Oracle

Talent Acquisition Cloud

Using Oracle Business Intelligence for Oracle Talent Acquisition Cloud

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Using Oracle Business Intelligence for Oracle Talent Acquisition Cloud

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

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1 Administration

SmartOrg Administration

Report User Type Permissions

The following user type permissions can be granted to report viewers and developers.

If you have questions about if a user can perform an action, view the prerequisites in the task in the Oracle Taleo Reporting with Oracle Business Intelligence User Guide.

Configuration

The following permissions can be assigned to user types.

User Type Permission			
Domain	Name	Description	Path
Oracle Business Intelligence	View Reports and Dashboards	The report viewer permission allows the user to view, refresh, and export content. No authoring rights exist	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Oracle Business Intelligence] Edit > View Reports and Dashboards
Oracle Business Intelligence	Author Content (Limited)	The limited author has all of the view ing permissions in addition to light report authoring capabilities . This permission is tailored for the casual users that require a simple custom report from time to time.	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Oracle Business Intelligence] Edit > Author Content (Limited)
Oracle Business Intelligence	Author Content (BI Developer)	The BI developer has full fledged report, dashboard and agent authoring capabilities	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Oracle Business Intelligence] Edit > Author Content (BI Developer)
Oracle Business Intelligence	Perform Administration Tasks	The BI administrator has all of the rights of the BI author plus the rights to perform administrative actions in the OBI Gateway.	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Oracle Business Intelligence] Edit > Perform Administration Tasks
Oracle Business Intelligence	Access Subject Area - Recruiting	Users with authoring privileges must have the Access Subject Area - Recruiting permission to build reports containing recruiting data. .	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Oracle Business Intelligence] Edit > Access Subject Area - Recruiting

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User Type Permission			
Domain	Name	Description	Path
Oracle Business Intelligence	Access Subject Area - Recruiting (Legacy)	Users with authoring privileges must have the Access Subject Area - Recruiting (Legacy) permission to build reports containing recruiting data. This subject area is exclusively available to customers that have SAP BusinessObjects reporting. This permission is always visible, but it is not applicable if the legacy subject area is not enabled.	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Oracle Business Intelligence] Edit > Access Subject Area - Recruiting (Legacy)
Oracle Business Intelligence	Access Subject Area - Performance Management	Users with authoring privileges must have the Access Subject Area - Performance Management permission to build reports containing performance management data. This subject area is exclusively available to customers that have SAP BusinessObjects reporting. This permission is always visible, but it is not applicable if the legacy subject area is not enabled.	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Oracle Business Intelligence] Edit > Access Subject Area - Performance Management
Oracle Business Intelligence	Access Subject Area - Administration	Users with authoring privileges must have the Access Subject Area - Administration Management permission to build reports containing administration data. When developing reports and analyses against the Administration subject area, it is important to understand that every top level folder is independent, meaning that reports cannot be directly created across various folders. For example, it is not possible to mix elements from "OLF" and "System Users" in the same query.	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Oracle Business Intelligence] Edit > Access Subject Area - Administration
Report Data	Access all reportable data for Recruiting	Allows the user access to all data from the "Recruiting" and "Recruiting (Legacy)" subject area. Applicable to report viewers and developers. Users without this permission are subject to row level security for Recruiting data. Users with	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Report Data] Edit > Access all reportable data for Recruiting

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User Type Permission			
Domain	Name	Description	Path
		this permission bypass all data security in the reporting system.	
Report Data	Access all reportable data for Performance	Allows the user access to all data from the "Performance Management" subject area. Applicable to report viewers and developers. Users without this permission are subject to row level security for Performance Management data. Users with this permission bypass all data security in the reporting system.	Configuration > [SmartOrg] Administration > [Users] User Types > user type > Reporting and Analytics > [Report Data] Edit > Access all reportable data for Performance

Report Viewer

The report viewer user type permission allows the user to view, refresh, and export content. No authoring rights exist.

The report viewer has the following rights in Oracle Business Intelligence:

View, refresh and export analyses

View, refresh and export dashboards

View and download briefing books

View and search the catalog

View KPIs and Scorecards

Limited Author

The limited author has basic report writing capabilities, and all user rights granted to the report viewer.

Report authors have to be given rights to at least one subject area to successfully develop reports.

In addition to the rights inherited from the report viewer, the limited author has the following rights in Oracle Business Intelligence:

Author Analyses (Limited)

Create Prompts

Edit column formulas

Create Briefing Books

Manage folders in the catalog

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Archive and unarchive catalog content

BI Developer

The BI Author has robust report writing capabilities, and all user rights granted to the limited author.

Report authors have to be given rights to at lease one subject area to successfully develop reports.

In addition to the rights inherited from the report viewer, the limited author has the following rights in Oracle Business Intelligence:

Create Analyses (Advanced)

Create Dashboards and Dashboard Prompts

Create Agents (Schedule Reports)

Create KPIs and Scorecards

Upload files into the catalog

Create named conditions

Manage Named Filters

Settings

Reporting and Analytics settings can be modified to control the flow of information to Taleo Oracle Reporting with Business Intelligence Users.

Configuration

The following settings can be modified by the TEE administrator.

Setting	Description	Path
Activate Row Level Security for Advanced Reporting	Indicates if row level security is activated for the zone. If this setting is activated, row level security will be enforced for advanced reporting for all products in the zone (1=Activate, 0= Deactivate).	Configuration > [Reporting and Analytics] Settings
Show Documentation Folder	Displays the documentation folder in the reporting tool	Configuration > [Reporting and Analytics] Settings
Show Standard Reports Folder	Displays the standard reports folder in the reporting tool	Configuration > [Reporting and Analytics] Settings

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Language Settings

The language the user will see for multi lingual data fields is governed by the settings "Use Content Language Preference in Reporting" and "Organization Content Languages".

- If "Use Content Language Preference in Reporting" is enabled then the default language will be the first language designated in the "Content Language" area in the user account preferences.

- If "Use Content Language Preference in Reporting" is disabled then the default language will be the first language designated in the "Organization Content Languages".

Configuration

The following settings can be modified by the TEE administrator.

Setting	Description	Path
Organization Content Languages	Organization's content languages in Reporting and Analytics.	Configuration > [Reporting and Analytics] Settings
Use Content Language Preference in Reporting	Use the first language defined in the user's preferences as the content language in Reporting.	Configuration > [Reporting and Analytics] Settings

Row Level Security

Row level security is administered through a combination of user type permissions and settings.

The setting **Activate Row Level Security for Advanced Reporting** controls holistically whether reporting users are subject to row level security. If this setting is activated, row level security will be enforced. If this setting is inactive all reporting users will have access to all reportable data available in the system.

Row level security can be overwritten at the user type level by giving the user type the **Access all reportable data for Recruiting** user type permission.

Recruiting Row Level Security

Reporting users who are subject to row level security for the recruiting content are able to see recruiting data based on the in the user type setting **View requisitions** in the **Recruiting** > **Requisitions** functional domain.

> ✏️ **Note:** Users that cannot access the recruiting module and are limited by row level security will not be able to report on requisition information regardless of this user type permission.

Performance Management Row Level Security

Row level security is applied in OBI in the same manner it was applied in BusinessObjects. A good rule of thumb for the performance management subject area is that if you have access to data in the performance management module you should be able to access it in reporting.

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Oracle BI Administration

Copy/Move Artifacts

Copy/Move Artifacts allows an OBI tenant administrator to copy or move artifacts (folders, analyses, etc) from one tenant (zone) to another, and to delete artifacts.

This feature is designed for ease of use when moving artifacts between production and staging zones.

Actions are performed from the left panel to the right panel, so a folder or artifact selected in the left panel will be moved to the destination folder selected in the right panel. When a folder is moved all items in the folder, including other folders, are moved. The company shared folder cannot be moved, copied, or deleted, but it can be selected as a destination folder.

Objects can only be deleted from the left panel.

When moving artifacts between zones, be cognizant that some artifacts take the parent role and are made up of, or include child artifacts. For example, some analyses may include named filters; alerts can include dashboard pages, analyses or named conditions; dashboard can include analyses, dashboard filters, action menus, etc. The administrator must be mindful to move all child objects with parent objects and some parent object connections to children may need to be reestablished if the integrity of the folder structure for child objects does not remain intact. For example, if a dashboard's child objects are located in my company shared > analyses > dashboard analyses folder, they must be moved to the folder in the same folder path. Parent objects can be moved anywhere.

Artifacts with the same name cannot be included in the same location. For example if zone 1 and zone 2 already have a my company shared > recruiting folder the system will not allow you to overwrite zone 2's recruiting folder with zone 1's recruiting folder. This action can be completed if zone 2's recruiting folder is deleted, or if you copy into a different subdirectory such as my company shared > recruiting2.

If you attempt to copy a folder or file that would be a duplicate an error message will inform you that the action was not completed.

Copying or Moving an Artifact from One Tenant to Another

You must have the BI Tenant Administrator user type permission to perform this action.

You must be logged into a production zone to manage artifacts across zones.

Home > **Configuration** > **[Reporting and Analytics] Oracle BI Administration** > **Copy/Move Artifacts**

1. Select the tenant with the content to be copied or moved in the left tenant drop down. The tenant you are signed in under is automatically selected.
2. Select the destination tenant in the right tenant drop down.
3. Select the artifact to be copied or moved from the left channel, and the destination folder in the right channel.

    The company_shared folder cannot be copied or moved, but it can be selected as a destination folder.

    The artifact cannot be a duplicate of an artifact currently available in the destination folder.

4. Select an action.
    o Click **Copy** to make a copy of the artifact in the destination folder.

   o Click **Move** to move the artifact the the destination folder and remove it from the original tenant.

5. Click reset last selection to remove the focus from the selected artifacts, if necessary.

Deleting an Artifact

You must have the BI Tenant Administrator user type permission to perform this action.

Home > **Configuration** > **[Reporting and Analytics] Oracle BI Administration** > **Copy/Move Artifacts**

1. Select the tenant with the content to be deleted in the left tenant drop down. The tenant you are signed in under is automatically selected.
2. Select the artifact to be deleted in the left channel.

  Company_shared cannot be deleted.

3. Click **Delete Selected**.
4. Click **Yes** to confirm deletion.

The deleted artifact is no longer available in the catalog.

Folder Security

The tenant administrator limit folder access by assigning specific reporting groups access to folders. Reporting groups are defined as user groups that have the Reporting and Analytics coverage area.

Folder security can be assigned to user groups to limit the availability of reports to specific audiences.

If folder security is not set all OBI report users will have access to a folder.

Applying Folder Security

You must have the BI Tenant Administrator user type permission to perform this action.

Home > **Configuration** > **[Reporting and Analytics] Oracle BI Administration** > **[Folder Security] Edit**

1. Click the folder from the OBI Folders pane.
2. Select the appropriate user groups from the SmartOrg Reporting User Groups pane.

  Note: If a parent folder has security set users without access will not be able to traverse the folder to view objects in sub folders.

3. Click Save.

2 Basic Information to Tell Your Users

Basic Information to Tell Your Users

Exporting Results

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Navigate to the analysis.
2. Click the Export link and select the appropriate export option.

   For more information on the export options, see *"Export Menu Options for Views and Results"*.

Sorting Values in Table Views, Pivot Table Views, and Trellis Views

You can sort values in table views, pivot table views, and trellis views. You can sort on members, measures, and rows (where you see sideways triangles). You cannot sort on page or section edges. For more information on sorting, see *"Sorting Data in Views"*.

Drilling in Results

Many of the results that are displayed in views represent hierarchical data structures. The metadata specifies these hierarchies, and this enables you to access the different levels of detail within them. For example, information in a sales graph might be categorized by region. Clicking a specific region in the graph might display each country within that region, if the country is the next level within the hierarchy of the metadata. Such clicking is referred to as "drilling."

If the content designer has set up views for drilling, then you can drill in them on dashboards.

What Is Drilling?

Drilling is a way to navigate through data in views quickly and easily.

- You drill down to display data in more detail, which displays more members.

  You can drill down to an actual item in the database. For example, if you work in sales, you can drill down to the city level within a sales analysis, and observe that there is a large sale pending in Paris. If you are using an Oracle Siebel

operational application, then you can then drill down on the pending sale and go directly to that opportunity in the Oracle BI application.

- You drill up to display data in less detail, in hierarchical columns.

  For example, you might drill up from a month value to see a summary for the whole year. You can drill up in the current hierarchy, either for the entire column at the header level or for individual members. For example, you can drill up from District to Region. Drilling up hides the current level (such as District) and retains the higher level (such as Region).

Where Can I Drill?

You can drill in the following types of views:

- Table, pivot table, and trellis — See *"Drilling in Tables, Pivot Tables and Trellises"*.
- Graphs — See *"Drilling in Graphs"*.

Drilling in Tables, Pivot Tables and Trellises

When you drill down in a table, pivot table, or trellis, the detail level data is added to the current data. For example, when you drill from a continent, the table displays data for the continent and for the countries in that continent.

The way that you drill in tables, pivot tables, and trellises depends on the column type, as described in the following sections.

Drilling in Attribute Columns To drill in an attribute column, click the heading or member in which you want to drill. When you hover over the value before clicking, an underline is displayed below the value to indicate that you can click to drill.

When you drill in an attribute column, you add the lower level to the view. All views are affected by drilling in an attribute column, which is equivalent to a filter drill. After you click the value, a column is added to the analysis and a filter is automatically created and listed in the Criteria tab.

You cannot drill on groups for attribute columns. To see the definition of a group for an attribute column, edit the corresponding step in the Selection Steps pane.

You can also use the *"Right-Click Menu for Tables, Pivot Tables, and Trellises"* to drill in attribute columns.

Drilling in Hierarchical Columns To drill in a hierarchical column, click the Expand and Collapse icons beside the members. Click to expand or collapse one level. For example, expanding from Total Products to Products inserts the Product members while retaining the value for Total Products.

When you drill in a hierarchical column, you expand and collapse the nodes of data that are in the view. Drilling in a hierarchical column affects only that particular view. No other views are affected.

Drilling in level-based hierarchies and value-based hierarchies works the same. Each time you drill in a hierarchy, you expand or collapse one level. For example, if the hierarchy has a level for continents, regions, and cities, and the view shows continent data, you can expand from Australia down one level to display regions in Australia. From there, you can expand one level from a region, to cities in that region, or you can collapse one level, back to continents.

When you drill, the drill state is preserved. If you collapse at a higher level and re-expand, then the members are re-displayed at the same drill point.

When you click the Collapse icon, you collapse back to the current level any levels in the hierarchy that are present in the analysis, regardless of whether they were added by drilling down or by adding the levels from the Subject Areas pane.

You can perform asymmetric drilling, which enables you to drill various members to different levels. For example, if you expand World, then you might see Americas, Asia, and Australia at the same second-level for continents. You can then drill Americas to expand it and see its regions, while Asia and Australia are not expanded.

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You can expand and collapse the members of a group for hierarchical columns. For example, if you have a group that includes cities and the group is included in a view, then you see the cities when you click the group name.

You can also use the "*Right-Click Menu for Tables, Pivot Tables, and Trellises*" to expand and collapse hierarchical columns.

Drilling in Graphs

When you drill down in a graph, the detail level data replaces the current data. For example, when you drill down from a continent, the graph displays data for the countries in that continent, but not for the continent itself.

You can drill down in the following ways:

- You can click a label (for which drilling is available) on any axis or in the legend to drill down. (A change in the mouse pointer indicates that drilling is available.)

- If the graph contains only attribute columns and measure columns, then you can click a data point to drill all columns.

- If the graph contains multiple columns including at least one hierarchical column, then when you click a label or a data point, you see a menu from which you can select which columns to drill down. If there are action links available, then the menu also displays those links.

You do not drill up in a graph. Use the **Back** button on the browser to return to a previous graph.

> ✏️ **Note:** The time series line graph does not support drill down on a time column where data types other than data or date-time are used.

Action Links and Action Link Menus in Analyses and Dashboards

As you analyze data in analyses, view dashboards, or view content delivered by agents, you might want to take some action because of the business insight you gained from the data. You can do so by using action links and action link menus, if available:

- An action link is a link embedded in an analysis (on a column heading or a data value) or dashboard page that, when clicked, runs an associated action.

  For example, suppose a data value in an analysis includes an action link that sends the analysis to a specified email address. If, after analyzing the data, you decide that your manager must see this analysis, then you can send it to him directly from the analysis by clicking the action link.

- An action link menu is a menu embedded on a dashboard page that groups multiple action links as options on the menu. An action link menu lets you select, from a list of action link options, the right action to take.

Running an Action Associated with Action Links in Analyses and Dashboards

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

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- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Navigate to the action link.
2. Do one of the following:
   - If the action is associated with a standalone action link, then click the action link.
   - If the action is associated with an action link on an action link menu, then click the action link menu and then select the action link option.
3. Respond to any request for more information or any confirmation prompt that is displayed.

   🖊 **Note:** A successful invocation message indicates only that the action that is associated with the action link ran successfully. It does not indicate that the process or operation that the action represents ran successfully.

Using a Section Slider in a Graph or Gauge

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Navigate to the analysis or dashboard page that contains a section slider.
2. Use the components of the section slider to select a value as follows:
   - To select a particular value, move the slider thumb to that value.
   - To move the slider thumb to a value to the left of the current value, click the decrease button (the second button from the left on the slider).
   - To move the slider thumb to a value to the right of the current value, click the increase button (the right-most button on the slider).
   - To sequentially move the slider thumb through all the values, click the play button (the left-most button on the slider). The play button changes to a pause button to allow you to stop on a particular value.

The data in the graph or gauge is limited by the current value as indicated by the slider thumb.

Zooming and Scrolling in Graphs

If zooming and scrolling has been enabled for a graph, then the graph includes a Zoom icon. The zoom icon enables you to zoom in and out of a graph's plot area using its axes. Once you zoom in on an axis, you can scroll the axis.

To enable zooming and scrolling in a graph, the content designer sets the zoom and scroll properties in the "Graph Properties dialog: General tab".

When you zoom an axis, a zoom and scroll slider is displayed.

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A zoom and scroll slider consists of the following components:

- Left or bottom button — Scrolls to the left on the X axis or to the bottom on the Y axis, revealing portions of the graph that are out of view.

- Right or top button — Scrolls to the right on the X axis or to the top on the Y axis, revealing portions of the graph that are out of view.

- Scroll thumb — Represents the visible portion of the graph in relation to the full graph. You drag the scroll thumb to dynamically scroll the graph, revealing portions of the graph that are out of view.

- Resize handles — Are displayed at each end of the scroll thumb when you hover over the thumb. You use the resize handles to zoom in and out an axis.

- Tooltip — Is displayed only when a user hovers over either the thumb or a resize handle and describes the data that is currently displayed in the scroll thumb.

Zooming or Scrolling in a Graph

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Navigate to a graph that has zoom or scrolling enabled.
2. Hover the mouse over the graph to display the Zoom button.
3. Click the **Zoom** icon and then:
    - If only one axis has zoom and scroll enabled, then select either **Zoom In** or **Zoom Out**.

    - If both axes have zoom and scroll enabled:

        - To zoom in and out and scroll on the X axis, select Horizontal Axis and then either **Zoom In** or **Zoom Out**. A zoom and scroll slider is displayed on the X axis.

            To unzoom the X axis and display the actual graph size, select Actual Size.
        - To zoom in and out and scroll on the Y axis, select Vertical Axis and then either **Zoom In** or **Zoom Out**. A zoom and scroll bar is displayed on the Y axis.

            To unzoom the Y axis and display the actual graph size, select **Actual Size**.
        - To unzoom both the X and Y axes and display the actual graph size, select **Actual Size**.

    You can now zoom and scroll as desired by:

    - Using the **Zoom** button to zoom in and out incrementally

    - Dragging the scroll thumb on an axis to dynamically scroll the graph, revealing portions of the graph that are out of view

    - Clicking the scroll buttons on an axis to scroll left and right (on the X axis) or up and down (on the Y axis)

    - Using the resize handles to zoom in and out on an axis

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Scorecard Objects

The following scorecard objects can be added to a dashboard by the content designer:

- Cause & effect maps. See *"Cause & Effect Map"*

- Custom views. See *"Custom Views"*

- Strategy maps. See *"Strategy Maps"*

- Strategy trees. See *"Strategy Trees"*

- KPI watchlists. See *"KPI Watchlists"*

- Smart watchlists. See *"Smart Watchlists"*

For information on adding a scorecard object to a dashboard, see Adding Content to Dashboards.

As you work with scorecard objects, keep the following information in mind:

- If a dimension is not pinned, you can populate it by a prompt, if one is provided. For more information on dimensions, see *"Dimensions and Pinned Dimension Values"*

- There are two types of diagrams for a strategy tree:

    o Strategy tree diagram. See *"Strategy Tree Diagram"*.

    o Contribution wheel diagram. See *"Contribution Wheel Diagram"*.

    You can toggle between the two by right-clicking in the background area of the strategy tree and selecting either **View as Tree Diagram** or **View as Wheel Diagram**.

- If the content designer saved the smart watchlist with the Filter pane displayed as a:

    o Control panel, you can specify filter criteria to dynamically change what is shown in the smart watchlist.

    o Text summary, you can view a read-only summary of the current filter criteria.

    Note that the content designer also has the option to hide the Filter pane.

- In Accessibility mode:
    o Views (that is, cause & effect maps, custom views, strategy maps, and strategy trees) are rendered as watchlists. See Watchlists.
    o The Print function is disabled.

Order Prompts with Default Values are Applied

Because prompting enables you to build flexible dashboards and analyses, it is important to understand how Oracle BI initiates a complex dashboard's prompts.

The following list presents the order in which, at runtime, Oracle BI applies prompts with default values:

1. Hidden prompts whose scope is the dashboard page.

For more information about hidden prompts, see "*Adding a Hidden Dashboard Prompt to a Dashboard or Dashboard Page*".

2. Hidden prompts whose scope is the whole dashboard.

3. Prompts whose scope is the dashboard page. The precedence order of dashboard page prompts is unspecified.

4. Prompts whose scope is the whole dashboard.

5. Prompts, either inline or named, whose scope is the analysis.

System Configuration and Governors

This is a short description.

Row/Data Limits

By default, the report row/time limit governors are the following. This applies to all users of the system:

- Report Retrieved Records Limit: 65000

- Report Runtime Limit: 10 minutes

Data Latency

The system data refreshes approximately once an hour. This means data may take an hour from when it is input to when it is reportable.

Maximum Rows Exported

The maximum number of rows that can be exported is 65000.

The maximum number of cells that can be exported is 2 millions (rows*columns=cells).

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3 **Recruiting Standard Content**

Sample Dashboard

Recruiting Summary

The dashboard displays a variety of summarized, trended Recruiting metrics, including Source Type Yield, Candidate Stage Conversion, Requisition Activity, Hired Candidates, Recruiting Productivity, Offer Success Rate, Gender by Stage, Race/Ethnicity by Stage and Candidate Age Band by Stage. The visualizations are filterable by a set of common filters and can be analyzed in different ways.

Column 1

Section 1

1   [ab]   Recruiting - Summary Dashboard Prompt

Section 2

2	Recruiting - Source Type Yield Compound View	3	Recruiting - CSW Funnel Compound View	4	Recruiting - Requisition Activity History Compound View

Section 3

5	Recruiting - Filled Positions Trends Compound View	6	Recruiting - Recruiter Workload Compound View	7	Recruiting - Offer Success Rate Compound View

Section 4

8	Recruiting - EEO Gender By Stage Summary Compound View	9	Recruiting - EEO Race By Stage Summary Compound View	0	Recruiting - Candidate Age By Stage Summary Compound View

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Component	Name
1	*Recruiting - Summary Dashboard Prompt*
2	*Recruiting - Source Type Yield*
3	*Recruiting - CSW Funnel*
4	*Recruiting - Requisition Activity History*
5	*Recruiting - Filled Positions Trends*
6	*Recruiting - Recruiter Workload*
7	*Recruiting - Offer Success Rate* on page 32 Recruiting - Offer Success Rate
8	*Recruiting - EEO Gender By Stage Summary*
9	*Recruiting - EEO Race By Stage Summary*
0	*Recruiting - Candidate Age By Stage Summary*

Recruiting - Source Type Yield

The chart displays the top 5 source types based on various candidate measures.

Source Type Yield

Source Type Yield

Stage   1. All Submissions

University Recruiting, 4,648
Referral, 5,634
Our Web Site, 35,317
Other, 4,302
Job Board, 45,730

Submissions

Report Columns

Name	Syntax
Stage (Data Identifier)	
Source Type	"Submission Source"."Submission Source Type (Display As)"

Name	Syntax
	*Interaction: Source Analysis
# Submissions (Fact)	

Common Filters

Name
Submission Source Type (Display As) is not null
Recruiting - Summary Dashboard Prompt Listener

Unique Facts/Filters

Stage (Data Identifier)	Filter	# Submissions (Fact)
1. All Submissions	# Submissions is in top 5	# Submissions
2. Completed Submissions	Submission is Completed is equal to / is in Yes # Submissions is in top 5	# Submissions
4. Interviewed	# Submissions Reached 1st Intv. is in top 5	# Submissions Reached 1st Intv
3. Reviewed	# Submissions Reached Reviewed is in top 5	# Submissions Reached Reviewed
5. Hired	# Submissions Currently Hired is in top 5	# Submissions Currently Hired
6. Hires Ace	# Submissions Currently Hired is in top 5 Is Ace is equal to / is in Yes	# Submissions Currently Hired

Pie Graph Configuration

Name	Object
Graph Prompt	Stage
Slice Size	# Submissions
Slices	Source Type

Recruiting - CSW Funnel

The chart reveals health indicators based on candidate conversion rates across the key standard reference recruiting statuses.

Stage Conversion

Report Columns

Name	Syntax
| Stage | ```
CASE
 WHEN "Submission CSW Status - Historical"."Historical Reference Status
 Name" || ' - ' || "Submission General Info"."Submission Is Completed"
 = 'New - No'
 THEN '1- All Submissions'
 WHEN "Submission CSW Status - Historical"."Historical Reference Status
 Name" || ' - ' || "Submission General Info"."Submission Is Completed"
 = 'New - Yes'
 THEN '2- Completed Submissions'
 WHEN "Submission CSW Status - Historical"."Historical Reference Status
 Name" || ' - ' || "Submission General Info"."Submission Is Completed"
 IN ('Reviewed - No', 'Reviewed - Yes')
 THEN '3- Reviewed'
 WHEN "Submission CSW Status - Historical"."Historical Reference Status
 Name" || ' - ' || "Submission General Info"."Submission Is Completed"
 IN ('1st Interview - No', '1st Interview - Yes')
 THEN '4- Interviewed'
 WHEN "Submission CSW Status - Historical"."Historical Reference Status
 Name" || ' - ' || "Submission General Info"."Submission Is Completed"
 IN ('Hired - No', 'Hired - Yes')
 THEN '5- Hired'
 ELSE "Submission CSW Status - Historical"."Historical Reference Status
 Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
``` |
| # Submissions | ```
CASE
 when CASE
 WHEN "Submission CSW Status - Historical"."Historical Reference Status
 Name" || ' - ' || "Submission General Info"."Submission Is Completed"
``` |

Name	Syntax
| | ```
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions'
THEN "Candidate Counts"."# Submissions"
ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions"
END
``` |
| Target | ```
IFNULL(
(
(MSUM
(CASE when
CASE WHEN "Submission CSW Status - Historical"."Historical Reference
Status Name" || ' - ' || "Submission General Info"."Submission Is
Completed"
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions'
THEN "Candidate Counts"."# Submissions"
ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions" END, 2)
- CASE when
CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
``` |

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Name	Syntax

```
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions' THEN "Candidate Counts"."# Submissions" END)
* CASE
CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN '1- All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN '2- Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN '3- Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN '4- Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN '5- Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
WHEN '2- Completed Submissions'
THEN 0.9
WHEN '3- Reviewed'
THEN 0.1
WHEN '4- Interviewed'
THEN 0.8
WHEN '5- Hired'
THEN 0.5
ELSE 1 END)
,EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions")
```

| % Converted | `cast(`
`CASE when`
`CASE` |

Name	Syntax

```
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions'
THEN "Candidate Counts"."# Submissions"
ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions" END
/(msum(
CASE when
CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions'
THEN "Candidate Counts"."# Submissions"
ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions" END,2)
- CASE when
CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN 'All Submissions'
```

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Name	Syntax

	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" = 'New - Yes'`
	`THEN 'Completed Submissions'`
	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" IN ('Reviewed - No', 'Reviewed - Yes')`
	`THEN 'Reviewed'`
	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" IN ('1st Interview - No', '1st Interview - Yes')`
	`THEN 'Interviewed'`
	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" IN ('Hired - No', 'Hired - Yes')`
	`THEN 'Hired'`
	`ELSE "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" END`
	`<> 'All Submissions'`
	`THEN "Candidate Counts"."# Submissions"`
	`ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."# Submissions") + "Candidate Counts"."# Submissions" END)`
	`as double) * 100`

Filters

Name
Historical Reference Status Name is equal to / is in New; Hired; 1st Interview; Reviewed
Recruiting - Summary Dashboard Prompt Listener

View Configurations

Name	Additional Information
Funnel	Actual: # Submissions
	Target: Target
	Stage: Stage
Column	Bars: # Submissions, Target
	Group By: Stage
Table	Columns and Measures: Stage, # Submissions, Target, % Converted

Funnel Settings

For this funnel, high values are desirable.

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Threshold	Status
115	Exceeded Target
95	95% of Target
75	75% of Target
50	50 % Of Target

Recruiting - Requisition Activity History

The chart displays a 3 month rolling plus current's month's trend of key requisition activity measures, including filled requisitions, opened requisitions and time to fill.

Requisition Activity

Result Columns

In the following table the value i is replaced in the criteria with 0, -1, -2, -3, in the combined results criteria to get the metrics for the last 4 months rolling.

