

# **Hands On Oracle BI Answers and Dashboards**

Using Sales History Database (SH)

# Connect and log in



localhost/analytics Go

**Analytics**

The content you've requested requires that you be logged in to the Siebel Analytics Server.  
Please enter your User ID and Password below, and then press the Log In button.

User ID

Password

Remember my ID and password

English ▼

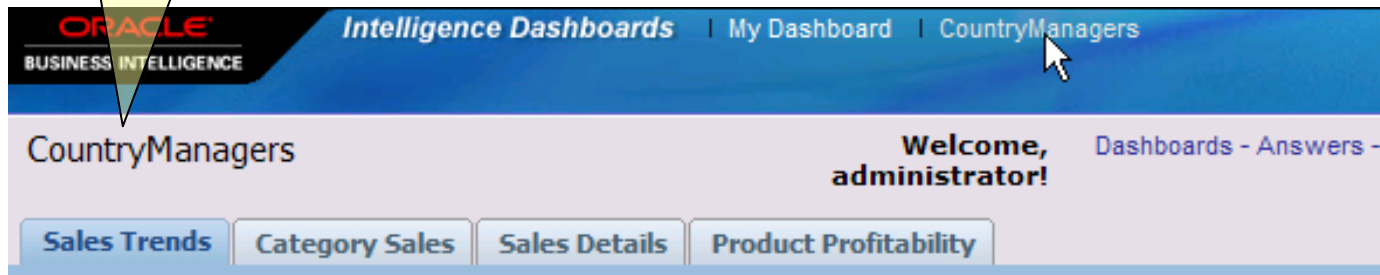
Log in as administrator,  
no password



# Select Dashboard

If you don't see this...

...then click this



The screenshot shows the Oracle Business Intelligence interface. At the top left is the Oracle Business Intelligence logo. The main navigation bar includes 'Intelligence Dashboards', 'My Dashboard', and 'CountryManagers'. Below this, the page title is 'CountryManagers' and the user is greeted with 'Welcome, administrator!'. A navigation menu contains 'Sales Trends', 'Category Sales', 'Sales Details', and 'Product Profitability'. A link for 'Dashboards - Answers -' is visible in the top right corner of the main content area.

You may have to click this first.

[Dashboards - Answers](#)

# Note Features

**Tabbed pages**

**"Current" month**  
Current month is December, 2001

**Time comparison**

Latest Month	% Chg Amount Sold MAgo	Win Streak	Loss Streak
	2.92	5	0

**Chart shows data on roll-over**

Category sales for last 12 months  
Amount Sold (000)

**Narrative**  
Hardware declined -12.37% this month compared to last month.

**Guided navigation**

**Narrative summary**  
10 of the last 12 months have been Wins.

**Conditional formatting**

Profitability	Amount Sold	Gross Profit	Promo Profit
★	874,069	201,895	142,695

TV promotion #13-351

**Regions and channels where Categories declined last month**

Prod Category	Country Region	Channel Desc	% Chg Amount Sold MAgo	Chg Amount Sold MAgo
Hardware	Americas	Direct Sales	-24.37	-26,714
		Partners	-8.54	-6,023
Hardware	Asia	Direct Sales	-43.53	-10,467
		Internet	-32.35	-5,409
Hardware	Europe	Partners	-49.40	-9,148
		Internet	-13.32	-4,001
Hardware	Oceania	Partners	-2.25	-791
		Partners	-0.68	-16

Prompt

Pick Category: Hardware ▾ Pick Subcategory (optional): ▾ Pick Calendar Month: ▾ Go

Select columns

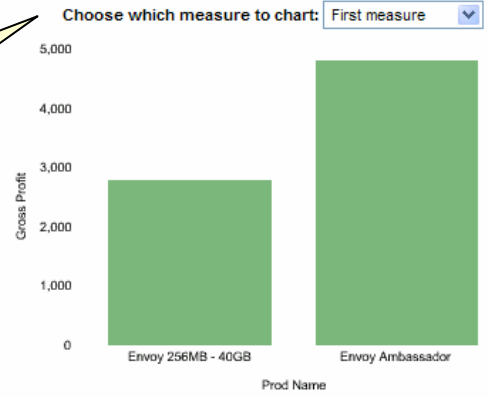
Pick columns to view:  
 Prod Name ▾ Gross Profit ▾ % Chg Amount Sold MAgo ▾

Filter used

Prod Category is equal to Hardware and Current Calendar Month

Prod Name	Gross Profit	% Chg Amount Sold MAgo ^
Envoy 256MB - 40GB	2,788	4.23
Envoy Ambassador	4,805	37.31
<b>Grand Total</b>	<b>7,593</b>	<b>20.14</b>

Select measure to view in chart



Sales Trends

Category Sales

Sales Details

Product Profitability

Page Options

Order Details

Country Region - Country Asia - Singapore

Page selector

Pivot table section heading using formatting options

<i>Customer Name</i>	<b>Campbell, Hayden</b>	<i>Cust Id</i>	<b>100605</b>	<i>Occupation</i>	<b>Prof.</b>
<i>Cust City</i>	<b>Singapore</b>	<i>Cust Postal Code</i>	<b>54930</b>	<i>Cust State Province</i>	<b>Singapore</b>
<i>Cust Gender</i>	<b>M</b>	<i>Cust Year Of Birth</i>	<b>1974</b>	<i>Education</i>	<b>Masters</b>
<i>Cust Marital Status</i>	<b>Married</b>				

Sell Date	Product Category	Product	Amount Sold
11/30/1998	Peripherals and Accessories	18" Flat Panel Graphics Monitor	900
		Model SM26273 Black Ink Cartridge	28
		Standard Mouse	23
	Software/Other	Mouse Pad	10
		O/S Documentation Set - English	45

Pivot table details

<i>Customer Name</i>	<b>Conway, Jayden</b>	<i>Cust Id</i>	<b>100012</b>	<i>Occupation</i>	<b>Prof.</b>
<i>Cust City</i>	<b>Singapore</b>	<i>Cust Postal Code</i>	<b>54930</b>	<i>Cust State Province</i>	<b>Singapore</b>
<i>Cust Gender</i>	<b>M</b>	<i>Cust Year Of Birth</i>	<b>1968</b>	<i>Education</i>	<b>PhD</b>
<i>Cust Marital Status</i>	<b>Married</b>				

Sell Date	Product Category	Product	Amount Sold
3/31/1998	Peripherals and Accessories	18" Flat Panel Graphics Monitor	900
		SIMM- 16MB PCMCIAII card	150

<i>Customer Name</i>	<b>Roy, Haley</b>	<i>Cust Id</i>	<b>100034</b>	<i>Occupation</i>	<b>Prof.</b>
<i>Cust City</i>	<b>Seletar</b>	<i>Cust Postal Code</i>	<b>32144</b>	<i>Cust State Province</i>	<b>Singapore</b>
<i>Cust Gender</i>	<b>M</b>	<i>Cust Year Of Birth</i>	<b>1963</b>	<i>Education</i>	<b>PhD</b>
<i>Cust Marital Status</i>	<b>Married</b>				

Sell Date	Product Category	Product	Amount Sold
3/31/1998	Peripherals and Accessories	SIMM- 16MB PCMCIAII card	150

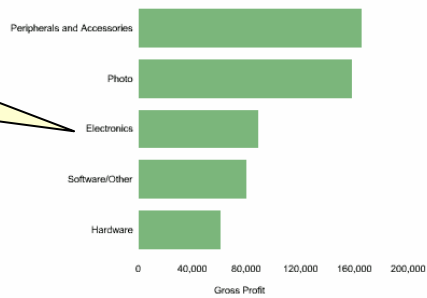


**Category Profitability**  
Current Calendar Month

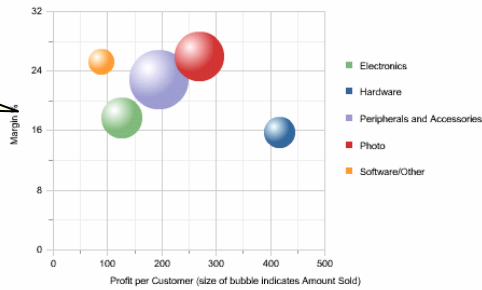
Prod Category	Gross Profit	Share of Gross Profit	Cum Share of Gross Profit
Peripherals and Accessories	166,123	29.9	29.9
Photo	158,177	28.5	58.4
Electronics	89,333	16.1	74.5
Software/Other	80,599	14.5	89.0
Hardware	60,962	11.0	100.0

Choose what to chart: Profitability

**Category Profitability**



Bubble chart to display three measures



**Product Profitability**  
80/20 -- click on product to see trend

Prod Name	Prod Category	# of Products	Gross Profit	Share of Gross Profit	Cum Share of Gross Profit
Mini DV Camcorder with 3.5" Swivel LCD	Photo	1	70,278	12.7	12.7
5MP Telephoto Digital Camera	Photo	1	63,379	11.4	24.1
17" LCD w/built-in HDTV Tuner	Peripherals and Accessories	1	56,560	10.2	34.3
Home Theatre Package with DVD-Audio/Video Play	Electronics	1	38,919	7.0	41.3
Envoy Ambassador	Hardware	1	36,308	6.5	47.8
Envoy 256MB - 40GB	Hardware	1	24,654	4.4	52.3
V Box	Electronics	1	22,350	4.0	56.3
Unix/Windows 1-user pack	Software/Other	1	22,149	4.0	60.3
18" Flat Panel Graphics Monitor	Peripherals and Accessories	1	20,085	3.6	63.9
8.3 Minitower Speaker	Electronics	1	17,201	3.1	67.0
DVD-R Disc with Jewel Case, 4.7 GB	Software/Other	1	16,780	3.0	70.0
PCMCIA modem/fax 28800 baud	Peripherals and Accessories	1	15,854	2.9	72.9
SDRAM- 16MB PCMCIAII card	Peripherals and Accessories	1	13,734	2.5	75.3
SDRAM- 8MB PCMCIAII card	Peripherals and Accessories	1	11,407	2.1	77.4
256MB Memory Card	Photo	1	10,410	1.9	79.3
All Other	Combined	55	114,097	20.6	100.0

