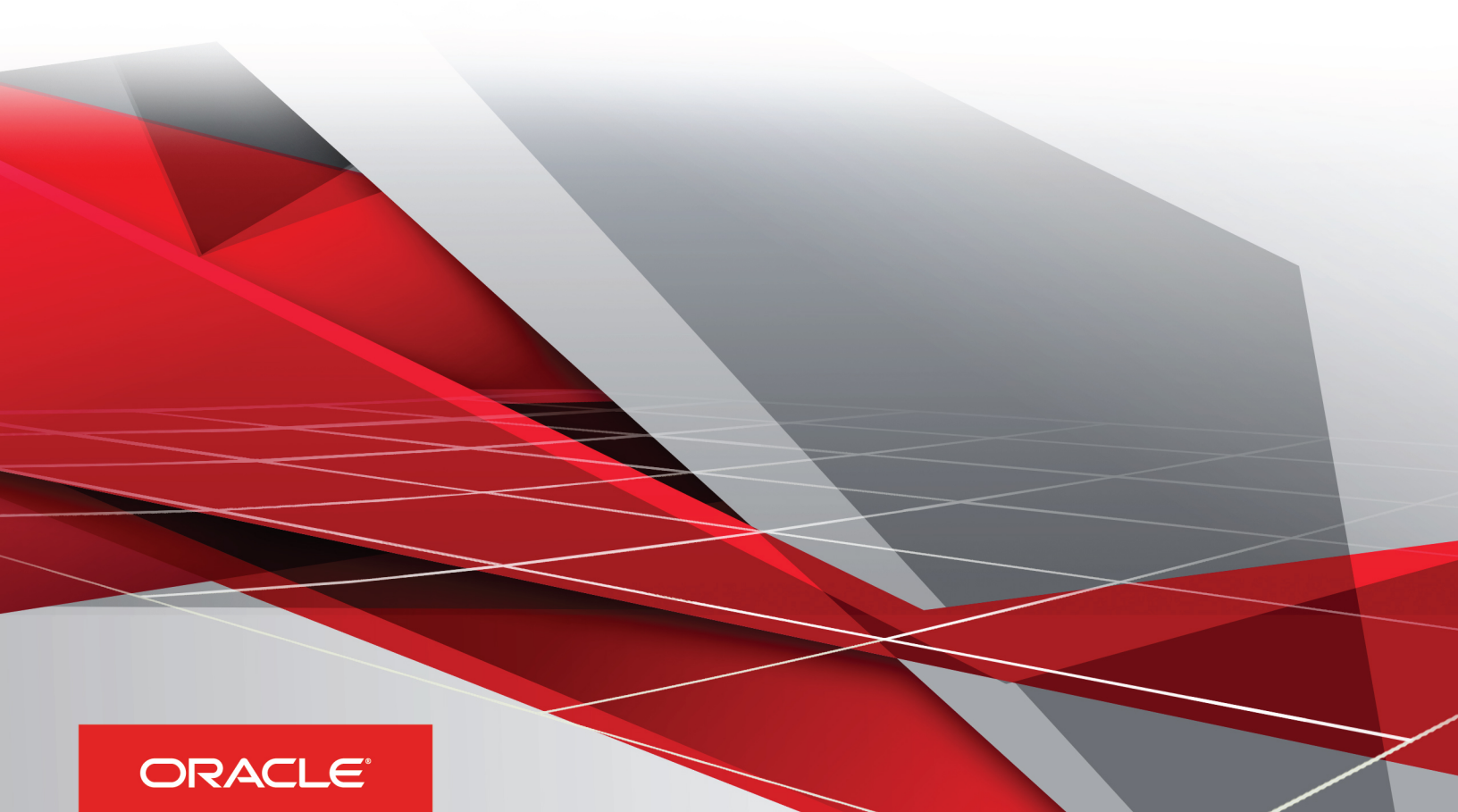
Oracle

Creating HCM Cloud Analytics for Oracle Transactional Business Intelligence Enterprise

Release 10



Oracle® Creating HCM Cloud Analytics for Oracle Transactional Business Intelligence Enterprise

Part Number E61673-02

Author: Megan Wallace

Contents

Preface

This Preface introduces information sources available to help you use Oracle Applications.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application.

> **Note**
> If you don't see any help icons on your page, click the Show Help button in the global area. Not all pages have help icons.

You can also access Oracle Applications Help at https://fusionhelp.oracle.com/.

Oracle Applications Guides

To find other guides for Oracle Applications, go to:

- Oracle Applications Help, and select **Documentation Library** from the **Navigator** menu.
- Oracle Help Center at http://docs.oracle.com/

Other Information Sources

My Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

- http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info
- http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs (if you are hearing impaired).

Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com) provides details on assets (such as services, integration tables, and composites) to help you manage the lifecycle of your software.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides!

- Send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
- Click your user name in the global area of Oracle Applications Help, and select **Send Feedback to Oracle**.

1 Overview

About This Guide

This guide provides details about designing custom dashboards using design concepts and standards that are specific to Oracle Transactional Business Intelligence Enterprise for HCM Cloud. This guide provides details about the standards for OTBI Enterprise dashboards and analyses, and provides instructions on:

- Developing a design plan for a custom dashboard.
- Creating dashboard components like those found on the HR Executive Dashboard.
- Building a custom HCM dashboard using design specifications for Oracle Transactional Business Intelligence Enterprise.

The audience for this guide is report content authors, and this guide assumes that you are already familiar with the Oracle Business Intelligence Answers tool, which is used to create dashboards, analyses, and other dashboard components.

Related Documents and Training

For more information about Oracle Transactional Business Intelligence Enterprise for HCM Cloud, review these additional sources:

- Oracle Transactional Business Intelligence Enterprise Using HCM Cloud Analytics
- Oracle Transactional Business Intelligence Enterprise Implementing Your Deployment
- Oracle Transactional Business Intelligence Enterprise Administering Your Deployment
- Oracle Transactional Business Intelligence Enterprise Known Issues

Customizing Oracle Transactional Business Intelligence Enterprise for HCM Cloud: Overview

Oracle Transactional Business Intelligence Enterprise for HCM Cloud includes predefined analyses and the delivered HR Executive Dashboard, which enable you to:

- Gain complete workforce visibility and predict future needs.
- Maximize employee contribution with high performing recruitment, talent development, and compensation practices.
- Deliver insights to ensure workforce meets corporate strategic goals and activities are cross - functionally aligned.

You can customize Oracle Transactional Business Intelligence Enterprise for HCM Cloud by:

- Creating custom dashboard components such as analyses, prompts, and so on.
- Creating a custom dashboard and adding custom components to it.
- Copying the HR Executive Dashboard and making changes that suit your business needs.

Oracle recommends using a specific style to create dashboards and components for Oracle Transactional Business Intelligence Enterprise. Use this guide to help you create customizations that meet your business needs and that meet Oracle's recommended standards.

Process for Creating Custom Dashboards: Overview

Predefined dashboards give users a wealth of information, but you can still create custom dashboards for them to use. Your custom dashboard may contain multiple pages, and each page can have a collection of analyses and other components.

> **Important**
> Save your dashboard and every custom item it contains in the catalog, under **Shared Folders - Custom**.

Process Overview

To create a custom dashboard:

1. Design a plan for your dashboard, including what each page contains and how users navigate between pages.
2. Create analyses, prompts, and any other custom item that you save separately in the catalog.
3. Create your dashboard, and add what you created in step 2 to the dashboard pages.

Though this guide takes you through this process, of course you might want to just customize a few aspects or components of predefined dashboards. You can still use the information in this guide to help you with that.

> **Important**
> Don't customize predefined content directly. Make a copy, save the copy in the Custom folder, and edit only the copy.

2 Design Plan

Planning Your Dashboard: Overview

Before you start creating your dashboards and what goes on the dashboard pages, you must plan everything out. If not, you might spend a lot of extra time reworking, especially if you have many pages.

Process Overview

To plan your dashboard:

1. Decide whom the dashboard is for, what information the users need, and what they need to achieve.
2. Based on that, determine the types of dashboard pages to build, what each page contains, and how users navigate between pages, all the while keeping in mind key design goals.
3. Plan out the specific details of every page in your dashboard, so that you know what components to create first before putting everything together on dashboard pages.

Key Design Goals

Predefined dashboards follow certain design principles. Your custom dashboard should look and behave like predefined dashboards, so that you follow these principles and also give users a consistent experience. The information in the rest of this guide helps you create custom content that's in line with these design goals:

- Build something that works equally well on mobile devices.
- Show the most important information first, at the top of the page.
- Always make it clear to users where they are in the dashboard and how to navigate to other pages for the information they want.
- Create analyses that convey the key information your users need, using the most appropriate visualization.

Dashboard Pages and Navigation: Explained

Predefined dashboards have four types of pages: overview, perspective, detail, and sample content. But, when you create your own custom dashboard, you usually plan for only perspective and detail pages. You might not find overview pages necessary, and the predefined sample content pages are there only to help you with customization.

Overview Page

The overview page is the landing page for a dashboard, and it orients users regarding what the dashboard is about.

- On the left side of the page are common business analysis questions that the target users might have. These links take them to specific analyses.
- On the right are analyses that give essential, overview information about the various business objects that the dashboard covers.

Users can find all of the overview page content on other pages too.

Perspective Pages

Most of the tabs on the dashboard are perspective pages.

- Perspectives provide an intuitive, top level of organization for your dashboard.
- Each perspective page maps to a specific business point of view, and the analyses on the page support that view.
- A perspective should be immediately familiar to your users as something relevant to their work.

For your own dashboard, decide on a limited number of perspectives and what each perspective covers. Consider having the first, leftmost perspective page provide summary information for your dashboard and navigation to other, more specific perspective pages.

Detail Pages

For your dashboard, determine what detail pages you need for each perspective. Detail pages:

- Give an in-depth view of a particular content area that your users care about.
- Provide content similar to perspective pages, but with richer and more granular information.
- Reduce the complexity of perspective pages so that users can easily digest the summary information on perspective pages.
- Help you avoid performance issues that can occur if you put too much on your perspective pages.