Name	Syntax
Period	EVALUATE('TO_CHAR(%1,%2)' as char, TIMESTAMPADD(SQL_TSI_MONTH, i, CURRENT_TIMESTAMP),'yyyy-mm') || replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')
Open (1st)	FILTER("Requisition Counts"."# Requisitions"

Name	Syntax

	`USING ("Requisition Status - Historical"."Req. Historical Status Start`
	`Date" <= CAST(EVALUATE('TO_DATE(%1,%2)' as date,EVALUATE('TO_CHAR(%1,`
	`%2)' as char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd')`
	`AS DATE))`
	`AND (("Requisition Status - Historical"."Req. Historical Status End`
	`Date" >= CAST(EVALUATE('TO_DATE(%1,%2)' as date,`
	`EVALUATE('TO_CHAR(%1,%2)' as char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)) OR "Requisition Status - Historical"."Req.`
	`Historical Status End Date" IS NULL)`
	`AND ("Requisition Identification"."Has Unlimited Openings"='No')`
	`AND ("Requisition Status - Historical"."Historical Status"='Sourcing'))`

Opened	`FILTER("Requisition Counts"."# Requisitions"`
	`USING ("Requisition Status - Historical"."Req. Historical Status Start`
	`Date"`
	`BETWEEN CAST(EVALUATE('TO_DATE(%1,%2)' as date,EVALUATE('TO_CHAR(%1,`
	`%2)' as char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)`
	`AND`
	`CAST(EVALUATE('TO_DATE(%1,%2)' as date, EVALUATE('TO_CHAR(%1,%2)' as`
	`char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i+1, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)`
	`AND ("Requisition Identification"."Has Unlimited Openings"='No')`
	`AND ("Requisition Status - Historical"."Historical`
	`Status"='Sourcing')))`

Filled	`FILTER("Requisition Counts"."# Requisitions"`
	`USING ("Requisition Status - Historical"."Req. Historical Status Start`
	`Date"`
	`BETWEEN CAST(EVALUATE('TO_DATE(%1,%2)' as date,EVALUATE('TO_CHAR(%1,`
	`%2)' as char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)`
	`AND CAST(EVALUATE('TO_DATE(%1,%2)' as date,EVALUATE('TO_CHAR(%1,%2)' as`
	`char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i+1, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)`
	`AND ("Requisition Identification"."Has Unlimited Openings"='No')`
	`AND ("Requisition Status - Historical"."Historical Status"='Filled')))`

Can/Hold	`FILTER("Requisition Counts"."# Requisitions"`
	`USING ("Requisition Status - Historical"."Req. Historical Status Start`
	`Date"`
	`BETWEEN CAST(EVALUATE('TO_DATE(%1,%2)' as date,EVALUATE('TO_CHAR(%1,`
	`%2)' as char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)`
	`AND CAST(EVALUATE('TO_DATE(%1,%2)' as date,EVALUATE('TO_CHAR(%1,%2)' as`
	`char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i+1, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)`
	`AND ("Requisition Identification"."Has Unlimited Openings"='No')`
	`AND ("Requisition Status - Historical"."Historical Status" IN`
	`('Canceled','On Hold'))))`

TTF	`FILTER("Requisition Cycle Time"."Average Time To Fill"`

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Name	Syntax

	`USING ("Requisition Status - Historical"."Req. Historical Status Start Date"`
	`BETWEEN CAST(EVALUATE('TO_DATE(%1,%2)' as date,EVALUATE('TO_CHAR(%1,%2)' as char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)`
	`AND CAST(EVALUATE('TO_DATE(%1,%2)' as date,EVALUATE('TO_CHAR(%1,%2)' as char,`
	`TIMESTAMPADD(SQL_TSI_MONTH, i+1, CURRENT_TIMESTAMP),'yyyy-mm') ||`
	`'01','yyyy-mm-dd') AS DATE)`
	`AND ("Requisition Identification"."Has Unlimited Openings"='No') AND`
	`("Requisition Status - Historical"."Historical Status"='Filled')))`

Filters

Name
Recruiting - Summary Dashboard Prompt Listener - No Filled Date

View Configurations

Name	Additional Information
Column	Bars: Open (1st), Opened, Filled, Can/Hold
	Lines: TTF
	Group By: Period
Table	Columns and Measures: Period, Open (1st), Opened, Filled, Can/Hold, TTF

Recruiting - Filled Positions Trends

The chart displays a trend of hired candidates with corresponding time metrics such as average time to hire.

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Hires

Hires

Report Columns

Name	Syntax
Filled Period	**EVALUATE('to_char(%1,%2)' as char,"Requisition Dates"."Latest Filled Date",'YYYY-MM')**
Dimension 1	
Dimension 2	
Fact	

Filters

Name
Current Reference Status Name is equal to / is in Hired
Hired Date is not null
Recruiting - Summary Dashboard Prompt Listener

Dimension 1

Short sentence or paragraph to describe the configuration table.

Name	Syntax
# Submissions Internal	"Candidate Counts"."# Submissions Internal"

Name	Syntax
# Submissions Ace	"Candidate Counts"."# Submissions Ace"
# Submissions Min. Requirements Met	"Candidate Counts"."# Submissions Min. Requirements Met"
# Male	`FILTER("Candidate Counts"."# Submissions" USING ("Candidate Regulations"."Gender"='Gender - Male'))`
# White	`FILTER("Candidate Counts"."# Submissions" USING (("Candidate Regulations"."Race"='Race - White') AND (("Candidate Regulations"."Ethnicity" <> 'Ethnicity - Hispanic Latino') OR ("Candidate Regulations"."Ethnicity" IS NULL))))`

Dimension 2

Short sentence or paragraph to describe the configuration table.

Name	Syntax
# Submissions External	"Candidate Counts"."# Submissions External"
# Submissions Non-Ace	"Candidate Counts"."# Submissions Non-Ace"
# Submissions Min. Requirements Unmet	"Candidate Counts"."# Submissions Min. Requirements Unmet"
# Female	`FILTER("Candidate Counts"."# Submissions" USING ("Candidate Regulations"."Gender"='Gender - Female'))`
# Non-White	`FILTER("Candidate Counts"."# Submissions" USING (("Candidate Regulations"."Race" NOT IN ('Race - White', 'Not Specified', 'Undisclosed')) OR ("Candidate Regulations"."Ethnicity"='Ethnicity - Hispanic Latino')))`

Facts

Short sentence or paragraph to describe the configuration table.

Name	Syntax
Average Time to Hire	"Candidate Cycle Time"."Average Time to Hire"
Median Time to Hire	`MEDIAN("Candidate Cycle Time"."Time to Hire")`
Average Submission Cycle Time	"Candidate Cycle Time"."Average Submission Cycle Time"
Median Submission Cycle Time	`MEDIAN("Candidate Cycle Time"."Submission Cycle Time")`
Average Time to Start	"Candidate Cycle Time"."Average Time to Start"
Median Time to Start	`MEDIAN("Candidate Cycle Time"."Time to Start")`

Name	Syntax
Avg Time To Intv.	`AVG(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Dates"."Submission Completed Date", "Submission Dates"."1st Interviewed Date"))`
Median Time to Intv.	`MEDIAN(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Dates"."Submission Completed Date", "Submission Dates"."1st Interviewed Date"))`

Bar Graph View

Element	Details
Bars	Dimension 1, Dimension 2
Lines	Fact
Group By	Filled Period

Recruiting - Recruiter Workload

The chart reveals ratios between active recruiters and workload/productivity metrics such as # Hires, # Requisitions and # Candidates Reviewed.

Recruiter Productivity

Report Columns

Name	Syntax
Filled Period	`EVALUATE('to_char(%1,%2)' as char,"Requisition Dates"."Latest Filled Date",'YYYY-MM')`
Fact	

Filters

Name
Current Status is equal to / is in Filled
Recruiting - Summary Dashboard Prompt Listener

Fact

Name	Location
# Requisitions by Recruiter	"Requisition Counts"."# Requisitions By Recruiter"
# Applicants / Recruiter	`FILTER("Candidate Counts"."# Submissions By Recruiter" USING (("Submission General Info"."Submission Is Completed"='Yes') AND ("Submission Prescreening Results"."Minimum Requirements Met"='Yes')))`
# Reviewed / Recruiter	`FILTER("Candidate Counts"."# Submissions By Recruiter" USING ("Submission Dates"."Reviewed Date" IS NOT NULL))`
# Interviewed / Recruiter	`FILTER("Candidate Counts"."# Submissions By Recruiter" USING ((("Submission Dates"."1st Interviewed Date" IS NOT NULL) OR ("Submission Dates"."2nd Interviewed Date" IS NOT NULL)) OR ("Submission Dates"."3rd Interviewed Date" IS NOT NULL)))`
# Hired / Recruiter	`FILTER("Candidate Counts"."# Submissions By Recruiter" USING ("Submission Dates"."Hired Date" IS NOT NULL))`
# Recruiters	`COUNT(DISTINCT "Requisition Recruiter"."Recruiter ID")`

Area Graph View

Element	Details
Areas	Fact
Group By	Filled Period

Recruiting - Offer Success Rate

The chart displays a trend of offers accepted vs. refused, alongside # offers extended.

Offer Success Rate

Report Columns

Name	Syntax
Filled Period	EVALUATE('to_char(%1,%2)' as char, "Requisition Dates"."Latest Filled Date",'YYYY-MM')
Reject/Decline Motives	"Submission General Info"."Reject/Decline Motives"
# Offers	"Candidate Counts"."# Submissions"
# Offers Accepted	"Candidate Counts"."# Submissions Offer Accepted"
# Offers Failed	"Candidate Counts"."# Submissions" - "Candidate Counts"."# Submissions Offer Accepted"
% Offers Failed	cast(("Candidate Counts"."# Submissions" - "Candidate Counts"."# Submissions Offer Accepted") / "Candidate Counts"."# Submissions" as float) * 100
% Offers Accepted	cast("Candidate Counts"."# Submissions Offer Accepted" / "Candidate Counts"."# Submissions" as float) * 100

Filters

Name
Is Most Recent is equal to / is in Yes
Status is equal to / is in Accepted; Refused; Reneged; Rescinded
Current Status is euql to / is in Filled
Recruiting - Summary Dashboard Prompt Listener

View Configurations

Name	Additional Information
Trend	Bars: % Offers Accepted, % Offers Failed
	Lines: # Offers
	Group By: Filled Period
Failed Offer Reasons	Slice Size: # Offers Failed
	Slices: Reject/Decline Motives

Recruiting - EEO Gender By Stage Summary

The chart displays a distribution of candidates by gender and historical recruiting status.

Gender By Stage

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Configuration

Name	Syntax
| Status | ```
case
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'New'
 then '1. New'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Reviewed'
 then '2. Rev.'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = '1st Interview'
 then '3. Intv'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Offer'
 then '4. Offer'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Hired'
 then '5. Hired'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Rejected'
 then '6. Rejected'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Declined'
 then '7. Declined'
end
``` |
| Gender | ```
case
 when "Candidate Regulations"."Gender"='Undisclosed' then 'Undisc.'
 when "Candidate Regulations"."Gender" is not null then
 replace("Candidate Regulations"."Gender",'Gender - ','')
 else 'Not Specified'
end
``` |
| Gender (Specified) | Selection steps are used to limit returned values to Male and Female.

```
case
 when "Candidate Regulations"."Gender"='Undisclosed' then 'Undisc.'
 when "Candidate Regulations"."Gender" is not null then
 replace("Candidate Regulations"."Gender",'Gender - ','')
 else 'Not Specified'
end
``` |
| # Submissions | "Candidate Counts"."# Submissions" |

Filters

Name
Historical Reference Status Name is equal to / is in Hired; 1st Interview; Declined; Rejected; Reviewed; Offer; New

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Name
Is Max Standard USA EEO Form With Answer is equal to / is in Yes
OR
Gender is null
Submission Is Completed is equal to / is in Yes
Minimum Requirements Met is equal to / is in Yes
Recruiting - Summary Dashboard Prompt Listener

View Configurations

Name	Additional Information
All Values - Pct Stacked	Bars: # Submissions
	Group By: Status
	Vary Color By: Gender
Gender Specified - Pct Stacked	Bars: # Submissions
	Group By: Status
	Vary Color By: Gender (Specified)
All Values - Nb Log Stacked	Bars: # Submissions
	Group By: Status
	Vary Color By: Gender
Pivot Table	Measures: # Submissions
	Rows: Status
	Columns: Gender

Recruiting - EEO Race By Stage Summary

The chart displays a distribution of candidates by race/ethnicity and historical recruiting status.

Race/Ethnicity By Stage

Race/Ethnicity By Stage

Race/Ethnicity Specified - Pct Stacked ▼

Configuration

Name	Syntax
Status	```case when "Submission CSW Status - Historical"."Historical Reference Status Name" = 'New' then '1. New' when "Submission CSW Status - Historical"."Historical Reference Status Name" = 'Reviewed' then '2. Rev.' when "Submission CSW Status - Historical"."Historical Reference Status Name" = '1st Interview' then '3. Intv' when "Submission CSW Status - Historical"."Historical Reference Status Name" = 'Offer' then '4. Offer' when "Submission CSW Status - Historical"."Historical Reference Status Name" = 'Hired' then '5. Hired' when "Submission CSW Status - Historical"."Historical Reference Status Name" = 'Rejected' then '6. Rejected' when "Submission CSW Status - Historical"."Historical Reference Status Name" = 'Declined' then '7. Declined' end```

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Name	Syntax
| Race | ```
case
 when "Candidate Regulations"."Race"='Undisclosed' then 'Undisc.'
 when "Candidate Regulations"."Race"='Not Specified' then 'N/S'
 when "Candidate Regulations"."Race" is not null
 then replace("Candidate Regulations"."Race",'Race - ','') else 'N/S'
end
|| ' (' ||
case
 when "Candidate Regulations"."Ethnicity"='Undisclosed' then 'Undisc.'
 when "Candidate Regulations"."Ethnicity"='Ethnicity - Not Hispanic
Latino' then 'NHL'
 when "Candidate Regulations"."Ethnicity"='Ethnicity - Hispanic Latino'
 then 'HL'
 when "Candidate Regulations"."Ethnicity" is not null then
 replace("Candidate Regulations"."Ethnicity",'Ethnicity - ','')
 else 'N/S'
end
|| ')'
``` |
| Race (Specified) | Selection Steps are used to remove N/S (N/S) and Undisc (N/S) values.<br><br>```
case
 when "Candidate Regulations"."Race"='Undisclosed' then 'Undisc.'
 when "Candidate Regulations"."Race"='Not Specified' then 'N/S'
 when "Candidate Regulations"."Race" is not null
 then replace("Candidate Regulations"."Race",'Race - ','') else 'N/S'
end
|| ' (' ||
case
 when "Candidate Regulations"."Ethnicity"='Undisclosed' then 'Undisc.'
 when "Candidate Regulations"."Ethnicity"='Ethnicity - Not Hispanic
Latino' then 'NHL'
 when "Candidate Regulations"."Ethnicity"='Ethnicity - Hispanic Latino'
 then 'HL'
 when "Candidate Regulations"."Ethnicity" is not null then
 replace("Candidate Regulations"."Ethnicity",'Ethnicity - ','')
 else 'N/S'
end
|| ')'
``` |
| # Submissions | "Candidate Counts"."# Submissions" |

Filters

Name
Historical Reference Status Name is equal to / is in Hired; 1st Interview; Declined; Rejected; Reviewed; Offer; New
Is Max Standard USA EEO Form With Answer is equal to / is in Yes OR Race is null
Submission Is Completed is equal to / is in Yes
Minimum Requirements Met is equal to / is in Yes
Recruiting - Summary Dashboard Prompt Listener

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View Configurations

Name	Additional Information
All Values - Pct Stacked	Bars: # Submissions Group By: Status Vary Color By: Race
Race/ Ethnicity Specified - Pct Stacked	Bars: # Submissions Group By: Status Vary Color By: Race (Specified)
All Values - Nb Log Stacked	Bars: # Submissions Group By: Status Vary Color By: Race
Pivot Table	Measures: # Submissions Rows: Status Columns: Race

Recruiting - Candidate Age by Stage Summary

The chart displays a distribution of candidates by age band and historical recruiting status.

Candidate Age Band By Stage

Report Fields

Name	Syntax
| Status | ```
case
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'New'
 then '1. New'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Reviewed'
 then '2. Rev.'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = '1st Interview'
 then '3. Intv'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Offer'
 then '4. Offer'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Hired'
 then '5. Hired'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Rejected'
 then '6. Rejected'
 when "Submission CSW Status - Historical"."Historical Reference Status
Name"
 = 'Declined'
 then '7. Declined'
end
``` |

Name	Syntax
Age	```case when TimeStampDiff(SQL_TSI_YEAR,"Candidate Identification"."Date of Birth","Submission Dates"."Submission Completed Date") < 40 then 'Under 40' when TimeStampDiff(SQL_TSI_YEAR,"Candidate Identification"."Date of Birth","Submission Dates"."Submission Completed Date") >= 40 then 'Over 40' else 'N/S' end```
Age (Specified)	Selection Steps are utilized to remove N/S records. ```case when TimeStampDiff(SQL_TSI_YEAR,"Candidate Identification"."Date of Birth","Submission Dates"."Submission Completed Date") < 40 then 'Under 40' when TimeStampDiff(SQL_TSI_YEAR,"Candidate Identification"."Date of Birth","Submission Dates"."Submission Completed Date") >= 40 then 'Over 40' else 'N/S' end```
# Submissions	"Candidate Counts"."# Submissions"

Filters

Name
Historical Reference Status Name is equal to / is in Hired; 1st Interview; Declined; Rejected; Reviewed; Offer; New
Submission Is Completed is eqal to / is in Yes
Minimum Requirements Met is equal to / is in Yes
Recruiting - Summary Dashboard Prompt Listener

View Configurations

Name	Additional Information
All Values - Pct Stacked	Bars: # Submissions Group By: Status Vary Color By: Age
Specified Age - Pct Stacked	Bars: # Submissions Group By: Status Vary Color By: Age (Specified)
All Values - Nb Log Stacked	Bars: # Submissions Group By: Status

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Name	Additional Information
	Vary Color By: Age
Pivot Table	Measures: # Submissions
	Rows: Status
	Columns: Age

Open Requisitions

The dashboard displays a series charts and KPIs related to currently open requisitions, enabling users to consume an at a glance view of in process Recruiting activity. The charts/KPIs include open requisition summary tiles, open requisition counts, open requisition aging and candidate pipeline. The visualizations are filterable by a set of common filters and can be analyzed in different ways.

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Column 1

Section 1

1

[ab]

Recruiting - Open Req Dashboard Prompt

Section 2

2

Recruiting - Open Reqs Tiles
Compound View

Section 3

3

Recruiting - Open Reqs By Dim
Compound View

4

Recruiting - Open Req Aging
Compound View

Section 4

5

Recruiting - Pipeline Summary
Compound View

Component	Name
1	*Recruiting - Open Req. Dashboard Prompt*
2	Recruiting - Open Reqs Tiles *Recruiting - Open Reqs Tiles* on page 43
3	*Recruiting - Open Reqs By Dim*

Component	Name
4	*Recruiting - Open Req Aging*
5	*Recruiting - Pipeline Summary*

Recruiting - Open Reqs Tiles

The summary is comprised of tiles outlining key measures pertaining to open requisitions.

Edit - Refresh - Print - Export - Add to Briefing Book

Report Columns

Name	Syntax
Organization Level1 Name	"Requisition Organization"."Organization Level1 Name"
# Requisitions	"Requisition Counts"."# Requisitions"
# Requisitions by Recruiter	"Requisition Counts"."# Requisitions By Recruiter" *Requisitions by Recruiter gives both the information about # of requisitions by recruiter and has conditional formatting to help identify when a recruiter may be over or under worked. If # Requisitions by Recruiter is between 0 and 5 then Yellow background If # Requisitions by Recruiter is between 12 and 20 then Yellow background If # Requisitions by Recruiter is between 5 and 12 then Green background If # Requisitions by Recruiter is greater than or equal to 20 then Red background
# Submissions Currently New	"Candidate Counts"."# Submissions Currently New"

# Submissions Currently Active	`"Candidate Counts"."# Submissions Currently In 1st Intv." +` 	
	`"Candidate Counts"."# Submissions Currently In 2nd Intv." +`
	`"Candidate Counts"."# Submissions Currently In 3rd Intv." +`
	`"Candidate Counts"."# Submissions Currently In Offer" +`
	`"Candidate Counts"."# Submissions Currently in Review" +`
	`"Candidate Counts"."# Submissions Currently In Testing"`

Req. Aging	`Avg(TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Sourced Date", CURRENT_TIMESTAMP))` *Req. Aging gives both the information about requisition aging and has conditional formatting to help identify when a requisition might be getting stale. If Req. Aging is greater than or equal to 70 then Red background

Name	Syntax
	If Req. Aging is between 0 and 45 then Green background
	If Req. Aging is between 45 and 70 then Yellow background
# Offers Extended	`COUNT(CASE WHEN "Submission Job Offer"."Status"='Extended' THEN "Submission General Info"."Submission Identifier" END)`

Report Filters

Name
Current Status is equal to / is in Sourcing
Has Unlimited Openings is equal to / is in No
Recruiting - Open Req. Dashboard Prompt Listener

Report Tile Views

Measure	Name	Description
# Requisitions	# Open Reqs.	Currently open requisitions
# Requisitions by Recruiter	Reqs / Recruiter	# Open requisitions by recruiter.
Req. Aging	Avg Days Open	Avg. Aging of requisitions (from sourcing date till now.)
# Submissions Currently Active	# Active Apps	Returns the number of distinct submissions currently active in the hiring process.
# Submissions Currently New	# New Apps	Returns the number of submissions currently in the "New" status

Recruiting - Open Reqs by Dim

The chart displays a summary of open requisitions by various dimensions.

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Open Requisitions

Edit - Refresh - Print - Export - Add to Briefing Book

View By: Column 1 - Dimensions

Name	Syntax
Organization Level 1 Name	"Requisition Organization"."Organization Level1 Name"
Organization Level 2 Name	"Requisition Organization"."Organization Level2 Name"
Location Level 1 Name	"Requisition Primary Location"."Location Level1 Name"
Location Level 2 Name	"Requisition Primary Location"."Location Level2 Name"
Job Field Level 1 Name	"Requisition Job Field"."Job Field Level1 Name"
Job Field Level 2 Name	"Requisition Job Field"."Job Field Level2 Name"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Recruiter	"Requisition Recruiter"."Recruiter Name"
Job Level	"Requisition Profile"."Req. Job Level"
Job Type	"Requisition Profile"."Req. Job Type"

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Name	Syntax
Justification	"Requisition Identification"."Justification"

View By: Column 2 - Fact

Name	Syntax
# Sourcing	"Requisition Counts"."# Requisitions Currently Sourcing"
# On Hold	"Requisition Counts"."# Requisitions Currently On Hold"
# Approved	"Requisition Counts"."# Requisitions Currently Approved"

View Configurations

View	Additional Information
Waterfall	Group By: Column 1 - Dimensions Measures: Column 2 - Facts
Pie	Slices: Column 1 - Dimensions Slice Size: Column 2 - Facts
Column	Group By: Column 1 - Dimensions Bars: Column 2 - Facts
Table	Columns and Measures: Column 1 - Dimensions, Column 2 - Facts

Report Filters

Short sentence or paragraph to describe the configuration table.

Name
Current Status is equal to / is in Sourcing; Approved; On Hold
Has Unlimited Openings is equal to / is in No
Recruiting - Open Req. Dashboard Prompt Listener

Recruiting - Open Req Aging

The chart outlines aging of open requisitions across various dimensions.

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Aging

Report Columns

Short sentence or paragraph to describe the configuration table.

Type Permission	
Name	Location
Dimensions	
Avg Aging	**Avg(TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Sourced Date", CURRENT_TIMESTAMP))**
# Open 0-45 Days	**count(distinct case when TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Sourced Date" , CURRENT_TIMESTAMP) between 0 and 45 then "Requisition Identification"."Req. Identifier" end)**
# Open 45-100 Days	**count(distinct case when TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Sourced Date", CURRENT_TIMESTAMP) between 45 and 100 then "Requisition Identification"."Req. Identifier" end)**

Type Permission	
Name	**Location**
# Open 100-150 Days	`count(distinct case when TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Sourced Date", CURRENT_TIMESTAMP) between 100 and 150 then "Requisition Identification"."Req. Identifier" end)`
# Open 150+ Days	`count(distinct case when TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Sourced Date", CURRENT_TIMESTAMP) >= 150 then "Requisition Identification"."Req. Identifier" end)`

View By: Dimensions

Short sentence or paragraph to describe the configuration table.

Name	Syntax
Organization Level 1 Name	"Requisition Organization"."Organization Level1 Name" *Interaction:Requisition Details, Candidate Details
Organization Level 2 Name	"Requisition Organization"."Organization Level2 Name" *Interaction:Requisition Details, Candidate Details
Location Level 1 Name	"Requisition Primary Location"."Location Level1 Name" *Interaction:Requisition Details, Candidate Details
Location Level 2 Name	"Requisition Primary Location"."Location Level2 Name" *Interaction:Requisition Details, Candidate Details
Job Field Level 1 Name	"Requisition Job Field"."Job Field Level1 Name" *Interaction:Requisition Details, Candidate Details
Job Field Level 2 Name	"Requisition Job Field"."Job Field Level2 Name" *Interaction:Requisition Details, Candidate Details
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name" *Interaction:Requisition Details, Candidate Details
Recruiter	"Requisition Recruiter"."Recruiter Name" *Interaction:Requisition Details, Candidate Details
Job Level	"Requisition Profile"."Req. Job Level" *Interaction:Requisition Details, Candidate Details

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Name	Syntax
Job Type	"Requisition Profile"."Req. Job Type"
	*Interaction:Requisition Details, Candidate Details
Justification	"Requisition Identification"."Justification"
	*Interaction:Requisition Details, Candidate Details
Organization Level 1 Name (Drill)	"Requisition Organization"."Organization Level1 Name"
Location Level 1 Name (Drill)	"Requisition Primary Location"."Location Level1 Name"
Job Field Level 1 Name (Drill)	"Requisition Job Field"."Job Field Level1 Name"

View Configurations

Context	Additional Information
Avg Aging	Group By: Dimension
	Bars: Avg Aging
	This view has conditional formatting based on average aging.
	When average aging is between 0 and 45 the bars will be green.
	When average aging is between 45 and 100 the bars will be orange.
	When average aging is between 100 and 150 the bars will be red.
	When average aging is greater than or equal to 150 the bars will be red.
# Reqs by Aging Band	Group By: Dimension
	Areas: #Open 0-45 Days, # Open 45-100 Days, # Open 100-150 Days, # Open 150+ Days
Pareto of Urgent Reqs	Group By: Dimension
	Measures: # Open 150+ Days

Report Filters

Name
Current Status is equal to / is in Sourcing
Has Unlimited Openings is equal to / is in No
Recruiting - Open Req. Dashboard Prompt Listener

Recruiting - Pipeline Summary

The chart provides a quantitative and qualitative summary of the candidate pipeline on requisitions across various dimensions.

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Report Columns

Name	Syntax
Dimension	
Status	Statuses are binned into the following categories: 0. New - Incomplete, 1. New - Complete, 2. Review, 3. Interview, 4. Testing, 5. Offer, NS.