80/20 analysis

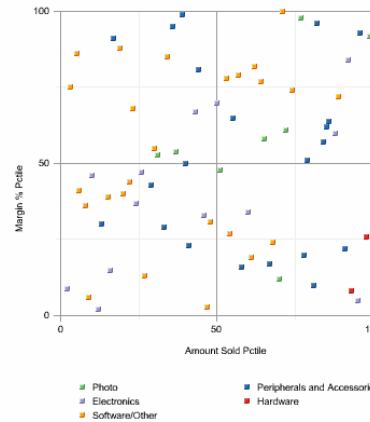
Navigate and pass value as filter

View selector

**Product Quadrant Analysis**

Current Calendar Month

Scatter



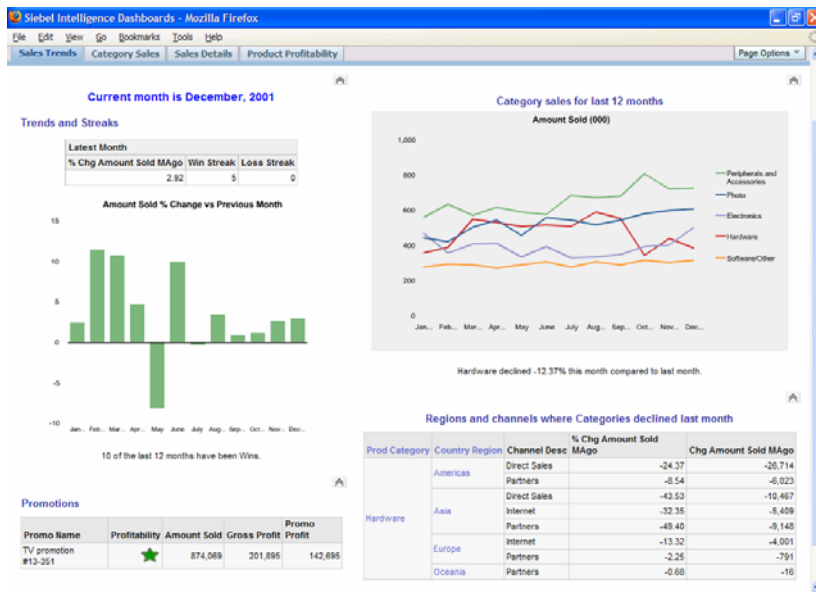
Quadrant analysis using percentile values

# Personalization

Log out, then log in as Kurt, Keiko, Charles, or Karen

Administrator sees data for all countries

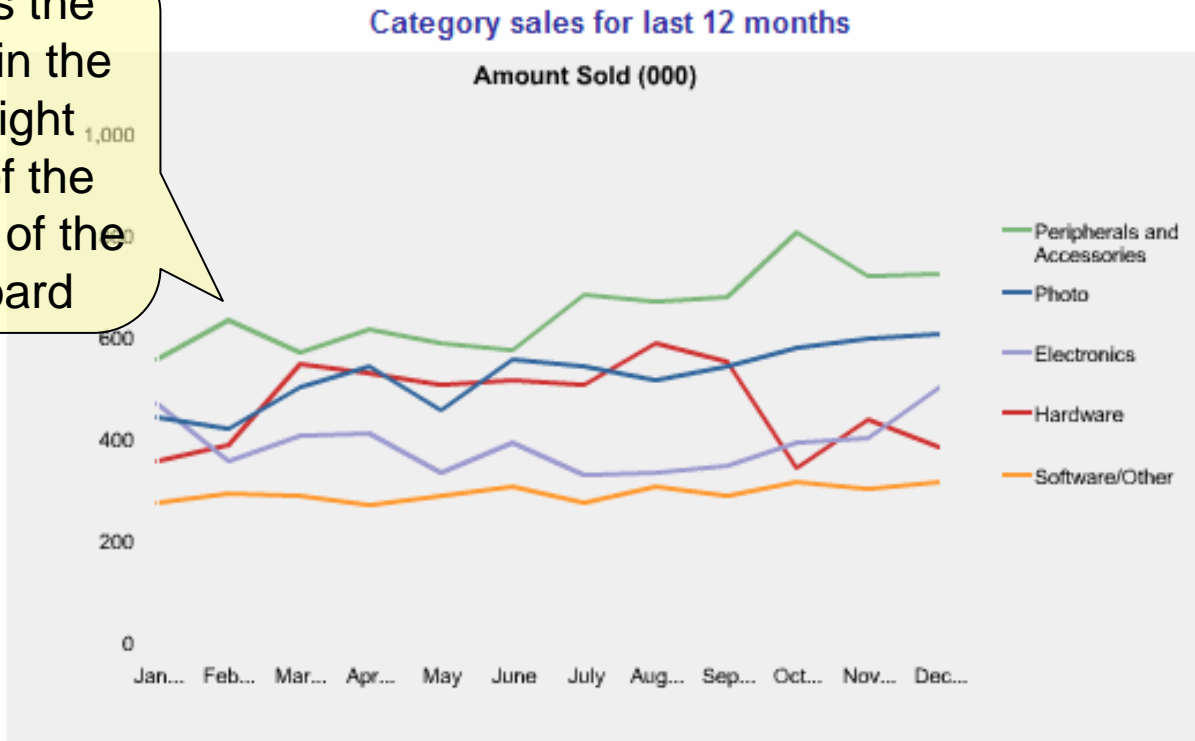
Kurt, Germany country manager, sees only data for Germany





# Now Create This...

This was the analysis in the upper right corner of the first page of the dashboard




Hardware declined -12.37% this month compared to last month.

First, log back in as Administrator

# Answers: Select Subject Area

**Subject Areas**

 [SH](#)  
Subject area using data from Oracle's "Sales History" demo database

ORACLE BUSINESS INTELLIGENCE **Answers**

Dashboards **Answers** Advanced Reports Marketing Delivers Admin My Account Log Out

Search

My Folder  
This folder is empty.

Shared Folders  
This folder is empty.

My Briefing Books

My Filters

Shared Filters

[Refresh Display](#)

[Reload Server Metadata](#)


This is the start page for Answers. Return to this page by clicking the Answers link.

**Browse Saved Requests**  
To view requests as stored in the Web Catalog, use the Catalog tab. To view requests organized by Dashboards, use the Dashboards tab. Click a request name to view or modify it.


**Create New Request**  
To create a new request, select a Subject Area.

**Manage Briefing Books**  
To download or edit a Briefing Book, click on its name in the Briefing Books section of the Catalog tab.

**Subject Areas**

 [SH](#)  
Subject area using data from Oracle's "Sales History" demo database

**Direct Database Request**

 [Create Direct Request](#)  
Create a new SQL request that will be sent directly to the database. The results of the request, if any, can be displayed and manipulated within Answers, and subsequently incorporated into Intelligence Dashboards and Delivers.

# Build Query

Click to expand or contract

Click column to add it to the Criteria

Drag to change column order

















The screenshot displays the Oracle Business Intelligence 'Answers' interface. The left sidebar shows a tree view of data sources under 'SH', including 'Columns', 'Measures', and 'Quota Facts'. The 'Amount Sold (000)' measure is highlighted. The main area shows the 'Criteria' tab with a table of selected columns: 'Calendar Month Desc', 'Calendar Month Name', 'Prod Category', and 'Amount Sold (000)'. Below the table are buttons for 'Display Results' and 'Remove All'. A 'Filters' section is also visible with a 'Combine with Similar Request' button.

Calendar	Products	Sales Facts	
Calendar Month Desc ↓↑	Calendar Month Name ↓↑	Prod Category ↓↑	Amount Sold (000) ↓↑

# Logical SQL

- The next two slides are about SQL
- When you use Answers, you are creating "Logical SQL"
- Logical SQL references logical objects, not physical database objects
- The next slides compare the physical SQL that you might expect to see if you were using a query tool that only knew about physical tables, versus the logical SQL that the web server creates to specify a query of logical objects
- These logical objects are defined in metadata and represent business concepts using business vocabulary

# Standard SQL (physical)

Calendar		Products	Sales Facts
Calendar Month Desc ↓↑	Calendar Month Name ↓↑	Prod Category ↓↑	Amount Sold (000) ↓↑
   	   	   	   

SELECT

```
c."Calendar Month Desc"  
, c."Calendar Month Name"  
, p."Prod Category"  
, sum(f."Amount Sold (000)")
```

Columns in  
results  
("projection  
list")

Aggregation  
function: sum()

FROM

```
Calendar c, Products p, "Sales Facts" f
```

Tables

















```
WHERE (c joins to f?, p joins to f?)
```

join syntax

```
GROUP BY c."Calendar Month Desc"  
, c."Calendar Month Name"  
, p."Prod Category"
```

GROUP BY

# Logical SQL

Calendar		Products	Sales Facts
Calendar Month Desc ↓↑	Calendar Month Name ↓↑	Prod Category ↓↑	Amount Sold (000) ↓↑
   	   	   	   

Criteria Results Prompts Advanced

## SQL Issued

The field below contains the SQL that will be issued to the Siebel Analytics Server

```
SELECT  
Calendar."Calendar Month Desc" saw_0  
, Calendar."Calendar Month Name" saw_1  
, Products."Prod Category" saw_2  
, "Sales Facts"."Amount Sold (000)" saw_3
```