Consider creating these special types of detail pages, if needed:

- **Show data pages:** Provide all the same information as a specific analysis from a perspective page, but in a table that users can export. Users open these pages using **Show data** links on perspective pages.
- **Inspector pages:** Provide essential summary information about a specific business object, for example a person, which can be relevant to many perspectives. Choose only the most important, fundamental business objects in your dashboard to inspect.

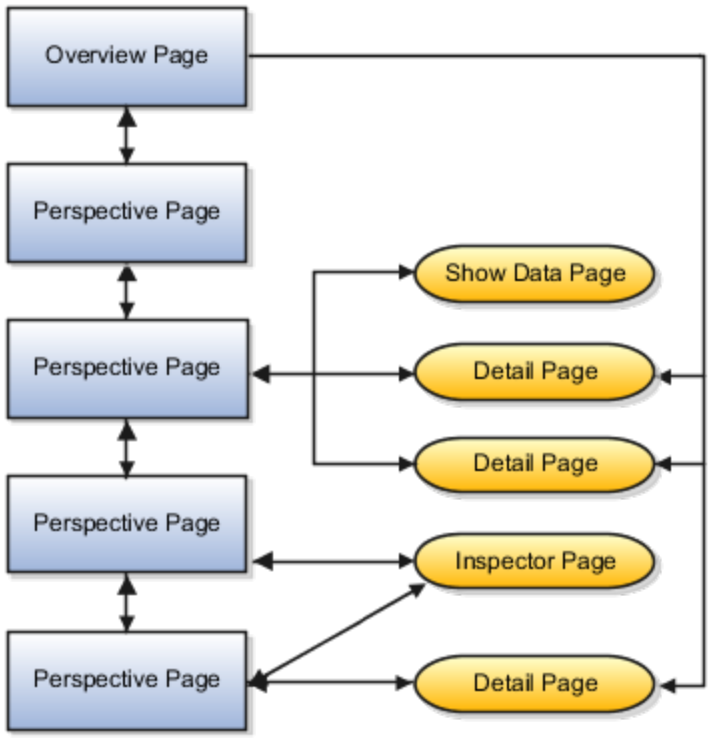
All other, regular detail pages are referred to as standard detail pages.

Navigation

As part of planning your perspective and detail pages, determine the navigation within your dashboard.

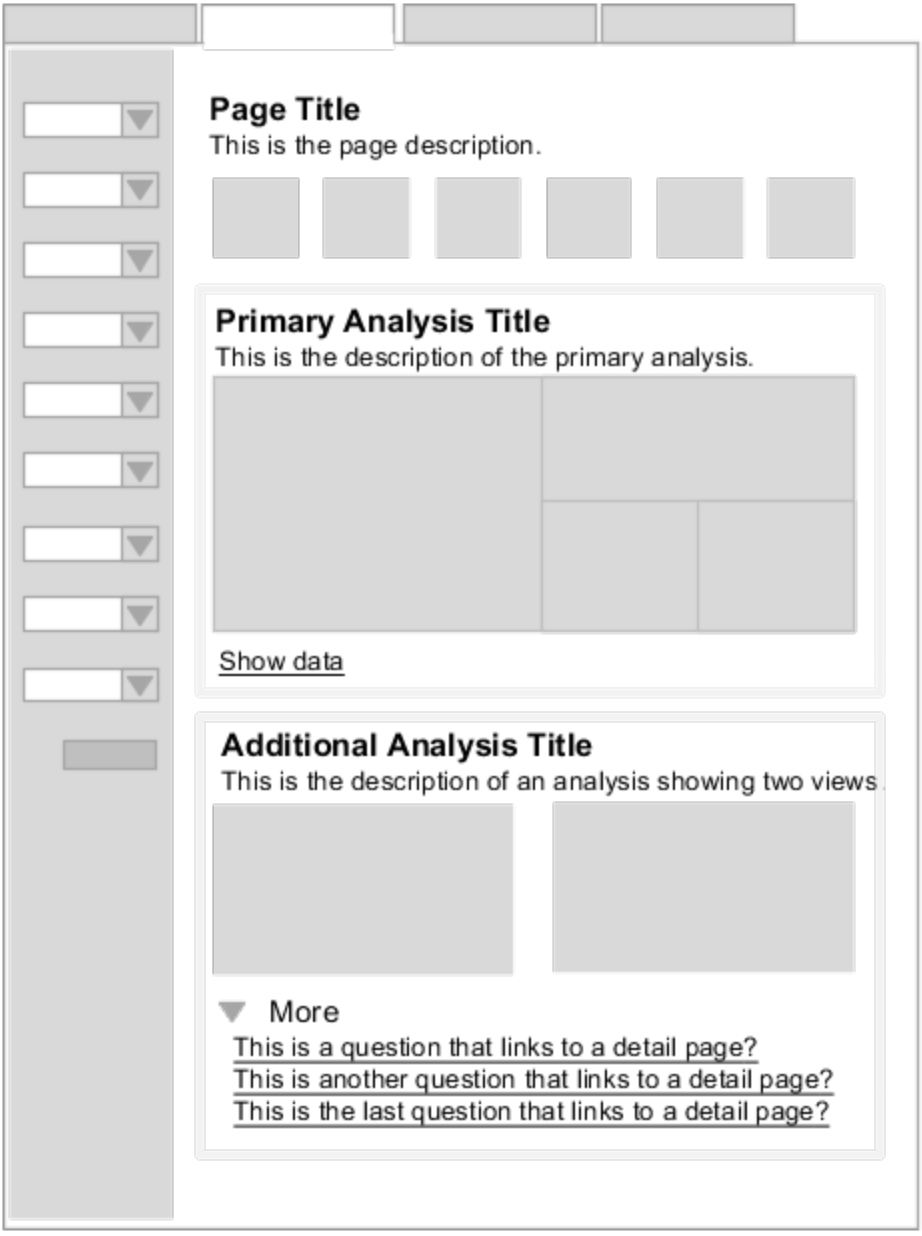
- Decide on the order of tabs across the top of the dashboard. Users can open the overview page (if any) and all perspective pages using these tabs.
- Determine how users access detail pages, and how they return from those pages.
    - Users typically go from perspective pages to specific detail pages for more information.
    - The overview page can also link to detail pages.
    - After users open a standard detail page or show data page, they generally go right back to the relevant perspective page.
    - Since an inspector page can be relevant to multiple perspectives, you can have multiple perspective pages that link to the same inspector page.
    - You can also link from standard detail pages and show data pages to inspector pages.
    - Inspector pages should open in a new window. Users just close the window when they're done, and return to where they opened the inspector page from.

The following diagram shows an example of pages in a dashboard and how users navigate between them. This example includes the special types of detail pages, as well as standard detail pages.



Designing Perspective Pages: Points to Consider

After you have a general plan for the perspective pages you want in your dashboard, you design the details of the pages before building them in the application. Aside from planning out the layout and content of the page, as illustrated in the following diagram, also keep in mind that users can view the page on mobile devices.



Page Layout

Your perspective page should have two columns:

- A narrow one on the left side, containing prompts
- The main body of the page on the right, containing analyses and links to detail pages

Main Page Content

For the right column, plan out these page components from top to bottom:

- **Title:** A page title that summarizes the perspective you're capturing, but in as few words as possible.

  > **Note**
  > The page title doesn't have to match the tab label. Keep the tab label even shorter.

- **Description:** A brief sentence or two to describe what the page is all about.
- **Performance Tiles:**A row of performance tiles to orient users with essential, aggregated KPIs.

  > **Tip**
  >
  > - Don't have more than six tiles in the row, and you might consider having two rows if needed.
  > - You can plan for a sparkline to appear for each tile.

- **Primary Analysis:** A single analysis that shows the most crucial information for this perspective.
- **Additional Sections:** One or more sections with other analyses that support the perspective.
  - Put the more important sections higher up on the page.
  - A section can have multiple analyses. If so, you can put them side by side, or have a single primary analysis first, followed by other analyses.
  - Don't put so many sizable views or analyses side by side in the same section that content is cramped and users need to scroll horizontally.

    > **Note**
    > You can find some recommended sizes for analyses in the next chapter.

Each analysis, including the primary one, should display a short title and description. It's recommended that each description has a sentence that starts with a verb, and optionally a second sentence that summarizes how the user can interact with the analysis.

> **Note**
> As you design your main page content, consider some general patterns to follow for providing access to detail pages.

Prompts

After you plan out the analyses to include on the page, determine what prompts to put in the left column. Each prompt affects all the analyses on the page.

- Use the same prompts for every perspective page in your dashboard, as much as possible.

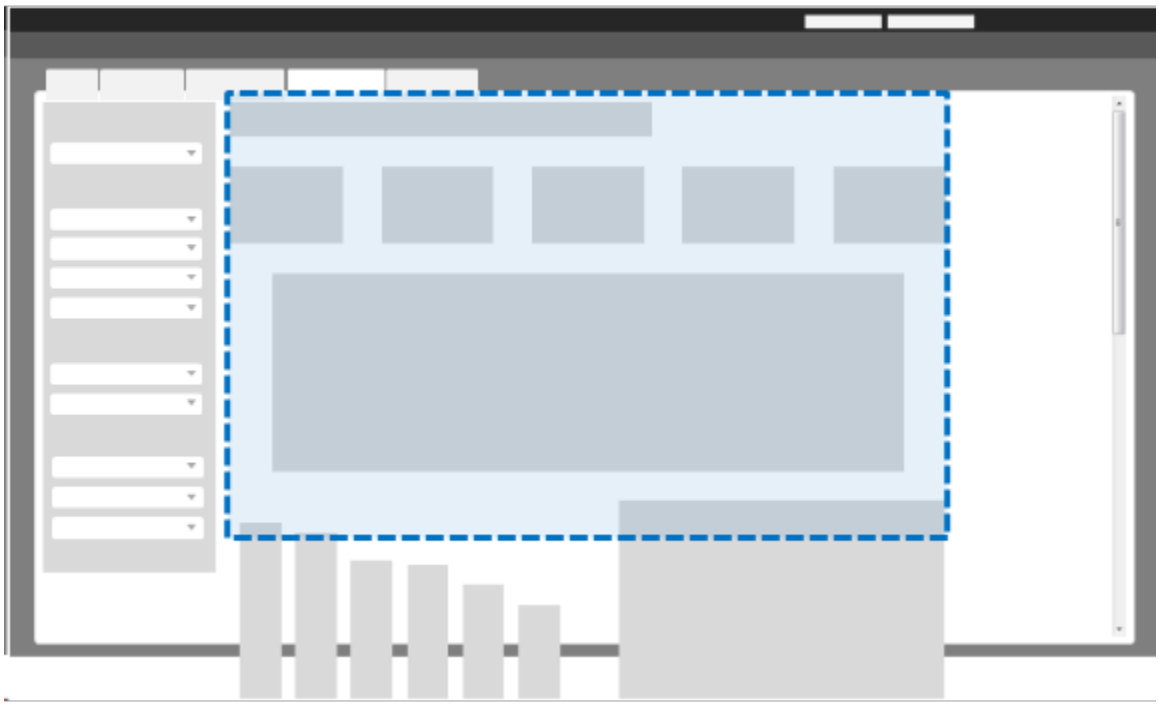
- Put what you think are the more helpful or frequently used prompts at the top.
- Don't include too many prompts, for example more than ten.

