	2005 Q 2	1967
	2005 Q 3	1835
	2005 Q 4	2085
2006	2006 Q 1	2000
	2006 Q 2	1856
	2006 Q 3	1456
	2006 Q 4	1428
2007	2007 Q 1	1298
	2007 Q 2	1346

Refresh - Print - Export - Copy

Drill-Down
On Graphs

- Drill-downs are automatically enabled on graphs by default too!



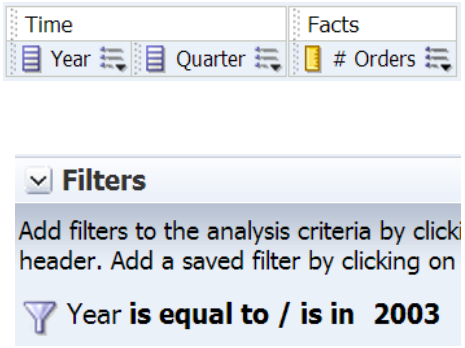
Drill-Down

Answers Results Tab

- Note that if you drill-down on the Answers "Results" tab, it will actually modify the Analysis!
- For example, here we drill-down on Year = 2003 on the Results tab and the definition of the Analysis has changed:
  - The "Quarter" column has been automatically added to the Analysis
  - The Analysis is now configured to filter for Year = 2003

Year	# Orders
2001	2686
2002	16232
2003	5241
2004	8743
2005	8016
2006	6740
2007	5266
Grand Total	**52924**

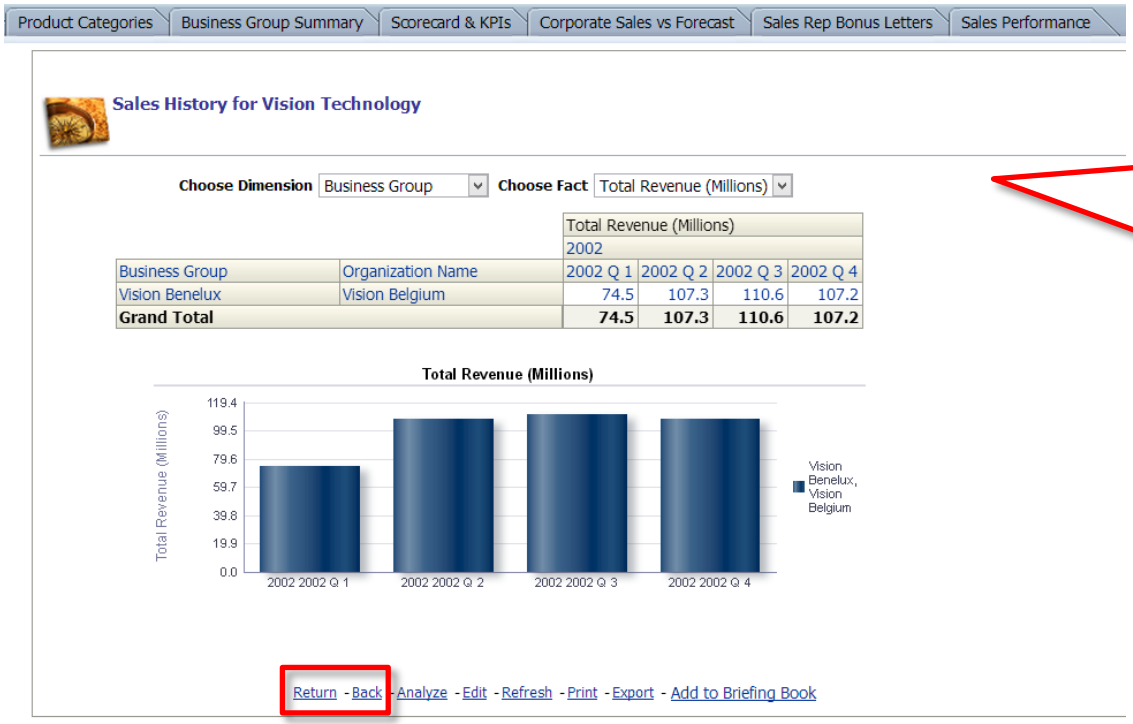
Year	Quarter	# Orders
2003	2003 Q 1	1268
	2003 Q 2	1266
	2003 Q 3	1299
	2003 Q 4	1408
Grand Total		**5241**



- NOTE: To prevent this from happening, use the Preview option to test out your drill-downs!

Drill-Down
Within Dashboards

- When you drill-down within a Dashboard, you will get two links underneath the Analysis to undo the drill-down operations:
  - **Return**: To return you all the way back up to the top level
  - **Back**: To take you back up one level of drill



If you are performing drill-downs within a Dashboard then remember to set the "Drill in place" option for the Dashboard Section

PEAK indicators

Drill-Down and Navigation

Navigate to BI Content

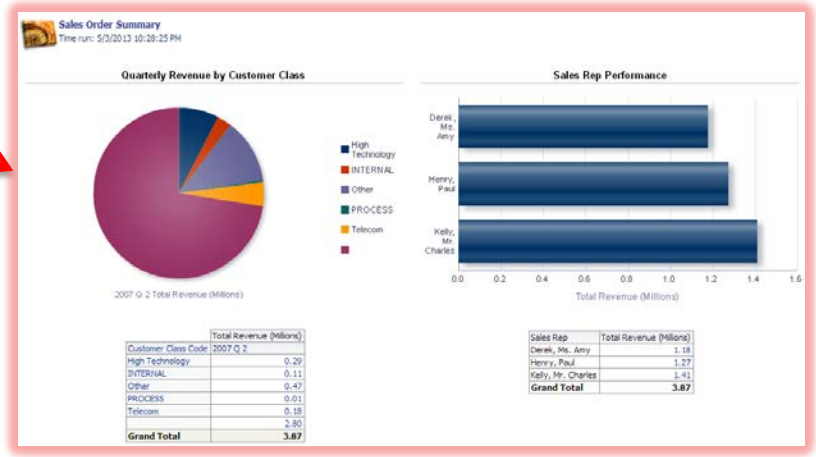
Navigate to BI Content

About Actions

- Oracle BI comes with a powerful feature called "**Action Framework**" which enables users to initiate various "Actions" from their Analyses/Dashboards
  - One of the Actions available is "**Navigate to BI Content**" which allows you to navigate directly from one Analysis to another Analysis or Dashboard Page