Projection list

No aggregation function

```
FROM SH
```

No references to tables or databases – source is subject area

No GROUP BY

```
ORDER BY saw_0, saw_1, saw_2
```

Default sorting

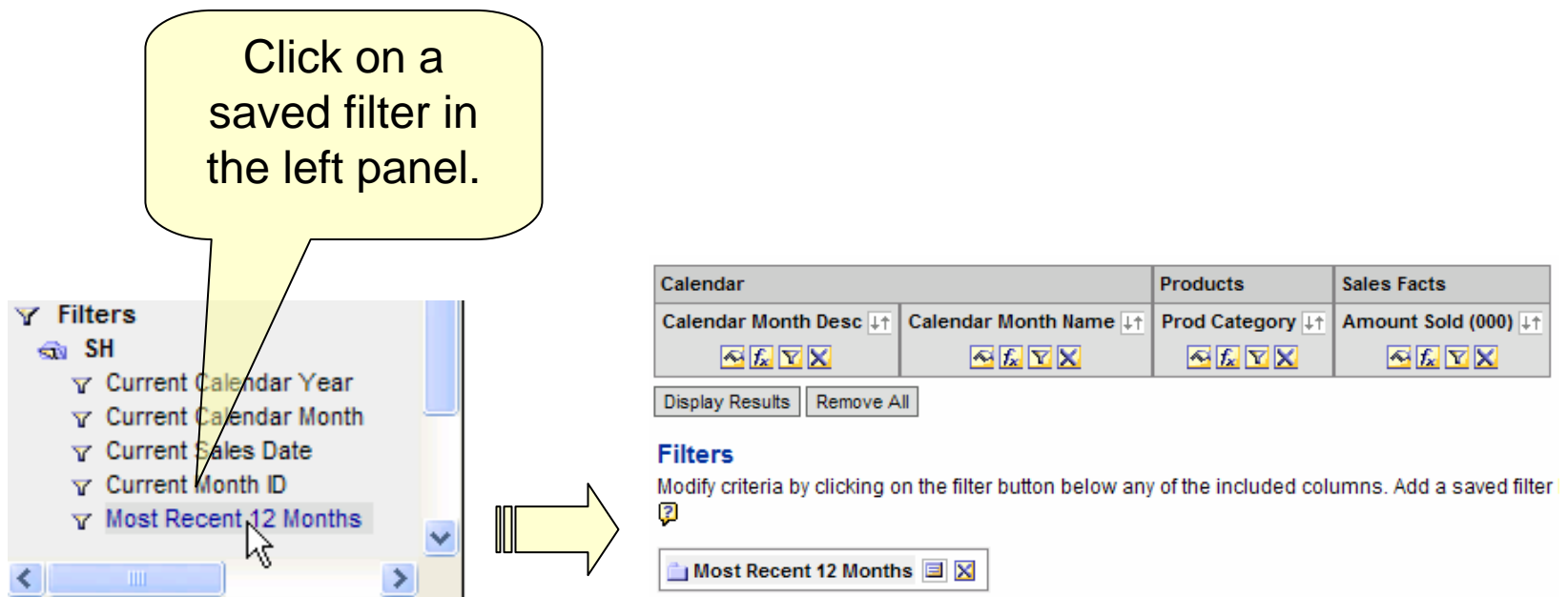
# Advanced Tab

- Logical SQL is shown on the Advanced Tab
- You can write logical SQL by hand – but it is much easier to use Answers to create it

# Filter for Most Recent 12 Months

- To see only the data for the last 12 months, add a filter to the query

Click on a saved filter in the left panel.



The image illustrates the process of applying a saved filter. On the left, a 'Filters' panel shows a list of filters under 'SH', with 'Most Recent 12 Months' selected. A yellow callout bubble points to this filter. A yellow arrow points from the callout to the right panel. The right panel shows a table with columns from 'Calendar', 'Products', and 'Sales Facts'. Below the table are 'Display Results' and 'Remove All' buttons. Under the 'Filters' section, the 'Most Recent 12 Months' filter is applied to the 'Calendar Month Desc' column.

Calendar	Products	Sales Facts	
Calendar Month Desc ↓↑	Calendar Month Name ↓↑	Prod Category ↓↑	Amount Sold (000) ↓↑

Display Results Remove All

**Filters**  
Modify criteria by clicking on the filter button below any of the included columns. Add a saved filter

Most Recent 12 Months



# Create a Filter

- Instead of using a saved filter, you could create a filter manually
- Suppose you wanted only to see data for the Direct sales channel

# Add filter for Direct Channel



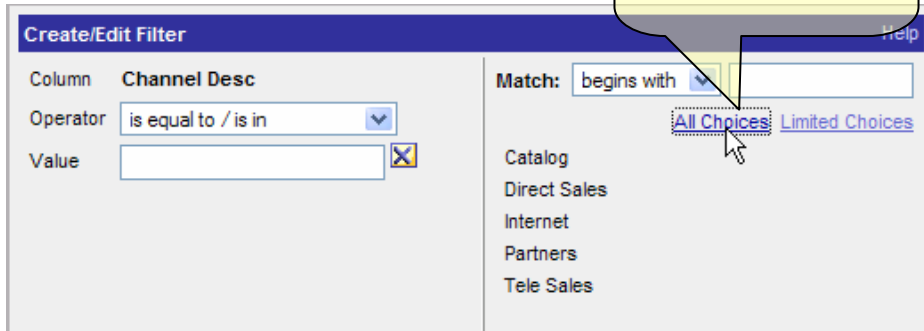
Left panel

1. Add Channel Desc column to query

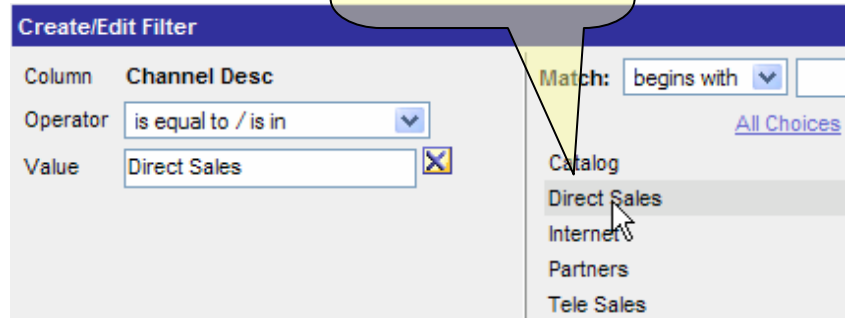


2. Click filter button on column

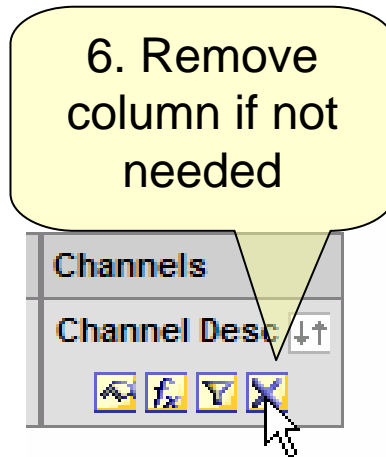
3. View Choices



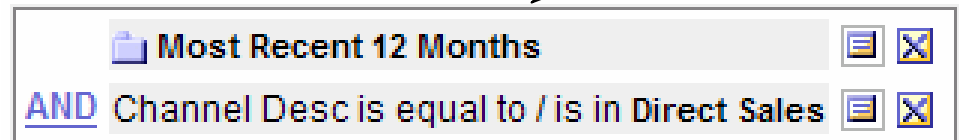
4. Click on Choices



# Add filter (continued)



Final filter



# Extensive Filter Options

Many operators

Column: Channel Class  
Operator: is equal to / is in  
Value: is equal to / is in

is not equal to / is not in  
is less than  
is greater than  
is less than or equal to  
is greater than or equal to  
is between  
is null  
is not null  
is in top  
is in bottom  
contains all  
contains any  
does not contain  
begins with  
ends with  
is LIKE (pattern match)  
is not LIKE (pattern match)  
is prompted

Add Advanced

Add Value  
Advanced SQL Expression  
Variable

Use variables or express in SQL

Advanced Filter based on results of another request  
Convert this filter to SQL

Filter based on another query (subquery)

Complex nested filters

Channel Class is equal to / is in Direct  
AND Country Region is equal to / is in Asia, Europe, Middle East, Oceania, Africa  
AND Calendar Year is equal to / is in 2001, 2000  
OR  
Country Region is equal to / is in Americas  
AND Calendar Year is equal to / is in 2001

Edit Filter Group

# View Results

Click on Results tab

Or click here for specific data view: compound, table, chart, pivot

The screenshot shows the Oracle BI interface with the 'Results' tab selected. The 'Columns' section is visible, containing a table of available columns and their associated actions.