Mobile Devices

On mobile devices such as tablets, users see only the main page content (the right column), without the prompts on the left. If you design your page as described above, you ensure that:

- The content is optimized for vertical scrolling only.
- The most important content (the performance tiles and primary analysis) is available on the screen without scrolling.

> **Tip**
> If possible, make a small portion of the additional sections also visible without scrolling, as illustrated in the following diagram. This way, users can easily tell that there's more on the page.



General Patterns for Linking to Detail Pages: Explained

In most cases, users navigate to detail pages from perspective pages. For your own dashboard, consider general patterns used to provide links from perspective to detail pages. You can link to inspector pages not only from perspective pages, but also other types of pages, for example standard detail pages.

More Information Section

On your perspective page, you have at least one section displaying one or more analyses. If you have detail pages related to the analyses in a specific section, then you can put another section right below. This second section is a collapsible region that contains one or more links to detail pages.

- The section title is the same as the title for the first section, but with More added to the front.
- Phrase each link as a question that the information from the detail page would answer.

Show Data Link

On a perspective page, you present an analysis, for example, only in a chart view. You might decide that users need to have detailed data from that analysis in a table format, especially for export. So, you plan for a show data page.

- In your design for the parent perspective page, plan for a section to display the chart.
- At the bottom of that section, put a Show data link to open the show data page.

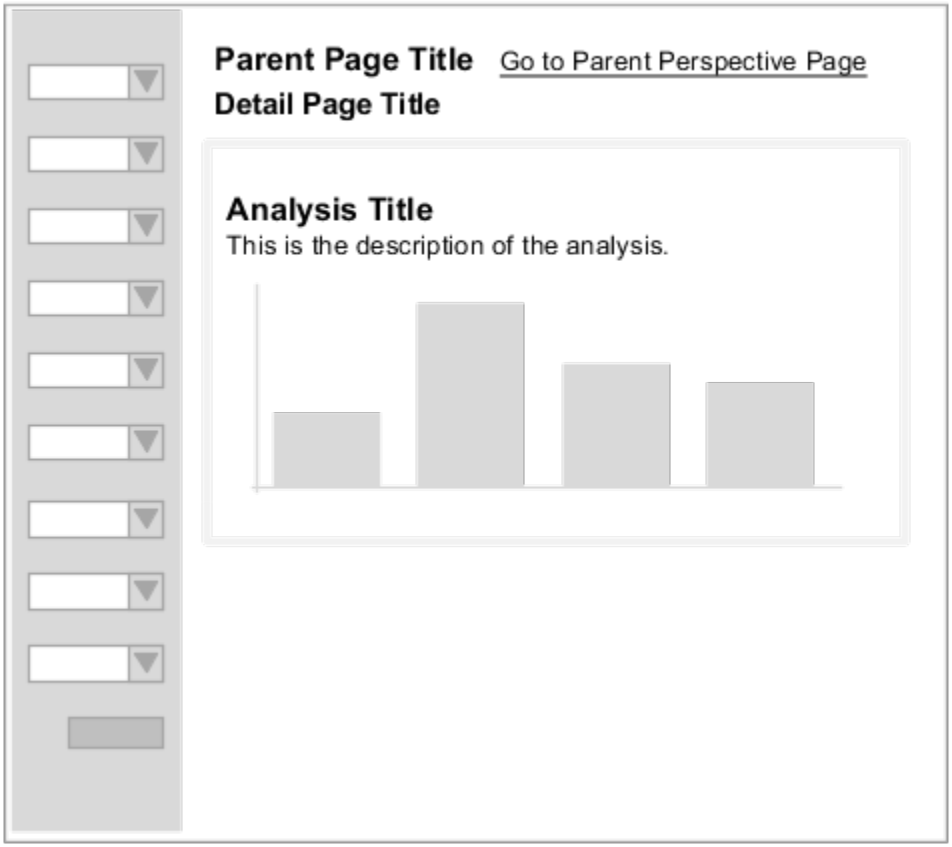
Inspector Page Navigation

For one or more key business objects in your dashboard, you might plan for inspector pages to help users get more insight. You link to inspector pages from within the chart or table in an analysis.

For example, you have a table with a column displaying person names, and you want an inspector page for persons. So you plan for each cell in that column to be a link to the inspector page, so that when users click on Jane Smith, for example, they open an inspector page with information only about Jane Smith.

Designing Detail Pages: Points to Consider

After you have a general plan for the detail pages you want, determine the specifics of each page before building them in the application. Aside from planning out the layout and content of the page, as illustrated in the following diagram, also keep in mind additional or different considerations for show data and inspector pages.



Page Layout

The layout for detail pages is the same as perspective pages, with prompts in the left column and the main page content in the right.

Page Content

Plan out your page, from top to bottom:

- **Parent Page Title:** The same title as the parent perspective page, immediately followed by a link that takes you back to the parent page.
- **Detail Page Title:** The title of the detail page. Consider using the name of the analysis or section on the perspective page that is associated with this detail page.
- **Sections:** Typically, a section with one analysis, but you might need multiple analyses in the same section, or even multiple sections.

> **Important**
> If you have more than one section, put the most important one first so that users don't need to scroll to see it on mobile devices.

Prompts

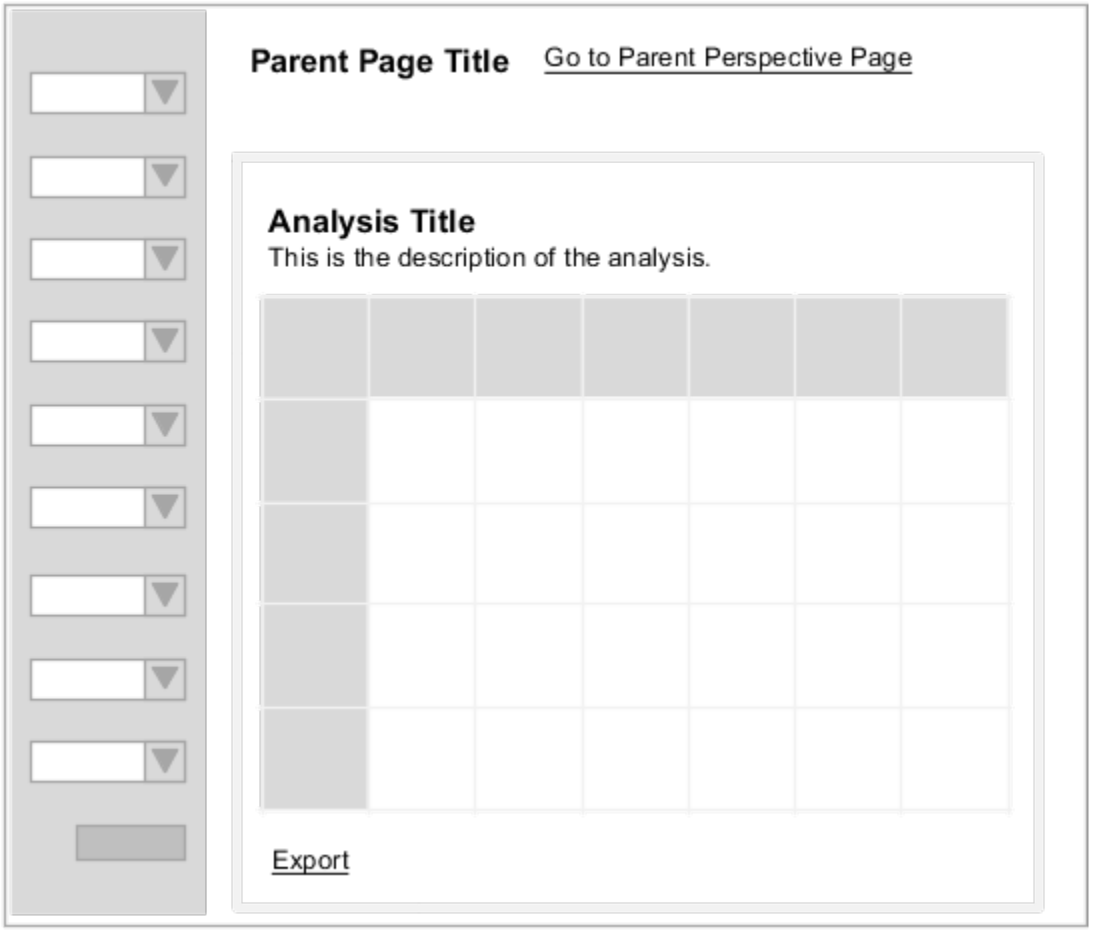
The prompts for a detail page should be exactly the same as the ones on its parent perspective page.