	Total Revenue (Millions)							
	▽ Total							
		▷ 2001	▷ 2002	▷ 2003	▷ 2004	▷ 2005	▷ 2006	▷ 2007
Business Group		2001	2002	2003	2004	2005	2006	2007
Vision Benelux	2736.24	222.51	399.48	415.28	422.36	471.47	387.98	417.15
Vision East Europe	594.15	48.77	75.29	98.24	90.99	93.59	94.28	92.97
Vision Nordics	1273.03	86.48	57.50	56.67	261.17	268.71	267.73	274.76
Vision UK and Ireland	120.13	8.18					9.46	16.42
Vision West Europe	864.03	72.07					75.57	49.48
Grand Total	**5587.57**	**438.02**	**610.54**	**956.96**	**908.50**	**957.73**	**865.02**	**850.78**

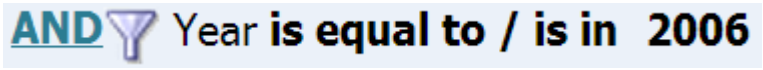
View a Summary of Sales Orders



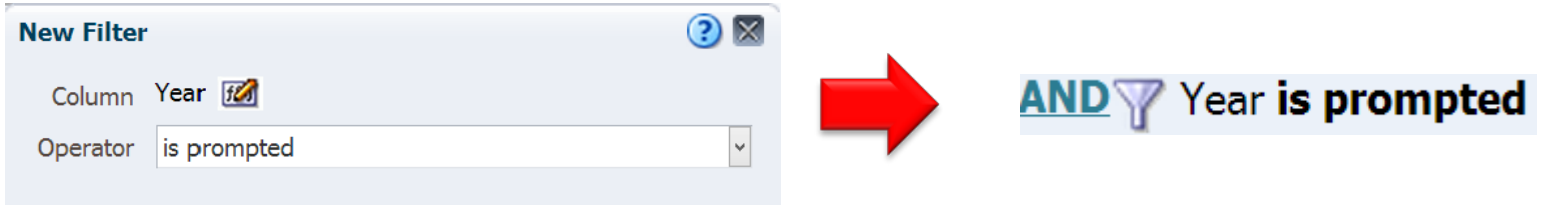
Navigate to BI Content

"Is Prompted" Filters

- When you perform navigation, you typically wish to pass in filter criteria to the target request. For example, if the user clicks on a sales measure for the Year 2007 then the target report should also filter for the Year 2007
- Passing filters from one Analysis to another in this way only works if:
  - The target Analysis already has a filter for the specific column (in which case the filter criteria will be overridden):



  - Or the target Analysis has an "Is Prompted" filter applied. For example:



Navigate to BI Content

"Is Prompted" Filters

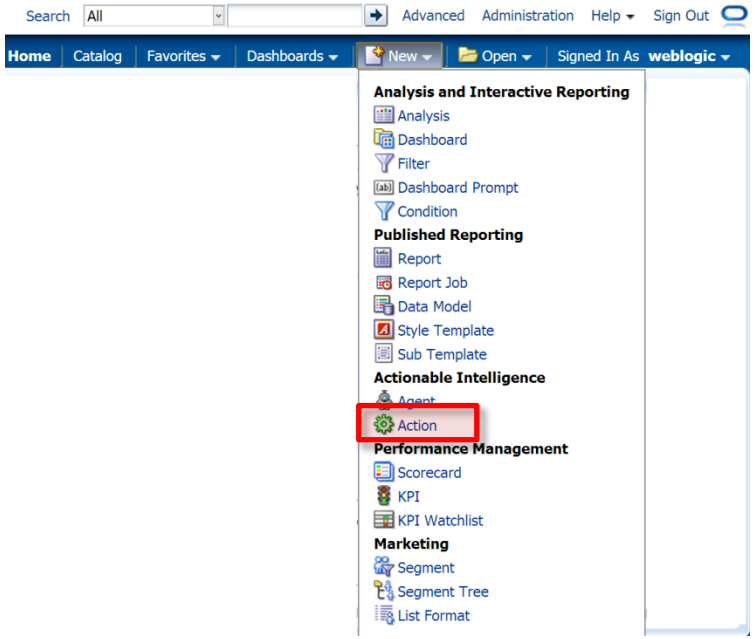
- As a best practice, it is suggested that you create a "Saved Filter" for each Subject Area which contains the set of "Is Prompted" filters for that Subject Area:

- You can then apply this Saved Filter to all your target Analyses, which will save you from having to add loads of individual "Is Prompted" filters to each Analysis

- Having a Saved Filter means that you only have to maintain your "Is Prompted" filters in one place

Creating Actions

- Actions can be created as re-usable objects, referred to as "**named**" Actions:



- Or you can create "**inline**" Actions:
  - If you want to use an Action only once, you can define it directly within an analysis, dashboard page, agent, scorecard objective, scorecard initiative, or KPI. These inline actions are not re-usable

Navigate to BI Content

Example

- Consider this example where will create an “in-line” Action to navigate from an Analysis to view a “Summary of Sales Orders”
  - The users will want to open up the target Analysis by clicking on one of the “Total Revenue (Millions)” values

Order Revenue by Quater

Figures displayed in Millions

	Total Revenue (Millions)			
Business Group	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4
Vision Benelux	105.51	99.90	105.80	105.94
Vision East Europe	23.19	24.46	21.12	24.20
Vision Nordics	63.14	67.09	70.62	73.90
Vision UK and Ireland	4.20	3.87	2.62	5.73
Vision West Europe	16.11	10.70	11.20	11.47
Grand Total	**212.16**	**206.01**	**211.37**	**221.24**