Calendar		Products	Sales Facts
Calendar Month Desc ↓↑	Calendar Month Name ↓↑	Prod Category ↓↑	Amount Sold (000) ↓↑

Buttons: Display Results Remove All

Or click here

# Add Totals

Criteria Results Prompts Advanced Dashboards Answers Advanced Re

Compound Layout

Add View: [grid] [table] [chart] [map] [list]

Title [edit] [undo] [redo] [delete]

Table [edit] [undo] [redo] [delete]

Calendar Month Desc	Calendar Month Name	Prod Category	Amount Sold (000)
		Electronics	243
		Hardware	225

Click pencil icon to edit table view

Click for Grand total

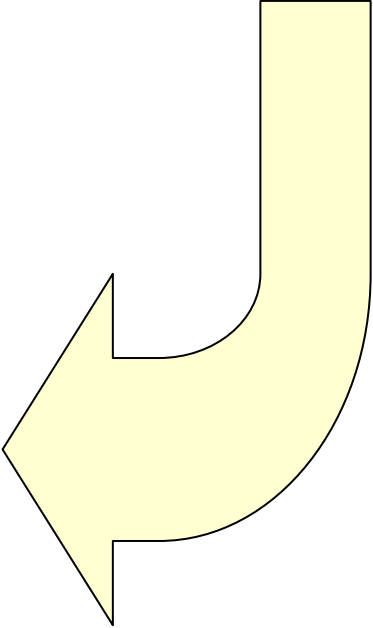
Criteria Results Prompts Advanced Dashboards Answers Advanced R

Table

Display Header Toolbars with Results

Calendar Month Desc	Calendar Month Name	Prod Category	Amount Sold (000)
		Electronics	243
		Hardware	225
2001-01	Jan	Electronics and Accessories	291
		Photo	198
		Software/Other	150
		Electronics	164

Click for subtotal when column value changes



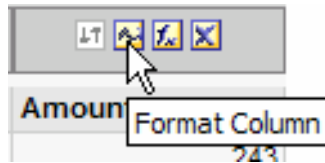
# Change Data Format

January Total

1106

January Total

1,106



The 'Edit Column Format' dialog box is shown with the 'Data Format' tab selected. It contains the following settings:

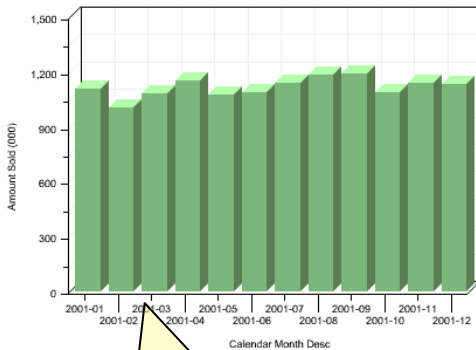
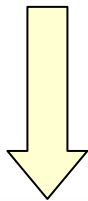
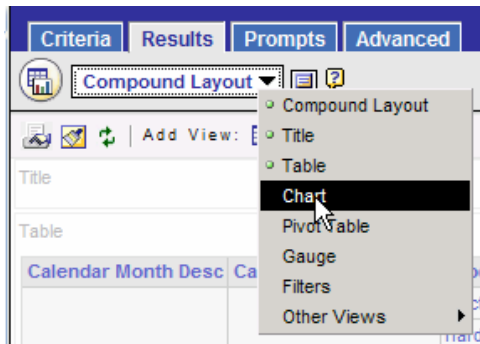
- Override Default Data Format
- Treat Numbers As: Number
- Negative Format: Minus: -123
- Digits: 0
- Use 1000's Separator

Save

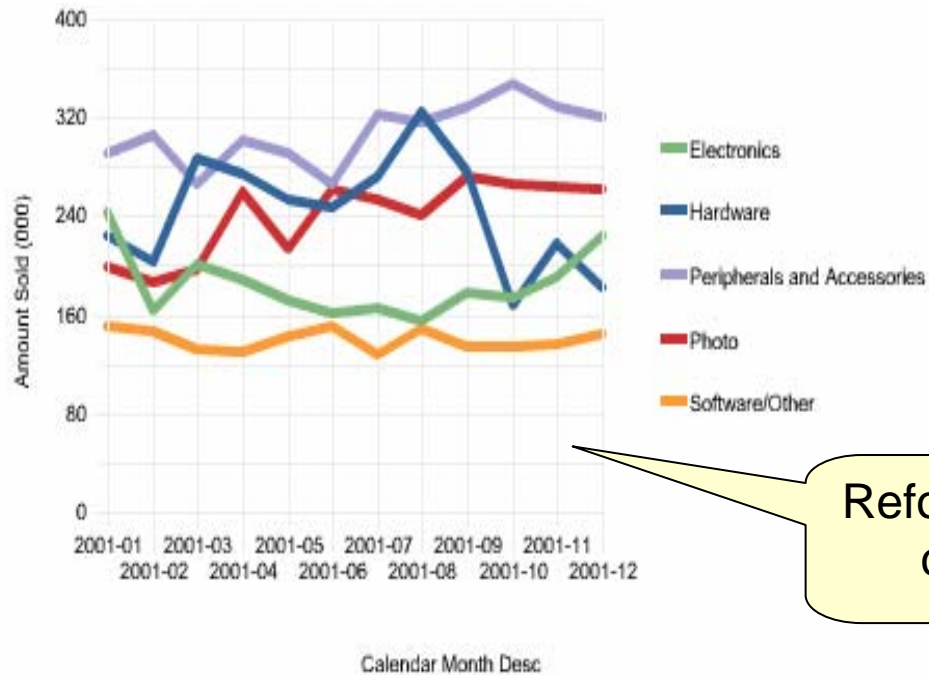
as the system-wide default for "'Sales Facts"."Amount Sold (000)'"  
as the system-wide default for this data type

Web administrators have these options

# Create a Chart



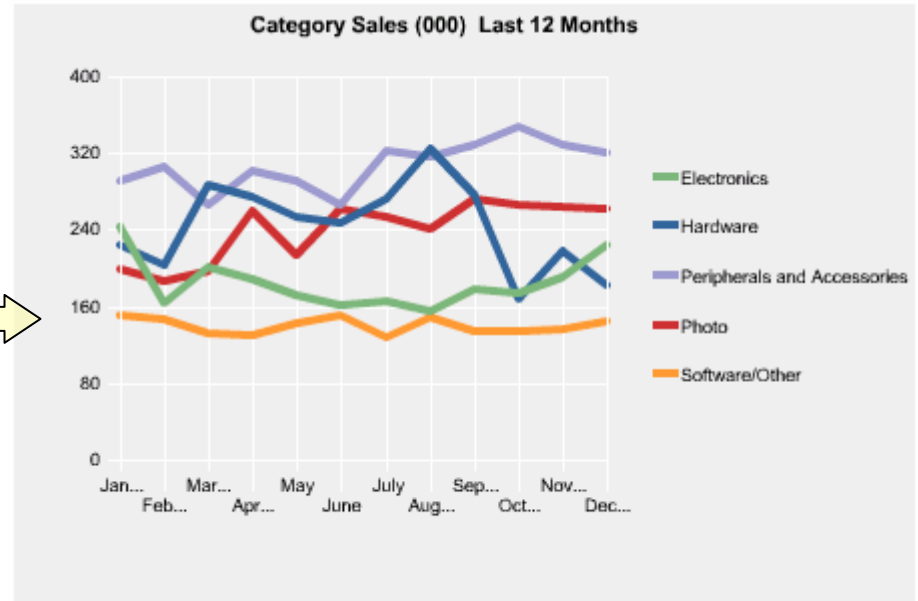
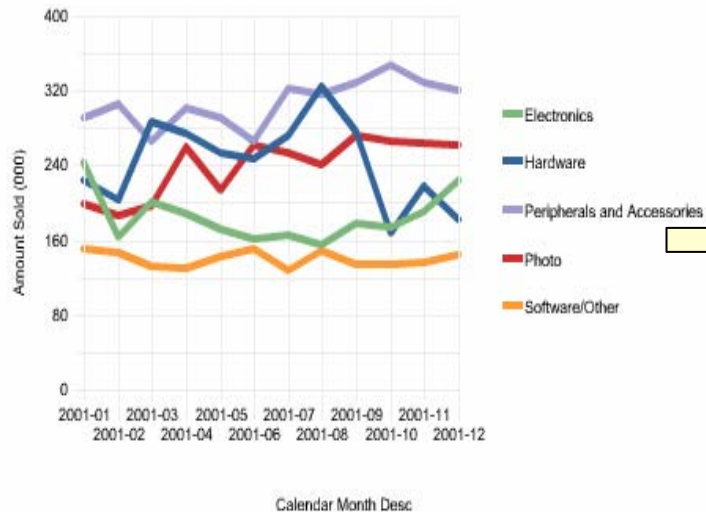
Default chart



Reformatted chart



# Reformat Chart



- Remove label on left axis
- Remove label on bottom axis
- Change attribute on bottom axis
- Abbreviate names on bottom axis
- Add Title (at top)
- Change Background color
- Change color of grid lines

# Re-sort Legend



Why? Easier for reader to align legend with chart

How? Add measure that will give desired sort order

1. Click

2. Click twice

Primary, ascending

Secondary, descending

Calendar	Products	Sales Facts	Sales Facts Current Month
Calendar Month Desc	Calendar Month Name	Prod Category	Amount Sold (000) Current Month

ORACLE

# Create Pivot Table

- Move row headers to columns, sections, or pages
- Move measure names
- Show data as % of column or row
- Format sections with report elements (borders, padding, etc.)
- Add Calculated Items (e.g. special totals)

Prod Category	January		February		March		April		May		June		July		August		September		October		November		December		Amount Sold (000)	% of Period
	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period		
Peripherals and Accessories	291	26.3%	306	30.4%	267	24.7%	301	26.2%	292	27.2%	266	24.5%	322	28.2%	317	26.7%	329	27.6%	347	31.9%	329	28.9%	321	28.3%	3688	27.6%
Photo	198	17.9%	186	18.5%	196	18.1%	259	22.5%	214	19.9%	262	24.1%	253	22.2%	241	20.3%	272	22.8%	266	24.4%	263	23.1%	262	23.1%	2872	21.5%
Electronics	243	22.0%	164	16.3%	200	18.5%	188	16.3%	172	16.0%	161	14.8%	165	14.5%	155	13.1%	178	14.9%	173	15.9%	191	16.8%	225	19.8%	2215	16.6%
Hardware	225	20.3%	204	20.3%	287	26.5%	274	23.8%	253	23.6%	248	22.8%	273	23.9%	325	27.4%	277	23.3%	168	15.4%	217	19.1%	182	16.0%	2933	21.9%
Software/Other	150	13.6%	146	14.5%	131	12.1%	129	11.2%	143	13.3%	150	13.8%	128	11.2%	148	12.5%	135	11.3%	134	12.3%	137	12.0%	144	12.7%	1675	12.5%
<b>Grand Total</b>	<b>1107</b>	<b>100.0%</b>	<b>1006</b>	<b>100.0%</b>	<b>1081</b>	<b>100.0%</b>	<b>1151</b>	<b>100.0%</b>	<b>1074</b>	<b>100.0%</b>	<b>1087</b>	<b>100.0%</b>	<b>1141</b>	<b>100.0%</b>	<b>1186</b>	<b>100.0%</b>	<b>1191</b>	<b>100.0%</b>	<b>1088</b>	<b>100.0%</b>	<b>1137</b>	<b>100.0%</b>	<b>1134</b>	<b>100.0%</b>	<b>13383</b>	<b>100.0%</b>