```
CASE
 WHEN "Submission CSW Status - Current"."Current Reference Status Name"
 || ' - ' || "Submission General Info"."Submission Is Completed"
 = 'New - No'
 THEN '0. New - Incomplete'
 WHEN "Submission CSW Status - Current"."Current Reference Status Name"
 || ' - ' || "Submission General Info"."Submission Is Completed"
 = 'New - Yes'
 THEN '1. New - Complete'
 WHEN "Submission CSW Status - Current"."Current Reference Status Name"
 || ' - ' || "Submission General Info"."Submission Is Completed"
 IN ('Reviewed - No', 'Reviewed - Yes')
 THEN '2. Review'
 WHEN "Submission CSW Status - Current"."Current Reference Status Name"
 || ' - ' || "Submission General Info"."Submission Is Completed"
 IN ('1st Interview - No', '1st Interview - Yes')
 THEN '3. Interview'
 WHEN "Submission CSW Status - Current"."Current Reference Status Name"
 || ' - ' || "Submission General Info"."Submission Is Completed"
 IN ('Testing - No', 'Testing - Yes')
 THEN '4. Testing'
 WHEN "Submission CSW Status - Current"."Current Reference Status Name"
 || ' - ' || "Submission General Info"."Submission Is Completed"
 = 'Offer - Yes'
 THEN '5. Offer'
 ELSE 'NS'
END
```

# Submissions	"Candidate Counts"."# Submissions"
# New Complete	

```
FILTER("Candidate Counts"."# Submissions Currently New"
USING (("Submission General Info"."Submission Is Completed"='Yes')
AND ("Submission Prescreening Results"."Minimum Requirements
 Met"='Yes')))
```

Name	Syntax
# New Incomplete	`FILTER("Candidate Counts"."# Submissions Currently New" USING (("Submission General Info"."Submission Is Completed"='No') AND ("Submission Prescreening Results"."Minimum Requirements Met"='Yes')))`
# Review	"Candidate Counts"."# Submissions Currently in Review"
# Intv.	"Candidate Counts"."# Submissions Currently In 1st Intv."
# Offer	"Candidate Counts"."# Submissions Currently In Offer"
# Testing	"Candidate Counts"."# Submissions Currently In Testing"
% Ace	cast("Candidate Counts"."# Submissions Ace"/"Candidate Counts"."# Submissions" as double) * 100
% Min Requirements Met	cast("Candidate Counts"."# Submissions Min. Requirements Met" / "Candidate Counts"."# Submissions" as double) * 100

View By: Dimension

Short sentence or paragraph to describe the configuration table.

Name	Syntax
Organization Level 1 Name	"Requisition Organization"."Organization Level1 Name"
Organization Level 2 Name	"Requisition Organization"."Organization Level2 Name"
Location Level 1 Name	"Requisition Primary Location"."Location Level1 Name"
Location Level 2 Name	"Requisition Primary Location"."Location Level2 Name"
Job Field Level 1 Name	"Requisition Job Field"."Job Field Level1 Name"
Job Field Level 2 Name	"Requisition Job Field"."Job Field Level2 Name"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Recruiter	"Requisition Recruiter"."Recruiter Name"
Job Level	"Requisition Profile"."Req. Job Level"
Job Type	"Requisition Profile"."Req. Job Type"
Justification	"Requisition Identification"."Justification"
Degree	"Submission Education History"."Submission Education Degree Type"
Source Type	"Submission Source"."Submission Source Type (Display As)"
Internal/External Submission	`CASE WHEN "Submission General Info"."Submission Is Internal" = 'Yes' THEN 'Internal' ELSE 'External' END`
Submission Medium	"Submission General Info"."Submission Medium"
Gender	"Candidate Regulations"."Gender"
Race	"Candidate Regulations"."Race"

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View Configurations

Name	Additional Information
Pipeline Quality	Horizonal Axis: % Min Requirements Met
	XY(Vertical Axis): % Ace
	XY(Bubble Size): # Submissions
	Vary Color By: Dimension
Submissions by Stage	Bars: # New Incomplete, # New Complete, # Review, # Intv., # Testing, # Offer
	Group By: Dimension

Report Filters

Name
Current Status is equal to / is in Sourcing
Has Unlimited Openings is equal to / is in No
Current Reference Status Name is equal to / is in 1st Interview; New; Reviewed; Testing; Offer
Recruiting - Open Req. Dashboard Prompt Listener

Source Analysis

The dashboard provides an in depth view pertaining to source efficiency and effectiveness. The charts include source yield, candidate stage conversion, source efficiency analysis, top 5 source trends by stage and source volume/conversion rate trends. The visualizations are filterable by a set of common filters and can be analyzed in different ways.

Column 1

Section 1

1

[ab]

Recruiting - Summary Dashboard Prompt

2

[ab]

Recruiting - Source Type And Source Dashboard Prompt

Section 2

3

Recruiting - Source Yield
Compound View

4

Recruiting - CSW Funnel (Source Dashboard)
Compound View

Section 3

5

Recruiting - Source Efficiency Analysis
Compound View

Section 4

6

Recruiting - Source Yield Top Sources Trend (Pie Trellis)
Compound View

7

Recruiting - Source Yield Stats (Line Trellis)
Compound View

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Component	Name
1	*Recruiting - Summary Dashboard Prompt*
2	*Recruiting - Source Type and Source Dashboard Prompt*
3	*Recruiting - Source Yield*
4	*Recruiting - CSW Funnel (Source Dashboard)*
5	*Recruiting - Source Efficiency Analysis*
6	*Recruiting - Source Yield Top Sources Trend (Pie Trellis)*
7	*Recruiting - Source Yield Stats (Line Trellis)*

Recruiting - Source Yield

The chart displays the top 5 sources based on various candidate measures.

Top Sources

Selected Columns

Name	Syntax
Stage (Data Identifier)	Each of the 6 unioned criteria has a unique data identifier.
Source Type	"Submission Source"."Submission Source Type (Display As)"

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Name	Syntax
Submission Source	"Submission Source"."Submission Source (BL)"
# Submissions	The value used for # of submissions varies based on stage.

Unique Columns/Filters

Data Identifier	# Submissions	Additional Filter(s)
'1. All Submissions'	"Candidate Counts"."# Submissions"	
'2. Completed Submissions'	"Candidate Counts"."# Submissions"	Submission Is Completed is equal to / is in Yes
'4. Interviewed'	"Candidate Counts"."# Submissions Reached 1st Intv."	
'3. Reviewed'	"Candidate Counts"."# Submissions Reached Reviewed"	
'5. Hired'	"Candidate Counts"."# Submissions Currently Hired"	
'6. Hires Ace'	"Candidate Counts"."# Submissions Currently Hired"	Is Ace is equal to /is in Yes

Filters

Name
Submission Source Type (Display As) is not null
Submissions is in top 10
Submission Source (BL) is prompted
Submission Source (Display As) is prompted
Recruiting - Summary Dashboard Prompt Listener

Pie Graph Configuration

Name	Details
Graph Prompt	Stage
Slice Size	# Submissions
Slices	Submission Source (BL)

Recruiting - CSW Funnel (Source Dashboard)

The chart reveals health indicators based on candidate conversion rates across the key standard reference recruiting statuses.

Stage Conversion

Stage Conversion

View As: Funnel ▾

Report Columns

Name	Syntax

Stage	```CASE
	  WHEN "Submission CSW Status - Historical"."Historical Reference Status
	  Name" || ' - ' || "Submission General Info"."Submission Is Completed"
	  = 'New - No'
	  THEN '1- All Submissions'
	  WHEN "Submission CSW Status - Historical"."Historical Reference Status
	  Name" || ' - ' || "Submission General Info"."Submission Is Completed"
	  = 'New - Yes'
	  THEN '2- Completed Submissions'
	  WHEN "Submission CSW Status - Historical"."Historical Reference Status
	  Name" || ' - ' || "Submission General Info"."Submission Is Completed"
	  IN ('Reviewed - No', 'Reviewed - Yes')
	  THEN '3- Reviewed'
	  WHEN "Submission CSW Status - Historical"."Historical Reference Status
	  Name" || ' - ' || "Submission General Info"."Submission Is Completed"
	  IN ('1st Interview - No', '1st Interview - Yes')
	  THEN '4- Interviewed'
	  WHEN "Submission CSW Status - Historical"."Historical Reference Status
	  Name" || ' - ' || "Submission General Info"."Submission Is Completed"
	  IN ('Hired - No', 'Hired - Yes')
	  THEN '5- Hired'
	  ELSE "Submission CSW Status - Historical"."Historical Reference Status
	  Name" || ' - ' || "Submission General Info"."Submission Is Completed"
	END```

Name	Syntax
# Submissions	```CASE
when CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions'
THEN "Candidate Counts"."# Submissions"
ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions"
END```
Target	```IFNULL(
(
(MSUM
(CASE when
CASE WHEN "Submission CSW Status - Historical"."Historical Reference
Status Name" || ' - ' || "Submission General Info"."Submission Is
Completed"
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions'
THEN "Candidate Counts"."# Submissions"```

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Name	Syntax
| | ```
ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions" END, 2)
- CASE when
CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions' THEN "Candidate Counts"."# Submissions" END)
* CASE
CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN '1- All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN '2- Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN '3- Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN '4- Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN '5- Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
WHEN '2- Completed Submissions'
THEN 0.9
WHEN '3- Reviewed'
THEN 0.1
WHEN '4- Interviewed'
THEN 0.8
WHEN '5- Hired'
THEN 0.5
ELSE 1 END)
``` |

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Name	Syntax
	`,EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."# Submissions") + "Candidate Counts"."# Submissions")`

% Converted	

```
cast(
CASE when
CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions'
THEN "Candidate Counts"."# Submissions"
ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions" END
/(msum(
CASE when
CASE
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - No'
THEN 'All Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
= 'New - Yes'
THEN 'Completed Submissions'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Reviewed - No', 'Reviewed - Yes')
THEN 'Reviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('1st Interview - No', '1st Interview - Yes')
THEN 'Interviewed'
WHEN "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
IN ('Hired - No', 'Hired - Yes')
THEN 'Hired'
ELSE "Submission CSW Status - Historical"."Historical Reference Status
Name" || ' - ' || "Submission General Info"."Submission Is Completed"
END
<> 'All Submissions'
THEN "Candidate Counts"."# Submissions"
ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."#
Submissions") + "Candidate Counts"."# Submissions" END,2)
```

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Name	Syntax

	`- CASE when`
	`CASE`
	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" = 'New - No'`
	`THEN 'All Submissions'`
	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" = 'New - Yes'`
	`THEN 'Completed Submissions'`
	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" IN ('Reviewed - No', 'Reviewed - Yes')`
	`THEN 'Reviewed'`
	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" IN ('1st Interview - No', '1st Interview - Yes')`
	`THEN 'Interviewed'`
	`WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" IN ('Hired - No', 'Hired - Yes')`
	`THEN 'Hired'`
	`ELSE "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" END`
	`<> 'All Submissions'`
	`THEN "Candidate Counts"."# Submissions"`
	`ELSE EVALUATE('LEAD(%1,1) OVER (ORDER BY 1)',"Candidate Counts"."# Submissions") + "Candidate Counts"."# Submissions" END)`
	`as double) * 100`

Filters

Short sentence or paragraph to describe the configuration table.

Name
Historical Reference Status Name is equal to / is in New; Hired; 1st Interview; Reviewed
Submission Source Type (Display As) is prompted
Submission Source (BL) is prompted
Recruiting - Summary Dashboard Prompt Listener

View Configurations

Name	Additional Information
Funnel	Actual: # Submissions
	Target: Target
	Stage: Stage
Column	Bars: # Submissions, Target
	Group By: Stage

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Name	Additional Information
Table	Columns and Measures: Stage, # Submissions, Target, % Converted

Funnel Settings

For this funnel, high values are desirable.

Threshold	Status
115	Exceeded Target
95	95% of Target
75	75% of Target
50	50 % Of Target

Recruiting - Source Efficiency Analysis

The chart enables comparing of sources across various measures.

Source Efficiency

Selected Columns

Short sentence or paragraph to describe the configuration table.

Name	Syntax
Filled Period	EVALUATE('to_char(%1,%2)' as char,"Requisition Dates"."Latest Filled Date" ,'YYYY-MM')
Source Type	"Submission Source"."Submission Source Type (Display As)"

Name	Syntax
Slice	
# Submissions	"Candidate Counts"."# Submissions"
# Submissions Complete	"Candidate Counts"."# Submissions Complete"
# Apps Met Reqs.	FILTER("Candidate Counts"."# Submissions Min. Requirements Met" USING ("Submission General Info"."Submission Is Completed"='Yes'))
# Submissions Reached 1st Intv.	"Candidate Counts"."# Submissions Reached 1st Intv."
Horizontal Axis	
Vertical Axis	
Bubble	

Filters

Name
Submission Source Type (Display As) is not null
Submission Source Type (Display As) is prompted
Submission Source (BL) is prompted
Recruiting - Summary Dashboard Prompt Listener

Slice

Name	Syntax
Source	"Submission Source"."Submission Source (BL)"
Source Type	"Submission Source"."Submission Source Type (Display As)"
Filled Period	EVALUATE('to_char(%1,%2)' as char,"Requisition Dates"."Latest Filled Date" ,'YYYY-MM')

Horizontal/Vertical Axis

Type Permission	
Name	Syntax
% Submissions Met Reqs.	```cast(
FILTER("Candidate Counts"."# Submissions Min.
Requirements Met"
USING ("Submission General Info"."Submission Is
Completed"='Yes'))
/ "Candidate Counts"."# Submissions Complete"
as float)*100```
% Submissions Complete	cast("Candidate Counts"."# Submissions Complete"/"Candidate Counts"."# Submissions" as float)*100
% Submissions Ace	```cast(```

Type Permission	
Name	Syntax

	`FILTER("Candidate Counts"."# Submissions Ace"`
	`USING ("Submission General Info"."Submission Is`
	`Completed"='Yes'))`
	`/ "Candidate Counts"."# Submissions Complete"`
	`as float)*100`

% Submissions Reached Reviewed	cast("Candidate Counts"."# Submissions Reached Reviewed"/"Candidate Counts"."# Submissions Complete" as float)*100
% Submissions Reached 1st Intv.	cast("Candidate Counts"."# Submissions Reached 1st Intv."/"Candidate Counts"."# Submissions Complete" as float)*100
% Submissions Reached Offer	cast("Candidate Counts"."# Submissions Reached Offer"/"Candidate Counts"."# Submissions Complete" as float)*100
% Submissions Reached Hired	cast("Candidate Counts"."# Submissions Currently Hired"/"Candidate Counts"."# Submissions Complete" as float)*100

Bubble

Name	Syntax
# Submissions Currently Hired	"Candidate Counts"."# Submissions Currently Hired"
# Submissions Reached 1st Intv.	"Candidate Counts"."# Submissions Reached 1st Intv."
# Submissions Reached Offer	"Candidate Counts"."# Submissions Reached Offer"
# Submissions Ace	"Candidate Counts"."# Submissions Ace"
# Submissions Min. Requirements Met	"Candidate Counts"."# Submissions Min. Requirements Met"
# Submissions Complete	"Candidate Counts"."# Submissions Complete"
# Submissions Reached Reviewed	"Candidate Counts".""

Bubble Graph Configuration

Name	Location
Horizontal Axis	Horizontal Axis
Vertical Axis	Vertical Axis
Bubble Size	Bubble
Vary Color By	Slice

Recruiting - Source Yield Top Sources Trend (Pie Trellis)

The trellis provides a table view of pie charts displaying top 5 sources by stage conversion, enabling an at a glance view of top 5 source performance over time.

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Top 5 Source Trends By Stage

Selected Columns

Name	Syntax
Stage (Data Identifier)	Each of the 6 unioned criteria has a unique data identifier.
Source Type	"Submission Source"."Submission Source Type (Display As)"
Submission Source	"Submission Source"."Submission Source (BL)"
# Submissions	The value used for # of submissions varies based on stage.
Filled Period	EVALUATE('to_char(%1,%2)' as char, "Requisition Dates"."Latest Filled Date",'YYYY-MM')

Unique Columns/Filters

Data Identifier	# Submissions	Additional Filter(s)
'1. All Submissions'	"Candidate Counts"."# Submissions"	
'2. Completed Submissions'	"Candidate Counts"."# Submissions"	Submission Is Completed is equal to / is in Yes
'4. Interviewed'	"Candidate Counts"."# Submissions Reached 1st Intv."	
'3. Reviewed'	"Candidate Counts"."# Submissions Reached Reviewed"	
'5. Hired'	"Candidate Counts"."# Submissions Currently Hired"	

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Data Identifier	# Submissions	Additional Filter(s)
'6. Hires Ace'	"Candidate Counts"."# Submissions Currently Hired"	Is Ace is equal to /is in Yes

Filters

Name
Submission Source Type (Display As) is not null
Rank("Candidate Counts"."# Submissions Currently Hired" By EVALUATE('to_char(%1,%2)' as char, "Requisition Dates"."Latest Filled Date",'YYYY-MM')) is less than or equal to 5
Submission Source (BL) is prompted
Submission Source (Display As) is prompted
Recruiting - Summary Dashboard Prompt Listener

Trellis Configuration

Name	Location
Columns	Latest Filled Date
Rows	Stage
View as	Pie
Slices	Submission Source (BL)
	# Submissions

Recruiting - Source Yield Stats (Line Trellis)

The trellis provides a table view of trends for sources across a variety of measures.

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Source Volume and Conversion Rate Trends

Source Volume And Conversion Rate Trends

Source	# Submissions Complete	% Submissions Complete	# Submissions Met Reqs.	% Submissions Met Reqs.	# Submissions Ace
Career Section					
Monster					
Facebook					
Talent Exchange					
Baker Tilly Agency					
LinkedIn					

Selected Columns

Name	Syntax
Filled Period	EVALUATE('to_char(%1,%2)' as char,"Requisition Dates"."Latest Filled Date",'YYYY-MM')
Source Type	"Submission Source"."Submission Source Type (Display As)"
Source	"Submission Source"."Submission Source (BL)"
# Submissions Complete	"Candidate Counts"."# Submissions Complete"
# Submissions Met Reqs.	"Candidate Counts"."# Submissions Min. Requirements Met"
# Submissions Ace	"Candidate Counts"."# Submissions Ace"
# Submissions Reached 1st Intv.	"Candidate Counts"."# Submissions Reached 1st Intv."
# Submissions Hired	"Candidate Counts"."# Submissions Currently Hired"
# Ace Hires	FILTER("Candidate Counts"."# Submissions Currently Hired" USING ("Submission Prescreening Results"."Is Ace" = 'Yes'))
% Submissions Complete	cast("Candidate Counts"."# Submissions Complete"/"Candidate Counts"."# Submissions" as float) * 100
% Submissions Met Reqs.	cast(FILTER("Candidate Counts"."# Submissions Min. Requirements Met" USING ("Submission General Info"."Submission Is Completed"='Yes'))/ "Candidate Counts"."# Submissions Complete" as float)*100

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Name	Syntax
% Submissions Ace	cast(FILTER("Candidate Counts"."# Submissions Ace" USING ("Submission General Info"."Submission Is Completed" = 'Yes'))/ "Candidate Counts"."# Submissions Complete" as float)*100
% Submissions Reached 1st Intv	cast("Candidate Counts"."# Submissions Reached 1st Intv."/"Candidate Counts"."# Submissions Complete" as float) * 100
% Submissions Hired	cast("Candidate Counts"."# Submissions Currently Hired"/"Candidate Counts"."# Submissions Complete" as float) * 100

% Ace Hires	`cast(`
	`FILTER("Candidate Counts"."# Submissions Currently Hired"`
	`USING ("Submission Prescreening Results"."Is Ace"='Yes'))`
	`/"Candidate Counts"."# Submissions Ace"`
	`as float) * 100`

Filters

Name
Submission Source Type (Display As) is not null
Submission Source Type (Display As) is prompted
Submission Source (BL) is prompted
Recruiting - Summary Dashboard Prompt Listener

Trellis Configuration

Name	Location
Rows	Source
Measures	# Submissions Complete
	% Submissions Complete
	# Submissions Met Min Reqs.
	% Submissions Met Min Reqs.
	# Submissions Ace
	% Submissions Ace
	# Submissions Reached 1st Intv.
	% Submissions Reached 1st Intv.
	# Submissions Hired
	% Submissions Hired
	# Ace Hires
	% Ace Hires

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Name	Location
Visualization	# Submissions Complete
View As: Spark Line	# Submissions Met Min Reqs.
Lines: Filled Period	# Submissions Ace
	# Submissions Reached 1st Intv.
	# Submissions Hired
	# Ace Hires
Visualization	% Submissions Complete
View As: Spark Bar	% Submissions Met Min Reqs.
Bars: Filled Period	% Submissions Ace
	% Submissions Reached 1st Intv.
	% Submissions Hired
	% Ace Hires

Open Reqs. Pivot

Component	Name
1	*Recruiting - Open Req Dashboard Prompt*
2	*Recruiting - Open Req Summary Pivot*

Recruiting - Open Req. Summary Pivot

This pivot table view provides details on a variety of metrics that can be viewed using different contexts by choosing different sections, rows, and columns.

Section: ALL ▼ **Row:** Organization ▼ **Column:** Category ▼

All

Organization	Open	On Hold	# Openings Left To Hire	Avg. Days Open	New Apps	Active Apps	Apps In Offer Stage	# Hired	Accounting							
									Open	On Hold	# Openings Left To Hire	Avg. Days Open	New Apps	Active Apps	Apps In Offer Stage	# Hired
Grand Total	1514	24	1662	7	15173	1571	259	274	288	1	291	6	1423	315	39	105
Automation	171	0	237	11	1157	120	14	2	37	0	36	13	96	29	4	0
Chemical	110	2	113	1	1091	3	5	2	18	0	19	12	196	1	0	0
Combined Strengths	70	1	72	4	1085	83	6	0	34	0	34	0	149	34	3	0
Consumer Products	200	4	241	3	2009	225	36	5	33	0	32	4	81	14	0	0
Corporate	12	1	14	0	110	27	3	2	2	1	4	0	14	8	0	0
Corporate Functions	260	8	289	10	3139	244	11	1	41	0	43	8	164	44	3	0
Domestic Operations	201	0	191	0	1360	261	18	10	16	0	15	7	43	31	2	0
Emerging Industry	1	0	1	0	5	0	0	0								
Energy Services	56	5	62	12	583	19	2	0	17	0	18	3	36	12	0	0
Financial Services	45	0	46	17	447	33	7	0	26	0	27	0	149	14	4	0
Operations	9	0	9	33	90	0	0	0								
Production	42	0	31	1	1106	189	130	244	3	0	1	6	416	84	22	105
Systems	337	3	356	9	2991	367	27	8	61	0	62	10	79	44	1	0

Selected Columns

Name	Syntax
Section	

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Name	Syntax
Row	
Column	
Open	"Requisition Counts"."# Requisitions Currently Sourcing"
On Hold	"Requisition Counts"."# Requisitions Currently On Hold"
# Openings Left To Fill (Hired)	"Requisition Counts"."# Openings Left To Fill (Hired)"
Avg. Days Open	FILTER(Avg(TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Sourced Date", CURRENT_TIMESTAMP)) USING ("Requisition Status - Current"."Current Status"='Sourcing'))
New Apps	FILTER("Candidate Counts"."# Submissions Currently New" USING ("Submission General Info"."Submission Is Completed" = 'Yes'))
Active Apps	"Candidate Counts"."# Submissions Currently In 1st Intv." + "Candidate Counts"."# Submissions Currently In 2nd Intv." + "Candidate Counts"."# Submissions Currently In 3rd Intv." + "Candidate Counts"."# Submissions Currently in Review" + "Candidate Counts"."# Submissions Currently In Testing"
Apps In Offer Stage	"Candidate Counts"."# Submissions Currently In Offer"
# Submissions Currently Hired	"Candidate Counts"."# Submissions Currently Hired"

Filters

Name
Current Status is equal to / is in On Hold; Sourcing
Recruiting - Open Req. Dashboard Prompt Listener

Section

Name	Syntax
Organization Level1 Name	"Requisition Organization"."Organization Level1 Name"
Organization Level2 Name	"Requisition Organization"."Organization Level2 Name"
Location Level1 Name	"Requisition Primary Location"."Location Level1 Name"
Location Level2 Name	"Requisition Primary Location"."Location Level2 Name"
Job Field Level1 Name	"Requisition Job Field"."Job Field Level1 Name"
Job Field Level2 Name	"Requisition Job Field"."Job Field Level2 Name"
Employee Status	"Requisition Profile"."Req. Employee Status"
All	'All'

Row

Name	Syntax
Recruiter	"Requisition Recruiter"."Recruiter Name"

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Name	Syntax
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Organization Level1 Name	"Requisition Organization"."Organization Level1 Name"
Organization Level2 Name	"Requisition Organization"."Organization Level2 Name"
Location Level1 Name	"Requisition Primary Location"."Location Level1 Name"
Location Level2 Name	"Requisition Primary Location"."Location Level2 Name"
Job Field Level1 Name	"Requisition Job Field"."Job Field Level1 Name"
Job Field Level2 Name	"Requisition Job Field"."Job Field Level2 Name"
Employee Status	"Requisition Profile"."Req. Employee Status"
All	'All'

Column

Name	Syntax
Organization Level1 Name	"Requisition Organization"."Organization Level1 Name"
Organization Level2 Name	"Requisition Organization"."Organization Level2 Name"
Location Level1 Name	"Requisition Primary Location"."Location Level1 Name"
Location Level2 Name	"Requisition Primary Location"."Location Level2 Name"
Job Field Level1 Name	"Requisition Job Field"."Job Field Level1 Name"
Job Field Level2 Name	"Requisition Job Field"."Job Field Level2 Name"
Employee Status	"Requisition Profile"."Req. Employee Status"
Job Level	"Requisition Profile"."Req. Job Level"
Job Type	"Requisition Profile"."Req. Job Type"
Job Schedule	"Requisition Profile"."Req. Job Schedule"

Pivot Table Configuration

Name	Location
Sections (Totals Enabled)	Section
Rows (Totals Enabled)	Row
Columns	Column
Measures	Open
	On Hold
	# Openings Left to Hire
	Avg. Days Open
	New Apps

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Name	Location
	Active Apps
	Apps In Offer Stage
	# Hired

Dashboard Prompts

Recruiting - Open Req. Dashboard Prompt

Name	Location
Location (1)	"Requisition Primary Location"."Location Level1 Name"
Location (2)	"Requisition Primary Location"."Location Level2 Name" Location 2 is limited by Location 1 selections.
Organization (1)	"Requisition Organization"."Organization Level1 Name"
Organization (2)	"Requisition Organization"."Organization Level2 Name" Organization (2) is limited by Organization (1) selections.
Requisition	"Requisition Identification"."Req. Identifier"
Recruiter	"Requisition Recruiter"."Recruiter Name" Recruiter is limited by the value of all prompts.
Department	"Requisition Department"."Department Name"
H. Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Job Field 1	"Requisition Job Field"."Job Field Level1 Name"
Opened	EVALUATE('TO_CHAR(%1,%2)' AS CHARACTER, "Requisition Dates"."First Sourced Date" ,'YYYY-MM') By default the last year rolling is selected.

Recruiting - Summary Dashboard Prompt

Location (1) --Select Value--   Organization (1) --Select Value--   Requisition --Select Value--   Department --Select Value--

Location (2) --Select Value--   Organization (2) --Select Value--   Recruiter --Select Value--   H. Manager --Select Value--

Name	Location
Location (1)	"Requisition Primary Location"."Location Level1 Name"
Location (2)	"Requisition Primary Location"."Location Level2 Name" Location 2 is limited by Location 1 selections.
Organization (1)	"Requisition Organization"."Organization Level1 Name"
Organization (2)	"Requisition Organization"."Organization Level2 Name" Organization (2) is limited by Organization (1) selections.
Requisition	"Requisition Identification"."Req. Identifier"
Recruiter	"Requisition Recruiter"."Recruiter Name" Recruiter is limited by the value of all prompts.
Department	"Requisition Department"."Department Name"
H. Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Job Field 1	"Requisition Job Field"."Job Field Level1 Name"
Filled	EVALUATE('to_char(%1,%2)' as character, "Requisition Dates"."Latest Filled Date" ,'YYYY-MM') By default the last year rolling is selected.

Recruiting - Source Type and Source Dashboard Prompt

Source Type --Select Value--   Source --Select Value--   Apply

Name	Location
Source Type	"Submission Source"."Submission Source Type (Display As)"
Source	"Submission Source"."Submission Source (BL)" Source is limited by the Source Type selections.

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Saved Filters

Recruiting - Open Req. Dashboard Prompt Listener

Name
Recruiter Name is prompted
EVALUATE('TO_CHAR(%1,%2)' AS CHARACTER, "Requisition Dates"."First Sourced Date" ,'YYYY-MM') is prompted
"Requisition Primary Location"."Location Level1 Name" is prompted
"Requisition Primary Location"."Location Level2 Name" is prompted
"Requisition Job Field"."Job Field Level1 Name" is prompted
"Requisition Job Field"."Job Field Level2 Name" is prompted
"Requisition Primary Location"."Location Level1 Name" is prompted
"Requisition Primary Location"."Location Level2 Name" is prompted
Department Name is prompted
Hiring Manager Name is prompted
Req. Identifier is prompted

Recruiting - Summary Dashboard Prompt Listener

Name
Recruiter Name is prompted
EVALUATE('to_char(%1,%2)' as character, "Requisition Dates"."Latest Filled Date" ,'YYYY-MM')) is prompted
"Requisition Primary Location"."Location Level1 Name" is prompted
"Requisition Primary Location"."Location Level2 Name" is prompted
"Requisition Job Field"."Job Field Level1 Name" is prompted
"Requisition Job Field"."Job Field Level2 Name" is prompted
"Requisition Primary Location"."Location Level1 Name" is prompted
"Requisition Primary Location"."Location Level2 Name" is prompted
Department Name is prompted
Hiring Manager Name is prompted
Req. Identifier is prompted

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Recruiting - Summary Dashboard Prompt Listener - No Filled Date

Name
Recruiter Name is prompted
"Requisition Primary Location"."Location Level1 Name" is prompted
"Requisition Primary Location"."Location Level2 Name" is prompted
"Requisition Job Field"."Job Field Level1 Name" is prompted
"Requisition Job Field"."Job Field Level2 Name" is prompted
"Requisition Primary Location"."Location Level1 Name" is prompted
"Requisition Primary Location"."Location Level2 Name" is prompted
Department Name is prompted
Hiring Manager Name is prompted
Req. Identifier is prompted

Standard Reports

Candidate Details

The report provides a listing of candidate, submission and requisition attributes, based on a variety of user-selected parameters.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Candidate Identifier	*Returns Candidate ID*
Candidate Name	*Returns the candidate name*
Candidate is Internal	*Returns whether or not the candidate is internal*
Candidate Email	*Returns the candidate email*
Candidate Primary Phone Designation	*Returns the candidate primary phone designation*
Candidate Mobile Phone	*Returns the candidate mobile phone number*
Candidate Home Phone	*Returns the candidate home phone number*
Candidate Work Phone	*Returns the candidate work phone number*
Is Ace	*Returns yes or no value based on whether the submission was Ace.*

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Name	Description
Minimum Requirements Met	*Returns yes or no value based on wheather the submission met minimum requirements.*
Current Reference Status Name	*Returns the current reference status name*
Current Workflow Name	*Returns the name of the candidate selection workflow used for this job submission.*
Current Step Name	*Returns the current CSW step name*
Current Status Name	*Returns the current CSW status name*
Current Status Start Date	*Returns the date when the candidate was moved to the current status.*
Recruiter Name	*Returns the recruiter name*
Recruiter Email	*Returns the recruiter email*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
Hiring Manager Name	*Returns the hiring manager name*
Hiring Manager Email	*Returns the hiring manager email*
Organization Level1 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Submission Is Completed	*Returns whether or not the submission is complete*
Submission Medium	*Returns the submission medium*
Submission Is Internal	*Returns whether or not the candidate was internal as of when he/she created the submission*
Motives	*Returns the candidate rejection/declination motives when they are automatically generated by the system* . If an auto generated motive is not available, the system returns *the candidate rejection/declination motives.*
Submission Created Date	*Returns the date/time when the submission was created*
Submission Completed Date	*Returns the date/time when the submission was completed*
Hired Candidate Start Date	*Returns the hire start date/time as entered when the candidate is moved to the Hired reference status* . If the hire start date is not available the system returns *the hire start date as entered in the candidate job offer section.*
Latest Filled Date	*Returns the date/time when the requisition was most recently filled.*
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*
Current Status	*Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.*
Submission Source Type (Display As)	*Returns the recruitment source type, as displayed in the recruiting administration application, under the "display as" column.*
Submission Source (BL)	*Returns the submission source, in its base locale*
Race	*Returns the answer to the regulation question*
Gender	*Returns the answer to the regulation question*
Ethnicity	*Returns the answer to the regulation question*
Regulation Form Code	*Returns the code associated to the global regulation data collection form.*

Name	Description
EEO Job Category	*Returns the requisition's EEO job category.*

Report Prompts

All report prompts are optional.

Name	Description
Requisition Status	Filters the report based on whether the requisition current status is in the list of values selected.
Submission Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Hired Candidate Start Date	Filters the report based on whether the hired start date is between two selected dates. If the hire start date is null the offer actual start date is used.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.

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Name	Description
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Minimum Requirements Met	Filters the report based on whether the minimum requirements met indicator is in the list of values selected.
Is Ace	Filters the report based on whether the is ace indicator is in the list of values selected.
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.
Submission Is Completed	Filters the report based on whether the submission is completed indicator is in the list of values selected.

Report Filters

Filter	Description
Is Max Standard USA EEO Form with Answer is equal to/ is in YES OR Regulation Form Code is null	Filters the report based on whether USA EEO from has been answered or no regulation form has been specified.
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.
Current Step Name is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.

Filter	Description
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date")	This is a listener for a prompt. When the prompt is set this value filters on the Hire Start Date. If hire start date is null it filters on the Offer Actual Start Date.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.

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Filter	Description
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.

Candidate EEO Summary By Recruiting Status, Requisition

The report provides by requisition, a summary of candidates by historical recruiting status reached, race, ethnicity and gender.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Recruiter Name	*Returns the recruiter name*
Hiring Manager Name	*Returns the hiring manager name*
Organization Level1 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Current Status	*Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.*
Race	*Returns the answer to the regulation question*
Gender	*Returns the answer to the regulation question*
Ethnicity	*Returns the answer to the regulation question*
Regulation Form Code	*Returns the code associated to the global regulation data collection form.*
EEO Job Category	*Returns the requisition's EEO job category.*
Historical Workflow Name	*Returns the name of the candidate selection workflow used for this job submission.*
Historical Step Sequence	*Returns who changed the candidate to this status*
Historical Step Name	*Returns the sequence of the step in its workflow*
# Submissions	*Returns the number of distinct job submissions.*

Report Prompts

All report prompts are optional.

Name	Description
Requisition Status	Filters the report based on whether the requisition current status is in the list of values selected.

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Name	Description
Submission Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Hired Candidate Start Date	Filters the report based on whether the hired start date is between two selected dates. If the hire start date is null the offer actual start date is used.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.