Show Data Pages

If you're building a show data page, then generally follow the same layout and content considerations above, except that you:

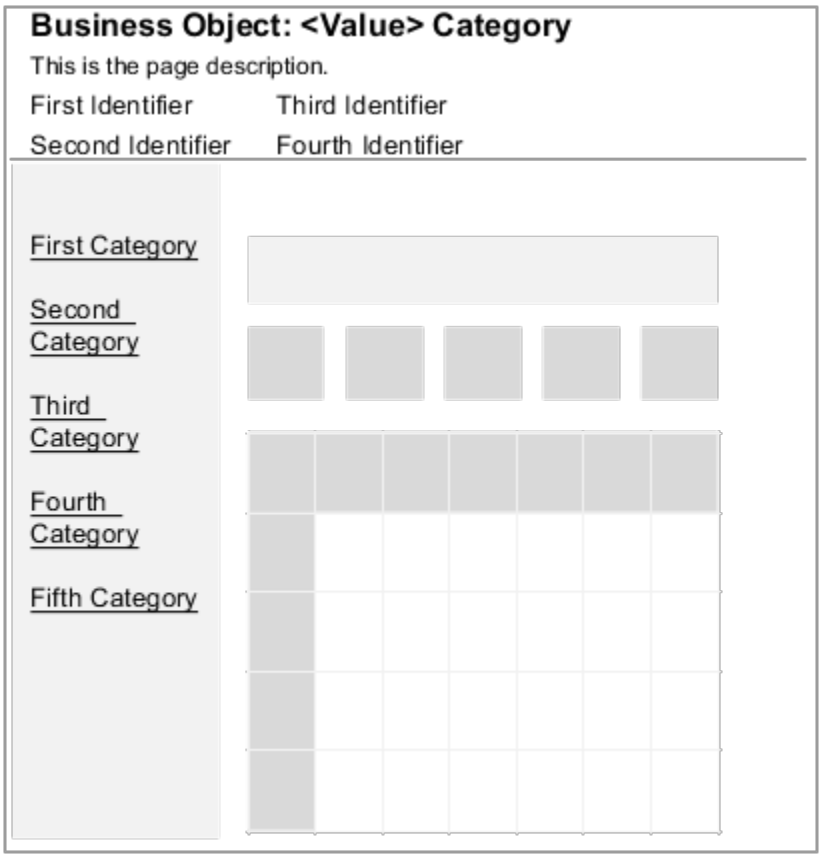
- Don't have a detail page title.
- Plan for just one section to house the table showing the data, and not have any other analyses or views.
- Put an **Export** link below the table.

This diagram shows the layout and content of a show data page.



Inspector Pages

If you're building an inspector page, then you have different page layout and content, as illustrated in the following diagram.



Plan your page from top to bottom:

- **Title:** The business object, followed by the specific business object value and the category selected from the left column. For example, if the object is a person and the category is **Overview**, then the title can be **Person: Jane Smith Overview**.
- **Description:** A brief description of the inspector page.
- **Identifiers:** Some attributes to identify the business object, for example the date of birth and address for a person.
- **Categories and Analyses:** A column on the left with links, each opening up one or more analyses in the right column.
    - A link represents a category of information relevant to the business object.
    - Each analysis shows information specific to the business object, for a given category.

Note

- As always, put the more important analyses at the top of the page.
- If you have just one category for your business object, then you don't even need categories. Just present your analyses below the title and identifiers.

3 Dashboard Components

Creating Analyses and Other Dashboard Components: Overview

Before you create your perspective and detail pages, you create analyses, prompts, and any other dashboard component that must be saved separately in the business intelligence catalog. You later add these components to your dashboard pages.

General Considerations

When you create your dashboard components:

- Keep in mind that the components don't have their final look until you add them to a dashboard page.
- Leave settings in their default state unless specified otherwise.
- Keep titles for analyses as short as possible.

> **Note**
> You might not even need to display a title, for example for tables used in detail pages.

Dashboard Components

The following table lists some of the dashboard components that you can create and includes an example of the component on the HR Executive Dashboard.

> **Note**
> Not all components of the HR Executive Dashboard are included in this table. The components that are more common, such as tables and graphs are not included.

Dashboard Component	Description	Example on HR Executive Dashboard
Performance tile	Displays a single aggregate measure value in a manner that is both visually simple and prominent, yet it immediately reveals summary metrics to the user that will likely be presented in more detail within a dashboard view. Performance tiles: • Focus the user's attention on simple, need-to-know facts	Headcount tile on the Workforce Health Summary page

Dashboard Component	Description	Example on HR Executive Dashboard
	directly and prominently on the tile. • Communicate status through simple formatting by using color, labels, and limited styles, or through conditional formatting of the background color or measure value to make the tile visually prominent. For example, if revenue is not tracking to target, the revenue value may appear in red. • Respond to prompts, filters, and user roles and permissions by making them relevant to the user and their context. • Support a single, aggregate or calculated value.	
Treemap	Displays a space-constrained, two-dimensional visualization for hierarchical structures with multiple levels. Treemaps: • Are limited by a predefined area and display two levels of data. • Contain rectangular tiles. The size of the tile is based on a measure, and the color of the tile is based on a second measure. • Are similar to a scatter plot graphs in that the map area is constrained, and the graph allows you to visualize large quantities of data and quickly identify trends and anomalies within that data.	Headcount treemap on the Workforce Health Summary page
View selector	Adds a view selector in the results. A view selector is a drop-down list from which users can select a	View list for the Workforce Demographics analysis on the Demographics page that enables

Dashboard Component	Description	Example on HR Executive Dashboard
	specific view of the results from among the saved views.	you to view by Gender, Age, Ethnicity, and Country
Narrative	Displays the results as one or more paragraphs of text. You can type in a sentence with placeholders for each column in the results, and specify how rows should be separated.	Refresh date banner
Dashboard prompts	A type of filter that applies to all items in a dashboard. Dashboard prompts are created outside of a specific dashboard and are stored in the catalog as objects, which can then be added to any dashboard or dashboard page that contains the columns that are specified in the prompt. Dashboard prompts enable you to specify the data values that determine the content of all of the analyses and scorecard objects contained on the dashboard.	Drop-down lists that appear on the left-side of all of the dashboard pages except the Overview and Sample Content pages. Examples include; Time, Country, Manager, and Job Family.
Microchart, sparkline type	A text-sized graphic (of similar size to a piece of nearby text) that is ideal for showing trend information. A microchart does not have axes or legends. Like larger graphs, a microchart's measure values are rendered as relatively sized bars (or lines, or area). Each measure name is displayed in its column header. Further details of the measure appear as tooltip text when you hover the mouse over a data cell.	Graphs that appear directly below the performance tiles on all pages except the Overview and Sample Content pages

Using Color in Analyses: Points to Consider

Color is usually used in analyses for a purpose, to convey meaning.

Considerations for Color

When you create your analyses (and even before), keep in mind the following points.

- Use default colors for charts and tables, unless specified otherwise.

- To be consistent with predefined analyses, use the following colors to convey severity:
  - **High: #C13E43**
  - **Medium: #ED6647**
  - **Low: #555555**
- If a default color is something that already has a special meaning in your analyses, for example to convey severity, then override the default with a neutral color such as:
  - **#E371B2**
  - **#47BDEF**
  - **#009B7C**
  - **#FAD55C**
- You might have multiple views or analyses with a graphical element, such as a bar or line, that represents the same value or category. Use the same color for this element in all the affected views or analyses, to make it easier for users to see relationships across multiple charts.

Creating Charts: Procedure

On dashboard pages, especially perspective pages, information is mostly conveyed using charts. That means you create analyses with views such as Graph, Treemap, or Funnel.

Creating Charts for Dashboard Pages

Follow these steps:

1. Click the **New** menu, and select **Analysis** under **Analysis and Interactive Reporting**.
2. Select a subject area.
3. In the Subject Areas pane on the Criteria tab, double-click the columns to include, or drag them to the Selected Columns pane.
4. Open the Results tab.
5. Click the **Edit View** icon for the Title view, and enter a short analysis title.
6. In the Views pane, click the **New View** icon and select **Static Text** under **Other Views**.
7. Enter the short description for your analysis, and click **Done**.
8. With static text selected in the Views pane, click the **Add View** icon.
9. For the Compound Layout, drag the static text container and drop it below the title.
10. Click the **Remove View from Compound Layout** icon for the Table view.
11. Click the **New View** icon, and select the type of chart you want.
12. Click the icon that opens the view properties.

13. Enter a size that doesn't make users scroll horizontally to see the whole chart.
    - Common sizes to use include:
      - Width: **850** and Height: **350**
      - Width: **850** and Height: **330**
    - For larger graphs, such as treemaps, the largest you should go is **850** for width, **375** for height.
    - For shorter graphs, such as timelines, you can use **850** for width, **250** for height.
14. Select **Top** for the **Legend** field, if available.
15. Click **OK**.
16. Make other changes for your chart as needed, and click **Done**.
17. In the Views pane, select the view for your chart, and click the **Add View** icon.
18. Add more views for your analysis as needed.
19. Save your analysis under **Shared Folders - Custom**.

> **Tip**
> Take a look at the structure in the catalog for predefined analytics, and consider using a similar structure within the Custom folder.

Creating Tables: Procedure

For your dashboard, you use tables mostly for detail pages, especially show data pages. For tables, you create analyses with the Table or Pivot Table view. A special type of table you create would be for the identifiers that you put in the page header of inspector pages.

Creating General Tables for Dashboard Pages

Follow these steps:

1. Click the **New** menu, and select **Analysis** under **Analysis and Interactive Reporting**.
2. Select a subject area.
3. In the Subject Areas pane on the Criteria tab, double-click the columns to include, or drag them to the Selected Columns pane.
4. Open the Results tab.
5. If you want to display a title, click the **Edit View** icon for the Title view, and enter your text. If not, click the **Remove View from Compound Layout** icon.
6. If you want to display a short description below the title:
   a. In the Views pane, click the **New View** icon and select **Static Text** under **Other Views**.
   b. Enter the short description for your analysis, and click **Done**.

c. With static text selected in the Views pane, click the **Add View** icon.

d. For the Compound Layout, drag the static text container and drop it below the title.