# Save Request



Saves request in web catalog

Create new shared folder

Name the saved analysis

The 'Choose Folder' dialog box is open. It has a title bar with 'Choose Folder' and a 'Create Folder' button. The main area shows a tree view of folders:

- My Folder
  - \_Portal
  - Issues
- Shared Folders
  - SH
  - CountryManagers
  - Learn

Below the tree view are three input fields:

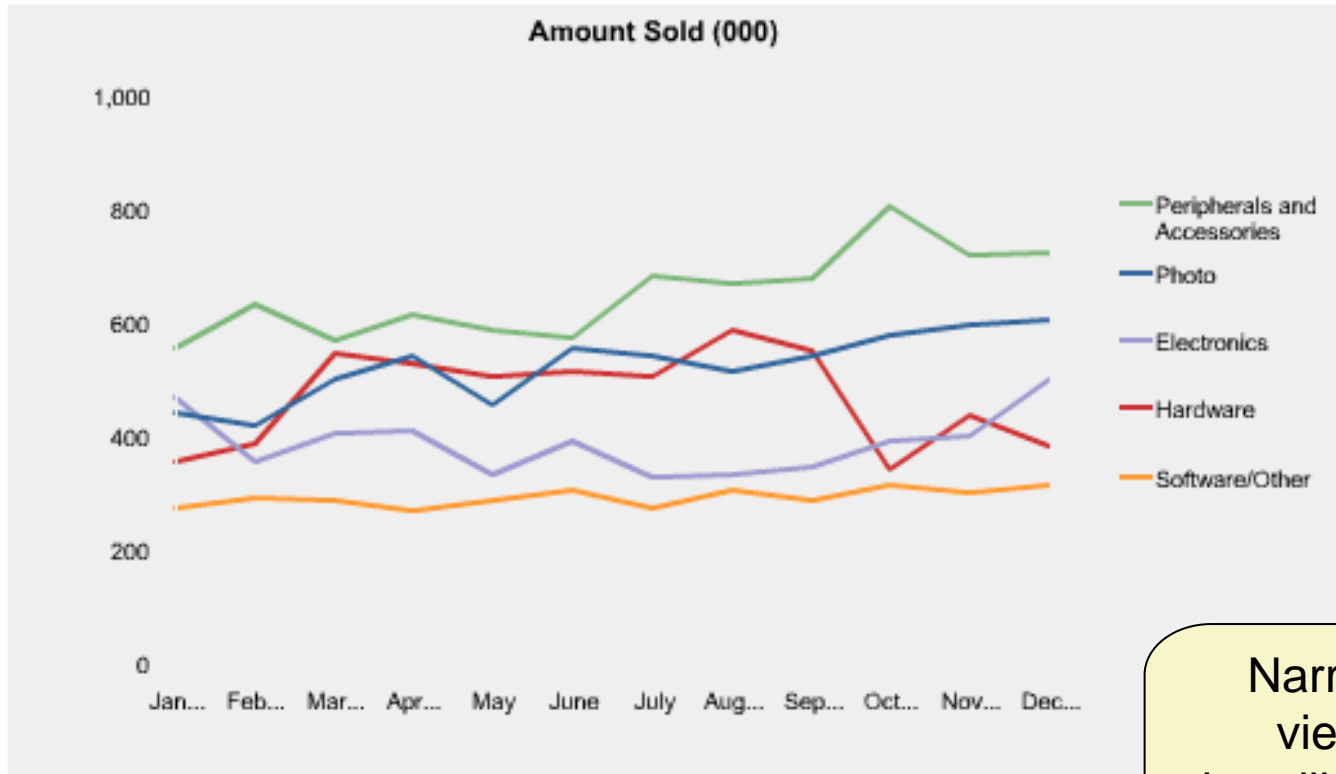
- Folder: Shared Folder : Learn
- Name: Category trends
- Description: Category sales over last 12 months

At the bottom right are 'OK' and 'Cancel' buttons.

Add a description

# Narratives

Category sales for last 12 months



Hardware declined -12.37% this month compared to last month.

Narrative view – headlines the message of the chart

# Narratives – how to

Products	Month Ago Facts
Prod Category ↓↑	% Chg Amount Sold MAgo ↓↑

Display Results Remove All

## Filters

Modify criteria by clicking on the filter button below any of

Current Calendar Month	
AND % Chg Amount Sold MAgo is less than 0	

Prod Category	% Chg Amount Sold MAgo
Hardware	-12.37

1. Create query to find data of interest

The screenshot shows the Oracle BI interface with the 'Other Views' menu open. The 'Narrative' option is highlighted, indicating the selection of a narrative view.

2. Select Narrative view




The screenshot shows the 'Narrative' view configuration screen. The 'Narrative' dropdown is selected, and the 'Narrative' text area contains the following text: `[b]@1[/b] declined [b]@2%[/b] this month compared with last month[br/]`. The 'Narrative' label is visible at the bottom of the text area.

3. Create Narrative, where @1 means value in first column, @2 second column...

[Display Results](#)

Hardware declined -12.37% this month compared with last month

# Create a No Results View

 **No Results**  

Use the fields below to specify what should be displayed when this analysis returns no results.

Headline

Text

[Display Results](#)

**No categories declined this month!**  
All categories had **positive** sales results compared with the previous month.

Shown in a dashboard when a query has no results

# Save

Choose Folder Create Folder

- My Folder
  - \_Portal
  - Issues
- Shared Folders
  - SH
  - CountryManagers
  - Learn

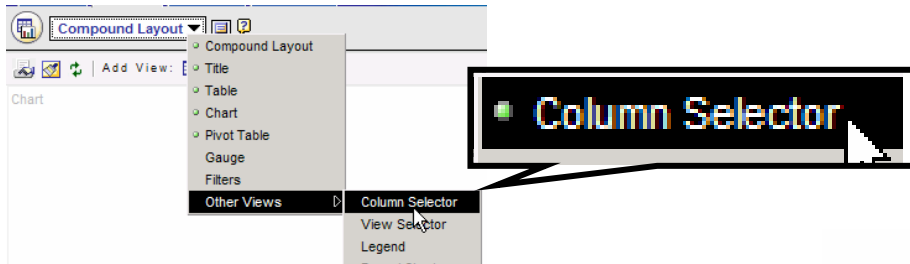
Folder:

Name:

Description:

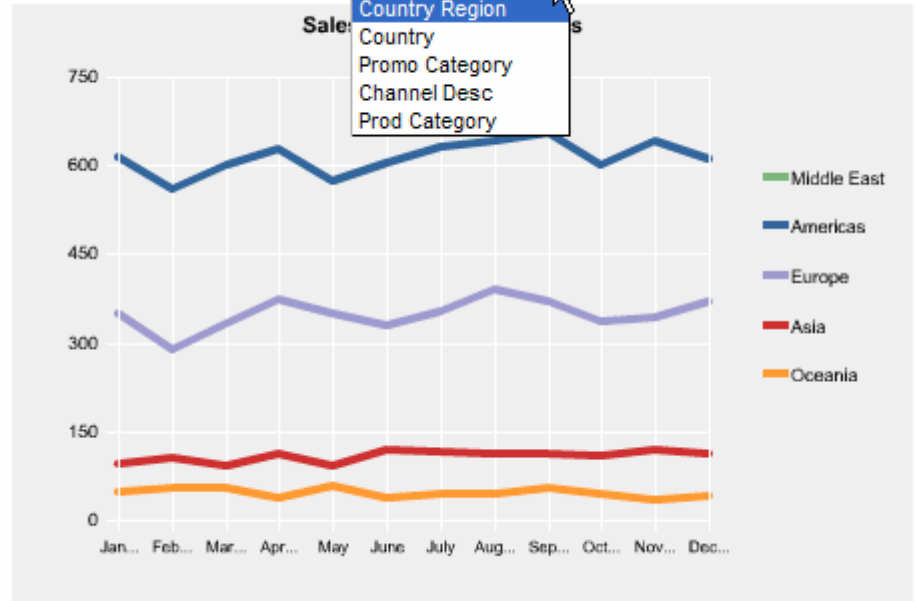


# Column Selector View

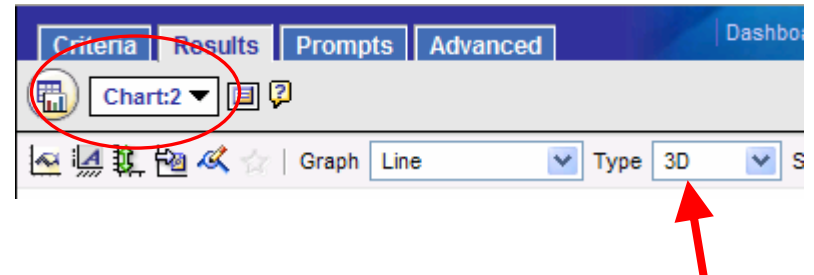
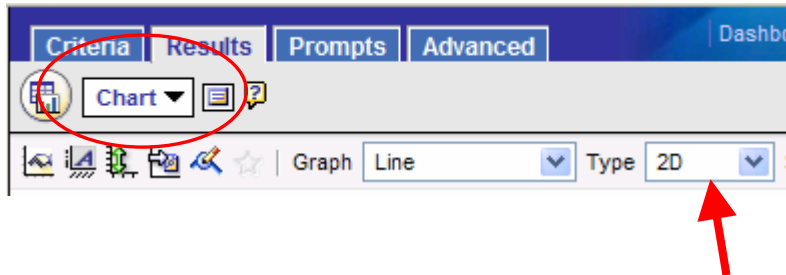
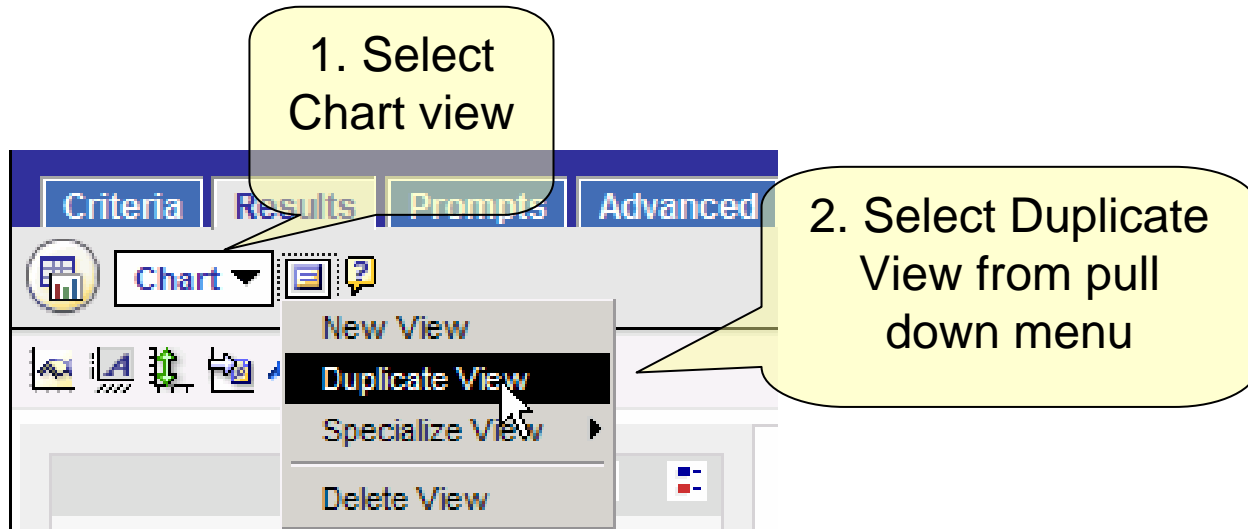


Allows dashboard users to change what columns are in the query

Column 1	Column 2	Column 3	Column 4	Column 5
<input type="checkbox"/> Include Selector Calendar Month Desc	<input type="checkbox"/> Include Selector Calendar Month Name	<input checked="" type="checkbox"/> Include Selector Prod Category	<input type="checkbox"/> Include Selector Amount Sold (000)	<input type="checkbox"/> Include Selector Amount Sold (000) Current Month
		<input type="text"/> <input checked="" type="checkbox"/> Country Region <input checked="" type="checkbox"/> Country <input checked="" type="checkbox"/> Promo Category <input checked="" type="checkbox"/> Channel Desc <input checked="" type="checkbox"/> Prod Category <a href="#">Clear Choices</a>		



# Create a Second Chart



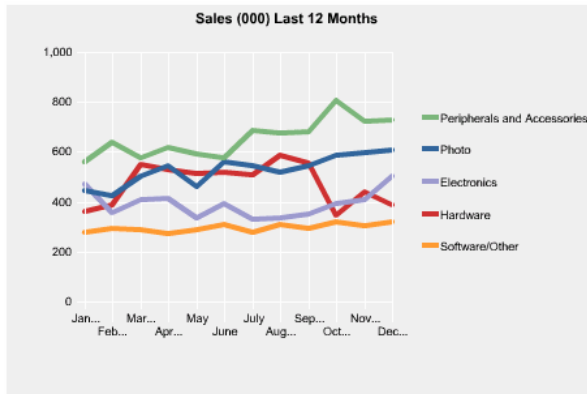
# Add a View Selector

Column selector

Prod Category

2D

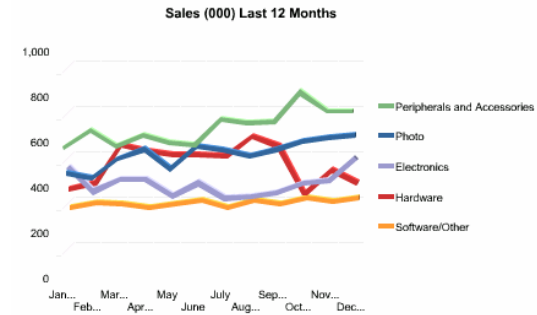
View selector  
– 2D chart selected



Prod Category

3D

3D selected



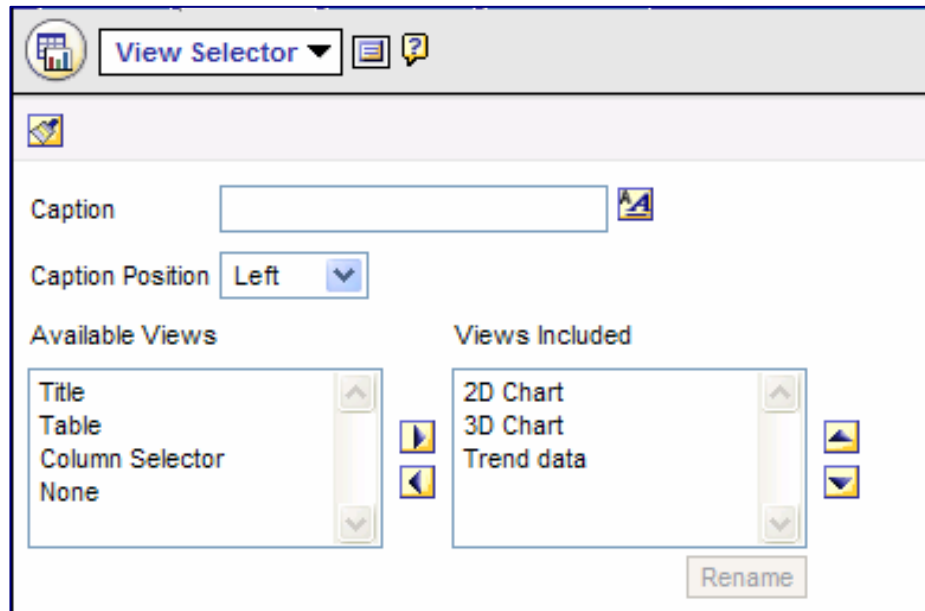
Pivot table  
(renamed)  
selected

Prod Category

Trends -- data

Channel Desc	January		February		March		April		May		June		July		August		September		October
	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)	% of Period	Amount Sold (000)
Direct Sales	1106	52.3%	1007	47.9%	1081	46.4%	1152	48.4%	1074	49.1%	1088	46.2%	1142	48.6%	1186	48.8%	1192	49.3%	1089
Partners	657	31.1%	621	29.5%	643	27.6%	705	29.6%	639	29.2%	717	30.4%	660	28.1%	671	27.6%	684	28.3%	649
Internet	350	16.6%	475	22.6%	606	26.0%	523	22.0%	474	21.7%	551	23.4%	546	23.3%	572	23.5%	544	22.5%	712
<b>Grand Total</b>	<b>2113</b>	<b>100.0%</b>	<b>2103</b>	<b>100.0%</b>	<b>2330</b>	<b>100.0%</b>	<b>2380</b>	<b>100.0%</b>	<b>2187</b>	<b>100.0%</b>	<b>2356</b>	<b>100.0%</b>	<b>2348</b>	<b>100.0%</b>	<b>2429</b>	<b>100.0%</b>	<b>2420</b>	<b>100.0%</b>	<b>2450</b>

# Creating a View Selector



The screenshot shows a configuration window titled "View Selector". At the top, there is a title bar with a "View Selector" dropdown menu and two icons (a list and a question mark). Below the title bar is a toolbar with a pencil icon. The main area contains the following fields:

- Caption:** An empty text input field with a small icon to its right.
- Caption Position:** A dropdown menu currently set to "Left".
- Available Views:** A list box containing "Title", "Table", "Column Selector", and "None".
- Views Included:** A list box containing "2D Chart", "3D Chart", and "Trend data".

Between the "Available Views" and "Views Included" list boxes are two small yellow arrows pointing right and left, used for moving items between the lists. At the bottom right of the "Views Included" list box is a "Rename" button.