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Name	Description
Minimum Requirements Met	Filters the report based on whether the minimum requirements met indicator is in the list of values selected.
Is Ace	Filters the report based on whether the is ace indicator is in the list of values selected.
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.
Submission Is Completed	Filters the report based on whether the submission is completed indicator is in the list of values selected.

Report Filters

Filter	Description
Is Max Standard USA EEO Form with Answer is equal to/ is in YES OR Regulation Form Code is null	Filters the report based on whether USA EEO from has been answered or no regulation form has been specified.
Historical Step Sequence is not null	Filters the report to remove candidates where no historical step sequence has been recorded.
Historical Step/Status Was Reverted is equal to/is in No	Filters the report to remove candidates whose step/status has been reverted.
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.
Current Step Name is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.

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Filter	Description
IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date")	This is a listener for a prompt. When the prompt is set this value filters on the Hire Start Date. If hire start date is null it filters on the Offer Actual Start Date.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.

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Candidate Offers Pending Approval

The report provides a listing of job offers that are currently in the pending approval status by aging.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Candidate Identifier	*Returns Candidate ID*
Candidate Name	*Returns the candidate name*
Candidate Email	*Returns the candidate email*
Candidate Primary Phone Designation	*Returns the candidate primary phone designation*
Candidate Mobile Phone	*Returns the candidate mobile phone number*
Candidate Home Phone	*Returns the candidate home phone number*
Candidate Work Phone	*Returns the candidate work phone number*
Is Ace	*Returns yes or no value based on whether the submission was Ace.*
Minimum Requirements Met	*Returns yes or no value based on wheather the submission met minimum requirements.*
Current Workflow Name	*Returns the name of the candidate selection workflow used for this job submission.*
Current Status Start Date	*Returns the date when the candidate was moved to the current status.*
Recruiter Name	*Returns the recruiter name*
Recruiter Email	*Returns the recruiter email*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
Hiring Manager Name	*Returns the hiring manager name*
Hiring Manager Email	*Returns the hiring manager email*
Organization Level1 Name	*Returns the name of the organization*
Organization Level 2 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Submission Is Completed	*Returns whether or not the submission is complete*
Submission Medium	*Returns the submission medium*
Submission Is Internal	*Returns whether or not the candidate was internal as of when he/she created the submission*
Motives	*Returns the candidate rejection/declination motives when they are automatically generated by the system* . If an auto generated motive is not available, the system returns *the candidate rejection/declination motives.*

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Name	Description
Submission Created Date	*Returns the date/time when the submission was created*
Submission Completed Date	*Returns the date/time when the submission was completed*
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*
Current Status	*Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.*
Offer Target Start Date	*Returns the target start date as entered in the candidate job offer section*
Target Start Date	*Returns the requisition's target start date.*
Time Since Last CSW Status Change	*Returns the time (in days) spent on hold between now and the most recent candidate selection workflow status change.*
Time Since Submission Completion	*Returns the time (in days) the requisition spent on hold between now and the candidate submission completion date.*
Time on Hold Since Latest CSW Status Change	*Returns the average time (in days) between now and the most recent candidate selection workflow status change.*
Time on Hold Since Submission Completion	*Returns average the time (in days) between now and the candidate submission completion date.*

Report Prompts

All report prompts are optional.

Name	Description
Submission Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Submission Completed Date	Filters the report based on whether the submission completed date is between two selected dates.
Req. Target Start Date	Filters the report based on whether the req. target start date is between two selected dates.
Offer Target Start Date	Filters the report based on whether the offer target start date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.

Name	Description
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.

Report Filters

Filter	Description
Submission Job Offer Status is equal to/ is in Approval in Progress	Filters the report based one whether the submission job offer status is currently Approval in Progress.
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.

Filter	Description
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Target Start Date is prompted	This is a listener for a prompt.
Offer Target Start Date is prompted	This is a listener for a prompt.

Candidate Summary by Recruiting Status (Time Spent in Each Status)

The report provides a summary of how long it takes to move candidates along in the recruiting cycle.

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Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Current Status Start Date	*Returns the date when the candidate was moved to the current status.*
Recruiter Name	*Returns the recruiter name*
Hiring Manager Name	*Returns the hiring manager name*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Current Status	*Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.*
Historical Workflow Name	*Returns the name of the candidate selection workflow used for this job submission.*
Historical Step Sequence	*Returns who changed the candidate to this status*
Historical Step Name	*Returns the sequence of the step in its workflow*
Historical Status Name	*Returns the sequence of the status in its step*
Historical Reference Status Name	*Returns the historical reference status name*
Average Duration (Days)	*Return an average, derived by function, of how long the candidates were in this status*
# Submissions	*Returns the number of distinct job submissions.*

Report Prompts

All report prompts are optional.

Name	Description
Requisition Status	Filters the report based on whether the requisition current status is in the list of values selected.
Submission Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Hired Candidate Start Date	Filters the report based on whether the hired start date is between two selected dates. If the hire start date is null the offer actual start date is used.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.

Name	Description
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Minimum Requirements Met	Filters the report based on whether the minimum requirements met indicator is in the list of values selected.
Is Ace	Filters the report based on whether the is ace indicator is in the list of values selected.
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.
Submission Is Completed	Filters the report based on whether the submission is completed indicator is in the list of values selected.

Report Filters

Filter	Description
Historical Status Sequence is not null	Filters the report to remove candidates where no historical status sequence has been recorded.

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Filter	Description
Historical Reference Status Name is not equal to/is not in Declined; Hired; Rejected	Filters the report to remove the declined, hired, and rejected reference status as these status are final statuses.
Historical Step/Status Was Reverted is equal to/is in No	Filters the report to remove candidates whose step/status has been reverted.
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.
Current Step Name is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date") is prompted	This is a listener for a prompt. When the prompt is set this value filters on the Hire Start Date. If hire start date is null it filters on the Offer Actual Start Date.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.

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Filter	Description
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.

Candidates Hired

The report provides a listing of hired candidates.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Candidate Identifier	*Returns Candidate ID*
Candidate Name	*Returns the candidate name*
Candidate is Internal	*Returns whether or not the candidate is internal*
Candidate Email	*Returns the candidate email*

Name	Description
Candidate Primary Phone Designation	*Returns the candidate primary phone designation*
Candidate Mobile Phone	*Returns the candidate mobile phone number*
Candidate Home Phone	*Returns the candidate home phone number*
Candidate Work Phone	*Returns the candidate work phone number*
Is Ace	*Returns yes or no value based on whether the submission was Ace.*
Minimum Requirements Met	*Returns yes or no value based on wheather the submission met minimum requirements.*
Current Reference Status Name	*Returns the current reference status name*
Current Workflow Name	*Returns the name of the candidate selection workflow used for this job submission.*
Current Step Name	*Returns the current CSW step name*
Current Status Name	*Returns the current CSW status name*
Current Status Start Date	*Returns the date when the candidate was moved to the current status.*
Recruiter Name	*Returns the recruiter name*
Recruiter Email	*Returns the recruiter email*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
Hiring Manager Name	*Returns the hiring manager name*
Hiring Manager Email	*Returns the hiring manager email*
Organization Level1 Name	*Returns the name of the organization*
Organization Level2 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Submission Is Completed	*Returns whether or not the submission is complete*
Submission Medium	*Returns the submission medium*
Submission Is Internal	*Returns whether or not the candidate was internal as of when he/she created the submission*
Submission Created Date	*Returns the date/time when the submission was created*
Submission Completed Date	*Returns the date/time when the submission was completed*
Hired Candidate Start Date	*Returns the hire start date/time as entered when the candidate is moved to the Hired reference status . If the hire start date is not available the system returns the hire start date as entered in the candidate job offer section.*
Offer Accepted Date	*Returns the date/time when the candidate accepted the job offer*
Latest Filled Date	*Returns the date/time when the requisition was most recently filled.*
Latest Position Accepted Date	*Returns the date/time when the last position was accepted on the requisition.*
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*
Current Status	*Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.*

Name	Description
Submission Source Type (Display As)	*Returns the recruitment source type, as displayed in the recruiting administration application, under the "display as" column.*
Submission Source (BL)	*Returns the submission source, in its base locale*
Race	*Returns the answer to the regulation question*
Gender	*Returns the answer to the regulation question*
Ethnicity	*Returns the answer to the regulation question*
Regulation Form Code	*Returns the code associated to the global regulation data collection form.*
EEO Job Category	*Returns the requisition's EEO job category.*
Time to Hire	*Returns the average number of days between the first fully approved date and the hired date.*
Submission Cycle Time	*Returns the average number of days between the submission completed date and hired date.*
Time to Start	*Returns the average number of days between the the first fully approved date and the hire start date (offer actual start date, if hire start date is null).*

Report Prompts

All report prompts are optional.

Name	Description
Requisition Status	Filters the report based on whether the requisition current status is in the list of values selected.
Submission Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Hired Candidate Start Date	Filters the report based on whether the hired start date is between two selected dates. If the hire start date is null the offer actual start date is used.
Hired Date	Filters the report based on whether the hired date is between two selected dates.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.
Offer Accepted Date	Filters the report based on whether the offer accepted date is between two selected dates.
Last Position Accepted Date	Filters the report based on whether the last position accepted date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.

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Name	Description
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Minimum Requirements Met	Filters the report based on whether the minimum requirements met indicator is in the list of values selected.
Is Ace	Filters the report based on whether the is ace indicator is in the list of values selected.
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.
Submission Is Completed	Filters the report based on whether the submission is completed indicator is in the list of values selected.

Report Filters

Filter	Description
Is Max Standard USA EEO Form with Answer is equal to/ is in YES OR Regulation Form Code is null	Filters the report based on whether USA EEO from has been answered or no regulation form has been specified.

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Filter	Description
Content Reference Status Name is equal to / is in Hired	Filters the report to candidates who have reached a hired content reference status.
Historical Step Sequence is not null	Filters the report to remove candidates where no historical step sequence has been recorded.
Historical Step/Status Was Reverted is equal to/is in No	Filters the report to remove candidates whose step/status has been reverted.
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.
Current Step Name is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date")	This is a listener for a prompt. When the prompt is set this value filters on the Hire Start Date. If hire start date is null it filters on the Offer Actual Start Date.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.

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Filter	Description
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.
Last Position Accepted Date is prompted	This is a listener for a prompt.
Hired Date is prompted	This is a listener for a prompt.
Offer Accepted Date is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.

Candidates Requiring Attention (Based on Aging)

The report returns a listing of candidates that have been in a recruiting status for a certain amount of time. The statuses and time thresholds are defined by the user at runtime. For example, candidates that are in the "New – To Be Reviewed" status and haven't been moved for over 5 days.

Report Columns

Name	Details
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Candidate Identifier	*Returns Candidate ID*
Candidate Name	*Returns the candidate name*
Candidate is Internal	*Returns whether or not the candidate is internal*
Candidate Email	*Returns the candidate email*
Candidate Primary Phone Designation	*Returns the candidate primary phone designation*
Candidate Mobile Phone	*Returns the candidate mobile phone number*
Candidate Home Phone	*Returns the candidate home phone number*
Candidate Work Phone	*Returns the candidate work phone number*
Is Ace	*Returns yes or no value based on whether the submission was Ace.*
Minimum Requirements Met	*Returns yes or no value based on wheather the submission met minimum requirements.*
Current Reference Status Name	*Returns the current reference status name*
Current Workflow Name	*Returns the name of the candidate selection workflow used for this job submission.*
Current Step Name	*Returns the current CSW step name*
Current Status Name	*Returns the current CSW status name*
Current Status Start Date	*Returns the date when the candidate was moved to the current status.*
Days Since Last Candidate Status Change	*Returns the time (in days) spent on hold between now and the most recent candidate selection workflow status change.*
Recruiter Name	*Returns the recruiter name*
Recruiter Email	*Returns the recruiter email*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
Hiring Manager Name	*Returns the hiring manager name*
Hiring Manager Email	*Returns the hiring manager email*
Organization Level1 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Submission Is Completed	*Returns whether or not the submission is complete*
Submission Medium	*Returns the submission medium*
Submission Completed Date	*Returns the date/time when the submission was completed*
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*

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Report Prompts

All report prompts are optional.

Name	Description
Days Since Last Status Change	This is a required prompt that filters the report based on whether the application has been in the current status for a certain amount of days.
Current Status Start Date	Filters the report based on whether the current status start date is between two selected dates.
Submission Completed Date	Filters the report based on whether the submission completed date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.

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Name	Description
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Minimum Requirements Met	Filters the report based on whether the minimum requirements met indicator is in the list of values selected.
Is Ace	Filters the report based on whether the is ace indicator is in the list of values selected.
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.
Submission Is Completed	Filters the report based on whether the submission is completed indicator is in the list of values selected.

Report Filters

Filter	Explanation
Current Status Name is equal to / is in Sourcing	Filters the report to requisitions that are still actively sourcing.
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.
Current Step Name is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.

Filter	Explanation
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Candidate Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Last Position Accepted Date is prompted	This is a listener for a prompt.
Time Since Last CSW Status Change is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.

Career Site Dropoff Statistics

The report provides visibility into incomplete job submissions in terms of where in the application process candidates are dropping off, in the context of career section application flows.

Report Columns

Name	Description
Career Site Name (BL)	*Returns the job application career site at the time the candidate applied, in its base locale.*
Career Site Application Flow Name (BL)	*Returns the name of the submission flow of the career site at the time the candidate applied, in its base locale.*

Name	Description
Career Site Last Page Reached Name (BL)	*Returns the name of the last submission flow page reached at the time the candidate applied, in its base locale.*
Career Site Last Page Reached Sequence	*Returns the sequence of the last submission flow page reached at the time the candidate applied.*
# Submissions	*Returns the number of distinct job submissions.*
# Submissions Complete	*Returns the number of distinct job submissions that are completed.*
# Submissions Incomplete	*Returns the number of distinct job submissions that are not completed.*
% Submissions Incomplete	*# Submissions Incomplete* / *# Submissions* *100

Report Prompts

All report prompts are optional.

Name	Description
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Career Site Name	Filters the report based on whether the career site name is in the list of values selected.
Application Flow Name	Filters the report based on whether the application flow name is in the list of values selected.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.

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Name	Description
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Minimum Requirements Met	Filters the report based on whether the minimum requirements met indicator is in the list of values selected.
Requisition Status	Filters the report based on whether the requisition status is in the list of values selected
Is Ace	Filters the report based on whether the is ace indicator is in the list of values selected.
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.

Report Filters

Filter	Explanation
Career Site Name (BL) is not null	Filters the report based to submissions where career site name has been recorded.
Submission Medium is equal to/is in Online	Filters the report to submissions that were submitted online.
Submission Originator is equal to/is in Candidate	Filters the report to submissions that have been completed by the candidate.
Current Status is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Career Site Application Flow Name (BL) is prompted	This is a listener for a prompt.
Career Site Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.

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Filter	Explanation
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.
Last Position Accepted Date is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.

EEO Summary by EEO Category

The report displays a summary of candidates by race, gender, ethnicity and EEO category.

Report Columns

Name	Description
Race	*Returns the answer to the regulation question*
Gender	*Returns the answer to the regulation question*

Name	Description
Ethnicity	*Returns the answer to the regulation question*
EEO Job Category	*Returns the requisition's EEO job category.*
EEO Establishment	*If the position is offered in the United States, this is the EEO establishment associated with the requisition.*
# Submissions	*Returns the number of distinct job submissions.*

Report Prompts

All report prompts are optional.

Name	Description
Requisition Status	Filters the report based on whether the requisition current status is in the list of values selected.
Submission Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Completed Date	Filters the report based on whether the submission completed date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Hired Candidate Start Date	Filters the report based on whether the hired start date is between two selected dates. If the hire start date is null the offer actual start date is used.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.

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Name	Description
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Minimum Requirements Met	Filters the report based on whether the minimum requirements met indicator is in the list of values selected.
Is Ace	Filters the report based on whether the is ace indicator is in the list of values selected.
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.
Submission Is Completed	Filters the report based on whether the submission is completed indicator is in the list of values selected.

Report Filters

Filter	Description
Is Max Standard USA EEO Form with Answer is equal to/ is in YES OR Regulation Form Code is null	Filters the report based on whether USA EEO from has been answered or no regulation form has been specified.
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.

Filter	Description
Current Step Name is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date")	This is a listener for a prompt. When the prompt is set this value filters on the Hire Start Date. If hire start date is null it filters on the Offer Actual Start Date.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.

Filter	Description
Submission Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.

Process Audits

The report provides a summary of data points that qualify under a variety of system audits.

Report Columns

Name	Location
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Title	*Returns the requisition title, in its base language.*
Exception	
Detail	
Candidate Identifier	*Returns Candidate ID*
Name	*Returns the candidate name*
Email	*Returns the candidate email*
Recruiter Name	*Returns the recruiter name*
Recruiter Email	*Returns the recruiter email*
Hiring Manager Name	*Returns the hiring manager name*
Hiring Manager Email	*Returns the hiring manager email*
Organization Level1 Name	*Returns the name of the organization*
Location Level1 Name	*Returns the name of the requisition primary location.*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Current Status	*Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.*
Req. Audit	'@{ReqAudit}{*ALL*}'

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Original Columns/Filters

Exception	Detail	Filters
'Hire with Suspect Time to Hire'	'Time to Hire: ' || CAST("Candidate Cycle Time"."Time to Hire" AS CHAR) || ' days.'	Content Reference Status Name is equal to / is in Hired AND (Time to Hire is less than or equal to 1 OR Time to Hire is greater than or equal to 365) AND @{ReqAudit}{*ALL*} is LIKE (pattern match) %Hires with Suspect Time to Hire%
'Ace Candidate New 5+ Days'	'New for ' || cast(round("Submission Aging"."Time Since Last CSW Status Change",2) as CHAR) || ' days.'	Time Since Last CSW Status Change is greater than or equal to 5 AND Is Ace is equal to / is in Yes AND Current Reference Status Name is equal to / is in New AND @{ReqAudit}{*ALL*} is LIKE (pattern match) %Ace Candidates New 5+ Days%
'Hire Missing Source'	''	Current Reference Status Name is equal to / is in Hired AND Submission Source (BL) is null AND @{ReqAudit}{*ALL*} is LIKE (pattern match) %Hires Missing Source%
'Hire Start Date < Submission Date'	'Start Date: ' || EVALUATE('to_char(%1, %2)' AS CHAR, ifnull("Submission Dates"."Hire Start Date","Submission Dates"."Offer Target Start Date"),'mm/dd/yyyy') || ' ; Submission Complete Date: ' || EVALUATE('to_char(%1,%2)' as CHAR,"Submission Dates"."Submission Completed Date",'mm/dd/yyyy')	IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date") < "Submission Dates"."Submission Completed Date" AND IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date") is not null AND

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Exception	Detail	Filters
		Current Reference Status Name is equal to / is in Hired AND @{ReqAudit}{*ALL*} is LIKE (pattern match) %Hires Start Date < Submission Date%
'Hire Missing Race or Gender (U.S)'	case when "Candidate Regulations"."Gender" is null and "Candidate Regulations"."Race" is null then 'Missing Race & Gender' when "Candidate Regulations"."Gender" is not null and "Candidate Regulations"."Race" is null then 'Missing Race' else 'Missing Gender' end	@{ReqAudit}{*ALL*} is LIKE (pattern match) %Hires Missing Race or Gender (U.S)% AND ((Is Max Standard USA EEO Form With Answer is equal to / is in Yes OR Regulation Form Code is null) AND (Gender is null OR Race is null) AND Location Level1 Name is equal to / is in United States)
'Hire Offer Accepted Date < Submission Date'	'Offer Accepted Date: ' || EVALUATE('to_char(%1,%2)' AS CHAR, "Submission Dates"."Offer Accepted Date",'mm/dd/yyyy') || ' ; Submission Complete Date: ' || EVALUATE('to_char(%1,%2)' as CHAR,"Submission Dates"."Submission Completed Date",'mm/dd/yyyy')	Current Reference Status Name is equal to / is in Hired AND Status is equal to / is in Accepted AND evaluate('case when %1 < %2 then %3 end' as CHAR, "Submission Dates"."Offer Accepted Date","Submission Dates"."Submission Completed Date",'X') is equal to / is in X @{ReqAudit}{*ALL*} is LIKE (pattern match) %Hires Offer Accepted Date < Submission Date%

Report Filters

Filter	Explanation
Current Status is prompted	This is a listener for a prompt.

Filter	Explanation
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Hired Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.
Current Step Name is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date") is prompted	This is a listener for a prompt. When the prompt is set this value filters on the Hire Start Date. If hire start date is null it filters on the Offer Actual Start Date.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.

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Filter	Explanation
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Last Modified Date is prompted	This is a listener for a prompt.
Last Position Accepted Date is prompted	This is a listener for a prompt.

Report Prompts

All report prompts are optional.

Name	Description
Audits	This is a presentation variable for ReqAudit. It filters the report based on the selected audit criteria.
Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Completed Date	Filters the report based on whether the submission completed date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Hired Start Date	Filters the report based on whether the hired start date is between two selected dates. If the hire start date is null the offer actual start date is used.
Hired Date	Filters the report based on whether the hired date is between two selected dates.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.

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Name	Description
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Last Position Accepted Date	Filters the report based on whether the last position accepted date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Requisition Status	Filters the report based on whether the current status is in the list of values selected.
Minimum Requirements Met	Filters the report based on whether the minimum requirements met indicator is in the list of values selected.
Is Ace	Filters the report based on whether the is ace indicator is in the list of values selected.

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Name	Description
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.
Submission Is Completed	Filters the report based on whether the submission is completed indicator is in the list of values selected.

Requisition Pipeline Detail (Active Requisitions)

The report displays a listing of active requisitions along with a summary of candidates by various attributes.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Recruiter Name	*Returns the recruiter name*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
Hiring Manager Name	*Returns the hiring manager name*
Organization Level1 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*
# Submissions	*Returns the number of distinct job submissions.*
# Submissions Complete	*Returns the number of distinct job submissions that are completed.*
# Submissions Ace	*Returns the number of distinct job submissions where the candidate is considered to be ACE.*
# Submissions Min. Requirements Met	*Returns the number of distinct job submissions where the candidate as met all the requisition minimum requirements.*
# Submissions Internal	*Returns the number of distinct submissions that are internal*
# Submissions Currently New	*Returns the number of distinct submissions currently in the "New" reference model status*
# Submissions Current in Review	*Returns the number of distinct submissions currently in the "Review" reference model status*
# Submissions Currently in 1st Intv.	*Returns the number of distinct submissions currently in the "1st Interview" reference model status*
# Submissions Currently in 2nd Intv.	*Returns the number of distinct submissions currently in the "2nd Interview" reference model status*
# Submissions Currently in 3rd Intv.	*Returns the number of distinct submissions currently in the "3rd Interview" reference model status*
# Submissions Currently in Offer	*Returns the number of distinct submissions currently in the "Offer" reference model status*

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Name	Description
# Submissions Currently in Testing	*Returns the number of distinct submissions currently in the "Testing" reference model status*
# Submissions Currently Hired	*Returns the number of distinct submissions currently in the "Hired" reference model status*
# Submissions Currently Rejected	*Returns the number of distinct submissions currently in the "Rejected" reference model status*
# Submissions Currently Declined	*Returns the number of distinct submissions currently in the "Declined" reference model status*
# Submissions Matched	*# Submissions* filtered using *Submission Medium*=Matched to Job
# Submissions in Process	*# Submissions Currently In 1st Intv.*+ *# Submissions Currently In 2nd Intv.* + *# Submissions Currently In 3rd Intv.* + *# Submissions Currently In Offer* + *# Submissions Currently in Review* + *# Submissions Currently In Testing*

Report Prompts

All report prompts are optional.

Name	Description
Latest Fully Approved Date	Filters the report based on whether the latest fully approved date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Req. Creation Date	Filters the report based on whether the req. creation date is between two selected dates.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.

Name	Description
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
# Openings Left to Fill (Hired)	Allows you to select the operator for the prompt on # openings left to fill (hired) and the corresponding values, if necessary.

Report Filters

Filter	Description
Current Status is eqal to/ is in Sourcing	Filters the report to requisitions in the sourcing status.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.

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Filter	Description
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Latest Fully Approved Date is prompted	This is a listener for a prompt.

Requisition Pipeline Summary (Active Requisitions)

The report displays a summary of active requisitions by various dimensions.

Report Columns

Name	Description
Requisition Organization Name	A hierarchical column based on *requisition organization names*.
Requisition Primary Location Name	A heirarchical column based on *requisition primary job location names*.
Requisition Job Field Name	A heirarchical column based on *requisition job field names*.
# Requisitions	*Returns the number of requisitions.*
# Openings	*Returns the number of openings on the requisition(s).*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
# Requisitions by Recruiter	*Returns the number of requisitions divided by the number of recruiters.*
Average Time Since Most Recent Approval (Minus TOH)	*Returns the time (in days) between now and the first occurrence of the requisition being changed to the sourcing status.*
# Submissions	*Returns the number of distinct job submissions.*
# Submissions Complete	*Returns the number of distinct job submissions that are completed.*
# Submissions Ace	*Returns the number of distinct job submissions where the candidate is considered to be ACE.*
# Submissions Min. Requirements Met	*Returns the number of distinct job submissions where the candidate as met all the requisition minimum requirements.*
# Submissions Internal	*Returns the number of distinct submissions that are internal*
# Submissions Currently New	*Returns the number of distinct submissions currently in the "New" reference model status*
# Submissions Current in Review	*Returns the number of distinct submissions currently in the "Review" reference model status*
# Submissions Currently in 1st Intv.	*Returns the number of distinct submissions currently in the "1st Interview" reference model status*
# Submissions Currently in 2nd Intv.	*Returns the number of distinct submissions currently in the "2nd Interview" reference model status*
# Submissions Currently in 3rd Intv.	*Returns the number of distinct submissions currently in the "3rd Interview" reference model status*
# Submissions Currently in Offer	*Returns the number of distinct submissions currently in the "Offer" reference model status*

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Name	Description
# Submissions Currently in Testing	*Returns the number of distinct submissions currently in the "Testing" reference model status*
# Submissions Currently Hired	*Returns the number of distinct submissions currently in the "Hired" reference model status*
# Submissions Currently Rejected	*Returns the number of distinct submissions currently in the "Rejected" reference model status*
# Submissions Currently Declined	*Returns the number of distinct submissions currently in the "Declined" reference model status*
# Submissions Matched	*# Submissions* filtered using *Submission Medium*=Matched to Job
# Submissions in Process	*# Submissions Currently In 1st Intv.*+ *# Submissions Currently In 2nd Intv.* + *# Submissions Currently In 3rd Intv.* + *# Submissions Currently In Offer* + *# Submissions Currently in Review* + *# Submissions Currently In Testing*
# Submissions by Candidate	*Returns the number of distinct submissions divided by the number of distinct candidates.*
# Submissions by Recruiter	*Returns the number of submissions divided by the number of recruiters.*
# Submissions by Requisition	*Returns the number of submissions divided by the number of requisitions.*
# Recruiters	Count of distinct *recruiter id*.

Report Prompts

All report prompts are optional.

Name	Description
Latest Fully Approved Date	Filters the report based on whether the latest fully approved date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Req. Creation Date	Filters the report based on whether the req. creation date is between two selected dates.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.

Name	Description
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.

Report Filters

Filter	Description
Current Status is eqal to/ is in Sourcing	Filters the report to requisitions in the sourcing status.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.

Filter	Description
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Req. Creation Date is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Latest Fully Approved Date is prompted	This is a listener for a prompt.

Requisitions Active Historical Snapshot

The report displays how many requisitions were in the sourcing status as of a user defined point in time.

Report Columns

Name	Description
Requisition Organization Name	A hierarchical column based on *requisition organization names*.
Requisition Primary Location Name	A heirarchical column based on *requisition primary job location names*.
Requisition Job Field Name	A heirarchical column based on *requisition job field names*.
# Requisitions	*Returns the number of requisitions.*
Avg Age	Returns the average time in days between the *req. historical status start date* and the point in time specified in the analysis prompt (ReqSnapDate).
# Submissions Complete	*Returns the number of distinct job submissions that are completed.*
# Submissions in Process	*# Submissions* filtered by: *historical reference status name* in 1st interview, 2nd interview, 3rd interview, offer, reviewed, and testing; and submission historical status start date less than the point in time specified in the analysis prompt (ReqSnapDate), and the historical status end date greater than the point in time specified in the analysis prompt (ReqSnapDate) or null.

Report Prompts

All report prompts are optional except enter date point in time.

Name	Description
Enter Date Point in Time	This is a variable prompt (ReqSnapDate) that is used by other filters to limit data based on the specified date, which is the snapshot date.
Latest Fully Approved Date	Filters the report based on whether the latest fully approved date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.

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Name	Description
Req. Creation Date	Filters the report based on whether the req. creation date is between two selected dates.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.

Report Filters

Filter	Description
Historical Status is equal to/ is in Sourcing	Filters the report to requisitions historically in the sourcing status.
Req. Historical Status Start Date is less than or equal to ReqSnapDate	Filters the report to requisitions whose historical status start date is less than or equal to the point in time specified in the analysis prompt (ReqSnapDate).
Req. Historical Status End Date is greater than or equal to ReqSnapDate OR Req. Historical Status End Date is null	Filters the report to requisitions whose historical status end date is greater than or equal to the point in time specified in the analysis prompt (ReqSnapDate), or null.

Filter	Description
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Req. Creation Date is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Latest Fully Approved Date is prompted	This is a listener for a prompt.

Requisitions Filled Details

The report displays a listing of filled requisitions along with a summary of candidates by various attributes.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Recruiter Name	*Returns the recruiter name*
Hiring Manager Name	*Returns the hiring manager name*
Organization Level1 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Req. Creation Date	
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*
Latest Fully Approved Date	*Returns the date/time when the requisition most recently successfully went through the full approval process.*
Latest Filled Date	*Returns the date/time when the requisition was most recently filled.*
Last Position Accepted Date	*Returns the date/time when the last position was accepted on the requisition.*
Req. Last Modified Date	*Returns the date/time when the requisition was last modified.*
# Openings	*Returns the number of openings on the requisition(s).*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
# Submissions	*Returns the number of distinct job submissions.*
# Submissions Complete	*Returns the number of distinct job submissions that are completed.*
# Submissions Ace	*Returns the number of distinct job submissions where the candidate is considered to be ACE.*
# Submissions Min. Requirements Met	*Returns the number of distinct job submissions where the candidate as met all the requisition minimum requirements.*
# Submissions Internal	*Returns the number of distinct submissions that are internal*
# Submissions Currently Hired	*Returns the number of distinct submissions currently in the "Hired" reference model status*
# Submissions Currently Rejected	*Returns the number of distinct submissions currently in the "Rejected" reference model status*
# Submissions Currently Declined	*Returns the number of distinct submissions currently in the "Declined" reference model status*
# Hires Min. Requirements Met	*# Submissions Min. Requirements Met* filtered using *Current Reference Status Name*=Hired
# Hires Ace	*# Submissions Ace* filtered using *Current Reference Status Name*=Hired
# Hires Internal	*# Submissions Internal* filtered using *Current Reference Status Name*=Hired
# Submissions by Hire	*# Submissions Complete* / *# Submissions Currently Hired*
# Interviews by Hire	*# Submissions Reached 1st Intv.* / *# Submissions Currently Hired*
Cycle Time	*Returns the average number of days between the req. creation date and the latest filled date.*

Name	Description
Time to Approve	*Returns the average number of days between the first to be approved date and the first fully approved date.*
Time to Fill	*Returns the average number of days between the first fully approved date and the latest filled date.*
Time to Latest Position Accepted	*Returns the average number of days between the first fully approved date and the last position accepted date.*
Time to Source	*Returns the average number of days between the req. creation date and the first sourced date.*
Average Submission Cycle Time	*Returns the number of days between the submission completed date and the hired date.*
Average Time to Hire	*Returns the number of days between the first fully approved date and the hired date.*
Average Time to Start	*Returns the number of days between the first fully approved date and the hire start date (offer actual start date, if hire start date is null).*

Report Prompts

All report prompts are optional.