7. Click the **View Properties** icon for the Table view.
8. For the **Data Viewing** option, select **Fixed headers with scrolling content**.
9. Enter the maximum table size:
   - For show data pages, use **1010** for width and **500** for height.
   - For other pages, use **850** for width and **330** for height.
10. Click **OK**.
11. Click the **Edit View** icon for the Table view to make other changes for your table as needed, and click **Done**.

> **Note**
> For show data pages, you add the **Export** link later, as part of creating the show data page.

12. Save your analysis under **Shared Folders - Custom**.

> **Tip**
> Take a look at the structure in the catalog for predefined analytics, and consider using a similar structure within the Custom folder.

Creating Tables for Identifiers in Inspector Pages

Follow these steps:

1. Click the **New** menu, and select **Analysis** under **Analysis and Interactive Reporting**.
2. Select a subject area.
3. In the Subject Areas pane on the Criteria tab, double-click the columns to include, or drag them to the Selected Columns pane. Include the columns that represent each identifier, as well as one other similar column (which doesn't appear to users).
4. Open the Results tab.
5. For the Title view, click the **Remove View from Compound Layout** icon.
6. For the Table view, click the **Edit** icon.
7. In the Layout section, move each identifier under Sections in the order you want them to appear as a column of identifiers. Leave the one additional column under the Columns and Measures section.
8. Click the **Section Properties** icon.
9. Select the **Display Heading** check box, and click **OK**.
10. For each identifier under Sections other than the first, click the **More Options** icon, and select **Place Value in New Row**.
11. In the Columns and Measures section, click the **Column and Measure Properties** icon.
12. Select **Off** for **Column Labels**, and click **OK**.

13. For the single column in the Columns and Measures section, click the **More Options** icon, and select **Format Values**.
14. Expand the Custom CSS Style Options (HTML Only) section.
15. Select the **Use Custom CSS Style** check box, and enter **display:none;**.
16. Click **OK**, then **Done**.
17. Create more table views as needed, one for each column of identifiers you want on your inspector page.
18. Save your analysis in an appropriate folder under **Shared Folders - Custom**.

Using Shared Filters in a Custom Dashboard or Analysis: Worked Example

This example describes available shared filters and illustrates how to use a shared filter that is similar to those on the HR Executive Dashboard.

Under Catalog, shared filters can be found by expanding **Shared Folders** folder, then expanding the**Human Capital Management** folder, then expanding the **Subject Area Contents** folder and then expanding the **Human Resources - Workforce Deployment** folder.

The following table lists the shared filters.

Filter Name	Description
3 Years Ago Filter	Filters data older than three years
Age Band Filter	Age Band Name and Age Band code are prompted
Current Year Filter	Filters data older than the current year
Department Hierarchy Filter	Prompts for department name, department, number, and hierarchy information
Diversity Attribute Filter	Prompts for Ethnic Group Name, Gender, Age Band, and Disabled Flag
Employee Filter	Worker Code is equal to Employee
Employment Filter	Prompts for Worker Type Name, Worker Type Code, Worker Subtype Name, Worker Subtype Code, Full Time Flag Code, and Full Time Flag
High Performer Filter	Performance Band Code is equal to or in PERF_BAND_5

Filter Name	Description
Hire Filter	Event Group Code is equal to or in HIRE
Job Attribute Filter	Prompts for a list of job attributes
Location Filter	Prompts for Location Country Name, Location Source State Code, Location City, Location Name, and Location Number
Org & Location Prompt	Prompts for Department Name and Location Name
Person Filter	Prompts for Person Number, Assignment Number, and Person Display Name
Supervisor Filter	Prompts for Supervisor Name and Supervisor Employee Number
Supervisor Hierarchy Filter	Prompts for Top Level Supervisor Name, Level 1 Supervisor Name through Level 16 Supervisor Names, Supervisor Display Name and Supervisor Number.
Termination Filter	Event Group Name is equal to/ is in Termination
Termination Flag Filter	Termination Flag Code is equal to/is in Y
Trailing Twelve Months	Month is greater than @{CAL_ MONTH_ YEAR_AGO} and Month is less than or equal to @{CURRENT_ MONTH}
Voluntary Filter	Event Sub Group Code is equal to /is in TERM~VOLUNTARY; TERM_ VOLUNTARY
Year Quarter Month Filter	Prompts for Year, Quarter, Month, Year Name, Quarter Name, and Month Name

Using Shared Filters

1. Access the Home page for Oracle Business Intelligence Enterprise Edition.
2. Click **Catalog** to open the Oracle Business Intelligence Catalog.

3. Click **New**.
4. Under Analysis and Interactive Reporting, select **Analysis**.
5. Select the **Human Resources - Workforce Deployment** subject area.

   All subject areas for Oracle Transactional Business Intelligence Enterprise are preceded with Human Resources.
6. Expand the **Facts - Human Resources - Workforce Deployment** folder.
7. Expand the **Workforce Deployment Facts** folder.
8. Double-click **Headcount** to move it to the Selected Columns region.
9. Under **Catalog** expand the **Shared Folders** folder.
10. Expand the **Human Capital Management** folder.
11. Expand the **Subject Area Contents** folder.
12. Expand the **Human Resources - Workforce Deployment** folder.
13. Scroll down to see the available filters and select one from the list.
14. Click **Add More Options** and click OK to apply the filter.

Creating Shared Filters: Worked Example

This example illustrates how to create a shared filter that is similar to those on the HR Executive Dashboard. Use this example to help you create custom shared filters.

Under Catalog, shared filters can be found by expanding the **Shared Folders** folder, then expanding the**Human Capital Management** folder, and then expanding the **Subject Area Contents** folder.

Creating Shared Filters

1. Access the Home page.
2. Under Create, click **Analysis**.
3. Select the **Human Resources - Workforce Deployment** subject area.

   All subject areas for Oracle Transactional Business Intelligence Enterprise are preceded with Human Resources.
4. Expand the **Facts - Human Resources - Workforce Deployment** folder.
5. Expand the **Workforce Deployment** Facts folder.
6. Double-click **Headcount** to use it in the filter.
7. Select an **Operator** such as is equal to and enter a **Value** such as 200.
8. Click **Save Filter** and navigate to /Shared Folders/Human Capital Management/ Subject Area Contents/Human Resources - Workforce Deployment.

9. Enter a **Name** for your filter and enter a **Description**.
10. Click OK.

Creating a Performance Tile: Worked Example

This example illustrates how to create a performance tile that is similar to the one showing headcount on the Workforce Health Summary page on the HR Executive Dashboard. Use this example to help you create a custom performance tile.

To create a performance tile:

1. Specify the criteria.
2. Add the performance tile view to the results.

Specifying the Criteria

1. Access the Home page.
2. Under Create, click **Analysis**.
3. Select the **Human Resources - Workforce Deployment** subject area.

   All subject areas for Oracle Transactional Business Intelligence Enterprise are preceded with Human Resources.
4. Expand the **Facts - Human Resources - Workforce Deployment** folder.
5. Expand the **Workforce Deployment** Facts folder.
6. Double-click **Headcount** to move it to the Selected Columns region.

Adding the Performance Tile View to the Results

1. Click the **Results** tab.
2. In the bottom left corner, click **New View** and select **Performance Tile**.
3. Click the Performance Tile Properties icon.
4. For the Tile Size, select **Custom**.
5. Enter **140** for Width.
6. Enter **80** for Height.
7. Select the **Utilize Available Space**option.
8. Leave **Compress Value** selected.
9. Click **Edit Conditional Formatting**.

The next few steps show how to format the headcount value to appear in a specific color under certain conditions. For example, the number should appear red when headcount exceeds the target set by your organization. Follow these recommendations when assigning colors to the numbers in your performance tile so that colors have the same meaning across all analyses that you create:

- Exceeds target: #68C182
- No condition: #000000
- Danger of not meeting target: #FFB54D
- Below target: #C13E43

10. In the Conditional Formatting dialog box, click **Add Condition** and select **Headcount.**
11. In the New Condition dialog box, select an operator, such as **Is Greater Than**.
12. In the Value field, enter a target number, such as 5,000 for headcount and click **OK**.
13. In the Edit Format dialog box, click the drop down list in the Background Color field.
14. In the Color Selector dialog box, enter the hex code for the color that represents the condition corresponding to the operator and target that you entered in steps 11 and 12. For example, if your target for headcount is 5,000, you want the number to appear in red when it exceeds the target.
15. Click **OK**.
16. In the Edit Format dialog box, click **OK**.
17. In the Conditional Formatting dialog box, click **OK**.
18. In the Performance Tile Properties dialog box, click **OK**.
19. Click **OK**.
20. Click **Save**.
21. To add the small graph that appears below the Headcount performance tile, create a micro sparkline.

Creating a Micro Sparkline: Worked Example

This example illustrates how to create a micro sparkline that is similar to the one at the top of the Headcount page on the HR Executive Dashboard. Use this example to help you create a custom micro sparkline.

To create a micro sparkline:

- Specify the criteria.
- Apply the filter.
- Add the sparkline.

Specifying the Criteria

1. Access the Home page for Oracle Business Intelligence Enterprise Edition.
2. Under Create, click **Analysis**.
3. Select the **Human Resources - Workforce Deployment** subject area.

   All subject areas for Oracle Transactional Business Intelligence Enterprise are preceded with Human Resources.
4. Expand the **Facts - Human Resources - Workforce Deployment** folder.
5. Expand the **Time** folder.
6. Expand the **Gregorian Calendar** folder.
7. Double-click **Month Name** to move it to the Selected Columns region.
8. Expand the **Workforce Deployment Facts** folder.
9. Double-click **Headcount** to move it to the Selected Columns region.

Applying the Filter

1. To apply a shared filter, in the bottom left corner in **Catalog**, expand the **Shared Folders** folder.
2. Expand the **Human Capital Management** folder.
3. Expand the **Subject Area Contents** folder.
4. Expand the **Human Resources - Workforce Deployment** folder.
5. Expand the **Role Dashboards** folder.
6. Double-click **Last 12 Months** filter and click **OK**.

Creating a Micro Sparkline

1. Click the **Results** tab.
2. In the bottom left corner, in **Views** select the Title and click **Remove View from Analysis**.
3. Select **Table** and click **Remove View from Analysis**.