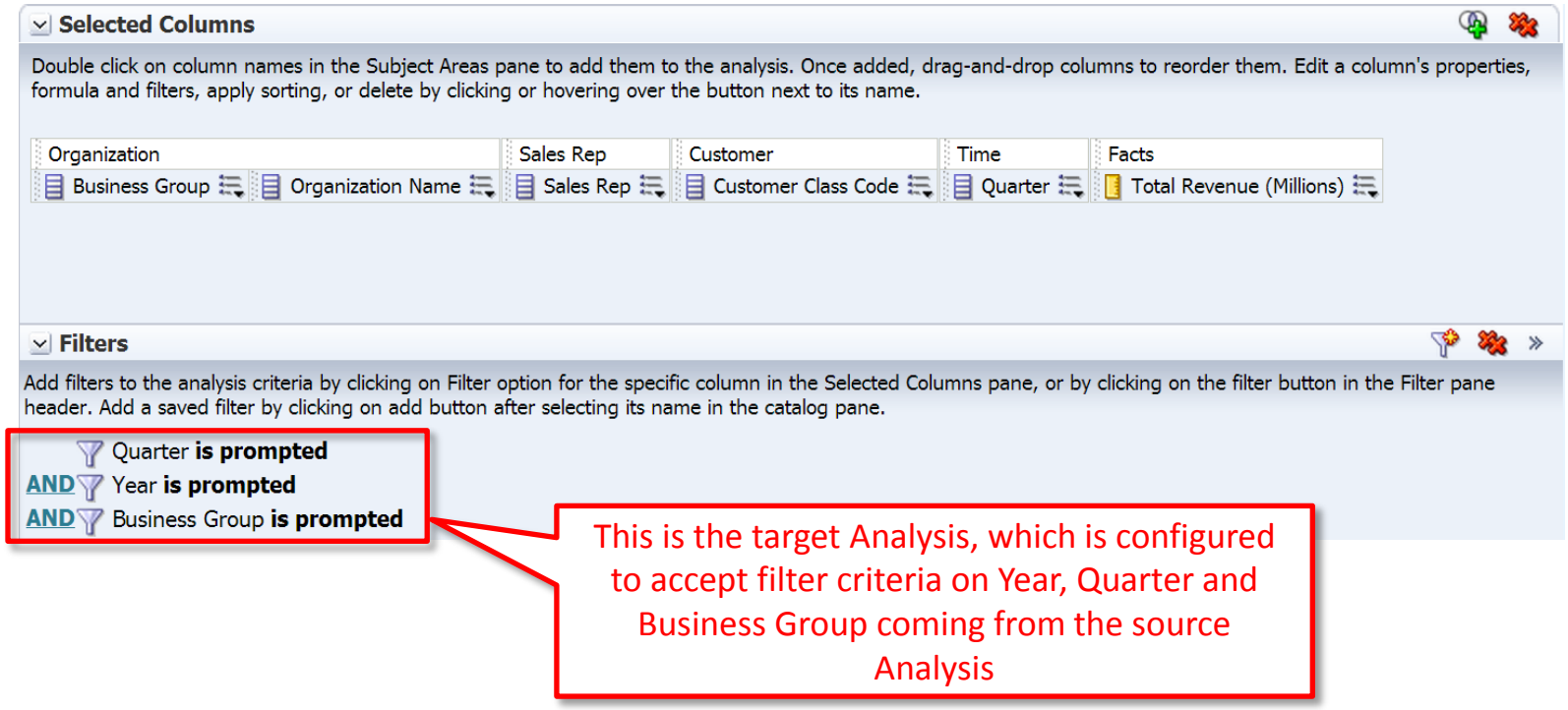
When we click on a Measure value, we need to make sure we pass in the appropriate filters to the target Analysis:

- Business Group
- Quarter

Navigate to BI Content

Step 1

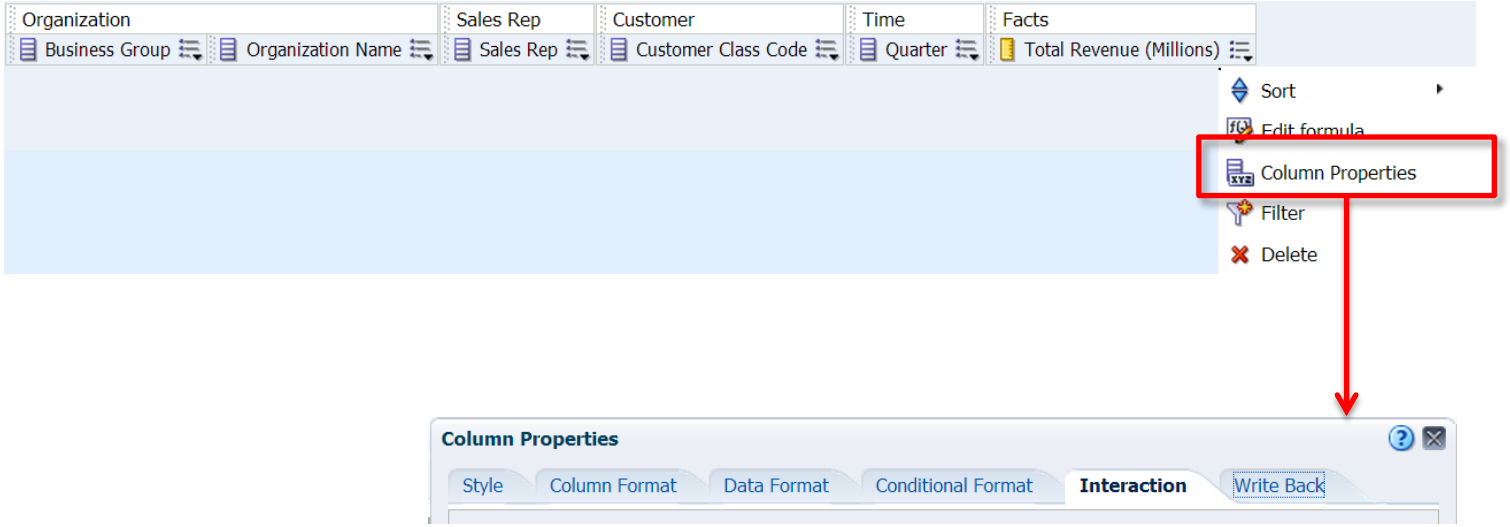
- Make sure the target Analysis has the appropriate “Is Prompted” filters in order to accept the required filter parameters from the source Analysis:



Navigate to BI Content

Step 2

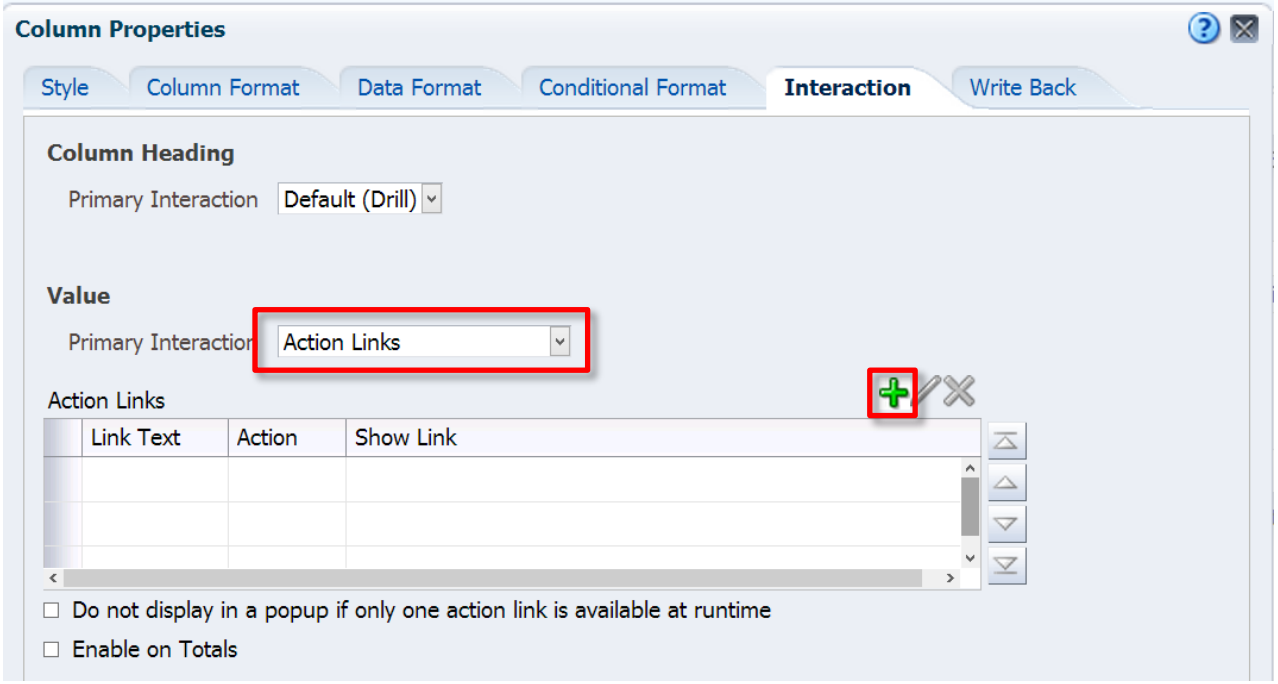
- On the source Analysis open up the “Column Properties” for the column which is to be used for the navigation
- Go to the “Interaction” tab



Navigate to BI Content

Step 3

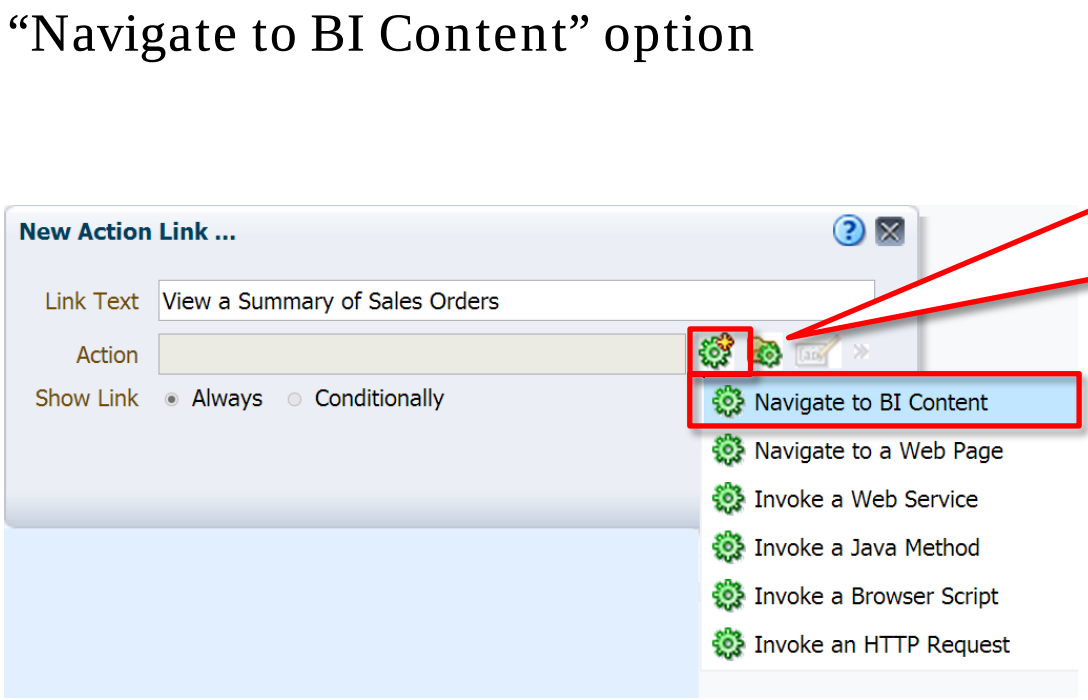
- Modify the Value “Primary Interaction” setting to “**Action Links**”
- Click the ✚ button the add a new Action Link