Save after this step

# Other Views : "Legend"

Title Promotions

Promo Name	Profitability	Amount Sold	Gross Profit	Promo Profit
TV promotion #13-351	★	874,069	201,895	142,695

Legend

★ Profitable    ▲ Break Even    ● Unprofitable

Legend view can display meaning of symbols used in conditional formatting

Legend items per row 3

Legend

Legend items per row 3

Editing within Compound Layout View

Title

Items

1.	Profitable	Sample Text
2.	Break Even	
3.	Unprofitable	

Display Results

★ Profitable    ▲ Break Even    ● Unprofitable

Graphics

No Image

Custom Image

Format

Font

Family: Default, Size: [ ]

Color: [ ], Style: Default, Effects: Default

Cell

Horizontal Alignment: Default, Background Color: [ ]

Vertical Alignment: Default, Image: ★

Border

Position: Default, Border Style: Default, Border Color: [ ]

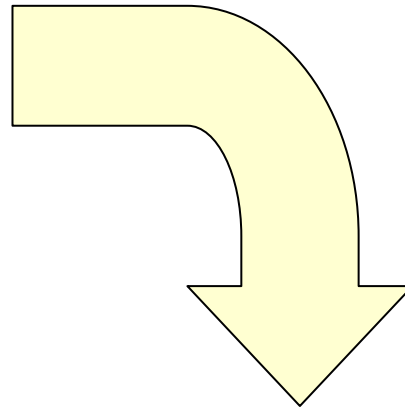
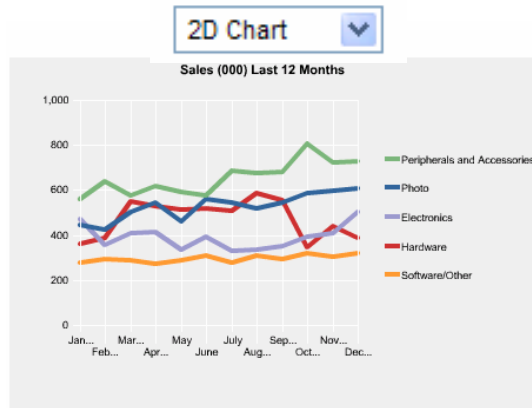
Conditional Formatting Options

From CSS Style Options (HTML Only)

OK Cancel

Legend controls

# Logical SQL View



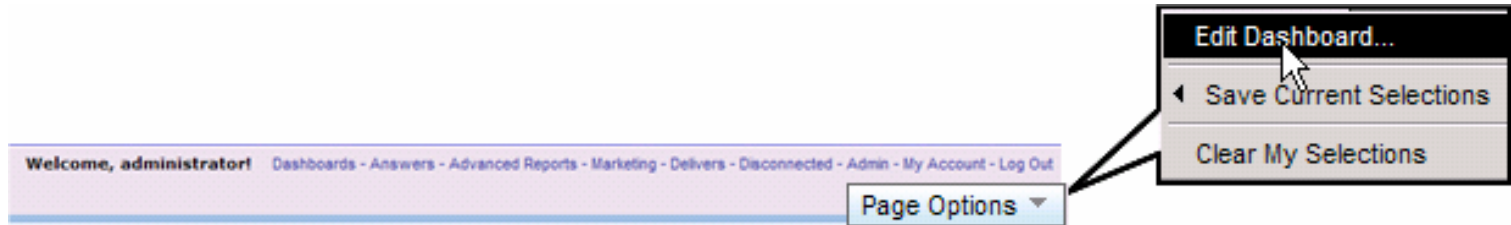
Logical SQL

```
SELECT Calendar."Calendar Month Desc" saw_0, Calendar."Calendar Month Name" saw_1,  
Products."Prod Category" saw_2, "Sales Facts"."Amount Sold (000)" saw_3, "Sales Facts Current  
Month"."Amount Sold (000) Current Month" saw_4 FROM SH WHERE Calendar."Calendar Month Id"  
between VALUEOF(maxMonthID)-11 and valueof(maxMonthID) ORDER BY saw_0, saw_4 DESC
```

# Create Shared Dashboard

- Dashboard to be shared by members of a web group
- Use *Admin* link to administer web catalog
  - Create dashboard
  - Dashboard needs group folder
    - Use existing group folder
    - Or create a new one

# Add Content to Dashboard



This is an empty Dashboard Page.

Click [here](#) to add content.

When dashboard is empty



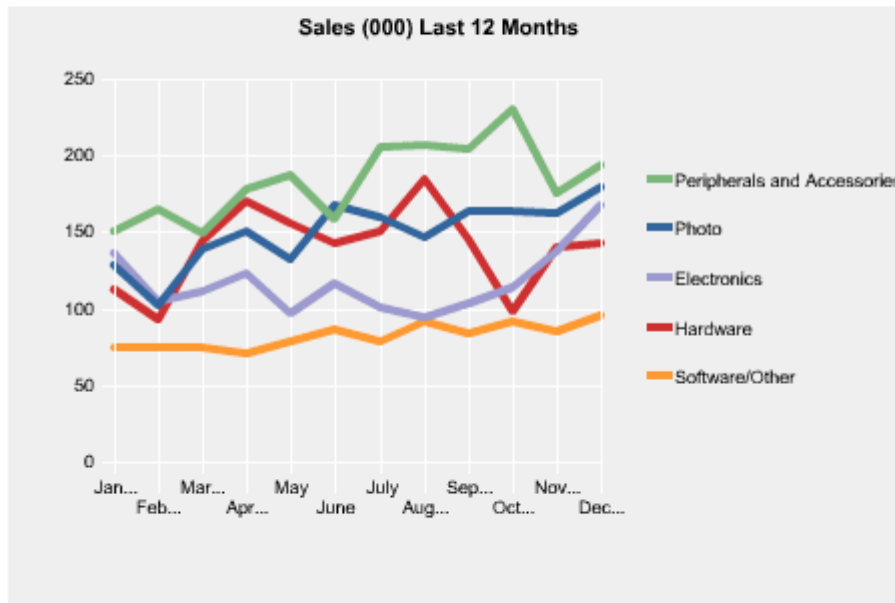


# Dashboard Prompts

Pick Country Region  
"Europe", "Middle ..."

Prod Category

2D Chart



Most Recent 12 Months  
and Country Region is equal to Europe, Middle East

Dashboard prompts allow users to change or set filters

Filter view displays filter values

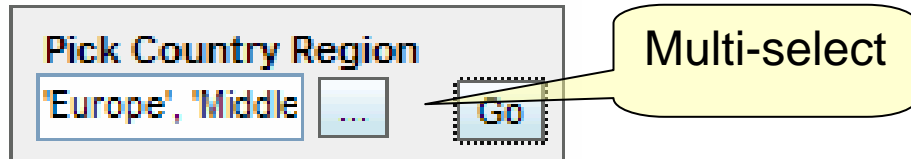
# Dashboard Prompt Options

Pick Country Region

'Europe', 'Middle ...

Go

Multi-select

A dashboard prompt titled "Pick Country Region" with a text input field containing the text "'Europe', 'Middle ..." and a "Go" button. A yellow callout bubble points to the "Go" button with the text "Multi-select".

Pick Country Region

(All Choices)

Africa

Americas

Asia

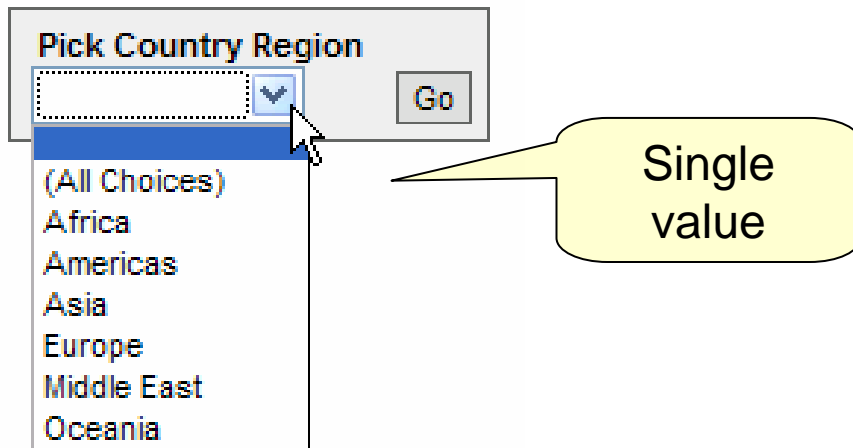
Europe

Middle East

Oceania

Go

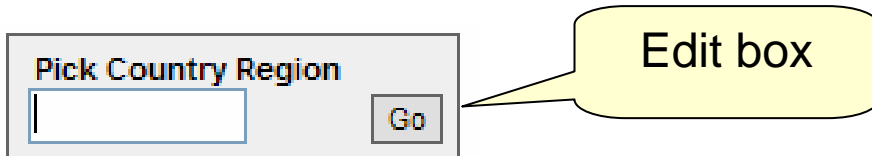
Single value

A dashboard prompt titled "Pick Country Region" with a dropdown menu and a "Go" button. The dropdown menu is open, showing a list of options: "(All Choices)", "Africa", "Americas", "Asia", "Europe", "Middle East", and "Oceania". A yellow callout bubble points to the dropdown menu with the text "Single value".

Pick Country Region

Go

Edit box

A dashboard prompt titled "Pick Country Region" with an empty text input field and a "Go" button. A yellow callout bubble points to the input field with the text "Edit box".

# Constrained Choices

Pick Country Region Country Subregion Country

Americas Northern America

(All Choices)  
Canada  
United States of America

Go

Possible Country values constrained by choices in Country Region and Country

Group	Column	Operator	Control	Show	Default to	Label
	Country Region	is equal to / is in	Drop-down List	All Values <input checked="" type="checkbox"/> (All Choices) <input type="checkbox"/> Constrain	Report Defaults	Pick Country Region
<input type="checkbox"/>	Country Subregion	is equal to / is in	Drop-down List	All Values <input checked="" type="checkbox"/> (All Choices) <input checked="" type="checkbox"/> Constrain	Report Defaults	
<input type="checkbox"/>	Country	is equal to / is in	Drop-down List	All Values <input checked="" type="checkbox"/> (All Choices) <input checked="" type="checkbox"/> Constrain	Report Defaults	

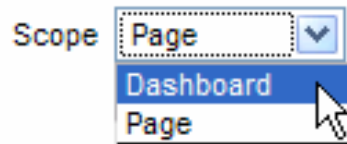
Constrain checked

Constrain checked

# Dashboard Prompt Scope

## Dashboard Prompt

Prompts for values which filter results on either an entire Dashboard or the current Dashboard page.