   This step removes the table from the results.
4. Near the center of the screen, under Compound Layout, click **New View** select **Graph** and **Line Graph**.
5. In the graph, click **Edit Graph Properties** and enter 100 for **Canvas Width**.

6. Enter 50 for **Canvas Height**.
7. For **Legend** select **None**.
8. Click the **Style** tab and in Plot Area, click the **Specify** button to deselect **Gridlines**.
9. Click the **Titles and Labels** tab and click the **Title** check box to remove the graph title.
10. Click the **Vertical Axis** check box to remove the title on the vertical axis.
11. Click the **Horizontal Axis** check box to remove the title on the horizontal axis.
12. Click the icon next to **Vertical Axis Labels** and select Hide in the **Axis Labels** field, then click **OK**.
13. Under Labels, click the icon next to **Horizontal Axis Labels** and select Hide in the **Axis Labels** then click **OK**.
14. Click **OK**.
15. Click **Done**.

Creating a Treemap: Worked Example

This example illustrates how to create a tree map that is similar to one showing headcount on the Workforce Healthy Summary page on the HR Executive Dashboard. Use this example to help you create a custom treemap.

To create a treemap:

1. Set up the criteria.
2. Add the treemap to the results.

Setting up the Criteria

1. Access the Home page for Oracle Business Intelligence Enterprise Edition.
2. Under Create, click **Analysis**.
3. Select the **Human Resources - Workforce Deployment** subject area.

   All subject areas for Oracle Transactional Business Intelligence Enterprise are preceded with Human Resources.
4. Expand the **Facts - Human Resources - Workforce Deployment** folder.
5. Expand the **Workforce Deployment** Facts folder.
6. Double-click **Headcount** to move it to the Selected Columns region.
7. Double-click **Active Headcount** to move it to the Selected Columns Region.
8. Expand the **Hierarchies** folder.
9. Expand the **Department Hierarchy** folder.

10. Double-click **Department Hierarchy 13** to move it to the Selected Columns Region.

Adding the Treemap to the Results

1. Click the **Results** tab.
2. In the bottom left corner, click **New View** and select **Treemap**.
3. Drag **Department Hierarchy 13 Name** into the **Group By** boxes.
4. For **Size By** , select Headcount.
5. For **Color By**, select Active Headcount.
6. For **Style**, select Percentile Binning.
7. For **Bins**, select Quartile (4).
8. Use the default color values.
9. Click **Done**.

Creating a View Selector: Worked Example

This example illustrates how to create a view selector that is similar to those on the HR Executive Dashboard. Use this example to help you create a custom view selctor.

To create a view selector:

1. Set up the criteria.
2. Add the view selector.
3. Create views for the view selector.
4. Add the view selector to the layout.

Setting Up the Criteria

1. Access the Home page for Oracle Business Intelligence Enterprise Edition.
2. Under Create, click **Analysis**.
3. Select the **Human Resources - Workforce Deployment** subject area.

   All subject areas for Oracle Transactional Business Intelligence Enterprise are preceded with Human Resources.
4. Expand the **Facts - Human Resources - Workforce Deployment** folder.

5. Expand the **Workforce Deployment Facts** folder.
6. Double-click **Headcount** to move it to the Selected Columns region.
7. Expand the **Hierarchies** folder.
8. Expand the **Department Hierarchies** folder.
9. Double-click **Department Hierarchy Name 12** to move it to the Selected Columns region.
10. Expand the **Worker Dimensions** folder.
11. Expand the **Location** folder.
12. Double-click **Location Country Name** to move it to the Selected Columns region.
13. Expand the **Employment** folder.
14. Double-click **Worker Type Name** to move it to the Selected Columns region.
15. Double-click **Salary Basis Name** to move it to the Selected Columns region.
16. Double-click **Employee Category Name** to move it to the Selected Columns region.

Adding a View Selector

1. Click the Results tab.
2. In the bottom left corner, click **New View** and select **Other Views** and **View Selector**.
3. For the **Caption** enter View By.
4. Click Done.

Creating Views for the View Selector

1. In the bottom left corner, click **New View** , select **Graph**, and select a graph type such as **Bar** and **Horizontal**.
2. In the center of the page above the graph click **Rename View** and enter Headcount then click **OK**.
3. To clean up the appearance, in the **Layout** section under **Measures**, drag Worker Type Name to **Excluded**.
4. Under **Graph Prompts** drag Headcount to **Measures**.
5. Click Done.
6. To add a second graph, in the bottom left corner, click **New View** , select **Graph**, and select a graph type such as **Bar** and **Horizontal**.
7. Above the graph click **Rename View** and enter **Worker Type Name** then click **OK**.
8. To clean up the appearance, in the Layout section under **Measures**, drag Headcount to **Excluded.**
9. Under **Graph Prompts** drag Worker Type Name to **Measures**.

10. Click **Done**.

Add the View Selector to the Layout

1. Under **Views** select **Table** and click **Remove View from Analysis**.

   This step is optional. You perform this step to remove the table from the final results.

2. Select **View Selector** and drag it to the Compound Layout under the Title component until you see a blue bar and release.

3. Click **Edit View** to edit the View Selector. While holding down the Control key, select **Headcount** and **Worker Type Name** and click the right arrow **>** to move them to **Views Included**.

4. Click **Done**.

Copying and Editing an ETL Refresh Date Banner: Worked Example

This example illustrates how to create an ETL refresh date banner that is similar to those on the HR Executive Dashboard. The ETL refresh date banner shows the date that the data was last refreshed. You can copy the existing banner and add it to your custom dashboard.

To create an ETL Refresh Date Banner:

1. Open the HR Executive Dashboard, select the ETL refresh date banner, and save a copy to the folder where your dashboard objects are located.

2. Place the saved banner into your dashboard.

3. View the banner properties and edit the banner text.

Copying the ETL Refresh Date Banner

1. Access the Home page.

2. Click **Catalog** to open the catalog.

3. Click **Dashboards** and select the HR Executive Dashboard.

4. From the Overview page, click **Page Options**.

5. Click **Edit Dashboard**.

6. Scroll down and select the Banner Compound View at the bottom of the page.

7. Click **Properties** and click **Edit Analysis**.

8. Click **Save As** in the upper right corner and navigate to the folder where your dashboard is located.
9. Click OK.

Placing the Banner into a Dashboard

1. Open your dashboard.

   You can click Dashboards and select it from the list.
2. Click **Page Options** and select **Edit Dashboard**.

   If needed, from Dashboard Objects, drag a **Section** to the layout to contain the banner.
3. From Catalog, expand **Shared Folders** and navigate to where you saved the banner.
4. Drag the **Banner** into the **Section**.
5. Select the Section and choose **Format Section**.
6. Expand **Custom CSS Style Options (HTML Only)** and make sure Use Custom CSS Class app_status is checked or enter app_status in the field if needed.
7. Click OK.
8. Click **Save**.

Viewing the Banner Properties

1. Select the **Banner**, click **Properties** and click **Edit Analysis**.
2. Click the **Narrative** object and click **Edit View**.
3. Click the **Criteria** tab.
4. For each of the fields in the **Selected Columns**, click the **drop-down** next to the field name and select **Edit Formula** to view the formula used for that field.

   Edit these formulas with caution. You can change the text that displays in the banner.
5. Click **OK**.
6. If you made any changes, click **Save Analysis**.

Creating an Action Link to Drill Into an Organizational Dashboard: Worked Example

This example illustrates how to create an action link that is similar to those on the HR Executive Dashboard.

To create an action link:

1. Open the dashboard you want to use.
2. Identify the analysis that you want to add an action to.
3. Identify the destination where you want the action to go to.
4. Add the action link.

Creating an Action Link

1. Access the Home page for Oracle Business Intelligence Enterprise Edition.
2. Click **Catalog** to open the Oracle Business Intelligence Catalog.
3. Open the dashboard you want to use.

   You can click **Dashboards** and select it from the list, or you can click **Open** and select it from the list.
4. Click **Page Options** and select **Edit Dashboard**.
5. Select the analysis you want to add an action to, click **Properties**, and select **Edit Analysis**.
6. Click the **Criteria** tab.
7. Select the column (dimension or metric, or both), then click **Column Properties**.
8. Click the Interaction tab and select **Action Links**, then click the **Add Action Link** button above the table.
9. Click **Create a New Action** and select **Navigate to BI Content**.
10. Navigate to the folder that contains the content you want to link to and select that object.
11. In the Create New Action dialog box, click **OK**.
12. In the New Action Link dialog box, click **OK**.
13. In the Column Properties dialog box, click **OK**.
14. Click **Save**.

Creating Dashboard Prompts: Procedure

In most cases, you use the same prompts in the left column of every perspective and detail pages in your dashboard. That means you create only one prompts object in the catalog, and reuse it for every page. For exceptions, you create additional prompts and use them only in select pages.

Creating Prompts for Dashboard Pages

Follow these steps:

1. Click the **New** menu, and select **Dashboard Prompt** under **Analysis and Interactive Reporting**.

2. Select a subject area.
3. In the Definition section, click the **New** icon and select **Column Prompt**.
4. Select a column and click **OK**.
5. Specify settings for the prompt, and click **OK**.
6. Repeat steps 3 through 5 for each prompt you want.
7. In the Display section, click the **Edit** icon.
8. Delete the value in the **Title** field.
9. For the **Prompt Display** field, select **Place label above prompt**.
10. Select the **Set width of all prompts to** check box, and leave the value at **120** pixels.
11. Deselect the **Show Apply button** check box.

> **Note**
> You can reselect this option later, if leaving out the **Apply** button causes performance issues.

12. Click **OK**.
13. Make other changes for your prompts, as needed.
14. Save your prompts under **Shared Folders - Custom**.

> **Tip**
> Take a look at the structure in the catalog for predefined analytics, and consider using a similar structure within the Custom folder.

Setting the Dashboard Prompts: Worked Example

This example illustrates how to set up the dashboard prompts that you use when viewing the HR Executive Dashboard. You can set the prompts on any of the pages other than the Overview Page. You can save the prompts for global use or for your own use.