Name	Description
Latest Fully Approved Date	Filters the report based on whether the latest fully approved date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Req. Creation Date	Filters the report based on whether the req. creation date is between two selected dates.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.
Latest Position Accepted Date	Filters the report based on whether the latest position accepted date is between two selected dates.
Req. Last Modified Date	Filters the report based on whether the req. last modified date is between two selected dates.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.

Name	Description
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.

Report Filters

Filter	Description
Current Status is eqal to/ is in Filled	Filters the report to requisitions in the filled status.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.

Filter	Description
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Latest Fully Approved Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Last Positon Accepted Date is prompted	This is a listener for a prompt.
Req. Last Modified Date is prompted	This is a listener for a prompt.

Requisitions Filled Summary

The report displays a summary of filled requisitions by various dimensions.

Report Columns

Name	Description
Requisition Organization Name	Returns the Requisition Organization hierarchy object.
Requisition Primary Location Name	Returns the Requisition Primary Location Name hierarchy object.
Requisition Job Field Name	Returns the Requisition Job Field Name hierarchy object.
Requisition Latest Filled Date	Returns the Requisition Latest Filled Date hierarchy object.
# Requisitions	*Returns the number of requisitions.*
# Openings	*Returns the number of openings on the requisition(s).*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
# Requisitions by Recruiter	*Returns the number of requisitions divided by the number of recruiters.*
# Submissions	*Returns the number of distinct job submissions.*
# Submissions Complete	*Returns the number of distinct job submissions that are completed.*
# Submissions Ace	*Returns the number of distinct job submissions where the candidate is considered to be ACE.*
# Submissions Min. Requirements Met	*Returns the number of distinct job submissions where the candidate as met all the requisition minimum requirements.*
# Submissions Internal	*Returns the number of distinct submissions that are internal*
# Submissions Currently Hired	*Returns the number of distinct submissions currently in the "Hired" reference model status*

Name	Description
# Submissions Currently Rejected	*Returns the number of distinct submissions currently in the "Rejected" reference model status*
# Submissions Currently Declined	*Returns the number of distinct submissions currently in the "Declined" reference model status*
# Submissions By Recruiter	*Returns the number of submissions divided by the number of recruiters.*
# Hires Min. Requirements Met	*# Submissions Min. Requirements Met filtered using Current Reference Status Name*=Hired
# Hires Ace	*# Submissions Ace filtered using Current Reference Status Name*=Hired
# Hires Internal	*# Submissions Internal filtered using Current Reference Status Name*=Hired
# Submissions by Hire	*# Submissions Complete / # Submissions Currently Hired*
# Interviews by Hire	*# Submissions Reached 1st Intv. / # Submissions Currently Hired*
Average Cycle Time	*Returns the number of days between the req. creation date and the latest filled date.*
Average Time to Approve	*Returns the number of days between the first to be approved date and the first fully approved date.*
Average Time to Fill	*Returns the number of days between the first fully approved date and the latest filled date.*
Average Time to Latest Position Accepted	*Returns the number of days between the first fully approved date and the last position accepted date.*
Average Time to Source	*Returns the number of days between the req. creation date and the first sourced date.*
Average Submission Cycle Time	*Returns the number of days between the submission completed date and the hired date.*
Average Time to Hire	*Returns the number of days between the first fully approved date and the hired date.*
Average Time to Start	*Returns the number of days between the first fully approved date and the hire start date (offer actual start date, if hire start date is null).*
# Recruiters	Returns a count of distinct *recruiter id's.*

Report Prompts

All report prompts are optional.

Name	Description
Latest Fully Approved Date	Filters the report based on whether the latest fully approved date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Req. Creation Date	Filters the report based on whether the req. creation date is between two selected dates.
Latest Filled Date	Filters the report based on whether the latest filled date is between two selected dates.
Latest Position Accepted Date	Filters the report based on whether the latest position accepted date is between two selected dates.
Req. Last Modified Date	Filters the report based on whether the req. last modified date is between two selected dates.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.

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Name	Description
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.

Report Filters

Filter	Description
Current Status is eqal to/ is in Filled	Filters the report to requisitions in the filled status.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.

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Filter	Description
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Latest Fully Approved Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Last Positon Accepted Date is prompted	This is a listener for a prompt.
Req. Last Modified Date is prompted	This is a listener for a prompt.
Req. Creation Date is prompted	This is a listener for a prompt.

Requisitions on Hold

The report provides a listing of requisitions that are currently in the "to be approved" status by aging.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*

Name	Description
Recruiter Name	*Returns the recruiter name*
Hiring Manager Name	*Returns the hiring manager name*
Organization Level1 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Req. Creation Date	
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*
Latest Fully Approved Date	*Returns the date/time when the requisition most recently successfully went through the full approval process.*
Latest Filled Date	*Returns the date/time when the requisition was most recently filled.*
Last Position Accepted Date	*Returns the date/time when the last position was accepted on the requisition.*
Req. Last Modified Date	*Returns the date/time when the requisition was last modified.*
Latest On Hold Date	
# Openings	*Returns the number of openings on the requisition(s).*
# Openings Left to Fill (Hired)	*Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.*
# Submissions	*Returns the number of distinct job submissions.*
# Submissions Complete	*Returns the number of distinct job submissions that are completed.*
# Submissions Ace	*Returns the number of distinct job submissions where the candidate is considered to be ACE.*
# Submissions Min. Requirements Met	*Returns the number of distinct job submissions where the candidate as met all the requisition minimum requirements.*
# Submissions Internal	*Returns the number of distinct submissions that are internal*
# Submissions Currently New	*Returns the number of distinct submissions currently in the "New" reference model status*
# Submissions Currently In Review	*Returns the number of distinct submissions currently in the "Review" reference model status*
# Submissions Currently In 1st Intv.	*Returns the number of distinct submissions currently in the "1st Interview" reference model status*
# Submissions Currently In 2nd Intv.	*Returns the number of distinct submissions currently in the "2nd Interview" reference model status*
# Submissions Currently In 3rd Intv.	*Returns the number of distinct submissions currently in the "3rd Interview" reference model status*
# Submissions Currently In Offer	*Returns the number of distinct submissions currently in the "Offer" reference model status*
# Submissions Currently Testing	*Returns the number of distinct submissions currently in the "Testing" reference model status*
# Submissions Currently Hired	*Returns the number of distinct submissions currently in the "Hired" reference model status*
# Submissions Currently Rejected	*Returns the number of distinct submissions currently in the "Rejected" reference model status*
# Submissions Currently Declined	*Returns the number of distinct submissions currently in the "Declined" reference model status*
# Submissions Matched	Returns *# Submissions* filtered by *Submission Medium*='Matched to Job'

Name	Description
# Submissions In Process	Returns an aggregate of : *# Submissions Currently In 1st Intv.* + *# Submissions Currently In 2nd Intv.* + *# Submissions Currently In 3rd Intv.* + *# Submissions Currently In Offer* + *# Submissions Currently in Review* + *# Submissions Currently In Testing*
# Hires Min. Requirements Met	*# Submissions Min. Requirements Met* filtered using *Current Reference Status Name*=Hired
# Hires Ace	*# Submissions Ace* filtered using *Current Reference Status Name*=Hired
# Hires Internal	*# Submissions Internal* filtered using *Current Reference Status Name*=Hired
# Submissions by Hire	*# Submissions Complete* / *# Submissions Currently Hired*
# Interviews by Hire	*# Submissions Reached 1st Intv.* / *# Submissions Currently Hired*
Cycle Time	*Returns the average number of days between the req. creation date and the latest filled date.*
Time to Approve	*Returns the average number of days between the first to be approved date and the first fully approved date.*
Time to Fill	*Returns the average number of days between the first fully approved date and the latest filled date.*
Time to Latest Position Accepted	*Returns the average number of days between the first fully approved date and the last position accepted date.*
Time to Source	*Returns the average number of days between the req. creation date and the first sourced date.*
Average Submission Cycle Time	*Returns the number of days between the submission completed date and the hired date.*
Average Time to Hire	*Returns the number of days between the first fully approved date and the hired date.*
Average Time to Start	*Returns the number of days between the first fully approved date and the hire start date (offer actual start date, if hire start date is null).*

Report Prompts

All report prompts are optional.

Name	Description
Latest Fully Approved Date	Filters the report based on whether the latest fully approved date is between two selected dates.
First Sourced After Latest Approved Date	Filters the report based on whether the first sourced after latest approved date is between two selected dates.
Latest On Hold Date	Filters the report based on whether the req. latest on hold date is between two selected dates.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.

Name	Description
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.

Report Filters

Filter	Description
Current Status is equal to/ is in On Hold	Filters the report to requisitions in the on hold status.
Time on Hold In Current Hold Period is not null	Filters the report to requisitions with a time on hold for current hold period metric.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.

Filter	Description
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Latest On Hold Date is prompted	This is a listener for a prompt.

Requisitions Pending Approval

The report provides a listing of requisitions that are currently in the "to be approved" status by aging.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Title (BL)	*Returns the requisition title, in its base language.*
# Openings	*Returns the number of openings on the requisition(s).*
Req. Creation Date	*Returns the date/time when the requisition was created.*
Recruiter Name	*Returns the recruiter name*
Recruiter Email	*Returns the recruiter email*
Hiring Manager Name	*Returns the hiring manager name*
Hiring Manager Email	*Returns the hiring manager email*
Organization Level1 Name	*Returns the name of the organization*

Name	Description
Location Level1 Name	*Returns the name of the requisition primary location.*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Req. Historical Status Start Date	*Returns the date/time when the requisition was placed into the status.*
Historical Status User	*Returns the user responsible for changing the requisition status.*
Days In To Be Approved	evaluate('CAST(LOCALTIMESTAMP(0) AT TIME ZONE ''EST5EDT'' as Date) - CAST(%1 AT TIME ZONE ''EST5EDT'' as Date)' as double,"Requisition Status - Historical"."Req. Historical Status Start Date")

Approver 1	<pre>case
	 when "Requisition Approval History"."Approver 1 Full Name" is not null
	 then "Requisition Approval History"."Approver 1 Full Name" || '
	'
	 || "Requisition Approval History"."Approver 1 Email" || '
	'
	 || "Requisition Approval History"."Approver 1 Decision" || ' '
	 ||
	 case
	 when "Requisition Approval History"."Approver 1 Decision Date" is not
	 null
	 then '(' ||
	 replace(
	 cast(MONTH("Requisition Approval History"."Approver 1 Decision Date")
	 as CHAR) || '/' ||
	 cast(DAYOFMONTH("Requisition Approval History"."Approver 1 Decision
	 Date") as CHAR) || '/' ||
	 cast(YEAR("Requisition Approval History"."Approver 1 Decision Date") as
	 CHAR),' ','') || ')'
	 end
	end</pre>

Approver 2	<pre>case
	 when "Requisition Approval History"."Approver 2 Full Name" is not null
	 then "Requisition Approval History"."Approver 2 Full Name" || '
	'
	 || "Requisition Approval History"."Approver 2 Email" || '
	'
	 || "Requisition Approval History"."Approver 2 Decision" || ' '
	 ||
	 case
	 when "Requisition Approval History"."Approver 2 Decision Date" is not
	 null
	 then '(' ||
	 replace(
	 cast(MONTH("Requisition Approval History"."Approver 2 Decision Date")
	 as CHAR) || '/' ||
	 cast(DAYOFMONTH("Requisition Approval History"."Approver 2 Decision
	 Date") as CHAR) || '/' ||
	 cast(YEAR("Requisition Approval History"."Approver 2 Decision Date") as
	 CHAR),' ','') || ')'
	 end
	end</pre>

Approver 3	<pre>case
	 when "Requisition Approval History"."Approver 3 Full Name" is not null
	 then "Requisition Approval History"."Approver 3 Full Name" || '
	'
	 || "Requisition Approval History"."Approver 3 Email" || '
	'
	 || "Requisition Approval History"."Approver 3 Decision" || ' '
	 ||
	 case
	 when "Requisition Approval History"."Approver 3 Decision Date" is not
	 null
	 then '(' ||</pre>

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Name	Description

	`replace(`
	`cast(MONTH("Requisition Approval History"."Approver 3 Decision Date")`
	`as CHAR) || '/' ||`
	`cast(DAYOFMONTH("Requisition Approval History"."Approver 3 Decision`
	`Date") as CHAR) || '/' ||`
	`cast(YEAR("Requisition Approval History"."Approver 3 Decision Date") as`
	`CHAR),' ','') || ')'`
	`end`
	`end`

Approver 4	`case` `when "Requisition Approval History"."Approver 4 Full Name" is not null` `then "Requisition Approval History"."Approver 4 Full Name" || '  '` `|| "Requisition Approval History"."Approver 4 Email" || '  '` `|| "Requisition Approval History"."Approver 4 Decision" || ' '` `||` `case` `when "Requisition Approval History"."Approver 4 Decision Date" is not` `null` `then '(' ||` `replace(` `cast(MONTH("Requisition Approval History"."Approver 4 Decision Date")` `as CHAR) || '/' ||` `cast(DAYOFMONTH("Requisition Approval History"."Approver 4 Decision` `Date") as CHAR) || '/' ||` `cast(YEAR("Requisition Approval History"."Approver 4 Decision Date") as` `CHAR),' ','') || ')'` `end` `end`
Approver 5	`case` `when "Requisition Approval History"."Approver 5 Full Name" is not null` `then "Requisition Approval History"."Approver 5 Full Name" || '  '` `|| "Requisition Approval History"."Approver 5 Email" || '  '` `|| "Requisition Approval History"."Approver 5 Decision" || ' '` `||` `case` `when "Requisition Approval History"."Approver 5 Decision Date" is not` `null` `then '(' ||` `replace(` `cast(MONTH("Requisition Approval History"."Approver 5 Decision Date")` `as CHAR) || '/' ||` `cast(DAYOFMONTH("Requisition Approval History"."Approver 5 Decision` `Date") as CHAR) || '/' ||` `cast(YEAR("Requisition Approval History"."Approver 5 Decision Date") as` `CHAR),' ','') || ')'` `end` `end`
Approver 6	`case` `when "Requisition Approval History"."Approver 6 Full Name" is not null` `then "Requisition Approval History"."Approver 6 Full Name" || '  '` `|| "Requisition Approval History"."Approver 6 Email" || '  '` `|| "Requisition Approval History"."Approver 6 Decision" || ' '` `||` `case` `when "Requisition Approval History"."Approver 6 Decision Date" is not` `null` `then '(' ||` `replace(`

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Name	Description

	`cast(MONTH("Requisition Approval History"."Approver 6 Decision Date")`
	`as CHAR) || '/' ||`
	`cast(DAYOFMONTH("Requisition Approval History"."Approver 6 Decision`
	`Date") as CHAR) || '/' ||`
	`cast(YEAR("Requisition Approval History"."Approver 6 Decision Date") as`
	`CHAR),' ','') || ')'`
	`end`
	`end`

Latest Approval Path Event Date	MAX("Requisition Tracking History"."Req. History Transaction Date")
Latest Approval Path Event User	SUBSTRING(MAX(EVALUATE('TO_CHAR(%1,%2)' AS CHAR,"Requisition Tracking History"."Req. History Transaction Date",'YYYYMMDDHH24MISS') || ' ' || "Requisition Tracking History"."Req. History Transaction By User"),16,255)
Days Since Latest Approval Path Event	evaluate('CAST(LOCALTIMESTAMP(0) AT TIME ZONE ''EST5EDT'' as Date) - CAST(%1 AT TIME ZONE ''EST5EDT'' as Date)' as double,MAX("Requisition Tracking History"."Req. History Transaction Date"))

Report Prompts

Name	Description
To Be Approved Date	Filters the report based on whether the req. historical status start date is between two selected dates.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.

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Name	Description
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.

Report Filters

Filter	Description
Transaction Event Type is equal to / is in Requisition Approved on Behalf; Requisition Approved; Requisition Approval Passed; Requisition Approval Passed on Behalf; Requisition Approval Requested; Requisition approval request	Filters the report to requisitions with the following transaction event types.
Historical Status is equal to / is in To Be Approved	Filters the report to requisitions with a historical status of To Be Approved.
Req. Historical Status End Date is null	Filters the report to requisitions where the historical status end date is not available.
Current Status is equal to / is in To Be Approved	Filters the report to requisitions with the status to be approved.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.

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Filter	Description
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.

4 Onboarding Standard Content

Sample Dashboard

Onboarding - In Progress

The dashboard shows counts of processes and tasks, and also includes metrics on how long tasks and processes have been open. There is also a detailed table that shows a list of currently in progress processes and the task currently being completed with a flag indicating whether the process is in the red status.

Component

Component	Name
1	*Onboarding - Dashboard Prompt*
2	*Onboarding - Dashboard Prompt Date Ranges - In Progress*
3	*Onboarding - Process In Progress Summary*
4	*Onboarding - Tasks In Process Summary*
5	*Onboarding - Processes In Progress Analysis*
6	*Onboarding - Processes In Progress List*

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Onboarding - Process In Progress Summary

Displays the number of submission transition processes that are in progress, by a variety of dimensions.

Onboarding Process In Progress

Report Columns

Name	Syntax
Dimensions	See View By: Dimensions
# Processes	"Submission Transitions Process Counts"."# Submission Transitions Processes"

View By: Dimensions

Name	Syntax
Organization	"Requisition Organization"."Organization Level1 Name"
Country	"Requisition Primary Location"."Location Level1 Name"
Category	"Requisition Job Field"."Job Field Level1 Name"
Department	"Requisition Department"."Department Name"

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Name	Syntax
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Process Name	`"Submission Transitions Process"."Submission Transitions Process Name (BL)" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Owner	`"Submission Transitions Process"."Submission Transitions Process Owner Full Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

Process Completion	`CASE WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 25`
	`Then '0-25%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 50`
	`THEN '25-50%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 75`
	`Then '50-75%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 100`
	`Then '75-100%'`
	`END || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

Process Days In Progress	`"Submission Transitions Process"."Submission Transitions Process Days In Progress" + "Requisition Identification"."# Openings" - "Requisition Identification"."# Openings"`

View Configurations

Name	Additional Information
Pie	Slice Size: # Processes Slices: Dimension
Table	Columns and Measures: Dimension, # Processes

Report Filters

Name
Submission Transitions Process Name (BL) is not null
Submission Transitions Process Type is equal to / is in New Hire
Submission Transitions Process Current Status is equal to / is in In Progress
Onboarding - Dashboard Prompt Listener

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Onboarding - Tasks In Progress Summary

Displays the number of submission transition process tasks that are in progress, by a variety of dimensions.

Onboarding Tasks In Progress

Report Columns

Name	Syntax
Dimensions	See View By: Dimension
Avg Days In Progress	`AVG(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Transitions Process"."Submission Transitions Task Assignment Date" , CURRENT_TIMESTAMP))`
# Tasks	"Submission Transitions Process Counts"."# Submission Transitions Tasks"

View By: Dimensions

Name	Syntax
Organization	"Requisition Organization"."Organization Level1 Name"

Name	Syntax
Country	"Requisition Primary Location"."Location Level1 Name"
Category	"Requisition Job Field"."Job Field Level1 Name"
Department	"Requisition Department"."Department Name"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Process Name	`"Submission Transitions Process"."Submission Transitions Process Name (BL)" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Owner	`"Submission Transitions Process"."Submission Transitions Process Owner Full Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Health Is Red	`"Submission Transitions Process"."Submission Transitions Process Progression Health Is Red" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

Process Completion	`CASE WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 25`
	`Then '0-25%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 50`
	`THEN '25-50%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 75`
	`Then '50-75%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 100`
	`Then '75-100%'`
	`END || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

Process Days In Progress	`"Submission Transitions Process"."Submission Transitions Process Days In Progress" + "Requisition Identification"."# Openings" - "Requisition Identification"."# Openings"`
Task Name	`"Submission Transitions Process"."Submission Transitions Task Name (BL)" || REPLACE("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Assignee	`"Submission Transitions Process"."Submission Transitions Task Assignee Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Type	`"Submission Transitions Process"."Submission Transitions Task Type" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Is Overdue	`"Submission Transitions Process"."Submission Transitions Task Is Overdue" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

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Name	Syntax
Task Days In Progress	`TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Transitions Process"."Submission Transitions Task Assignment Date", CURRENT_TIMESTAMP) + "Requisition Identification"."# Openings" - "Requisition Identification"."# Openings"`

View Configurations

Name	Additional Information
Pie	Slice Size: # Tasks Pies: Dimension
Column-Line	Bars: # Tasks Lines: Avg Days In Progress Group By: Dimension

Report Filters

Name
Submission Transitions Task Current Status is equal to / is in In progress
Submission Transitions Process Type is equal to / is in New Hire
Onboarding - Dashboard Prompt Listener

Onboarding - Processes In Progress Analysis

The analysis consists of two charts.

The chart on the left displays # of processes, average percent complete and days in progress by a variety of dimensions,

The chart on the right chart displays # tasks, task days in progress and process days in progress by a variety of dimensions.
The column selector allows you to toggle the dimension for both charts at once.

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Onboarding Process/Task Analysis

Onboarding Process/Task Analysis

Report Columns

Name	Syntax
Dimensions	See View By: Dimension
Process Days In Progress	"Submission Transitions Process Time"."Average Submission Transitions Process Days In Progress"
Task Days In Progress	`AVG(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Transitions Process"."Submission Transitions Task Assignment Date" , CURRENT_TIMESTAMP))`
Avg Process Percent Complete	`avg("Submission Transitions Process"."Submission Transitions Process Percent Complete")`
Task ID	`"Submission Transitions Process"."Submission Transitions Task Name (BL)" || ' - ' || CAST("Submission General Info"."Submission Identifier" AS CHARACTER) || ' - ' || CAST("Submission Transitions Process"."Submission Transitions Task Creation Date" AS CHARACTER)`
# Tasks	"Submission Transitions Process Counts"."# Submission Transitions Tasks"
# Processes	"Submission Transitions Process Counts"."# Submission Transitions Processes"

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View By: Dimensions

Name	Syntax
Organization	"Requisition Organization"."Organization Level1 Name"
Country	"Requisition Primary Location"."Location Level1 Name"
Category	"Requisition Job Field"."Job Field Level1 Name"
Department	"Requisition Department"."Department Name"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Process Name	`"Submission Transitions Process"."Submission Transitions Process Name (BL)" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Owner	`"Submission Transitions Process"."Submission Transitions Process Owner Full Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Health Is Red	`"Submission Transitions Process"."Submission Transitions Process Progression Health Is Red" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

Process Completion	`CASE WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 25`
	`Then '0-25%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 50`
	`THEN '25-50%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 75`
	`Then '50-75%'`
	`WHEN "Submission Transitions Process"."Submission Transitions Process Percent Complete" < 100`
	`Then '75-100%'`
	`END || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

Task Name	`"Submission Transitions Process"."Submission Transitions Task Name (BL)" || REPLACE("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Assignee	`"Submission Transitions Process"."Submission Transitions Task Assignee Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Type	`"Submission Transitions Process"."Submission Transitions Task Type" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Is Overdue	`"Submission Transitions Process"."Submission Transitions Task Is Overdue" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

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View Configurations

Name	Additional Information
Bubble	Horizontal Axis: Process Days In Progress
	XY (Vertical Axis): Avg Process Percent Complete
	XY (Bubble Size): # Processes
	Vary Color By: Dimension
Scatter	Horizontal Axis: Task Days In Progress
	XY (Vertical Axis): Process Days In Progress
	Vary Color By: Dimension

Report Filters

Name
Submission Transitions Task Current Status is equal to / is in In progress
Submission Transitions Process Type is equal to / is in New Hire
Onboarding - Dashboard Prompt Listener

Onboarding - Processes In Progress List

This table displays summary information about the currently in progress tasks and processes by new hire.

Onboarding Process/Task Analysis

Report Columns

Name	Syntax
Req. Identifier	"Requisition Identification"."Req. Identifier"
Candidate Identifier	"Candidate Identification"."Candidate Identifier"
Name	"Candidate Identification"."Name"
Submission Transitions Process Name	"Submission Transitions Process"."Submission Transitions Process Name (BL)"
Submission Transitions Process Percent Complete	"Submission Transitions Process"."Submission Transitions Process Percent Complete"
Process Days In Progress	"Submission Transitions Process"."Submission Transitions Process Days In Progress"
Submission Transitions Process Progression Health Is Red	"Submission Transitions Process"."Submission Transitions Process Progression Health Is Red" ✎ **Note:** A conditiontal format is set on this field. If process is red a red flag is displayed, if process is not red a green flag is displayed.

Name	Syntax
Submission Transitions Task Name (BL)	"Submission Transitions Process"."Submission Transitions Task Name (BL)"
Task Overdue Days	`TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Transitions Process"."Submission Transitions Task Due Date", CURRENT_TIMESTAMP)`
Submission Transitions Task Assignee Name	"Submission Transitions Process"."Submission Transitions Task Assignee Name"
Submission Transitions Task Assignee Department	"Submission Transitions Process"."Submission Transitions Task Assignee Department"
Submission Transitions Task Due Date	"Submission Transitions Process"."Submission Transitions Task Due Date"
Hiring Manager Name	"Requisition Hiring Manager"."Hiring Manager Name"

Report Filters

Name
Submission Transitions Process Current Status is equal to / is in In progress
Submission Transitions Process Current Task is equal to / is in In progress
Onboarding - Dashboard Prompt Listener

Onboarding - Completed

The dashboard page shows metrics on completed processes and tasks such as the number of processes completed compared to the number of processes canceled and counts on how many tasks in a process were overdue. The metrics can help you identify areas for improvement in your onboarding processes.

Component

Component	Name
1	*Onboarding - Dashboard Prompt*
2	*Onboarding - Dashboard Prompt Date Ranges - Completed*
3	*Onboarding - Process Completed Summary*
4	*Onboarding - Tasks Completed Summary*
5	*Onboarding - Process Completed Time*
6	*Onboarding - Tasks Completed Time*

Onboarding - Process Completed Summary

This chart shows a trend of completed and canceled processes.

Onboarding Processes Completed / Canceled

Report Columns

Name	Syntax
Dimensions	See View By: Dimension
# Completed	FILTER("Submission Transitions Process Counts"."# Submission Transitions Processes" USING ("Submission Transitions Process"."Submission Transitions Process Current Status"='Completed'))
# Canceled	FILTER("Submission Transitions Process Counts"."# Submission Transitions Processes" USING ("Submission Transitions Process"."Submission Transitions Process Current Status"='Canceled'))

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View By: Dimensions

Name	Syntax
Organization	"Requisition Organization"."Organization Level1 Name"
Country	"Requisition Primary Location"."Location Level1 Name"
Category	"Requisition Job Field"."Job Field Level1 Name"
Department	"Requisition Department"."Department Name"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Process Name	`"Submission Transitions Process"."Submission Transitions Process Name (BL)" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Owner	`"Submission Transitions Process"."Submission Transitions Process Owner Full Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Complete Period	`EVALUATE('TO_CHAR(%1,%2)' AS CHARACTER,"Submission Transitions Process"."Submission Transitions Process End Date",'YYYY-MM')`

View Configurations

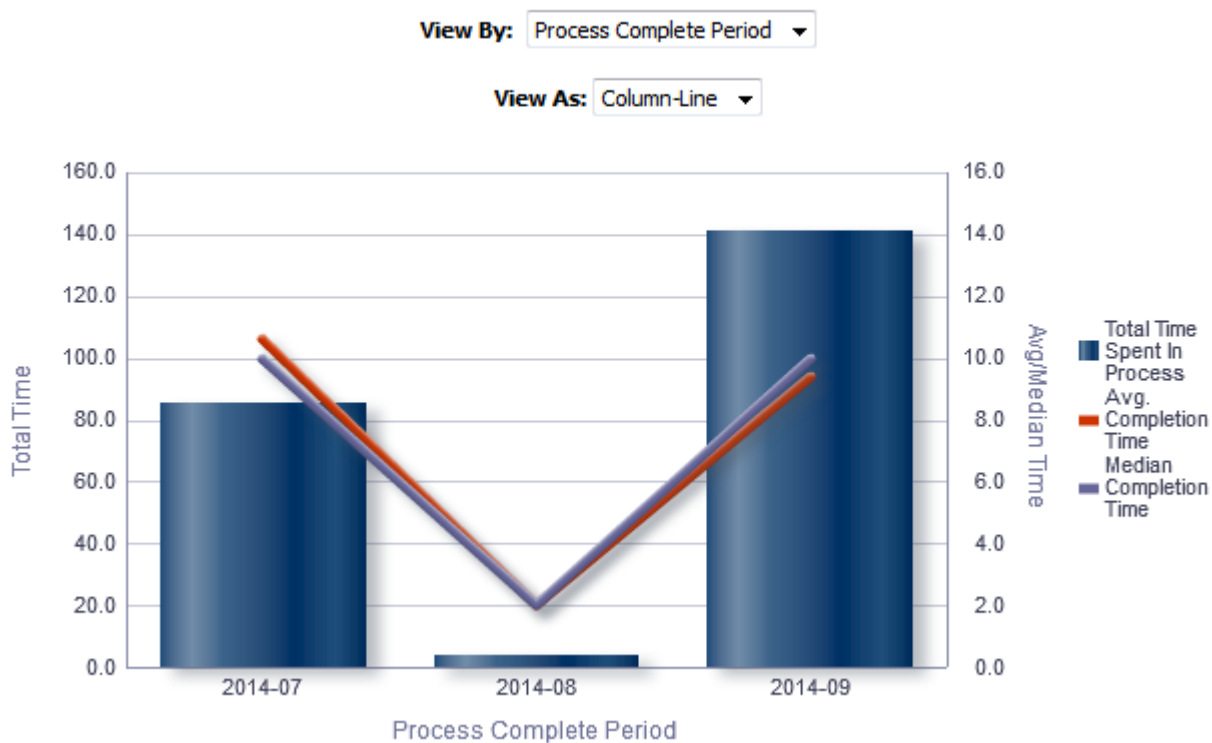| Name	Additional Information
Table	Columns and Measures: Dimension, # Complete, # Canceled
Column-Line	Bars: # Canceled, # Complete Group By: Dimension

Report Filters

Name
Submission Transitions Task Current Status is equal to / is in Canceled; Completed
Submission Transitions Process Type is equal to / is in New Hire
Submission Transitions Process Name (BL) is not null
Onboarding - Dashboard Prompt Listener

Onboarding - Tasks Completed Summary

This chart shows the number of tasks completed on time compared to the number of tasks that were completed late.