# Prompt Formula Must = Column Formula

Group	Column	Operator	Control	Show	Default to	Label
	Country Region	is equal to / is in	Multi-Select	All Values	Report Defaults	Pick Country Region

Prompt column formula =  
Customers."Country Region"

Most Recent 12 Months

AND Country Region is prompted

Save Filter... Remove Filters

Combine with Similar Request

- Edit Filter...
- Cut Filter
- Copy Filter
- Edit Column Formula...**

**Edit Column Formula**

Column Formula Bins

Customers."Country Region"

Match

**Edit Column Formula**

Column Formula Bins

Customers."Country Region"

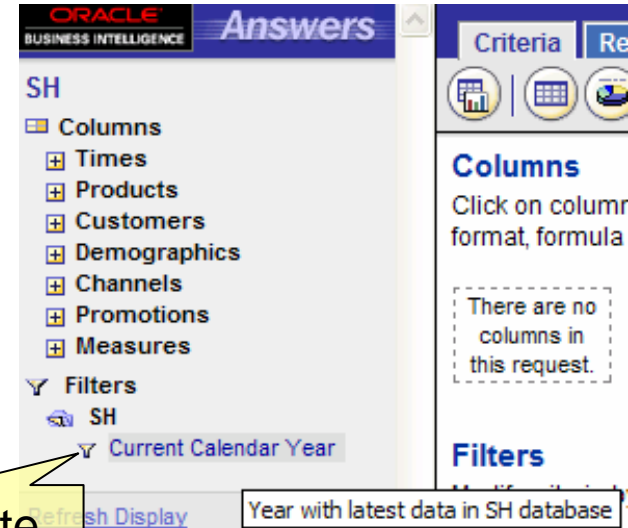
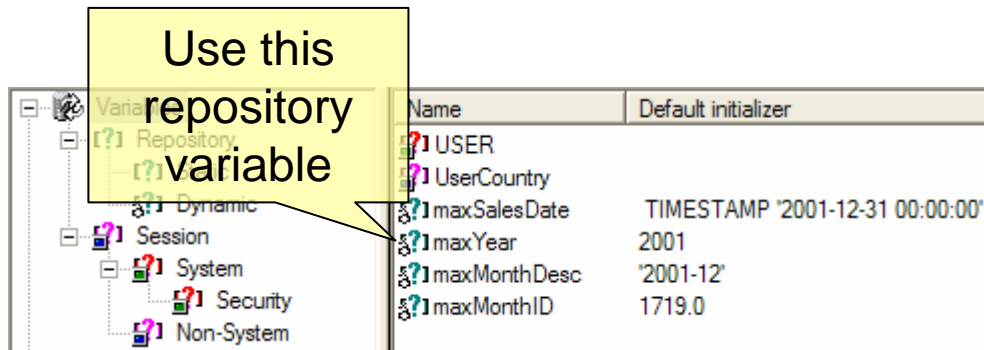
Concatenate  
an empty  
string – Not a  
Match

# Create Shared Filter

- Filters can be shared and use a repository variable (e.g. “maxYear” – cf. My Dashboard)
- Need a shared folder

Use this repository variable

Name	Default initializer
USER	
UserCountry	
maxSalesDate	TIMESTAMP '2001-12-31 00:00:00'
maxYear	2001
maxMonthDesc	'2001-12'
maxMonthID	1719.0



ORACLE BUSINESS INTELLIGENCE Answers

Criteria Re

SH

- Columns
  - Times
  - Products
  - Customers
  - Demographics
  - Channels
  - Promotions
  - Measures
- Filters
  - SH
    - Current Calendar Year

Refresh Display

Year with latest data in SH database

Columns: Click on column format, formula

Filters: There are no columns in this request.

And create this shared filter

# Dashboard Editor FAQ

**Dashboard Editor**

Drag and drop Dashboard Objects and Saved Content onto your current Dashboard. ?

**CountryManagers2** | Page Page 1 | + | + |  Allow Personal Saved Selections

**Dashboard Properties**

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

**General Properties**

Shared Folders : CountryManagers : Dashboards : CountryManagers2

Hide Dashboard

Style Default (OracleDemo) ▾

Description:

**Dashboard Pages**

Clicking Cancel does not undo operations in this section.

Pages	Hide Page	Page Operations	Selection Security	Reorder
Page 1	<input type="checkbox"/>		(empty page)	▾
Page 2	<input type="checkbox"/>		(empty page)	▴ ▾
Page 3	<input type="checkbox"/>		(empty page)	▴

**PDF and Print Control**

**Page Settings**

Paper Size User Default ▾

Orientation Portrait ▾

Print Rows All ▾

**Header and Footer**

Include Header Edit

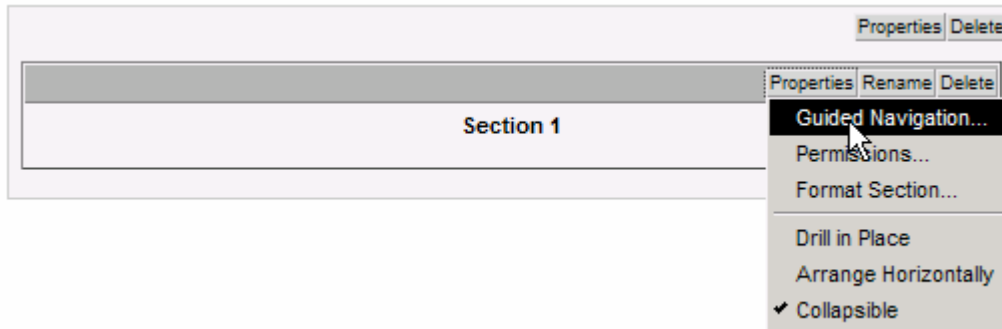
Include Footer Edit

OK Cancel

**Callouts:**

- New Page (points to the '+' icon in the top toolbar)
- Rename a page? (points to the 'a|c' icon in the Page 1 operations column)
- Delete a dashboard page? (points to the 'X' icon in the Page 1 operations column)

# FYI: Guided Navigation Sections



**Guided Navigation Section Properties**

Specify a Source Request to create a conditional Dashboard Section. The section will always appear if no Source Request is referenced.

**Source Request Properties**

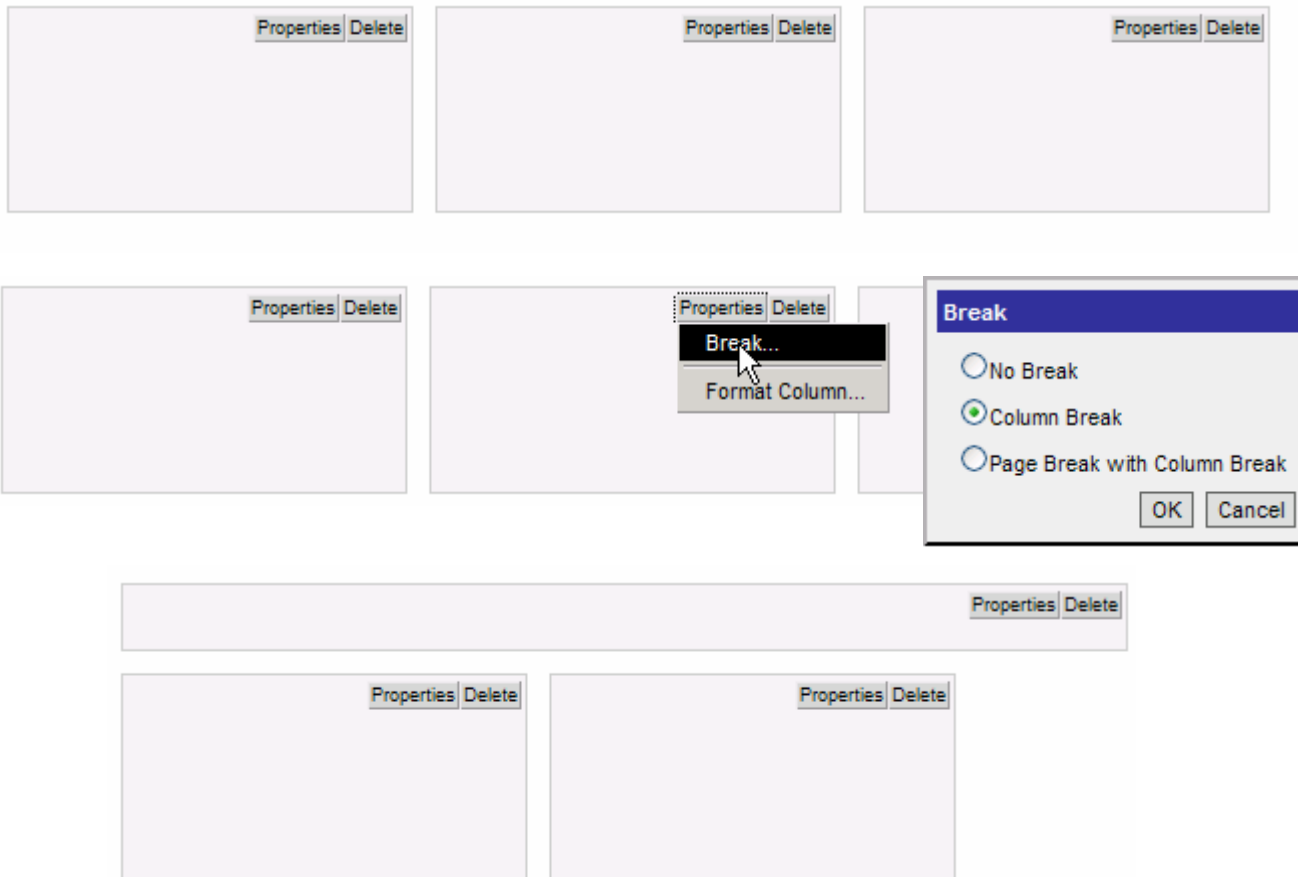
Reference Source Request  Yes  No

Source Request

Show Section  If request returns rows  If request returns nothing



# Creating Column Breaks



# Review

- Select Answers link
- Select Subject Area
- Criteria tab
  - Click on columns in left panel to add them to Criteria tab
    - Re-order columns (optional)
    - Set sort order (optional – otherwise default sorting will occur)
    - Format columns (optional – otherwise default formatting)
  - Set filters
- Results tab
  - See results
  - Add totals
  - Create other views – chart, pivot table, etc.
  - Arrange views in compound layout
- Save
- Use dashboard editor from dashboard

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