The prompt values that you set are then applied to all of the other pages in the HR Executive Dashboard, including the Overview page.

Setting the Dashboard Prompts

1. From the HR Executive Dashboard click one of the tabs such as **Workforce Health Summary**.

2. In the left column, select the criteria you want to use such as **Time**, **Country**, **Manager**, and so on. For example, set **Time** to 2013/01.
3. In the upper right corner click **Page Options** and select **Save Current Customization**.
4. Enter a name for the customization such as Year 2013.
5. To save the customization for your own use, click **Me**. To save it for global use, click **Others** and click **Set Permissions**.
6. Click **Search for users, roles, or groups** to browse available roles or groups or you can search for specific roles or groups.
7. Click **Add Roles/Groups** and use **Name** to enter part of the name of a role or group then click **Search**.
8. Click a single result to select it and click **>** to move it to **Selected Rows/Groups**.

   Or, click **>>** to select all of the accounts.
9. Click **OK**.
10. Click **Make this my default for this page** to set this as a default.
11. Click **OK**.

4 Dashboard Creation

Creating Dashboards and Pages: Overview

After you create analyses, prompts, and any other custom components you need for your dashboard pages, you're ready to build your dashboard.

General Considerations

When you create your dashboard and all the pages:

- Leave settings in their default state unless specified otherwise.
- Avoid using custom HTML code and scripts.
- Use styles and colors as described in this chapter so that your pages look consistent with predefined dashboards.

Process Overview

To build your dashboard in the application:

1. Create a dashboard, which starts out blank, and set its properties. Or, you can copy a predefined dashboard and customize it.
2. Create perspective pages within your dashboard.
3. Create detail pages within your dashboard.

   > **Note**
   > You create a separate dashboard for each inspector page.

4. Back in the main body of perspective pages, where analyses are displayed, create links that go to detail pages.

Creating Dashboards and Setting Properties: Procedure

Like analyses and prompts, a dashboard is an individual item that you create and then save in the catalog. As part of creating your dashboard, you need to set the style in the dashboard properties, which affects how every page in the dashboard looks.

Creating Your Dashboard

Follow these steps:

1. Click the **New** menu, and select **Dashboard** under **Analysis and Interactive Reporting**.

2. Enter the dashboard name to appear under the **Dashboards** menu.
3. Keep the default location of the dashboard in the catalog, within **Shared Folders - Custom - Dashboard**.
4. Choose to add content now, and click **OK**.
5. In the dashboard edit mode, click the **Tools** icon, and select **Dashboard Properties**.
6. Select **BIAppsCloud** as the style.
7. Select **page 1** in the Dashboard Pages table, and click the **Rename** icon.
8. Enter the name of the first perspective page you want to build, and click **OK**. Users see this name in the row of tabs on the dashboard.
9. Deselect the **Show Add To Briefing Book** check box.
10. Click **OK**, and save your dashboard.

Copying the HR Executive Dashboard: Worked Example

To create a custom dashboard for Oracle Transactional Business Intelligence Enterprise, you can either create a new dashboard following the guidelines and procedures in this guide, or you can copy the HR Executive Dashboard and make changes to the copy.

Creating a Copy of the HR Executive Dashboard

1. Access the Home page for Oracle Business Intelligence Enterprise Edition.
2. Click **Catalog** to open the Business Intelligence Catalog.
3. Expand **Shared Folders**.
4. Expand **Human Capital Management**.
5. Expand **Dashboards**.
6. Click **Dashboards** and select the HR Executive Dashboard.
7. At the top of the page, click the **Edit** icon.

   The Edit icon resembles a pencil.
8. In the upper-right corner of the page, click **Save Dashboard As** and navigate to the folder where you want to create your new dashboard such as /Shared Folders/Custom Dashboards.
9. Edit the **Name** HR Executive Dashboard to change it to a customized name.
10. Enter a **Description** such as Customized HR Dashboard.

11. Click **OK**.
12. To customize a page, click **Page Options** and select **Edit Dashboard**.
13. To customize an element on the page, click **Properties** and select an item to edit, for example, select **Edit Analysis**.

Creating Perspective Pages: Procedure

By default, a new dashboard comes with one blank page that you can use for your first perspective page. You can add more perspective pages, each as a tab in the dashboard. For each page, you determine the layout using columns and sections, add analyses and other content, and set properties for components within the page.

Adding and Reordering Perspective Pages

To add perspective pages, with your dashboard in edit mode:

1. Click the **Add Dashboard Page** icon.
2. Enter the name you want users to see in the row of tabs on the dashboard, and click **OK**.
3. Repeat steps 1 and 2 to add more pages.
4. Click the **Tools** icon, and select **Dashboard Properties**.
5. In the Dashboard Pages table, deselect the **Show Add To Briefing Book** check box for each page.
6. To reorder pages, select the page you want to move and use the icons to the right of the table.
7. Click **OK**.

Adding Prompts

To put prompts on your perspective page:

1. From the Dashboard Objects pane, drag a column into the main area on the right.
2. Hover over the column, click the **Properties** icon, and select **Column Properties**.
3. Click the icon after the **Background Color** field to open the color selector.
4. Enter **#F7F9FA**, and click **OK**.
5. From the Dashboard Objects pane, drag a section into the column.
6. Hover over the section, click the **Properties** icon, and deselect **Collapsible**.
7. In the Catalog pane, open **Shared Folders** and find your prompt.
8. Select the prompt and drag it into the section.

9. Save your work.

Creating the Page Header

To add the page title and description:

1. Put another column to the right of the prompts column.
2. Open the properties for the right column.
3. Expand the Additional Formatting Options section.
4. In the **Indent (Left Padding)** field, enter **10**, and click **OK**.
5. Put a section into the column.
6. Open the section properties, and deselect **Collapsible**.
7. Open the section properties again and select **Format Section**.
8. Expand the Custom CSS Style Options (HTML Only) section.
9. Select the **Use Custom CSS Class** check box, and enter **otbi_title** in the field.
10. Click **OK**.
11. From the Dashboard Objects pane, drag a text into the section.
12. Hover over the text, and click the **Properties** icon.
13. Enter the page title, and click **OK**.
14. Put another section below the one for the title. This second section is for the page description.
15. Repeat steps 6 through 13, except:
    - Enter **otbi_subtitle** for the custom CSS class.
    - Enter the description instead of the page title.
16. Save your work.

Adding Performance Tiles

To put the row of performance tiles on your perspective page:

1. Put another section below the page description.
2. Open the section properties, and deselect **Collapsible**.
3. In the Catalog pane, find each performance tile and drag it into the section.
4. If you also have sparklines for each tile, then put another section right below the one for the tiles.

5. Repeat steps 2 and 3, except you're placing the corresponding sparkline from the catalog under each performance tile.
6. Save your work.

Adding Analyses

To put the primary and additional analyses on your perspective page:

1. Put another section below the performance tiles or sparklines.
2. Open the section properties, and deselect **Collapsible**.
3. In the Catalog pane, find the analysis and drag it into the section.
4. If the default view is not what you want to show, hover over the analysis, click the **Properties** icon, and select the view you want under **Show View**.
5. Put more sections at the bottom, if needed, and repeat steps 2 through 4.

> **Note**
> If any of the additional sections contain multiple analyses, then make sure to put them in the same section.

6. Save your work.

Creating Standard Detail Pages and Show Data Pages: Procedure

You create standard detail pages and show data pages as part of your dashboard, but hide them so that they don't appear to the user as tabs in the dashboard. You then create links between the perspective and detail pages.

> **Note**
> For show data pages, there's an extra procedure for adding an **Export** link.

Adding Detail Pages

To add detail pages, with your dashboard in edit mode:

1. Click the **Add Dashboard Page** icon.
2. Enter a brief name for the page, and click **OK**.
3. Repeat steps 1 and 2 to add more pages.
4. Click the **Tools** icon, and select **Dashboard Properties**.

5. In the Dashboard Pages table, deselect the **Show Add To Briefing Book** check box for each page.
6. Select the **Hide Page** check box for each detail page.
7. Click **OK**.

Adding Prompts

To put prompts on your detail page:

1. From the Dashboard Objects pane, drag a column into the main area on the right.
2. Hover over the column, click the **Properties** icon, and select **Column Properties**.
3. Click the icon after the **Background Color** field to open the color selector.
4. Enter **#F7F9FA**, and click **OK**.
5. From the Dashboard Objects pane, drag a section into the column.
6. Hover over the section, click the **Properties** icon, and deselect **Collapsible**.
7. In the Catalog pane, open **Shared Folders** and find the same prompts used in the parent perspective page.
8. Select the prompt and drag it into the section.
9. Save your work.

Creating the Page Header

To add the parent perspective page title, the detail page title, and a link back to the perspective page:

1. Put another column to the right of the prompts column.
2. Open the properties for the right column.
3. Expand the Additional Formatting Options section.
4. In the **Indent (Left Padding)** field, enter **10**, and click **OK**.
5. Put a section into the column.
6. Open the section properties, and deselect **Collapsible**.
7. Open the section properties again and select **Format Section**.
8. In the Cell section, select **Bottom** for the vertical alignment.
9. Expand the Custom CSS Style Options (HTML Only) section.
10. Select the **Use Custom CSS Class** check box, and enter **otbi_title** in the field.
11. Click **OK**.

12. From the Dashboard Objects pane, drag a text into the section.
13. Hover over the text, and click the **Properties** icon.
14. Enter the same title as the parent perspective page, and click **OK**.
15. From the Dashboard Objects pane, drag an action link and drop it to the right of the title text.
16. Hover over the action link, and click the **Properties** icon.
17. For the link text, enter **Go to** followed by the parent perspective page name, the one that displays on the tab.
18. Click the **New Action** icon after the **Action** field, and select **Navigate to BI Content**.
19. Find and select the parent perspective page in the catalog, and click **OK** until you close all dialog boxes.
20. Put another section below the one for the parent page title. This second section is for the detail page title.

> **Note**
> If you're creating a show data page, you don't need this section for a detail page title. You can just skip to step 22 and save your work.