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Onboarding Tasks Completed

Onboarding Tasks Completed

Process Complete Period ▾

View As: Column ▾

Report Columns

Name	Syntax
Dimensions	See View By: Dimension
# Tasks On Time	FILTER("Submission Transitions Process Counts"."# Submission Transitions Tasks" USING ("Submission Transitions Process"."Submission Transitions Step End Date" <= "Submission Transitions Process"."Submission Transitions Task Due Date"))
# Tasks Late	FILTER("Submission Transitions Process Counts"."# Submission Transitions Tasks" USING ("Submission Transitions Process"."Submission Transitions Step End Date" > "Submission Transitions Process"."Submission Transitions Task Due Date"))

View By: Dimensions

Name	Syntax
Organization	"Requisition Organization"."Organization Level1 Name"
Country	"Requisition Primary Location"."Location Level1 Name"
Category	"Requisition Job Field"."Job Field Level1 Name"
Department	"Requisition Department"."Department Name"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Process Name	`"Submission Transitions Process"."Submission Transitions Process Name (BL)" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Owner	`"Submission Transitions Process"."Submission Transitions Process Owner Full Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Name	`"Submission Transitions Process"."Submission Transitions Task Name (BL)" || REPLACE("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Assignee	`"Submission Transitions Process"."Submission Transitions Task Assignee Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Assignee Department	`"Submission Transitions Process"."Submission Transitions Task Assignee Department" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Type	`"Submission Transitions Process"."Submission Transitions Task Type" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Complete Period	`EVALUATE('TO_CHAR(%1,%2)' AS CHARACTER,"Submission Transitions Process"."Submission Transitions Process End Date",'YYYY-MM') || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

View Configurations

Name	Additional Information
Column	Bars: # Tasks On Time, # Tasks Late Group By: Dimension
Table	Columns and Measures: Dimension, # Tasks On Time, # Tasks Late

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Report Filters

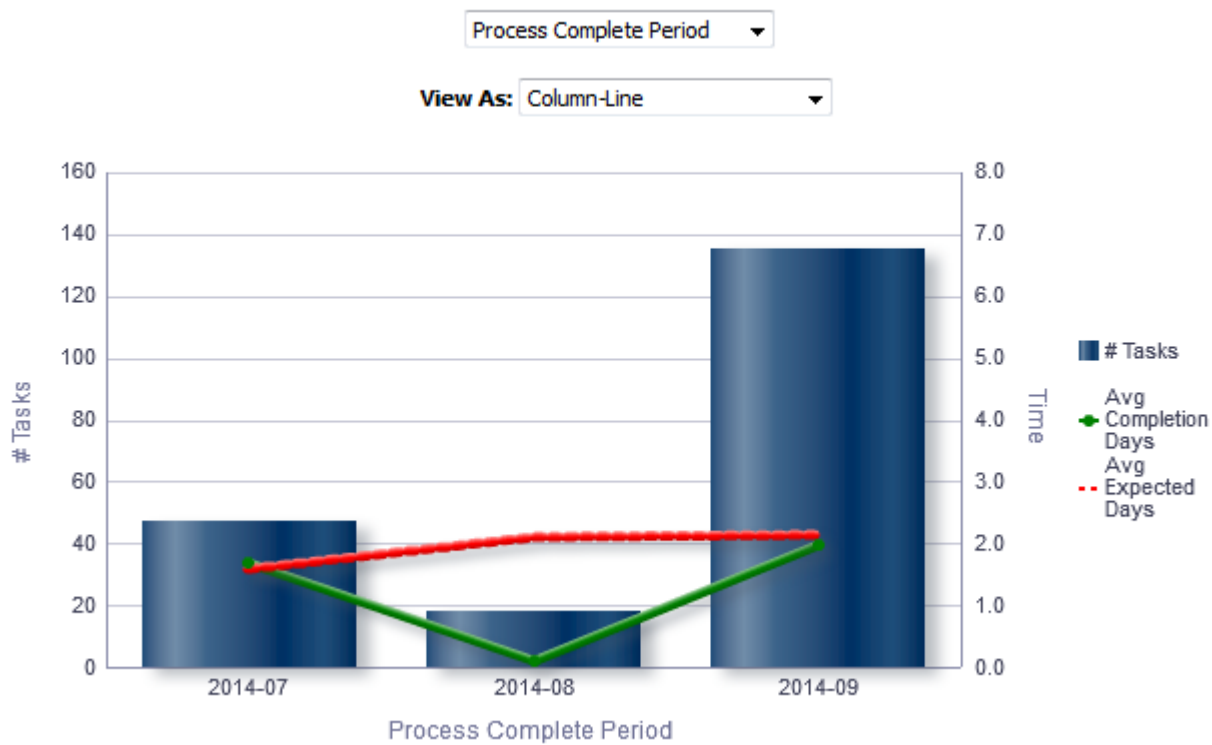| Name |
| --- |
| Submission Transitions Task Current Status is equal to / is in Completed |
| Submission Transitions Process Current Status is equal to / is in Completed |
| Submission Transitions Process Type is equal to / is in New Hire |
| *Onboarding - Dashboard Prompt Listener* |

Onboarding - Process Completed Time

This chart shows total time to complete the process for all users who completed it, and also shows the average and median time it took users to complete the processes.

Time To Complete Processes

Report Columns

Name	Syntax
Dimensions	See View By: Dimension

Name	Syntax
Median Completion Time	`MEDIAN("Submission Transitions Process"."Submission Transitions Process Days To Complete")`
Total Time Spent In Process	`SUM("Submission Transitions Process"."Submission Transitions Process Days To Complete")`
# Submission Transition Processes	"Submission Transitions Process Counts"."# Submission Transitions Processes"
Avg. Completion Time	"Submission Transitions Process Time"."Average Submission Transitions Process Days To Complete"

View By: Dimensions

Name	Syntax
Organization	"Requisition Organization"."Organization Level1 Name"
Country	"Requisition Primary Location"."Location Level1 Name"
Category	"Requisition Job Field"."Job Field Level1 Name"
Department	"Requisition Department"."Department Name"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Process Name	`"Submission Transitions Process"."Submission Transitions Process Name (BL)" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Owner	`"Submission Transitions Process"."Submission Transitions Process Owner Full Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Complete Period	`EVALUATE('TO_CHAR(%1,%2)' AS CHARACTER,"Submission Transitions Process"."Submission Transitions Process End Date",'YYYY-MM')`

View Configurations

Name	Additional Information
Table	Columns and Measures: Dimension, # Processes, Total Time Spent In Process, Avg. Completion Time, Median Completion Time
Column-Line	Bars: Total Time Spent In Process Lines: Avg. Completion Time, Median Completion Time Group By: Dimension

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Report Filters

Name
Submission Transitions Task Current Status is equal to / is in Completed
Submission Transitions Process Type is equal to / is in New Hire
Submission Transitions Process Name (BL) is not null
Onboarding - Dashboard Prompt Listener

Onboarding - Tasks Completed Time

This chart shows the number of tasks that have been completed, as well as the expected completion time and the average completion time in days.

Time To Complete Tasks

Report Columns

Name	Syntax
Dimensions	See View By: Dimension

Name	Syntax
Submission Transitions Task Name (BL)	"Submission Transitions Process"."Submission Transitions Task Name (BL)"
Avg Completion Days	`AVG(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Transitions Process"."Submission Transitions Task Assignment Date" , "Submission Transitions Process"."Submission Transitions Step End Date"))`
Avg Expected Days	`AVG(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Transitions Process"."Submission Transitions Task Assignment Date" , "Submission Transitions Process"."Submission Transitions Task Due Date"))`
# Tasks	"Submission Transitions Process Counts"."# Submission Transitions Tasks"
Total Time Spent	`SUM(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Transitions Process"."Submission Transitions Task Assignment Date" , "Submission Transitions Process"."Submission Transitions Step End Date"))`

View By: Dimensions

Name	Syntax
Organization	"Requisition Organization"."Organization Level1 Name"
Country	"Requisition Primary Location"."Location Level1 Name"
Category	"Requisition Job Field"."Job Field Level1 Name"
Department	"Requisition Department"."Department Name"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Process Name	`"Submission Transitions Process"."Submission Transitions Process Name (BL)" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Process Owner	`"Submission Transitions Process"."Submission Transitions Process Owner Full Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Name	`"Submission Transitions Process"."Submission Transitions Task Name (BL)" || REPLACE("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Assignee	`"Submission Transitions Process"."Submission Transitions Task Assignee Name" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Assignee Department	`"Submission Transitions Process"."Submission Transitions Task Assignee Department" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`
Task Type	`"Submission Transitions Process"."Submission Transitions Task Type" || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

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Name	Syntax
Process Complete Period	`EVALUATE('TO_CHAR(%1,%2)' AS CHARACTER,"Submission Transitions Process"."Submission Transitions Process End Date",'YYYY-MM') || Replace("Requisition Identification"."Req. Identifier","Requisition Identification"."Req. Identifier",'')`

View Configurations

Name	Additional Information
Table	Columns and Measures: Dimension, # Tasks, Avg Completion Days, Avg Expected Days, Total Time Spent
Column-Line	Bars: # Tasks Lines: Avg Completion Days, Avg Expected Days Group By: Dimension
Stacked Total Time By Task	Bars: Total Time Spent Vary Color By: Submission Transitions Task Name (BL) Group By: Dimension

Report Filters

Name
Submission Transitions Task Current Status is equal to / is in Completed
Submission Transitions Process Type is equal to / is in New Hire
Submission Transitions Process Current Status is equal to / is in Completed
Onboarding - Dashboard Prompt Listener

Dashboard Prompts

Onboarding - Dashboard Prompt

Name	Location
Location (1)	"Requisition Primary Location"."Location Level1 Name"
Location (2)	"Requisition Primary Location"."Location Level2 Name" Location 2 is limited by Location 1 selections.
Process Name	"Submission Transitions Process"."Submission Transitions Process Name (BL)"

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Name	Location
Organization (1)	"Requisition Organization"."Organization Level1 Name"
Organization (2)	"Requisition Organization"."Organization Level2 Name" Organization (2) is limited by Organization (1) selections.
Process Owner	"Submission Transitions Process"."Submission Transitions Process Owner Full Name"
Requisition	"Requisition Identification"."Req. Identifier"
Recruiter	"Requisition Recruiter"."Recruiter Name" Recruiter is limited by the value of all prompts.
Task Name	"Submission Transitions Process"."Submission Transitions Task Name (BL)"
Department	"Requisition Department"."Department Name"
H. Manager	"Requisition Hiring Manager"."Hiring Manager Name"
Job Field 1	"Requisition Job Field"."Job Field Level1 Name"
Hire Start Date	EVALUATE('TO_CHAR(%1,%2)' AS CHARACTER,"Submission Dates"."Hire Start Date",'YYYY-MM') By default the last year rolling is selected.
Task Is Overdue	"Submission Transitions Process"."Submission Transitions Task Is Overdue"

Onboarding - Dashboard Prompt Date Ranges - In Progress

Name	Location
Process Start Date	"Submission Transitions Process"."Submission Transitions Process Start Date"
Task Assigned Date	"Submission Transitions Process"."Submission Transitions Task Assignment Date"
Process Latest Change Date	"Submission Transitions Process"."Submission Transitions Process Latest Status Change Date"
Task Due Date	"Submission Transitions Process"."Submission Transitions Task Due Date"

Onboarding - Dashboard Prompt Date Ranges - Completed

Name	Location
Process Start Date	"Submission Transitions Process"."Submission Transitions Process Start Date"
Process End Date	"Submission Transitions Process"."Submission Transitions Process End Date"

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Saved Filters

Onboarding - Dashboard Prompt Listener

Name
Recruiter Name is prompted
"Requisition Primary Location"."Location Level1 Name" is prompted
"Requisition Primary Location"."Location Level2 Name" is prompted
"Requisition Job Field"."Job Field Level1 Name" is prompted
"Requisition Job Field"."Job Field Level2 Name" is prompted
"Requisition Primary Location"."Location Level1 Name" is prompted
"Requisition Primary Location"."Location Level2 Name" is prompted
Department Name is prompted
Hiring Manager Name is prompted
Req. Identifier is prompted
Submission Transitions Process Name (BL) is prompted
Submission Transitions Process Start Date is prompted
Submission Transitions Process Latest Status Change Date is prompted
Submission Transitions Task Assignment Date is prompted
Submission Transitions Task Due Date is prompted
Submission Transitions Process Owner Full Name is prompted
Submission Transitions Task Name (BL) is prompted
Submission Transitions Task Assignee Name is prompted
EVALUATE('TO_CHAR(%1,%2)' AS CHARACTER,"Submission Dates"."Hire Start Date",'YYYY-MM') is prompted
Submission Transitions Task Is Overdue is prompted
Submission Transitions Process End Date is prompted

Standard Reports

Onboarding Process Details

This report provides a summary of all onboarding processes and their associated steps.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Candidate Identifier	*Returns Candidate ID*
Candidate Name	*Returns the candidate name*
Correspondence Email	*Returns the subject correspondence email* or, if that is null, *Returns the candidate email*
Corporate Email	*Returns the subject corporate email*
Primary Phone Designation	*Returns the candidate primary phone designation*
Mobile Phone	*Returns the subject mobile phone number* or, if that is null, *Returns the candidate mobile phone number*
Home Phone	*Returns the subject home phone number* or, if that is null, *Returns the candidate home phone number*
Work Phone	*Returns the subject work phone number* with the *extension*, if available, or, if the subject home phone number is null, *Returns the candidate work phone number*
Fax Number	*Returns the subject fax number*
Department Name	*Returns the subject department name*
Current Reference Status Name	*Returns the current reference status name*
Current Workflow Name	*Returns the name of the candidate selection workflow used for this job submission.*
Current Step Name	*Returns the current CSW step name*
Current Status Name	*Returns the current CSW status name*
Current Status Start Date	*Returns the date when the candidate was moved to the current status.*
Hiring Manager Name	*Returns the hiring manager name*
Hiring Manager Email	*Returns the hiring manager email*
Organization Level1 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Submission Is Completed	*Returns whether or not the submission is complete*
Submission Is Internal	*Returns whether or not the candidate was internal as of when he/she created the submission*
Submission Created Date	*Returns the date/time when the submission was created*
Submission Completed Date	*Returns the date/time when the submission was completed*
Hired Candidate Start Date	*Returns the hire start date/time as entered when the candidate is moved to the Hired reference status* . If the hire start date is not available the system returns *the hire start date as entered in the candidate job offer section.*
Hired Date	*Returns the most recent date/time when the candidate was moved to the Hired reference status.*
Offer Accepted Date	*Returns the date/time when the candidate accepted the job offer*

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Name	Description
Latest Filled Date	*Returns the date/time when the requisition was most recently filled.*
Latest Position Accepted Date	*Returns the date/time when the last position was accepted on the requisition.*
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*
Req. Status	*Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.*
Time to Hire	*Returns the average number of days between the first fully approved date and the hired date.*
Submission Cycle Time	*Returns the average number of days between the submission completed date and hired date.*
Time to Start	*Returns the average number of days between the the first fully approved date and the hire start date (offer actual start date, if hire start date is null).*
Onboarding Process Name (BL)	*Returns the process name in its base locale*
Onboarding Process Code	*Returns the submission transitions process code*
Onboarding Process Current Status	*Returns the submission transitions process current status*
Onboarding Process Start Date	*Returns the submission transitions process start date*
Onboarding Process End Date	*Returns the submission transitions process end date*
Onboarding Process Percent Complete	*Returns the submission transitions process percent complete*
Onboarding Process Progression Health Is Red	*Returns yes if a step or task in the submission transitions process is overdue.*
Onboarding Process Owner Full Name	*Returns the submission transitions process owner full name*
Onboarding Process Days In Progress	*If the submission transitions process is in progress, the time in days between the submission transitions process start date and the current date is returned.*
Onboarding Process Days To Complete	*If the submission transitions process is complete, the time in days between the profile transitions process start date and the profile transitions latest status change date.*
Onboarding Step Name (BL)	*Returns the submission transitions step name in its base locale*
Onboarding Step Start Date	*Returns the submission transitions step start date*
Onboarding Step Due Date	*Returns the submission transitions step due date*
Onboarding Step End Date	*Returns the submission transitions step end date*
Onboarding Step Days In Progress	*If the submission transitions step is complete, the time in days between the submission transitions step start date and the submission transitions step latest status change date is returned.*
Onboarding Step Days To Complete	*If the submission transitions step is complete, the time in days between the submission transitions step start date and the submission transitions step latest status change date is returned.*
Onboarding Step Overdue Days	*If the submission transitions step is in progress, the time in days between the submission transitions step due date and the current date is returned.*
Onboarding Task Name	*Returns the name of task in its base locale*
Onboarding Task Owner Name	*Returns the submission transitions task owner name*
Onboarding Task Owner Email	*Returns the submission transitions task owner email*
Onboarding Task Type	*Returns the submission transitions task type*

Name	Description
Onboarding Task Current Status	*Returns the submission transitions task current status*
Onboarding Task Creation Date	*Returns the submission transitions task creation date*
Onboarding Task Due Date	*Returns the submission transitions task due date*
Onboarding Task Assignee Name	*Returns the submission transitions task assignee name*
Onboarding Task Assignee Email	*Returns the submission transitions task assignee email*
Onboarding Task Assignee Department	*Returns the submission transitions task assignee department*
Onboarding Step Is Overdue	*Returns the submission transitions step is overdue*
Onboarding Task Is Overdue	*Returns whether or not the submission transitions task is overdue*

Report Prompts

All report prompts are optional.

Name	Description
Transitions Prompts	
Process Start Date	Filters the report based on whether the process start date is between two selected dates.
Process End Date	Filters the report based on whether the process end date is between two selected dates.
Task Due Date	Filters the report based on whether the task due date is between two selected dates.
Step Start Date	Filters the report based on whether the step start date is between two selected dates.
Step Due Date	Filters the report based on whether the step due date is between two selected dates.
Step End Date	Filters the report based on whether the step end date is between two selected dates.
Process Name (BL)	Filters the report based on whether the process name is in the list of values selected.
Process Current Status	Filters the report based on whether the process current status is in the list of values selected.
Step Name (BL)	Filters the report based on whether the step name is in the list of values selected.
Task Name (BL)	Filters the report based on whether the task name is in the list of values selected.
Task Current Status	Filters the report based on whether the task current status is in the list of values selected.
Task Owner Name	Filters the report based on whether the task owner name is in the list of values selected.
Process Health Is Red	Filters the report based on whether process progression health is red indicator is in the list of values selected.
Step Is Overdue	Filters the report based on whether step is overdue indicator is in the list of values selected.
Report Prompts	
Submission Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Hired Candidate Start Date	Filters the report based on whether the hired start date is between two selected dates. If the hire start date is null the offer actual start date is used.

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Name	Description
Hired Date	Filters the report based on whether the hired date is between two selected dates.
Offer Accepted Date	Filters the report based on whether the offer accepted date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Requisition Status	Filters the report based on whether the current status is in the list of values selected
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.

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Report Filters

Filter	Description
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.
Current Step Name is prompted	This is a listener for a prompt.
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date")	This is a listener for a prompt. When the prompt is set this value filters on the Hire Start Date. If hire start date is null it filters on the Offer Actual Start Date.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.

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Filter	Description
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.
Last Position Accepted Date is prompted	This is a listener for a prompt.
Hired Date is prompted	This is a listener for a prompt.
Offer Accepted Date is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Submission Transition Process Name (BL) is not null	Filter to ensure only records with onboarding processes are returned.
Submission Transition Process Name (BL) is prompted	This is a listener for a prompt.
Submission Transition Process Current Status is prompted	This is a listener for a prompt.
Submission Transition Process Start Date is prompted	This is a listener for a prompt.
Submission Transition Process End Date is prompted	This is a listener for a prompt.
Submission Transition Process Progression Health Is Red is prompted	This is a listener for a prompt.
Submission Transition Step Start Date is prompted	This is a listener for a prompt.

Filter	Description
Submission Transition Step End Date is prompted	This is a listener for a prompt.
Submission Transition Step Due Date is prompted	This is a listener for a prompt.
Submission Transition Task Name (BL) is prompted	This is a listener for a prompt.
Submission Transition Task Owner Name is prompted	This is a listener for a prompt.
Submission Transition Task Current Status is prompted	This is a listener for a prompt.
Submission Transition Task Due Date is prompted	This is a listener for a prompt.
Submission Transition Process Code is not null	Filter to ensure only records with onboarding processes are returned.

Onboarding Process Summary

This report provides a summary of all onboarding processes.

Report Columns

Name	Description
Req. Identifier	*Returns the requisition id, as displayed in the recruiting application.*
Req. Title	*Returns the requisition title, in its base language.*
Candidate Identifier	*Returns Candidate ID*
Candidate Name	*Returns the candidate name*
Correspondence Email	*Returns the subject correspondence email* or, if that is null, *Returns the candidate email*
Corporate Email	*Returns the subject corporate email*
Primary Phone Designation	*Returns the candidate primary phone designation*
Mobile Phone	*Returns the subject mobile phone number* or, if that is null, *Returns the candidate mobile phone number*
Home Phone	*Returns the subject home phone number* or, if that is null, *Returns the candidate home phone number*
Work Phone	*Returns the subject work phone number* with the *extension*, if available, or, if the subject home phone number is null, *Returns the candidate work phone number*
Fax Number	*Returns the subject fax number*
Department Name	*Returns the subject department name*
Current Reference Status Name	*Returns the current reference status name*
Current Workflow Name	*Returns the name of the candidate selection workflow used for this job submission.*

Name	Description
Current Step Name	*Returns the current CSW step name*
Current Status Name	*Returns the current CSW status name*
Current Status Start Date	*Returns the date when the candidate was moved to the current status.*
Hiring Manager Name	*Returns the hiring manager name*
Hiring Manager Email	*Returns the hiring manager email*
Organization Level1 Name	*Returns the name of the organization*
Job Field Level1 Name	*Returns the name of the requisition job field.*
Location Level1 Name	*Returns the name of the requisition primary location.*
Submission Is Completed	*Returns whether or not the submission is complete*
Submission Is Internal	*Returns whether or not the candidate was internal as of when he/she created the submission*
Submission Created Date	*Returns the date/time when the submission was created*
Submission Completed Date	*Returns the date/time when the submission was completed*
Hired Candidate Start Date	*Returns the hire start date/time as entered when the candidate is moved to the Hired reference status* . If the hire start date is not available the system returns *the hire start date as entered in the candidate job offer section.*
Hired Date	*Returns the most recent date/time when the candidate was moved to the Hired reference status.*
Offer Accepted Date	*Returns the date/time when the candidate accepted the job offer*
Latest Filled Date	*Returns the date/time when the requisition was most recently filled.*
Latest Position Accepted Date	*Returns the date/time when the last position was accepted on the requisition.*
First Sourced After Latest Approval Date	*Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.*
Req. Status	*Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.*
Time to Hire	*Returns the average number of days between the first fully approved date and the hired date.*
Submission Cycle Time	*Returns the average number of days between the submission completed date and hired date.*
Time to Start	*Returns the average number of days between the the first fully approved date and the hire start date (offer actual start date, if hire start date is null).*
Onboarding Process Name (BL)	*Returns the process name in its base locale*
Onboarding Process Code	*Returns the submission transitions process code*
Onboarding Process Current Status	*Returns the submission transitions process current status*
Onboarding Process Start Date	*Returns the submission transitions process start date*
Onboarding Process End Date	*Returns the submission transitions process end date*
Onboarding Process Percent Complete	*Returns the submission transitions process percent complete*
Onboarding Process Progression Health Is Red	*Returns yes if a step or task in the submission transitions process is overdue.*
Onboarding Process Owner Full Name	*Returns the submission transitions process owner full name*

Name	Description
Onboarding Process Days In Progress	*If the submission transitions process is in progress, the time in days between the submission transitions process start date and the current date is returned.*
Onboarding Process Days To Complete	*If the submission transitions process is complete, the time in days between the profile transitions process start date and the profile transitions latest status change date.*

Report Prompts

All report prompts are optional.

Name	Description
Transitions Prompts	
Process Start Date	Filters the report based on whether the process start date is between two selected dates.
Process End Date	Filters the report based on whether the process end date is between two selected dates.
Process Name (BL)	Filters the report based on whether the process name is in the list of values selected.
Process Current Status	Filters the report based on whether the process current status is in the list of values selected.
Process Owner Full Name	Filters the report based on whether the process owner full name is in the list of values selected.
Process Progression Health Is Red	Filters the report based on whether process progression health is red indicator is in the list of values selected.
Report Prompts	
Submission Current Status Start Date	Filters the report based on whether the submission current status start date is between two selected dates.
Submission Created Date	Filters the report based on whether the submission created date is between two selected dates.
Hired Candidate Start Date	Filters the report based on whether the hired start date is between two selected dates. If the hire start date is null the offer actual start date is used.
Hired Date	Filters the report based on whether the hired date is between two selected dates.
Offer Accepted Date	Filters the report based on whether the offer accepted date is between two selected dates.
Ref. Status Name	Filters the report based on whether the current status reference name is in the list of values selected.
Workflow Name	Filters the report based on whether the current workflow name is in the list of values selected.
Step Name	Filters the report based on whether the current step name is in the list of values selected. If the workflow name filter is being used, only the steps in the selected workflow will be available.
Status Name	Filters the report based on whether the current status name is in the list of values selected. If the step name filter is being used, only the statuses in the filtered steps will be available.
Organization (Level 1)	Filters the report based on whether the organization level1 name is in the list of values selected.
Organization (Level 2)	Filters the report based on whether the organization level2 name is in the list of values selected. If the Organization (Level 1) filter is being used, only the child organizations in organization level2 will be available.
Organization (Level 3)	Filters the report based on whether the organization level3 name is in the list of values selected. If the Organization (Level 2) filter is being used, only the child organizations in organization level3 will be available.

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Name	Description
Organization (Level 4)	Filters the report based on whether the organization level4 name is in the list of values selected. If the Organization (Level 3) filter is being used, only the child organizations in organization level4 will be available.
Location (Level 1)	Filters the report based on whether the location level1 name is in the list of values selected.
Location (Level 2)	Filters the report based on whether the location level2 name is in the list of values selected. If the Location (Level 1) filter is being used, only the child locations in location level2 will be available.
Location (Level 3)	Filters the report based on whether the location level3 name is in the list of values selected. If the Location (Level 2) filter is being used, only the child locations in location level3 will be available.
Location (Level 4)	Filters the report based on whether the location level4 name is in the list of values selected. If the Location (Level 3) filter is being used, only the child locations in location level4 will be available.
Job Field (Level 1)	Filters the report based on whether the job field level1 name is in the list of values selected.
Job Field (Level 2)	Filters the report based on whether the job field level2 name is in the list of values selected. If the Job Field (Level 1) filter is being used, only the child job fields in job field level2 will be available.
Job Field (Level 3)	Filters the report based on whether the job field level3 name is in the list of values selected. If the Job Field (Level 2) filter is being used, only the child job fields in job field level3 will be available.
Job Field (Level 4)	Filters the report based on whether the job field level4 name is in the list of values selected. If the Job Field (Level 3) filter is being used, only the child job fields in job field level4 will be available.
Recruiter Name	Filters the report based on whether the recruiter name is in the list of values selected.
Hiring Manager Name	Filters the report based on whether the hiring manager name is in the list of values selected.
Req. Identifier	Filters the report based on whether the req. identifier is in the list of values selected.
Req. Title	Filters the report based on whether the req. title is in the list of values selected.
Requisition Status	Filters the report based on whether the current status is in the list of values selected
Submission Is Internal	Filters the report based on whether the submission is internal indicator is in the list of values selected.

Report Filters

Filter	Description
Current Status Start Date is prompted	This is a listener for a prompt.
Submission Created Date is prompted	This is a listener for a prompt.
Submission Completed Date is prompted	This is a listener for a prompt.
Latest Filled Date is prompted	This is a listener for a prompt.
Current Reference Status Name is prompted	This is a listener for a prompt.
Current Workflow Name is prompmted	This is a listener for a prompt.
Current Step Name is prompted	This is a listener for a prompt.

Filter	Description
Current Status Name is prompted	This is a listener for a prompt.
Organization Level1 Name is prompted	This is a listener for a prompt.
Organization Level2 Name is prompted	This is a listener for a prompt.
Organization Level3 Name is prompted	This is a listener for a prompt.
Organization Level4 Name is prompted	This is a listener for a prompt.
IFNULL("Submission Dates"."Hire Start Date","Submission Dates"."Offer Actual Start Date")	This is a listener for a prompt. When the prompt is set this value filters on the Hire Start Date. If hire start date is null it filters on the Offer Actual Start Date.
Location Level1 Name is prompted	This is a listener for a prompt.
Location Level2 Name is prompted	This is a listener for a prompt.
Location Level31 Name is prompted	This is a listener for a prompt.
Location Level4 Name is prompted	This is a listener for a prompt.
Job Field1 Name is prompted	This is a listener for a prompt.
Job Field2 Name is prompted	This is a listener for a prompt.
Job Field3 Name is prompted	This is a listener for a prompt.
Job Field4 Name is prompted	This is a listener for a prompt.
Recruiter Name is prompted	This is a listener for a prompt.
Hiring Manager Name is prompted	This is a listener for a prompt.
Req. Identifier is prompted	This is a listener for a prompt.
Title (BL) is prompted	This is a listener for a prompt.
Is Ace is prompted	This is a listener for a prompt.
Minimum Requirements Met is prompted	This is a listener for a prompt.
Submission Is Internal is prompted	This is a listener for a prompt.

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Filter	Description
Submission Is Completed is prompted	This is a listener for a prompt.
Current Status is prompted	This is a listener for a prompt.
Last Position Accepted Date is prompted	This is a listener for a prompt.
Hired Date is prompted	This is a listener for a prompt.
Offer Accepted Date is prompted	This is a listener for a prompt.
First Sourced After Latest Approval Date is prompted	This is a listener for a prompt.
Submission Transition Process Code is not null	Filter to ensure only records with onboarding processes are returned.