Navigate to BI Content

Step 4

- In the “Link Text” field, enter a short piece of text to display to the user when the Action Link is invoked
- Click on the button to create a new “in-line” Action, and select the “Navigate to BI Content” option

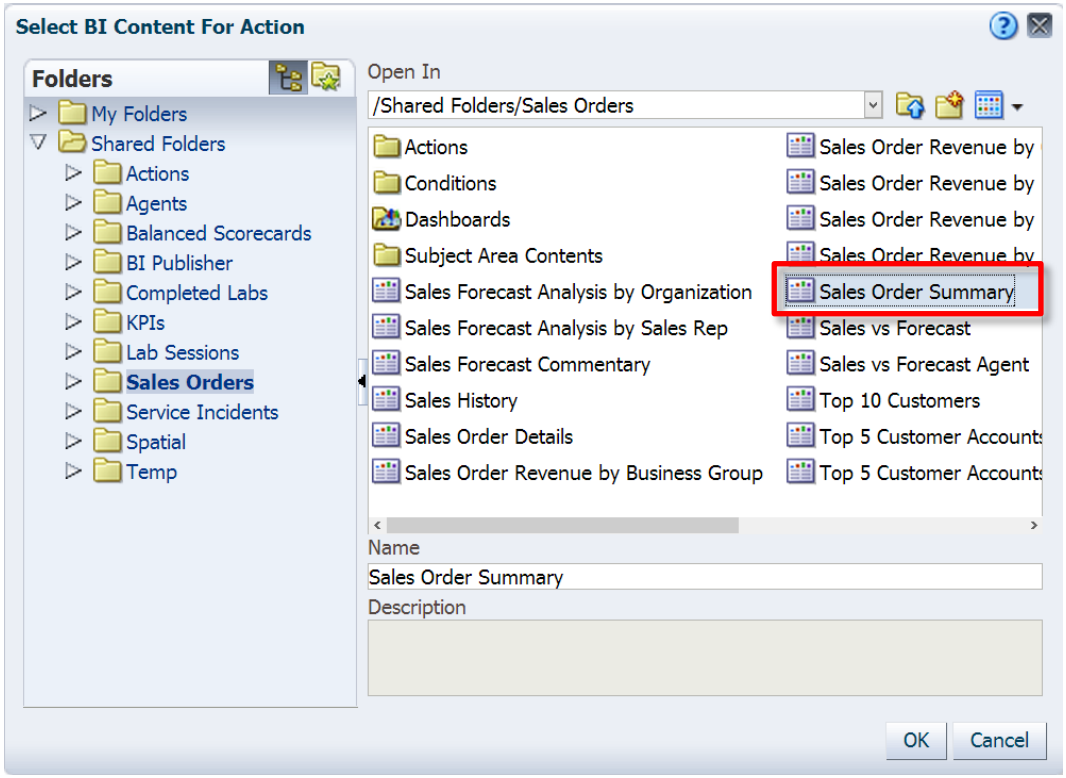


NOTE: If we instead wanted to use an existing “named” Action then we would use this button to select it from the Catalog

Navigate to BI Content

Step 5

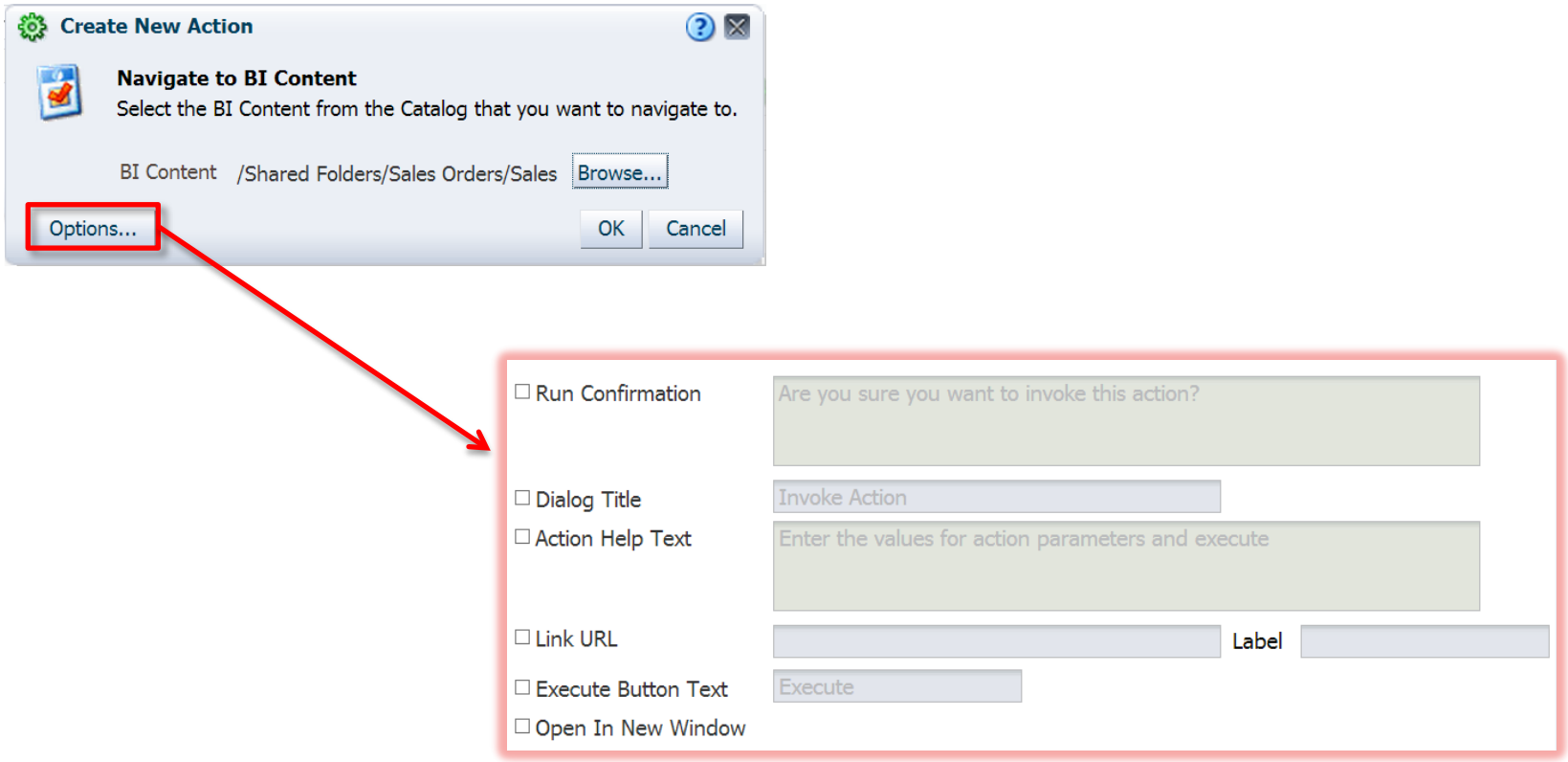
- Browse for and select the target Analysis from the Catalog:
  - The target could also be a Dashboard Page (even one which is “hidden”)