21. Repeat steps 6 through 14, except:
    - Skip step 8.
    - Enter **otbi_subpage** for the custom CSS class.
    - Enter the detail page title instead of the perspective page title. This should be the same as what you entered in step 9 when you created the dashboard for your detail page.
22. Save your work.

Adding Analyses

To put analyses on your detail page:

1. Put another section under the page header.
2. Open the section properties, and deselect **Collapsible**.
3. In the Catalog pane, find the analysis and drag it into the section.
4. If the default view is not what you want to show, hover over the analysis, click the **Properties** icon, and select the view you want under **Show View**.

> **Note**
> If you want to show the title view, set this first view to the title view, and then create another section right below for another view of the same analysis.

5. If you're not creating a show data page, then put more sections at the bottom, if needed, and repeat steps 2 through 4.

> **Note**
> If any section contains multiple analyses, then make sure to put them in the same section.

6. Save your work.

Adding Export Link

To add an **Export** link below the table for a show data page:

1. Click the **Tools** icon and select **Page Report Links**.
2. Select the **Customize** option.
3. Select the **Export** check box.
4. Click **OK**.
5. Save your work.

Creating Inspector Pages: Procedure

You create an inspector page as a separate dashboard with multiple hidden tabs, or dashboard pages. Each page represents a category of information describing that business object. For example, if your inspector page has three categories, then you create a dashboard with three dashboard pages. You then create links from data values on perspective pages to the corresponding inspector page (usually, the dashboard page for the first category).

> **Note**
> After you preform the prerequisites and create the dashboard for your inspector page, follow the rest of the steps for each page in the dashboard.

Prerequisites

Before you create your inspector page:

- Create a prompt with just one column, the one that you want to use for the link to open the inspector page. For example, if you want users to click on a person name to open an inspector page about that person, then use the person name column. This prompt is used as part of creating the dashboard for your inspector page, so that the page displays information for the right business object.
- Create an analysis to be used to show the business object value in the page title, for example the specific person name.
    a. Add just one column, the same as the one for the prompt.

b. Add a filter for the column, selecting **is prompted** for the **Operator** field.

c. In the Results tab, remove all views and add a Narrative view (found under **Other Views**).

d. Edit the view and enter **@1** in the **Narrative** field.

- Create an analysis with table views that display the identifiers for your inspector page.

Creating the Dashboard for Your Inspector Page

Follow these steps:

1. Click the **New** menu, and select **Dashboard** under **Analysis and Interactive Reporting**.
2. Enter a dashboard name, for example the business object that your inspector page is for.
3. Change the location of the dashboard in the catalog, from **Shared Folders - Custom - Dashboard** to another folder under **Custom**, not **Dashboard**. This way the dashboard doesn't appear in the Dashboards menu.
4. Choose to add content now, and click **OK**.
5. Click the Add Dashboard Page icon.
6. Enter the name of the second category in the inspector page, and click OK
7. Repeat steps 5 and 6 to add more pages, one for each of the remaining categories.
8. Click the **Tools** icon, and select **Dashboard Properties**.
9. Select **BIAppsCloud** as the style.
10. Click the **Edit** icon after **Filters and Variables**.
11. Click the **Embed new hidden dashboard prompt** icon, find and select the prompt you created, and click **OK** until you're back in the Dashboard Properties dialog box.
12. Select **page 1** in the Dashboard Pages table, and click the **Rename** icon.
13. Enter the name of the first category in the inspector page, and click **OK**.
14. For each row, select the **Hide Page** check box, and deselect the **Show Add To Briefing Book** check box.
15. Click **OK**, and save your dashboard.

Creating the Page Header

To add the page title, description, and identifiers:

1. From the Dashboard Objects pane, drag a column into the main area on the right.

2. Hover over the column, click the **Properties** icon, and select **Column Properties**.
3. In the Border section, select the bottom border in the diagram.
4. Select **Single** for the **Border Style** field.
5. Enter **#EEEEEE** as the border color, and click **OK** until you close all dialog boxes.
6. Follow steps 5 through 14 for creating page headers in standard detail pages, except:
    - Enter **Top** for the vertical alignment.
    - For the text, enter the business object followed by a colon, for example **Person:**.
7. From the Catalog pane, find the analysis you created for the page title, and drop it to the right of the text object.
8. Put another text to the right of the analysis, with the name of the category.
9. Put another section below the first.
10. For the section properties, deselect **Collapsible** and enter **otbi_subtitle** for the custom CSS class.
11. Put a text in this section and enter the page description.
12. Put a section below the one for the page description.
13. For the section properties, deselect **Collapsible** and enter **otbi_menu** for the custom CSS class.
14. From the Catalog pane, find the analysis with the table views you created for the identifiers, and drop it in this section.
15. Save your work.

Creating the Menu of Categories

To add a list of category links that appears on the left of your inspector page:

1. Put a column under the one for the page header.
2. Open the column properties
3. In the Border section, select the right border in the diagram.
4. Select **Single** for the **Border Style** field.
5. Enter **#EEEEEE** as the border color, and click **OK**.
6. In the Additional Formatting Options section, enter a width that accommodates the links without the names wrapping too much, and click **OK**.
7. Put a section in this column.

8. For the section properties:
    - Deselect **Collapsible**.
    - Select **Left** for the horizontal alignment.
    - Enter **otbi_menu** for the custom CSS class
9. From the Dashboard Objects pane, drag an action link into the section.
10. Open the action link properties.
11. Enter the category name in the **Link Text** field.
12. Click the **New Action** icon after the **Action** field, and select **Navigate to BI Content**.
13. Find and select the dashboard page for this category in the catalog, and click OK until you close all dialog boxes.
14. Repeat steps 9 through 13 for other categories on your inspector page.
15. Save your work.

Adding Analyses

To put analyses for the category on the dashboard page:

1. Put another column to the right of the one for the menu of categories.
2. Open the column properties
3. In the Additional Formatting Options section, enter **10** in the **Indent (Left Padding)** field, and click **OK**.
4. Put a section in this column.
5. For the section properties:
    - Deselect **Collapsible**.
    - Select **Left** for the horizontal alignment.
6. Add one or more analyses to the section.
7. Add additional sections and analyses as needed.
8. Save your work.

Adding Links to Detail Pages: Procedure

After you create your detail pages, you can add links to them from other pages. These steps follow the general patterns for linking to detail pages: more information section, show data links, and inspector page navigation.

More Information Sections

To create a section containing links to detail pages for more information:

1. Open your perspective page in the edit mode.
2. From the Dashboard Objects pane, drag a section and drop it right below the section that you want to provide more information for.
3. Hover over the section, click the **Properties** icon, and select **Show Section Title**.
4. Open the section properties again, and select **Rename**.
5. Enter **More** followed by the name of the analysis or section that the detail pages support.
6. Open the section properties again, and select **Format Section**.
7. In the Cell section, select **Left** for the horizontal alignment.
8. Expand the Additional Formatting Options section.
9. Enter **15** in the **Indent (Left Padding)** field.
10. Expand the Custom CSS Style Options (HTML Only) section.
11. Select the **Use Custom CSS Class** check box, and enter **otbi_simplelink** in the field.
12. Click **OK**.
13. From the Dashboard Objects pane, drag an action link into the section.
14. Hover over the action link, and click the **Properties** icon.
15. For the link text, enter a question that summarizes what the detail page answers.
16. Click the **New Action** icon after the **Action** field, and select **Navigate to BI Content**.
17. Find and select the detail page in the catalog (under your dashboard), and click **OK** until you close all dialog boxes.
18. Repeat steps 13 through 17 for additional links, making sure to put all the links in the same section.
19. Save your work.

Show Data Links

To add a link that opens a show data page:

1. Open your perspective page in the edit mode.
2. From the Dashboard Objects pane, drag an action link and drop it right below the corresponding analysis, in the same section.

3. Hover over the action link, and click the **Properties** icon.
4. For the link text, enter **Show data**.
5. Click the **New Action** icon after the **Action** field, and select **Navigate to BI Content**.
6. Find and select the show data page in the catalog, and click **OK** until you close all dialog boxes.
7. Save your work.

Inspector Page Navigation

To add a link that opens an inspector page:

1. Open in edit mode the page where you want to add the link.
2. Hover over the analysis that you want to link from, click the **Properties** icon, and select **Edit Analysis**.
3. Open the Criteria tab.
4. Click the icon after the column that you want to link from, and select **Column Properties**.

> **Important**
> This must be the same column that you used for the prompt for the inspector pages.

5. Open the Interaction tab.
6. In the Value section, select **Action Links** for the **Primary Interaction** field.
7. Click the **Add Action Link** icon.
8. Click the **New Action** icon after the **Action** field, and select **Navigate to BI Content**.
9. Find and select the inspector page (for the first category) in the catalog, and click **OK**.
10. In the Create New Action dialog box, click the **Options** button.
11. Select the **Open In New Window** check box, and click **OK** until you close all dialog boxes.
12. Save your work.

Glossary

analysis

A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.

analytics

Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

business intelligence catalog

The repository where all business intelligence objects, including analytics, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and custom objects.

dashboard

A collection of analyses and other content, presented on one or more pages to help users achieve specific business goals. Each page is a separate tab within the dashboard.

detail page

A dashboard page with one or more analyses, providing more information to support a perspective or overview page.

inspector page

A detail page that has analyses only for a specific business object, for example a person.

KPI

Abbreviation for key performance indicator. KPIs are quantifiable metrics that can reflect how well operational, tactical, or strategic objectives are being met.

performance tile

A single, summary measure value displayed prominently with, in some cases, a trend line.

perspective page

A dashboard page that has a collection of analyses to support a specific business point of view.

prompt

A parameter that you set when you use analytics, limiting the data in the analysis or in all analyses on the dashboard or dashboard page (tab).

show data page

A detail page that has only one analysis, showing data in a table view.

sparkline

A small, condensed line graph that shows the shape of a given metric's variation over time, in context of other relevant data on the dashboard page.

subject area

A set of columns, or pieces of data, related to a specific business object or area.

view

A specific way to present the results of an analysis, for example as a table or graph. Other types of views, such as the title view, show other components of the analysis.