5 **Creating Analyses**

Creating Analyses

What are Analyses

An analysis is a query against an organization's data that provides answers to business questions. A query contains the underlying SQL statements that are issued to the Oracle BI Server.

Analyses let you explore and interact with information by visually presenting data in tables, graphs, pivot tables, and so on. You can save, organize, and share the results of analyses.

Analyses that you create can be saved in the Oracle BI Presentation Catalog and integrated into any Oracle BI EE dashboard. Analyses can be enhanced through features such as graphs, result layout, calculated items, and drilling.

How are Analyses Processed

When an analysis is processed, the request is sent in the form of logical SQL statements to the Oracle BI Server. The BI Server generates queries against the appropriate data sources. When the BI Server receives the query results, they are in a format that is not yet suitable for returning to the user. The BI Server merges the results and applies any additional calculations or filters that pertain to the results. The BI Server then sends the data to Oracle BI Presentation Services to format the results for display.

Embedding an Analysis in a Dashboard

This is a short description.

Embedding an analysis in a dashboard causes it to execute automatically and display the most current results every time the dashboard is accessed. This provides access to the most current results. For example, if you are a recruiter, then you might want to have metrics on your currently open requisitions displayed on the front page of your dashboard.

You can embed saved analyses by using the Dashboard editor. For information about the Dashboard editor, see *"Dashboard Content"*.

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Subject Areas and Columns

What are Subject Areas and Columns

A subject area contains folders, measure columns, attribute columns, hierarchical columns, and hierarchy levels that represent information about the areas of an organization's business or about groups of users with an organization. Subject areas usually have names that correspond to the types of information that they contain, such as Recruiting, Onboarding, and Performance Management.

> ✏ **Note:** In the 13B release there will only be a Recruiting subject area.

A subject area corresponds to the presentation layer in an Oracle BI metadata repository. In a repository, the subject area is the highest-level object in the presentation layer and represents the view of the data that end users see when they create or edit an analyses.

Individuals who design and build metadata repositories (Oracle Administrators) create subject areas using the Oracle BI Administration Tool. Generally, rather than creating one large subject area for their company's data, they create multiple smaller subject areas. This enables them to provide a particular group of users or a particular area of a company with the most important data that they need in one small subject area and the less important data in one or more related subject areas created from the same business model layer. Having these smaller subject areas makes it easier for users to find the data they need. It also makes it easier to maintain the data.

> ✏ **Note:** The individuals who design and build metadata repositories can specify that a subject area, folder (and its children), or column (both attribute and hierarchical) is to be hidden. A hidden subject area, folder, or column is not visible in the *"Subject Areas pane"* but is visible elsewhere, such as in an analysis or saved filter contents. (Because the object is still visible elsewhere, hiding a subject area, folder, or column in this way is not a solution for security or access control.) If the criteria of an existing analysis includes a subject area, folder, or column that is subsequently hidden, the analysis is still accessible but the subject area, folder, or column is no longer visible in the Subject Areas pane of the *"Analysis editor: Criteria tab"*.

Columns contain the individual pieces of data that an analysis returns. Columns usually have names that indicate the types of information that they contain, such as Account or Contact. Together with filters and selection steps, columns determine what data an analysis contains.

Typically, when you query a single subject area, all the measure columns that are exposed in that subject area are compatible with all the attribute columns and hierarchical columns that are exposed in the same subject area.

For an analysis to return data, you must select at least one column to include in the analysis.

What are the Types of Columns

Attribute Column

Holds a flat list of values that are also known as members. No hierarchical relationship exists between these members, as is the case for members of a hierarchical column.

Examples include Requisition ID or Name

Hierarchical Column

Holds data values that are organized using both named levels and parent-child relationships. This column is displayed using a tree-like structure. Individual members are shown in an outline manner. Hierarchies allow you to drill deeper into the data, to view more detailed information. Examples include Organization or Location.

A hierarchical column can be one of the following kinds:

- Level-based hierarchy: Consists of an ordered set of two or more levels. For example, a Time hierarchy might have three levels for Year, Quarter, and Month. Level-based hierarchies can also contain parent-child relationships.

- Parent-child hierarchy: Consists of values that define the hierarchy in a parent-child relationship and does not contain named levels. For example, an Employee hierarchy might have no levels, but instead have names of employees who are managed by other employees. Employees can have titles, such as Vice President. Vice Presidents might report to other Vice Presidents and different Vice Presidents can be at different depths in the hierarchy.

In addition to being level-based or parent-child, hierarchical columns can be one of the following:

- Ragged: A hierarchy in which all the lowest-level members do not have the same depth. For example, a Time hierarchy might have data for the current month at the day level, the previous month's data at the month level, and the previous 5 years' data at the quarter level. This type of hierarchy is also known as an unbalanced hierarchy.

- Skip-level: A hierarchy in which certain members do not have values for certain higher levels. For example, in the United States, the city of Washington in the District of Columbia does not belong to a state. The expectation is that users can still navigate from the country level (United States) to Washington and below without the need for a state.

- Measure Column: Holds a simple list of data values. It is a column in an Oracle BI EE repository, usually in a fact table, that can change for each record and can be added up or aggregated in some way. Examples include Revenue or Units Sold.

Throughout this guide, the term "column" on its own generally refers to all three types. Names for specific types of columns are included where necessary.

How are Columns Indicated Visually

Each type of column is indicated by its own icon in places such as the Subject Areas pane and Layout pane. You can expand level-based hierarchies and see their levels. Parent-child hierarchies are shown as hierarchical columns that have no levels.

Understanding the Double Column Feature

Oracle BI EE provides a feature called double columns. When a repository is configured for the double column feature, column data includes a display column that has a code column mapped to it (that is, it has double columns). A display column contains the display values for the column data, for example, Excellent, Good, and Poor. A code column contains code values that uniquely identify display values and are consistent across users or locales, for example, the code values 1 (uniquely identifying Excellent), 2 (uniquely identifying Good), and 3 (uniquely identifying Poor).

When Oracle BI EE processes a double column, for example, as part of the criteria of an analysis or as the basis for a filter, it generates and issues SQL statements to the Oracle BI Server that use code values rather than display values, thereby making the filter language independent.

The double column feature lets you:

- Build internationalized analyses that are automatically filtered by language independent codes. For example, you can build one filtered analysis that can be used by both French-language users and English-language users.

- Build common analyses that can be shared among groups even if the groups require different display values. For example, you can build a common analysis that displays for a Status field the values Excellent, Good, and Poor to one group, and Superb, Okay, and Bad to another group.

- Change display values without breaking existing analyses. For example, suppose that you have an analysis that is filtered on the display value Excellent. If it is a double column, then the filtering is performed on its code column with the code value for "Excellent" rather than the display value of "Excellent." This means that you can change the display value Excellent to Superb without breaking the existing analysis.

In addition, if your organization allows the display of code values within Oracle BI EE, you can use code values rather than the display values in some dialogs, such as the *"New Filter dialog"*. This means, for example, when specifying the values to use when applying a filter, you can specify code values rather than display values.

Before you can take advantage of the double column feature, your administrator must configure your repository by mapping code columns to display columns. Check with the administrator to see if your repository is configured for double columns.

What is the Analysis Editor

The *"Analysis editor"* lets you explore and interact with information by visually presenting data in tables, graphs, pivot tables, and so on. You can include the views that you create in an analysis for display in dashboards.

The Analysis editor contains the following tabs:

- Criteria tab — Lets you specify the criteria for an analysis, including columns, and filters. You can specify the order in which the results should be returned, formatting (such as headings, number of decimal places, styles such as fonts and colors, and conditional formatting), and column formulas (such as adding a Rank or Percentile function).

- Results tab — Lets you create different views of the analysis results such as graphs, tickers, and pivot tables. You can also add or modify selection steps.

- Prompts tab — Lets you create prompts that allow users to select values to filter an analysis or analyses on a dashboard. Prompts allow users to select values that dynamically filter all views within the analysis or analyses. You can also create prompts for use with selection steps, both for member selection steps and qualifying condition steps.

- Advanced tab — Lets you edit XML code and examine the logical SQL statement that was generated for an analysis. You can use the existing SQL statement as the basis for creating a new analysis.

The tabs of the Analysis editor are organized into various panes and areas. As you work, you can manage these panes to suit your needs. See *"Managing Panes in the Analysis Editor Tabs"*.

You access the Analysis editor when you create (or edit) an analysis. See *"Creating New Analyses"*.

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> ✎ **Note:** If you are using Oracle BI EE in accessibility mode, then, when you create (or edit) an analysis, the Analysis editor is replaced by the *"BI Composer"*. For more information on accessibility mode, see Appendix C, Accessibility Mode.

Managing Panes in the Analysis Editor Tabs

This is a short description.

Each of the tabs in the Analysis editor consists of several panes. For example, the Results tab consists of the *"Subject Areas pane"*, the *"Catalog pane"*, the *"Views pane"*, the *"Compound Layout"*, and the *"Selection Steps pane"*.

As you work, you can manage these panes to give yourself the most efficient work area for the task that you are performing. For example, if you add multiple views to the compound layout on the Results tab, then you might want to hide the other panes in the Results tab to maximize the area in which to see the views that you are adding. You can:

- Show or hide the panes that are displayed on the left side of the Analysis editor by clicking the sideways triangle button that is displayed between the left and right sides.
- Expand or collapse an individual pane by clicking the plus or minus button in the title bar of the pane.
- Resize an expanded pane by dragging its splitter. For example, you can drag the splitter on top of the Catalog pane up to increase the height of the pane.
- Show or hide a pane by clicking its show/hide toolbar button, if one is available for the pane on the toolbar. For example, you can show or hide the Filters pane in the Criteria tab by clicking the Show/Hide Filters pane button on the toolbar.

What is the Process for Constructing Analyses

The process for constructing an analysis includes the following steps:

1. *"Creating New Analyses"*
2. *"Specifying the Criteria for Analyses"*
3. *"Displaying the Results of Analyses"*
4. *"Adding Prompts to Analyses"*
5. *"Examining the Logical SQL Statements for Analyses"*
6. *"Saving Analyses"*

Creating New Analyses

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

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This procedure is a step in the process for constructing an analysis. For more information, see *"What Is the Process for Constructing Analyses?"*

Home > **Oracle Business Intelligence** > **New** > **Analysis**
1. Select a subject area.

The Analysis editor is displayed.

Specify the criteria for the analysis. See *"Specifying the Criteria for Analyses"*.

Specifying the Criteria for Analyses

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

This procedure is a step in the process for constructing an analysis. For more information, see *"What Is the Process for Constructing Analyses?"*

You use the *"Analysis editor: Criteria tab"* to specify the criteria for an analysis, including columns, filters, and selection steps. You also can specify:

- The default order in which columns are to be displayed in the analysis results
- The default sorting for the values that are displayed in views
- The default formatting (such as headings, number of decimal places, conditional formats, and system wide defaults)
- Column formulas (such as adding a Rank or Percentile function)
- The aggregation rules for column totals

Home > **Oracle Business Intelligence** > **Catalog**
1. Navigate to the analysis.
2. Edit the analysis.
3. In the Criteria tab, select the columns to be included in the analysis by doing one of the following:
   - Double-clicking the columns in the *"Subject Areas pane"*.
   - Dragging and dropping the columns from the Subject Areas pane to the *"Selected Columns pane"*.

     To select multiple non-contiguous columns, press and hold the Ctrl key, then click each column to include.

     ✏ **Note:** In general, the analysis should contain at least one measure column. Measure columns are the key additive measurements of business performance, such as dollar sales per store, or the number of service requests opened and closed each day. An analysis without any measure columns generally is not meaningful, and can cause poor query performance or unexpected results. If you want to build an analysis without any measure columns, then first consult the administrator.

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The selected columns are displayed in a box in the Selected Columns pane. Each column box has two sections. The upper section shows the name of the folder that contains the column, for example, Requisitions. The lower section shows the name of the column, for example, Requisition Title.

If you want to:

- o Add or remove related subject areas from which to select columns, click the Add/Remove Subject Areas toolbar button in the Subject Areas pane to display the *"Add/Remove Subject Areas dialog"*.If you add a related subject area but do not add any columns from that subject area to the analysis, then the subject area is not related to the analysis after you close and re-open the analysis.
- o Refresh the content in the Subject Areas pane, click the Refresh toolbar button on the Subject Areas pane or click the arrow beside the button. Clicking the button executes the default behavior of Refresh Display. Clicking the arrow enables you to select Refresh Display or Reload Server Metadata to refresh the subject area's metadata.

   For more information about these options, see the *"Subject Areas pane"*.

4. Modify the columns or levels of hierarchical columns as needed using the Selected Columns pane:
   - o Click the Options button to the right of a column name in the Selected Columns pane to display options to:
      - Specify the sort order for columns. (You cannot specify the sort order for hierarchy levels.)

         For more information, see *"Sorting Data in Views".*
      - Edit formulas for attribute columns and measure columns, including customizing headings, and specifying the aggregation rule. (You cannot customize headings, specify the aggregation rule, or edit the formulas for hierarchical columns or for hierarchy levels.)

         For more information, see *"Editing the Formula for a Column".*
      - Edit column properties to control the formatting and interaction of columns and hierarchy levels.

         For more information on applying formatting, see *"Column Format in Analyses".*
      - Add filters for attribute columns and measure columns. (You cannot add filters for hierarchical columns or hierarchy levels.) For more information, see *"Creating a Column Filter".*
      - Delete the columns from the analysis. (You cannot delete hierarchy levels.)
      - Save a column to the catalog using the Save Column As option. When you save a column to the catalog, save the column to the subject area folder under My Folders or Shared Folders to ensure it is available when you build an analysis for the same subject area. If a subject area folder does not exist, OBI creates a subject area folder and the Save As dialog defaults a save path to My Folders > Subject Area Contents > subject areas. Selections, filters, conditional actions links, and conditional formatting are not saved. References to the column are changed from the subject area to the catalog. You can reuse a saved column in another analysis by dragging and dropping it from the Catalog pane. You can edit a saved column. Changes that you make from the Catalog pane and Catalog page apply to all versions of the saved column. Edits that you make within an analysis apply only to that analysis.
   - o Click the Remove all columns from criteria toolbar button in the Selected Columns pane to remove all columns from the analysis.
   - o Click the Combine results based on union, intersection, and difference operations toolbar button in the Selected Columns pane to combine the results of two or more analyses into a single result. For more information, see *"Combining Columns Using Set Operations".*
   - o Use the Drag Column buttons in the Selected Columns pane to place the columns in the default order for display in the analysis results.

5. Add and edit inline filters as needed using the *"Filters pane"*

   For more information, see *"Creating a Column Filter".*

6. Create or edit selection steps as needed using the *"Selection Steps pane".*

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For more information, see *"Working with Selections of Data"*.

7. Add named filters, calculated items, and groups from the Oracle BI Presentation Catalog as needed using the *"Catalog pane"*.

8. Use the buttons on the toolbar for the Criteria tab, as needed, to show or hide the Filters pane, to show or hide the Selections Steps pane, and to edit the properties of the analysis, such as the type of message (default or custom) to be displayed if no results are available.

You can now add views to the analysis. See *"Displaying the Results of Analyses"*.

Column Formulas

You can edit the formulas for attribute columns and measure columns when you specify the criteria for an analysis. This editing affects the column only in the context of the analysis and does not modify the formula of the original column in the subject area. You can also customize table and column headings and specify the aggregation rule for column totals. (This functionality is not available for hierarchical columns.)

A column formula specifies what the column values represent. In its most basic form, such as "Base Facts"."1-Revenue", a column takes the data from the data source as is. You can edit the formula to add functions, conditional expressions, and so on. This editing enables you to present analysis results in a variety of ways. For example, suppose that you want to perform what-if analysis and show what the revenue might be by product if you increased revenue by 10%. You can see this increase by changing the formula for the Revenue column to show the revenue increased by 10%.

Related Topics

*   *"What Are Analyses?"*
*   *"Specifying the Criteria for Analyses"*

Editing the Formula of a Column

You must have one of the following user type permissions:

*   BI Author Limited
*   BI Author Developer
*   BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Navigate to the analysis.
2. Edit the analysis.
3. In the *"Selected Columns pane"*, click the Options button beside the column whose formula you want to edit and select Edit Formula. The *"Edit Column Formula dialog"* is displayed.
4. Use the *"Edit Column Formula dialog: Column Formula tab"* to perform various tasks such as creating customized headers and creating or editing the formula for the column. You can build a simple mathematical formula using operator and character buttons, such as "Base Facts"."1-Revenue"*1.10. You can click the Variable button to create and use a global variable to maintain a value that may need to be changed during the course of business across multiple analyses. You create a global variable as part of the process of creating an analysis. For example, you can create a global variable for the start of the fiscal year and change it as necessary for the start of each new fiscal year.
5. Optionally, use the *"Edit Column Formula dialog: Bins tab"* to combine values for the column into sets.
6. Click OK.

The column formula is saved with the analysis in which it is used.

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Combining Columns Using Set Operations

After you have selected a subject area for an analysis, you can combine columns from one or more subject areas using Set operations such as Union or Intersect. By combining columns, you create a new column for displaying the data in a different way.

Guidelines for Selecting Columns to Combine

When selecting columns to combine, keep the following guidelines in mind:

- The number and data types of the columns to combine must be the same. The number of rows that are returned for each column can differ.

- You can select columns from the same subject area or from a different subject area, but the columns must have some commonality.

- You can specify one Set operation for one collection of criteria. For example, if you create criteria from the A-Sample Sales subject area, you can apply only one Set operation to those columns. You cannot apply different Set operations to different columns in the collection of criteria.

- You cannot use hierarchical columns, selection steps, or groups when you combine criteria.

Difference Between Combining Columns Using Set Operations and Adding Columns from Related Subject Areas

Combining columns using Set operations produces different results than adding columns from related subject areas:

- When you combine columns using Set operations, the analysis results show a single newly combined column governed by a Set operation. For example, see *"Combining Columns from One or More Subject Areas"*.

- When you add columns from related subject areas to an analysis, the results show each added column individually. For example, if you have the appropriate permissions, then you can create an analysis by selecting one column from a primary subject area and selecting another column from a related subject area.

For information, see *"What Are Subject Areas and Columns?"*

Combining Columns from One Subject Area

The A-Sample Sales subject area contains the Offices folder, which contains the D1 Office and D2 Department columns. You can combine these two columns and create a new column called Offices & Departments. You can include the Union All Set operation to specify that this new column shows all the values from both columns in a single column in a table.

Combining Columns from one or more Subject Areas

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Create or edit an analysis.
2. In the Analysis editor, create an empty analysis that uses a subject area such as Recruiting.
3. In the Criteria tab, select the columns to include in the analysis. For example, select Name from the Candidates folder and Average Submission Cycle Time from the Candidate Cycle Time folder.
4. In the *"Selected Columns pane"*, click the Combine results based on union, intersection, and difference operations toolbar button to display the Select Subject Area menu.
5. Select a subject area that contains the columns to combine with the columns that you have previously included. For example, click Talent Profile.

   The Set Operations area is displayed in the Selected Columns pane. Note the boxes with dotted line borders that are displayed below the criteria. These boxes indicate the kind of column that you must combine with those that you have previously included. For example, the boxes might include "Add Column (Name)" and "Add Column (Average Submission Cycle Time)". This text indicates that the columns that you include in each of those boxes is combined with the previously selected Name and Average Submission Cycle Time columns using a Set operation to form a new column. When you combine measure columns, no arithmetic operations are performed.

6. In the Subject Areas pane, select the columns to combine with the originally selected columns. For example, from the Employee folder, select Name and from the Talent Profile Facts folder, select Average Time to Complete Talent Profile.

   Note that the boxes that previously had dotted line borders now hold the columns that you have just selected. You have now specified the columns to combine.
7. Click the Union button under the Result Columns link. Select the operation type to use for combining the columns. For example, select the Union All type.

   The result columns are those that are displayed in views after applying the set operation of the derived columns.
8. Click the Result Columns link. Note that the Selected Columns pane is updated to show the newly combined columns that you have just created. You can work with these columns as you do other columns in this pane. For example, you can rename the first column (that is the single newly combined column) by following these steps:
   a. Click the Options button for the Average Submission Cycle column.
   b. Select Column Properties.
   c. Select Column Format.
   d. Ensure that Custom Headings is selected.
   e. In the Column Heading box, enter `Average Time to Complete Required Tasks`.
   f. Click OK.
9. Click the Results tab to view the columns in a table in the *"Compound Layout"*.

Analysis Results

This is a short description.

You use the *"Analysis editor: Results tab"* to add different views of the results such as graphs, tickers, and pivot tables. For a list of the views that you can add, see *"What Types of Views Are Available?"*

When you create an analysis and display the Results tab, you see in the *"Compound Layout"* a title view and either a table or pivot table view by default, based on the following:

- If the analysis contains only attribute columns and measure columns, then a table is displayed by default.
- If the analysis contains at least one hierarchical column, then a pivot table is displayed by default.

You can combine views and position them anywhere in the Compound Layout. For example, you can create side-by-side pivot tables that reflect different views of the data, graphs that allow you to explore interrelationships in depth, and filters that limit the results.

Together all of these views are called a compound layout. You can create additional compound layouts, as described in *"Creating Additional Compound Layouts"*.

Displaying the Results of Analyses

This procedure is a step in the process for constructing an analysis. For more information, see *"What Is the Process for Constructing Analyses?"*

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Click the Results tab.
2. (Optional) Edit the table or pivot table or add additional views. For more information, see *"Adding Views for Display in Dashboards"*.

The results of the analysis are displayed in a table or pivot table.

Additional Compound Layouts

As you work with an analysis, you can create multiple compound layouts that use different combinations of views. For example, one layout might include a graph and a title, and another layout might include a graph and a narrative view. When you add the analysis to a dashboard page, you can select which layout you want to include on that page.

Creating Additional Compound Layouts

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the analysis.
2. Click the *"Analysis editor: Results tab"*.
3. Create another compound layout in the *"Compound Layout"* by clicking one of the following buttons on the toolbar of the Results tab:
    - Create Compound Layout — Creates a new instance of the compound layout.
    - Duplicate Compound Layout — Creates a copy of the current compound layout, with the same views.

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No Data in the Results Alert

This is a short description.

When the results of an analysis return no data, the following default message is displayed to users:

```
No Results
The specified criteria didn't result in any data.
This is often caused by applying filters and/or selections that are too
restrictive or that contain incorrect values.
Please check your Analysis Filters and try again.
The filters currently being applied are shown below.
```

Rather than display the default message, you can create a customized message to alert users. This message enables you to provide your own explanation for why the analysis returned no data.

Alerting Users to No Data in the Results of Analyses

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the analysis to which you want to add a custom message.
2. Click the *"Analysis editor: Results tab"*.
3. Click the Analysis Properties toolbar button. The *"Analysis Properties dialog"* is displayed.
4. In the No Results Settings box, select Display Custom Message.
5. In the Header field, enter the text of the header for the custom message.
6. In the Message field, enter the explanatory text.
7. Click OK.

Adding Prompts to Analyses

This procedure is a step in the process for constructing an analysis. For more information, see *"What Is the Process for Constructing Analyses?"*

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the analysis to which you want to add a prompt.

2. Click the Prompts tab.

3. Add the prompt, as described in Chapter 6, *"Prompting in Dashboards and Analyses"*.

Examining the Logical SQL Statements for Analyses

You use the "Analysis editor: Advanced tab" to examine the XML code and logical SQL statement that is generated for an analysis and optionally create a new analysis based on that SQL statement. Generally you need not use the features of this tab, because the vast majority of functionality for working with analyses is provided through the user interface. The following list provides examples of situations in which you might want to examine SQL statements:

- You can use the Prefix section to override any user variable or session variable that has been marked as available for updating. You can specify multiple variables to update with one line of code.
  To override variables, use the following syntax:
  `SET VARIABLE var-name=value`
  For example, you can set the variables that are shown in the following code line:
  `SET VARIABLE "My Variable"=4, DISABLE_CACTHE_HIT=1, LOGLEVEL = 2;`
  For information on variables, see "*Where Can I Reference Variables?*"

- You can temporarily change the logging level for an analysis for troubleshooting, even when logging is turned off for analyses. In the Prefix section of the Advanced tab, you can specify the following:
  `SET VARIABLE LOGLEVEL=4;`
  This specification runs the analysis at level 4, which facilitates advanced troubleshooting. The default level is 0, which indicates no logging. You can view the logs using the View Log link on the "*Administration: Manage Sessions page*".

- You can enter your own logical SQL statements. Entering your own statements eliminates many features of Oracle BI EE (such as hierarchical columns, selection steps, groups, and formatting), but enables you to use functions such as SET operations.

- You can create a new analysis using the SQL statements from an existing analysis as your starting point.

Before working with the Advanced tab, keep the following important points in mind:

- This procedure is only for advanced users and developers that have the appropriate responsibilities to access the Advanced tab. It is assumed that you understand advanced SQL statements, have expertise working with the Oracle BI Server metadata, are familiar with the SQL information in Appendix D, "Logical SQL Reference", and understand the content and structure of the underlying data sources.

- This tab provides the Advanced SQL Clauses area, which enables you to add clauses to the SQL statements and other similarly advanced features. These features, except for the ability to specify a prefix, are disabled for analyses that contain hierarchical columns, member selections, or groups.

- The links at the top of the tab allow you to download analysis results into Microsoft Excel. You might be unable to download analysis results based on the security features that have been configured at your organization. For information, contact your administrator.

  ✏ **Note:** You can see the logical SQL statement that an analysis is using by inserting a logical SQL view. You can also enter SQL statements using the "Administration: Issue SQL page".

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Editing XML Code or SQL Generated for an Analysis

This procedure is a step in the process for constructing an analysis. For more information, see *"What Is the Process for Constructing Analyses?"*

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

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1. Edit the analysis.
2. Click the *"Analysis editor: Advanced tab"*.
3. Use the links that correspond to the analysis name in the Referencing the Results area at the top of the tab to:
   - Display pages that contain links for working with the results of the analysis.

   - Download a file for working with the results of the analysis in Excel. For information, see "Integrating an Analysis with Microsoft Excel's Internet Query Feature".
4. Use the fields in the Analysis XML area to view and modify the XML code, and click Apply XML.

   If you modify the XML code, then you affect the analysis as it is saved in the Oracle BI Presentation Catalog.

   To apply the settings for the Partial Update and the Bypass Oracle BI Presentation Services Cache boxes, you must also click the Apply SQL button at the bottom of the tab.

5. Use the read-only box in the SQL Issued area to examine the SQL statement that is sent to the Oracle BI Server when the analysis is executed.

   If you want to create an analysis using the SQL statement from the current analysis as the starting point, then click the New Analysis button. Any hierarchical columns, selection steps, groups, or formatting that are specified in the current analysis are removed.
6. Depending on the content of the analysis, use the available fields in the Advanced SQL Clauses area to change the subject area, add GROUP BY or HAVING clauses, and specify DISTINCT processing and a prefix.
7. Click Apply SQL to apply your changes.

   Use care when clicking the Apply SQL button. When you do, Oracle BI EE creates a new analysis based on the SQL statement that you have added or modified. Therefore, you lose all views, formatting, and so on that you had previously created for the analysis. The XML code is also modified for the new analysis.

Saving Analyses

You can save an analysis to a:

- Personal folder, from which only you can access it.
  Your top-level personal folder is called My Folders. Every user with a unique user name has a folder called My Folders. This is designed to hold the analyses that you run most often, and other content that you access frequently. When you click the Refresh Display link at the bottom of the pane, the analysis is listed under the folder in which you saved it.

- Shared folder, from which users with permission to access that folder can access it.

- Lotus Notes database by either:

  o Saving the analysis to a Web archive file (file extension .mht), and then uploading the file to the Lotus Notes database.
  o Saving the analysis and scheduling it to be sent by email automatically to a specific address on a Lotus Notes server using an agent. The Lotus Notes server can then process the email and write it to the database.

Saving an Analysis

This procedure is a step in the process for constructing an analysis. For more information, see *"What Is the Process for Constructing Analyses?"*

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

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1. Edit the analysis.
2. In the Analysis editor, click the Save Analysis toolbar button to display the dialog to save the analysis.
3. If you want to save the analysis to a personal or shared folder:
   a. In the Save In box, select the personal or shared folder in which to save the analysis.
   b. In the Name field, enter a name for the analysis, such as hiring_manager_open_requisitions.
   c. Click OK.
4. If you want to save the analysis to a Lotus Notes database using a Web Archive file:
   a. In the Save In box, select the folder in which to save the analysis.
   b. In the Name field, enter a name for the analysis, including an .mht file extension, such as hiring_manager_open_requisitions.mht.
   c. Click OK.
   d. Upload the .mht file to the Lotus Notes database.
5. f you want to save the analysis to a Lotus Notes database using an agent:
   a. In the Save In box, select the folder in which to save the analysis.
   b. In the Name field, enter a name for the analysis, such as hiring_manager_open_requisitions.
   c. Click OK.
   d. Create the agent, scheduling it to be sent by email to a specific address on a Lotus Notes server.

      For more information on creating an agent, see *"Creating Agents".*

Creating Agents from Analyses

This is a short description.

You can create an agent directly from an analysis. When you create an agent using this method, Oracle BI EE does the following:

- Creates a condition based on the analysis and adds the condition to the *"Agent editor: Condition tab"*

- Adds the analysis as the content delivery on the *"Agent editor: Delivery Content tab"*

For more information on agents, see *"Delivering Content"*.

Creating an Agent from an Analysis

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

1. Locate the analysis from which you want to create an agent using one of the following methods:
   - Open the analysis, click the *"Analysis editor: Results tab"* and then the Schedule toolbar button.

     The analysis is saved and then the *"Agent editor"* is displayed.
   - Navigate to the analysis on the *"Catalog page"*, click the More list, and then click the Schedule option.

     The *"Agent editor"* is displayed.
2. Complete the following tabs of the Agent editor:
   - *"Agent editor: General tab"*
   - *"Agent editor: Schedule tab"*
   - *"Agent editor: Condition tab"*
   - *"Agent editor: Delivery Content tab"*
   - *"Agent editor: Recipients tab"*
   - *"Agent editor: Destinations tab"*
   - *"Agent editor: Actions tab"*
3. Save the agent.

Editing an Analysis

> ✎ **Note:** If you are using Oracle BI in accessibility mode, then you use the *"BI Composer"* rather than the *"Analysis editor"* to edit analyses. For more information on BI Composer, see *"BI Composer"*. For more information on accessibility mode, see Appendix C, Accessibility Mode.

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

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1. In the global header, click Catalog to display the *"Catalog page"*.
2. Navigate to the analysis to edit and click the Edit link. The analysis is displayed in the *"Analysis editor"*.
3. Make the desired changes.
4. Save the analysis.

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About Embedding an Analysis in a Dashboard

Embedding an analysis in a dashboard causes it to execute automatically and display the results within the dashboard. This provides access to current results. For example, if you are a sales executive whose company captures sales data on a daily basis, then you might want to have the dollar volume of product that was sold today be displayed on the front page of your dashboard.