Navigate to BI Content

Step 6

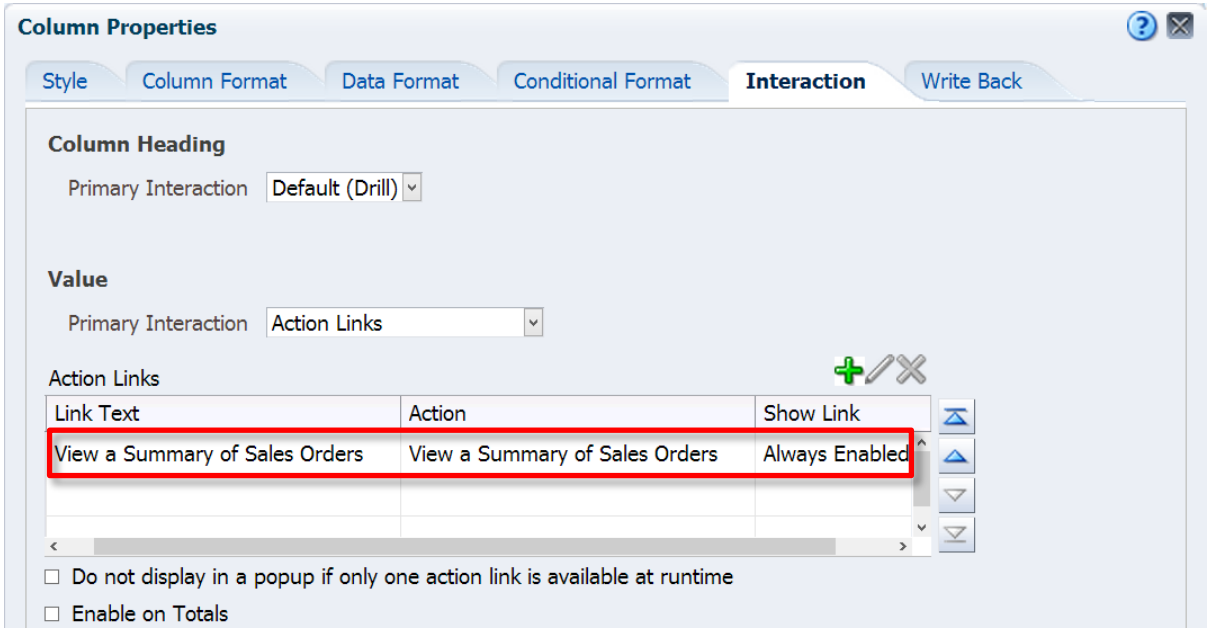
- If you wish, you can apply some further “Options” such as popping up a confirmation message to the user:



Navigate to BI Content

Step 7

- That's it! Our Action Link has been configured



Navigate to BI Content

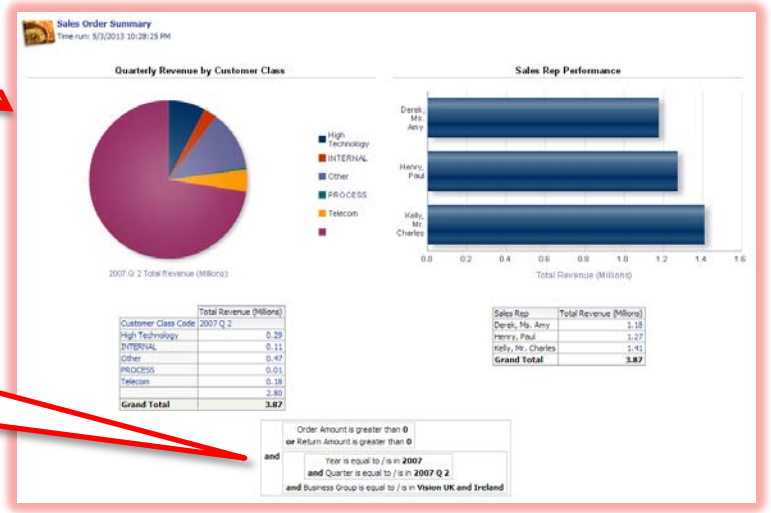
Step 8

- It is now time to test out the Action Link! When running the Analysis the Measure values are now hyperlinked:

Order Revenue by Quarter for 2007

Figures displayed in millions

	Total Revenue (Millions)			
Business Group	2007 Q 1	2007 Q 2	2007 Q 3	2007 Q 4
Vision Benelux	105.51	99.90	105.80	105.94
Vision East Europe	23.19	24.46	21.12	24.20
Vision Nordics	63.14	67.09	70.62	73.90
Vision UK and Ireland	4.20	3.87	2.62	5.73
Vision West Europe	16.11	10	View a Summary of Sales Orders	
Grand Total	**212.16**	**206.01**	**211.37**	**221.24**



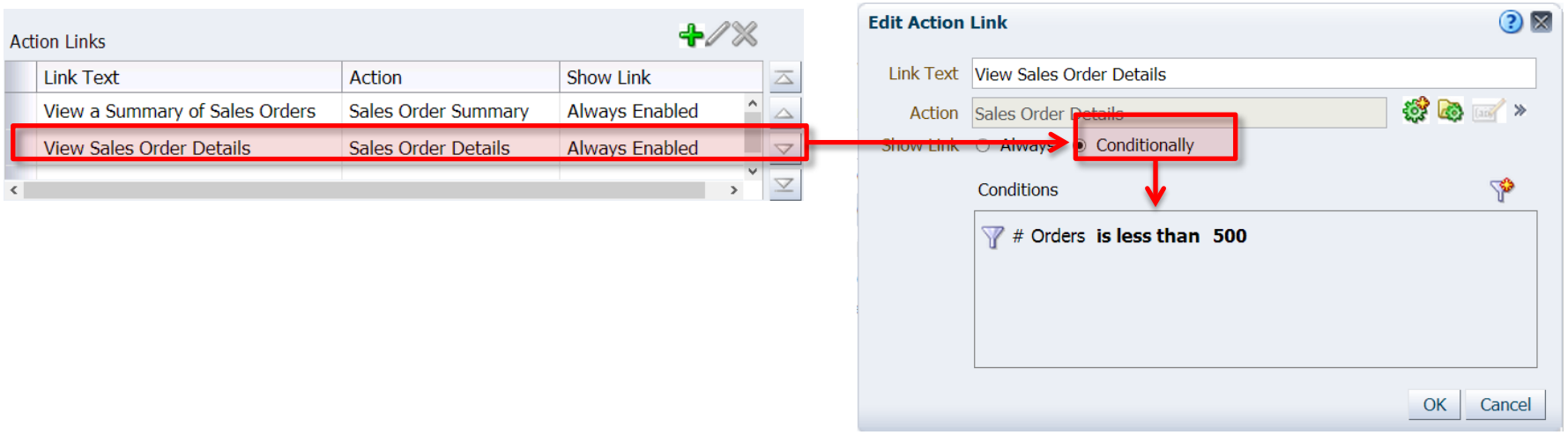
Our target Analysis has correctly filtered for:

- Quarter = 2007 Q 2
- Business Group = “Vision UK and Ireland”

Navigate to BI Content

Conditions

- Action Links can also be configured to be enabled “Conditionally”
  - In the example below, we have added a second Action Link which has been enabled conditionally to appear only if there are less than 500 Orders
  - The aim in this case is to prevent users from navigating to a detail report that will return more than 500 records



Navigate to BI Content

Multiple Action Links, with Conditions

- Depending on which Measure value the user clicks on, the set of Action Links will be different:

	Total Revenue (Millions)							
	▽ Total							
		▷ 2001	▷ 2002	▷ 2003	▷ 2004	▷ 2005	▷ 2006	▷ 2007
Business Group		2001	2002	2003	2004	2005	2006	2007
Vision Benelux	2736.24	222.51	399.48	415.28	422.36	471.47	387.98	417.15
Vision East Europe	594.15	48.77	75.29	98.24	90.99	93.59	94.28	92.97
Vision Nordics	1273.03	86.48	57.50	56.67	261.17	268.71	267.73	274.76
Vision UK and Ireland	120.13	8.18	4	View a Summary of Sales Orders			39.46	
Vision West Europe	864.03	72.07	74.08	369.93	116.65	106.25	75.57	49.48
Grand Total	**5587.57**	**438.02**	**610.54**	**956.96**	**908.50**	**957.73**	**865.02**	**850.78**

There are more than 500 Orders that make up the Total Revenue figure of 56.7 Million.
This exceeds the limits of the Condition applied to the second Action Link, so it does not display

	Total Revenue (Millions)							
	▽ Total							
		▷ 2001	▷ 2002	▷ 2003	▷ 2004	▷ 2005	▷ 2006	▷ 2007
Business Group		2001	2002	2003	2004	2005	2006	2007
Vision Benelux	2736.24	222.51	399.48	415.28	422.36	471.47	387.98	417.15
Vision East Europe	594.15	48.77	75.29	98.24	90.99	93.59	94.28	92.97
Vision Nordics	1273.03	86.48	57.50	56.67	261.17	268.71	267.73	274.76
Vision UK and Ireland	120.13	8.18	4	View a Summary of Sales Orders			39.46	
Vision West Europe	864.03	72.07	74	View Sales Order Details			75.57	49.48
Grand Total	**5587.57**	**438.02**	**610.**				**865.02**	**850.78**

The second Action Link appears when the user choose to navigate on a much smaller Total Revenue figure (as there will be less than 500 underlying Orders)

Navigate to BI Content

With Confirmation Messages

- Note that the second conditional Action was also configured to display a warning to the user before the new Analysis was invoked:

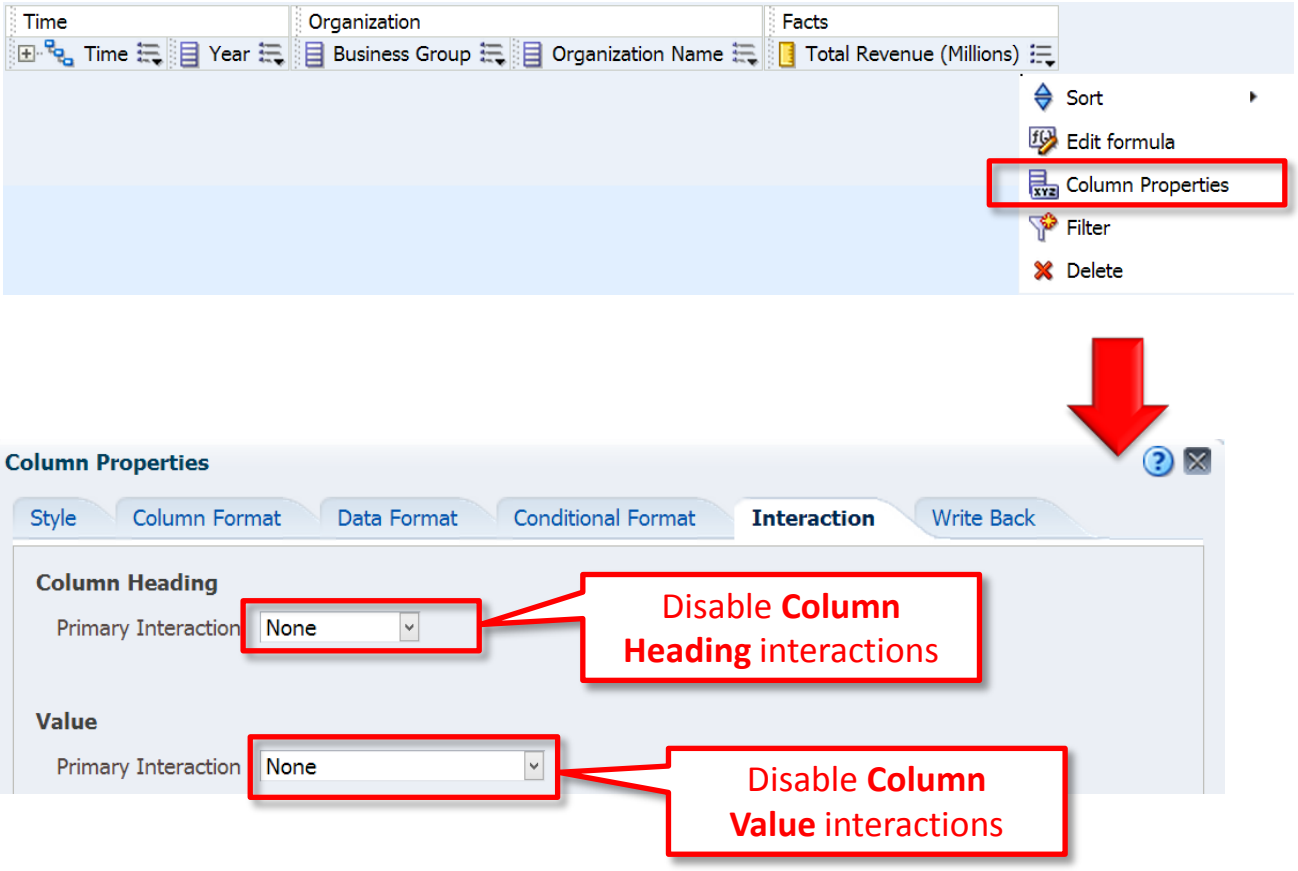
PEAK indicators

Drill-Down and Navigation

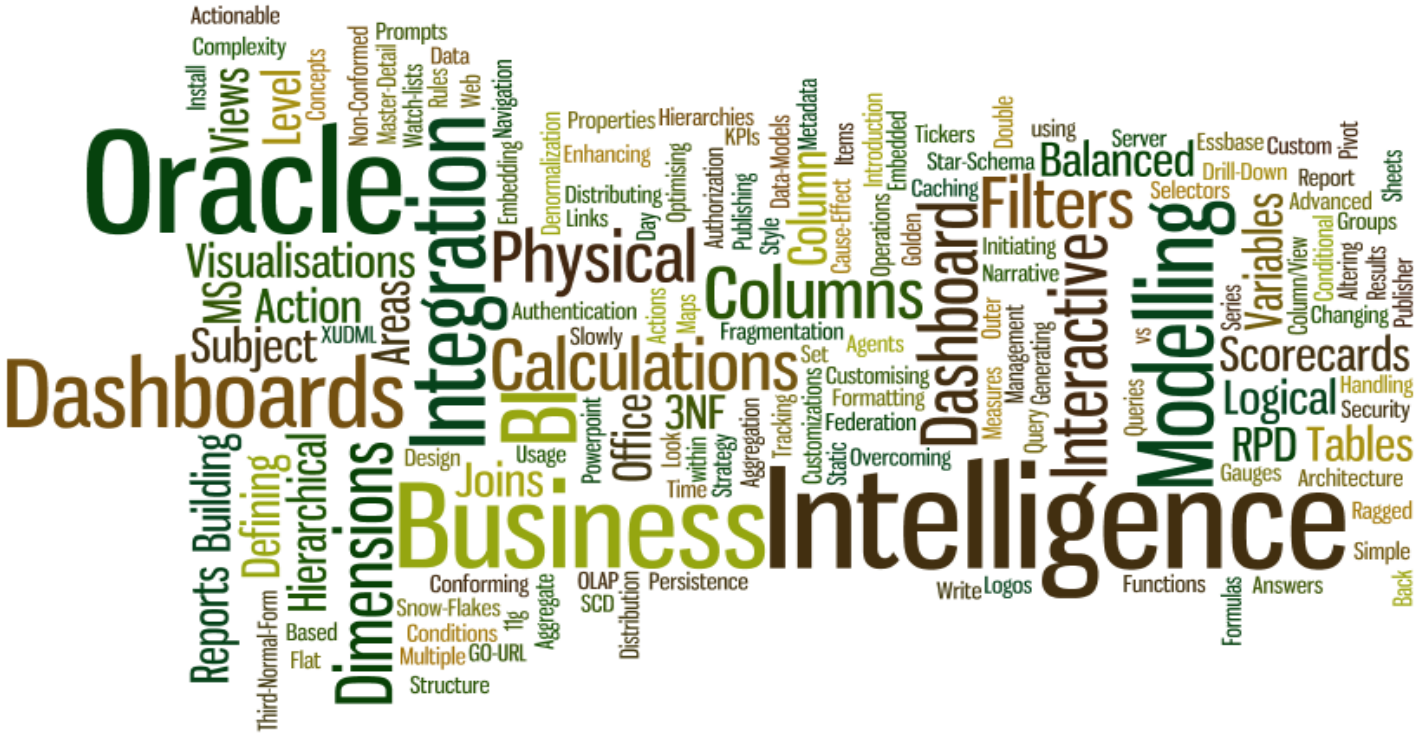
Disabling Interactions

Disabling Interactions

- You can disable all interactions for a column by going to “Column Properties” and setting the “Primary Interaction” to “None”



Questions?



PEAK
indicators

PEAK indicators

Helping Your Business Intelligence Journey