You can embed previously created analyses from the Oracle BI Presentation Catalog by using the Dashboard editor. For information about the Dashboard editor, see *"Adding Content to a Dashboard".*

Using Variables

You can reference variables in several areas of Oracle BI, including in analyses, dashboards, KPIs, actions, agents, and conditions. For example, suppose that you wanted to create an analysis whose title displays the current user's name. You can do this by referencing a variable.

Presentation Variables

A presentation variable is a variable that you can create as part of the process of creating one of the following types of dashboard prompts:

- Column prompt — A presentation variable created as part of a column prompt is associated with a column, and the values that it can take come from the column values.

  To create a presentation variable as part of a column prompt, in the *"New Prompt dialog"* (or Edit Prompt dialog), you have to select Presentation Variable in the Set a variable field and then enter a name for the variable in the Variable Name field.

  For information on working with column prompts, see *"Creating a Column Prompt"*.

- Variable prompt — A presentation variable created as part of a variable prompt is not associated with any column, and you define the values that it can take.

  To create a presentation variable as part of a variable prompt, in the *"New Prompt dialog"* (or Edit Prompt dialog), you have to select Presentation Variable in the Prompt for field and then enter a name for the variable in the Variable Name field.

  For information on working with variable prompts, see *"Creating a Variable Prompt".*

The value of a presentation variable is populated by the column or variable prompt with which it was created. That is, each time a user selects a value in the column or variable prompt, the value of the presentation variable is set to the value that the user selects.

Global Variables

You can create and use a global variable to maintain a value that may need to be changed during the course of business across multiple analyses.

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You create a global variable as part of the process of creating an analysis. For example, you can create a global variable for the start of the fiscal year and change it as necessary for the start of each new fiscal year.

Global variables can be of the following types:

- Date

- Date and Time

- Number

- Text

- Time

Where Can I Reference Variables

You can reference variables in the following areas (but not all types of variables can be referenced in each area):

- Title views. See *"Results tab: Title editor"*

- Narrative views. See *"Results tab: Narrative editor"*

- Static text views. See *"Results tab: Static Text editor"*

- Filters. See *"New Filter dialog"* and *"New EVALUATE_PREDICATE Function dialog"*.

- Column formulas. See *"Edit Column Formula dialog: Column Formula tab"*

- Conditional formatting conditions. See *"Column Properties dialog: Conditional Format tab"* and *"New Condition dialog"*.

- Table and column headings in analyses. See *"Column Properties dialog: Column Format tab"*

- Dashboard prompts and inline prompts. See *"New Prompt dialog"*

- Headers and footers for PDF output. See *"Edit Footer or Header dialog"*

- Link or image objects in a dashboard. See *"Link or Image Properties dialog"*

- Text objects in a dashboard. See *"Text Properties dialog"*

- Graphs to specify conditional formatting of graph data. See *"Graph Properties dialog: Style tab"* and *"Style and Conditional Formatting dialog: Conditional Formatting tab"*

- Gauge thresholds. See *"Enter Expression dialog"*

- Gauge limits. See *"Customize Gauge Limit dialog"*

- Agents. See the *"Agent editor: Delivery Content tab"*

- Actions to specify parameters. See *"Create New Action dialog"* and *"Edit Parameter Mapping dialog"*

- Conditions to specify parameters. See *"New Condition dialog"*

- Selection steps. See *"New Condition Step dialog"*

- KPIs to define thresholds. See *"KPI editor: States page"*

- KPIs included in a KPI watchlist. See *"Add KPI dialog"*

- URL fields in dialogs. See *"Image Map Prompt Properties dialog"*

For the syntax that you use to reference variables, see *"What Is the Syntax for Referencing Variables?"*

What is the Syntax for Referencing Variables

You can reference variables in analyses, dashboards, KPIs, and agents. How you reference a variable depends on the task that you are performing.

For tasks where you are presented with fields in a dialog, you must specify only the type and name of the variable (not the full syntax), for example, referencing a variable in a filter definition.

For other tasks, such as referencing a variable in a title view, you specify the variable syntax. The syntax you use depends on the type of variable as described in the *Syntax for Referencing Variables* table.

> ✏️ **Note:** In the syntax, if the "at" sign (@) is not followed by a brace ({), then it is treated as an "at" sign.

Syntax for Referencing Variables Table

Type of Variable	Syntax	Example
Presentation	@{variables.variablename}[format]{defaultvalue} or @{scope.variables['variablename']} where: • variablename is the name of the presentation or request variable, for example, MyFavoriteRegion • (optional) format is a format mask dependent on the data type of the variable, for example #,##0, MM/DD/YY hh:mm:ss. (Note that the format is not applied to the default value.) • (optional) defaultvalue is a constant or variable reference indicating a value to be used if the variable referenced by • variablename is not populated • scope identifies the qualifiers for the variable. You must specify the scope when a variable is used at multiple levels (analyses, dashboard pages, and dashboards) and you want to access a specific value. (If you do not specify the scope, then the order of precedence is analyses, dashboard pages, and dashboards.)	@{variables.MyFavoriteRegion}{EASTERN REGION} or @{dashboard.variables['MyFavoriteRegion']}

You also can reference variables in expressions. The guidelines for referenceing vairables in expressions are described in the *Guidelines for Referencing Variables in Expressions* table.

Guidelines for Referencing Variables in Expressions

Type of Variable	Guidelines	Example
Presentation	• Use this syntax: @{variablename}{defaultvalue} where variablename is the name of the presentation variable and defaultvalue (optional) is a constant or variable reference indicating a value to be used if the variable referenced by variablename is not populated. • To type-cast (that is, convert) the variable to a string, enclose the entire syntax in single quotes, for example: '@{user.displayName}' ✏ **Note:** If the @ sign is not followed by a {, then it is treated as an @ sign.	`"Market"."Region"=@{MyFavoriteRegion}{EASTERN REGION}`

For the specific areas where you can reference variables, see "*Where Can I Reference Variables?*".

What Predefined Presentation Variables are Available

The table *Predefined Presentation Variables* contains a list of the predefined presentation variables that you can reference in analyses, dashboards, KPIs, and agents. (Note that the syntax for these predefined presentation variables omits the variables. qualifier, for example, `@{session.locale}` rather than `@{session.variables.locale}`.)

✏ **Note:** For time zone variables, the time zone for a user must be set to a value other than Default in order for this variable to work. (Users set their preferred time zone in the "*My Account dialog: Preferences tab*".)

Predefined Presentation Variables

Scope	Presentation Variable	Example
system	productVersion	system.productVersion=11.1.1.3 (Build 090619.0110.000)
system	currentTime	system.currentTime=6/29/2009 7:35:59 PM
user	id	user.id=Administrator
user	displayName	user.displayName=Administrator
user	homeDirectory	u ser.homeDirectory=/users/administrator
dashboard	currentPage	dashboard.currentPage=page 1
dashboard	xml	dashboard.xml=the dashboard XML

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Scope	Presentation Variable	Example
dashboard	dashboard.currency.name	dashboard.currency.name=Euro
dashboard	dashboard.currency.symbol	dashboard.currency.symbol=$
dashboard	dashboard.currency.userPreference	dashboard.currency.userPreference=Global Currency 1
dashboard	dashboard.path This returns the path in the catalog.	dashboard.path=/users/administrator/_ portal/Sales
dashboard	dashboard.name	dashboard.name=MyDashboard
dashboard	dashboard.caption This returns the localized name of the dashboard.	dashboard.caption=Sales
dashboard	dashboard.location This returns the URL for the location.	dashboard.location = Dashboard&PortalPath=/users/administrator / _portal
dashboard	dashboard.description	dashboard.description=Sales by region and district
dashboard	dashboard.author	dashboard.author=Administrator
dashboard.currentPage	dashboard.currentPage.name	dashboard.currentPage.name=Sales page 1
dashboard.currentPage	dashboard.currentPage.path	dashboard.currentPage.path = /users/administrator/_portal/Sales/ page 1
dashboard.currentPage	dashboard.currentPage.currency.name	dashboard.currentpage.currency. name=USD
dashboard.currentPage	dashboard.currentPage.currency.symbol	dashboard.currentPage.currency. symbol=USD
dashboard.currentPage	dashboard.currentPage.currency.userPreference	dashboard.currentPage.currency.userPreferenc e=Global Currency 2
analysis	report.currency.name	report.currency.name=$ English - United States
analysis	report.currency.symbol	report.currency.symbol=$
analysis	report.currency.userPreference	report.currency.userPreference=Global Currency 2

Example of Referencing a Variable in a Title View

Suppose that you have created a dashboard prompt called Region, which is based on the Region column and which creates a presentation variable called MyFavoriteRegion.

Suppose also that you have created an analysis that shows Dollars by Region and District. You have also added a filter on the Region column that is set to Is Prompted so that you can prompt the user for a region using this Region prompt.

You can reference the MyFavoriteRegion variable in the Title view so that the user's selection in the Region prompt is displayed in the title of the analysis. To do so, you enter the variable syntax `@{variables.MyFavoriteRegion}` in the Title field in the Title editor.

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6 Adding Views for Display in Dashboards

What are Views

Views use the presentation capabilities of Oracle BI Enterprise Edition to help you look at results of analyses in meaningful, intuitive ways. You can add a variety of views to the results, such as graphs and pivot tables that allow drilling down to more detailed information, explanatory text, a list of filters that were used to limit the results, and more.

When you display the results of a new analysis, the following views are displayed by default in the *"Compound Layout"* in the *"Analysis editor: Results tab"*:

- A title view, which displays the name of the saved analysis.
- A table or pivot table view, which displays the results of the analysis, depending on the types of columns that the analysis contains:
    - If the analysis contains only attribute columns, only measure columns, or a combination of both, then a table is the default view.
    - If the analysis contains at least one hierarchical column, then a pivot table is the default view.

You can customize or delete the existing views for an analysis, add other views, and combine and position views anywhere in the pane.

Preparing multiple views of results can help you identify trends and relationships in data. If you are customizing results for display on a dashboard, then you can preview how the combination and position of views looks when viewed on a dashboard.

You can then save the analysis with the collection of views.

Related Topics

"What Types of Views Are Available?"

"Adding Views to the Results of Analyses"

"Editing Views"

"Saving a View"

"Removing a View"

View Types

> ✎ **Note:** Your privileges control whether you can create all views or specific views only.

View Name	Description
Title	Displays a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results.

View Name	Description
Table	Displays results in a visual representation of data organized by rows and columns. A table provides a summary view of data and enables users to see different views of data by dragging and dropping rows and columns.
Pivot Table	Displays results in a pivot table, which provides a summary view of data in cross-tab format and enables users to see different views of data by dragging and dropping rows and columns. Pivot tables structure data similarly to standard tables that contain column groups, but can display multiple levels of both row and column headings. Unlike regular tables, each data cell in a pivot table contains a unique value. By organizing data in this way, a pivot table is more efficient than a row-based table. Pivot tables are ideal for displaying a large quantity of data, for browsing data hierarchically, and for trend analysis.
Graph	Displays numeric information visually, which makes it easier to understand large quantities of data. Graphs often reveal patterns and trends that text-based displays cannot. However, when precise values are needed, graphs should be supplemented with other data displays, such as tables. A graph is displayed on a background, called the graph canvas. For the types and subtypes of graphs that are available, see *Graph Types* .
Funnel	Displays results as a three-dimensional graph that represents target and actual values using volume, level, and color. Typically, funnel graphs are used to graphically represent data that changes over different periods or stages. For example, funnel graphs are often used to represent the volume of sales over a quarter. Funnel graphs are well suited for showing actual compared to targets for data where the target is known to decrease (or increase) significantly per stage, such as a sales pipeline. In funnel graphs, the thresholds indicate a percentage of the target value, and colors provide visual information for each stage. You can click one of the colored areas to drill down to more detailed information. For the types of funnel graphs that are available, see *Funnel Graph Types*.
Gauge	Shows a single data value. Due to its compact size, a gauge is often more effective than a graph for displaying a single data value Gauges identify problems in data. A gauge usually plots one data point with an indication of whether that point falls in an acceptable or unacceptable range. Thus, gauges are useful for showing performance against goals. Depending on the data in the analysis, a gauge view might consist of multiple gauges in a gauge set. For example, if you create a gauge view to show the sales data for the last twelve months, the gauge view consists of twelve gauges, one for each month. If you create one to show the total sales in the US, then the gauge view consists of one gauge. A gauge or gauge set is displayed on a background, called the gauge canvas. For the types of gauges that are available, see *Gauge Types*.
Trellis	Displays multidimensional data shown as a set of cells in a grid, where each cell represents a subset of data using a particular graph type. Data can be represented with graphs, microcharts, and numbers. The trellis view has two subtypes: Simple Trellis and Advanced Trellis. Simple trellis views are ideal for displaying multiple graphs that enable comparison of like to like. Advanced trellis views are ideal for displaying spark graphs that show a trend. A simple trellis displays a single inner graph type, for example a grid of multiple Bar graphs. The inner graphs always use a common axis; that is to say, the graphs have a synchronized scale.

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View Name	Description
	An advanced trellis displays a different inner graph type for each measure. For example, a mixture of Spark Line graphs and Spark Bar graphs, alongside numbers. In this example, the Spark Line graph might show Revenue over time, and the Spark Bar graph might show Units Sold. A measure column displaying numbers might be placed adjacent to the Spark Line graphs, showing the Revenue measure as a total value for a year. In an advanced trellis, each measure column operates independently for drilling, axis scaling, and so on. For definitions of microchart, and spark graph, see *Trellis View Terms*.
Filters	Displays the filters in effect for an analysis. Filters, like selection steps, allow you to constrain an analysis to obtain results that answer a particular question. Filters are applied before the query is aggregated.
Selection Steps	Displays the selection steps in effect for an analysis. Selection steps, like filters, allow you to obtain results that answer particular questions. Selection steps are applied after the query is aggregated.
Column Selector	Adds a column selector in the results. A column selector is a set of drop-down lists that contain pre-selected columns. Users can dynamically select columns and change the data that is displayed in the views of the analysis.
View Selector	Adds a view selector in the results. A view selector is a drop-down list from which users can select a specific view of the results from among the saved views.
Legend	Adds a legend to the results, which enables you to document the meaning of special formatting used in results, such as the meaning of custom colors applied to gauges.
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.
Ticker	Displays the results as a ticker or marquee, similar in style to the stock tickers that run across many financial and news sites on the Internet. You can control what information is presented and how it scrolls across the page.
Static Text	A dds static text in the results. You can use HTML to add banners, tickers, ActiveX objects, Java applets, links, instructions, descriptions, graphics, and so on, in the results.
Logical SQL	Displays the SQL statement that is generated for an analysis. This view is useful for trainers and administrators, and is usually not included in results for typical users. You cannot modify this view, except to format its container or to delete it.

What Types of Views are Available

Graph Types

Note: All graph types except for scatter, radar, and microchart can be 2-dimensional (2D) or 3-dimensional (3D). Not all types of graphs are appropriate for all types of data.

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Graph Type	Description	Styles
Bar Subtypes available: Vertical Horizontal Stacked Vertical Stacked Horizontal	Shows quantities associated with categories. Bar graphs show quantities as bar lengths and categories as bars or groups of bars. Bar graphs are useful for comparing differences among like items; for example, competing product sales, same product sales over different time periods, or same product sales over different markets. Can be used to compare measure columns by showing bars in a horizontal or vertical direction.	Rectangle Triangle Cylinder Diamond Gradient Pattern Fill
Line	Shows quantities over time or by category. Line graphs are useful for showing trends over time. Can be used to plot multiple measure columns.	Standard Line Stepped Line Curved Line
Area Subtypes available: Area 100% Stack	Shows the trend of the contribution of each value over time or by category. It is a line graph for which the regions between lines are filled in. Regions stack, adding up to the total value for each time period or category.	Solid Fill Gradient Fill Pattern Fill
Pie	Shows data sets as percentages of a whole. Pie graphs are useful for comparing parts of a whole, such as sales by region or by district.	Solid Fill Gradient Fill Pattern Fill
Line-Bar Subtypes available: Standard Stacked	Plots two sets of data with different ranges, one set as bars, and one set as lines overlaid on the bars. Line bar graphs are useful for showing trend relationships between data sets.	Rectangle Triangle Cylinder Diamond Gradient Pattern Fill
Time Series Line	Plots time series data. It scales the horizontal axis based on the time that has elapsed between data points.	Standard Line Stepped Line Curved Line
Pareto	Is a form of bar graph and line graph that displays criteria in descending order. In this graph type, the line shows a cumulative total of the percentages. Pareto graphs are useful for identifying significant elements, such as best and worst or most and least.	Rectangle Triangle Cylinder Diamond

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Graph Type	Description	Styles
		Gradient
		Pattern Fill
Scatter	Displays x-y values as discrete points, scattered within an x-y grid. It plots data points based on two independent variables. This enables you to plot large numbers of data points and observe the clustering of data points. Scatter graphs are useful for observing relationships and trends in large data sets.	Standard Scatter Scatter-with-Lines
Bubble	Is a variation of a scatter graph that displays data elements as circles (bubbles). It shows three variables in two dimensions. One value is represented by the location of the circle on the horizontal axis. Another value is represented by the location of the circle on the vertical axis. The third value is represented by the radius of the circle. Bubble graphs are useful for plotting data with three variables, and for displaying financial data over a period of time.	None
Radar	Plots the same information as a bar graph, but instead displays data radiating from the center of the graph. Each data element has its own value axis. Radar graphs are useful for examining overlap and distribution.	None
Microchart Subtypes available: Spark Line Spark Bar Spark Area	A tiny graph (of similar size to a piece of nearby text) that displays only in the context of the trellis view and that is ideal for showing trend information. A microchart graph type is useful within an advanced trellis, where data is displayed as a mixture of spark graphs and numbers. 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.	None

Funnel Graph Types

Type	Description	Style
Standard	Uses a standard shape with equal stage widths.	Solid Fill Gradient Fill
Non-Standard	Uses a standard shape with unequal stage widths	Solid Fill Gradient Fill

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Type	Description	Style
Last-Stage Only	Uses a standard shape with equal stage widths. It is similar to standard funnel except that the target values of all the stages before the last is calculated based on the last stage target value and a constant called target factor.	Solid Fill Gradient Fill

What Types of Graphs are Available to Trellis Views

The list of graph types that are available for use in trellis views varies by trellis view subtype: Simple Trellis or Advanced Trellis.

The following types of graphs can be used in simple trellises:

- Bar (subtype Vertical)
- Bar (subtype Horizontal)
- Line
- Area
- Line-Bar
- Pie
- Scatter
- Bubble

The following visualization choices are available in advanced trellises:

- Numbers
- Microchart, of the following subtypes:
    - Spark Bar
    - Spark Line
    - Spark Area

For details on each graph type, see *Graph Types*.

Gauge Types

> ✎ **Note:** All gauges are 2-dimensional (2-D) except for bulb gauges which can be either 2-dimensional or 3-dimensional (3-D). Their sizes can be small, medium, large, or a custom size.

Type	Description
Dial	Shows data using a dial arc with one or more indicators that point to to where the data falls within predefined limits.

Type	Description
Horizontal bar	Shows data using a horizontal bar that changes color to indicate whether the data is within predefined limits. The inner rectangle of the horizontal bar shows the current level of data against the ranges marked on an outer rectangle.
Vertical bar	Shows data using a vertical bar that changes color to indicate whether the data is within predefined limits. The inner rectangle of the vertical bar shows the current level of data against the ranges marked on an outer rectangle.
Bulb	Shows data using a circle that changes color to indicate whether the data is within predefined limits. Bulb gauges are useful when you must know what the status is, and not any indication of a specific value, or relative information about other threshold ranges.

Adding Views to the Results of Analyses

If you select a graph type or gauge type that is incompatible with the results, then no results are shown.

Do not use a pie graph to visualize data that includes negative values. Either filter the analysis to ensure that all values are greater than 0 or use a different graph type.

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

✎ **Note:** The Author Limited does not have the permissions to create column selector, narrative, dashboard prompt, selection step, logical sql, view selector, or compound layout views.

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1. In the *"Analysis editor: Results tab"* (or alternatively in the *"Views pane"*), click the New View toolbar button, then the type of view to create.

   The view is displayed in a container on the *"Compound Layout"*. (Note that defaults are used to generate this view, such as the default view type, default formatting, and so on.)

2. To format the container for the view, click the Format Container toolbar button on the view container to display a formatting dialog.

   For information, see *"Formatting Analyses, Views, and Dashboard Pages"*.

3. To edit the view, click the Edit View toolbar button on the view container.

   For more information, see *"Editing Views"*.

4. Save the view. For information, see *"Saving a View"*.

Editing Views

> ✎ **Note:** Each view type, except for a Logical SQL view, has its own editor in which you perform your edits. (You cannot edit a Logical SQL view. You can only format its container or delete it.) Each view editor contains unique functionality for that view type but might also contain functionality that is the same across view types.

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

> ✎ **Note:** When editing a view created by an Author Developer, an Author Limited cannot edit views he cannot create.

Home > **Oracle Business Intelligence** > **Catalog**
1. Open the analysis that contains the view to edit.
2. Click the "*Analysis editor: Results tab*".
3. Click the Edit View button for the view (or, alternatively, select the view in the "*Views pane*" and click the Edit View toolbar button).

    One of the following editors is displayed:

    - "*Results tab: Column Selector editor*"
    - "*Results tab: Create Segment editor*"
    - "*Results tab: Create Target List editor*"
    - "*Results tab: Filters editor*"
    - "*Results tab: Funnel editor*"
    - "*Results tab: Gauge editor*"
    - "*Results tab: Graph editor*"
    - "*Results tab: Legend editor*"
    - "*Results tab: Narrative editor*"
    - "*Results tab: Pivot Table editor*"
    - "*Results tab: Selection Steps editor*"
    - "*Results tab: Static Text editor*"
    - "*Results tab: Table editor*"
    - "*Results tab: Ticker editor*"
    - "*Results tab: Title editor*"
    - "*Results tab: Trellis editor*"
    - "*Results tab: View Selector editor*"
4. Using the editor for the view, make the appropriate edits.

For additional guidance, see:

- o *"Editing Table and Pivot Table Views"*
- o *"Editing Graph Views"*
- o *"Editing Trellis Views"*
- o *"Editing a Gauge View"*
- o *"Editing a Narrative View"*
- o *"Editing a Column Selector View"*
- o *"Editing a View Selector View"*
- o *"Editing a Legend View"*

5. Click Done.
6. Save the view. For information, see *"Saving a View"*.

Table and Pivot Table Views

Two common views for analyzing and displaying data are the table and pivot table.

These views share the same type of editor and much of the same functionality such as dragging and dropping, sorting, drilling, and conditional formatting. The following list provides some differences between the two types:

- Default View — When you create an analysis and display the results, the default view depends on the data in the analysis:
  - o Table — If the analysis contains only attribute columns, only measure columns, or a combination of both, then a table is the default view.
  - o Pivot Table — If the analysis contains at least one hierarchical column, then a pivot table is the default view.

- Drop Targets — Drop targets, which you use to modify column layout, differ slightly between the two views. Both views have the <view-type> Prompts, Sections, and Excluded drop targets. When multiple columns are placed in the <view-type> Prompts target, or page edge, each column displays its values in an individual drop-down list.
  - o Table — Tables have columns and measures in the same drop target, and they do not have rows.
  - o Pivot Table — Pivot tables can have rows, columns, and measures as separate drop targets.

- Drag and Drop Measure Columns — Measure columns behave slightly differently when you drag and drop them on tables and pivot tables.
  - o Table — In tables, you can drag and drop measure columns in the middle of the table and they act as columns.
  - o Pivot Table — In pivot tables, you can drag and drop measure columns in the middle and their labels can be in many locations.

- Column Names and Headings — You can turn off the display of the column headings in both tables and pivot tables. For column names, however, the following differences apply:
  - o Table — In tables, you always see the names of columns.
  - o Pivot Table — In pivot tables, you can turn off the display of the column names.

- Properties — The properties of the two views differ slightly, in areas such as paging controls and green bar formatting.

You can use the editors for the table and pivot table to customize the look and functionality of the view. The editors share much of the same functionality.

Editing Table and Pivot Table Views

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

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1. Edit the analysis.
2. Display the *"Results tab: Table editor"* or the "Results tab: Pivot Table editor". For information, see *"Editing Views"*.
3. To set the properties of the table or pivot table, click the Table View Properties or the Pivot Table View Properties button on the toolbar.

    The *"Table Properties dialog"* or the *"Pivot Table Properties dialog"* is displayed, where you can:
    - Specify formatting preferences for tables and pivot tables.

4. Use the buttons on the toolbar of the editor to perform functions such as the following:
    - To modify formatting, see *"Adding Cosmetic Formatting to a Table or Pivot Table"*.
    - To add a group or calculated item to the view, see *"Groups and Calculated Items"*.

    For more information on the buttons common to all views, see *"Toolbar Buttons Common to All Views"*. For more information on specific data view buttons, see *"Data View Editor Toolbar"*

5. To affect the contents of the view, use the following panes:
    - The *"Subject Areas pane"*
    - The *"Catalog pane"*
    - The *"Layout pane"*, as described in *"Modifying the Layout of Data in Views"*
    - The *"Selection Steps pane"*

6. To specify the sort order for a column in the view, see *"Sorting Data in Views"*.
7. To drill in the data in the view, see *"Drilling in Views"*.
8. Right-click to perform basic view interactions. For information, see *"Right-Click Menu for Tables, Pivot Tables, and Trellises"*.

Adding Cosmetic Formatting to a Table or Pivot Table

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

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1. Edit the analysis.
2. Edit the table or pivot table.
3. On the toolbar of the editor, click the View Properties button.

    The *"Table Properties dialog"* or *"Pivot Table Properties dialog"* is displayed.
4. To add green bar styling, click the green bar styling box.

    To change the way the styling is applied, select a style from the list.

5. To add cosmetic formatting, click the alternate formatting button.

    The *"Edit Format dialog"* is displayed.
6. To change the default green bar color, choose a new background color for the cell format. Make any other appropriate changes, and click OK.
7. In the Properties dialog, make any other appropriate changes, and click OK.

For more information about cosmetic formatting, see *"Cosmetic Formatting"*

The Visual Appearance of Graphs

You can format the visual appearance of graphs based on two settings:

- The position of the graph elements (such as lines or bars in a line-bar graph or slices in a pie graph).

    See *"Graph Formatting Based on Position"*
- Conditions applied to columns. See *"Graph Formatting Based on Columns"*

Graph Formatting Based on Position

Positional formatting enables you to customize the appearance of a graph based on the position of graph elements; that is, the numeric sequence in which graph elements (for example, bars) are displayed in a group. A group is determined by the attribute columns that are displayed in the Group By drop target area. (For information on drop target areas, see *"Drop Targets"*.

For example, suppose that you have a bar graph whose criteria include the Region, Dollars, and Units columns. Dollars are displayed first, then Units in the Measures drop target area. Region is displayed in the Group By drop target.

You can format the visual appearance of a graph based on position in terms of its color, line width, and line symbols.

Graph Formatting Based on Columns

Conditional formatting enables you to customize the appearance of a graph based on conditions applied to columns. The formatting is applied to the column values that meet the condition.

You can specify a color in which to display graph data based upon a specific column value, or range of column values that meet the condition specified for the column.

For example:

- Conditionally changing the color of a graph based on specific column values.

    A user wants to create a bar graph to compare sales between two beverages, Lemonade and Cola. When creating a bar graph the user specifies two conditions, one where the bar representing Lemonade sales is yellow, and another where the bar representing Cola sales is blue.
- Conditionally changing the color of a graph based on a range of column values.

    A sales manager wants to create a bar graph to compare sales for all reps across two sales bands.When creating a bar graph the sales manager specifies two conditions, one where the bar is red for all sales reps with sales less than $250,000, and another where the bar is green for all sales reps with sales greater than $250,000.

The way that you specify conditional formatting for graphs is different from that used for other views. For information, see *"Applying Conditional Formatting to Tables, Pivot Tables, and Trellises"*.

Formatting the Visual Appearance of Graphs

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

1. Edit the analysis.
2. In the results tab, click **Edit View** for the graph view.
3. Click Edit Graph Properties on the toolbar of the graph editor.

   The *"Graph Properties dialog"* is displayed.
4. Click the *"Graph Properties dialog: Style tab"*.
5. Click the Style and Conditional Formatting button.

   The *"Style and Conditional Formatting dialog"* is displayed.
6. Click *"Style and Conditional Formatting dialog: Style Formatting tab"* to format the appearance of a graph based on position of the graph elements.

   To add a custom formatted position:

   a. Select the tab for the graph element (for example, bar) to which you want to add a custom formatted position.
   b. Click the Add new position button. A new position entry is displayed in the Custom Formatted Positions table.
   c. Specify the formatting. For example, to select the color to be applied to the position, click the down arrow next to the Color box to access the Color Selector dialog. (Note that the formatting options depend on the element.)
7. Click the *"Style and Conditional Formatting dialog: Conditional Formatting tab"* to format the appearance of a graph based on a condition that is applied to columns.

   To add a condition to a column:

   a. Click Add Condition Format and select the column to which you want to apply a condition.

      The *"New Condition dialog"* is displayed.
   b. Select the operator and enter a column value, or a range of column values for this condition.
   c. Click OK when you have finished.

      The new condition is displayed in the Conditional Formatting tab.
   d. To select the color to be applied to column values when the condition is met, click the down arrow next to the Color box to access the Color Selector dialog.
8. Click OK.

Rules for Applying Conditional Formats in Graphs

This is a short description.

The following rules apply for building and using conditions in graphs:

- Conditions can be created only from columns that are being used by the graph.

- When format conditions conflict with each other, conflicting conditions are prioritized in the following order:
   a. Conditional formatting on attributes
   b. Conditional formatting on measures
   c. Style formatting based on the positions of graph elements

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- When a user drills on a graph that has conditional formatting applied, the following rules apply:
    - A conditional format based on measures is not carried to the next level. (It does not make sense to carry the conditional format to a different level; for example if, in a geographic hierarchy, from Region to City.
    - A conditional format based on attributes is carried to the next graph if it has not been drilled on.
    For example, if you had the conditional format "Lemonade=Blue" and only drill on years, then "Lemonade=Blue" stays in place.

Graph Exceptions for Conditional Formatting on Columns

Graph Type	Exception
Line	Only symbol formatting is allowed for the line.
Line-Bar	
Radar	
Time Series Line	
Pareto	Formatting is applied only to the bars, not to the Pareto line.

Editing Graph Views

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Display the *"Results tab: Graph editor"*. For information, see *"Editing Views"*.
2. To set the properties of the graph, click the Edit Graph Properties button on the toolbar. The *"Graph Properties dialog"* is displayed, where you can set properties:
    - Related to the graph canvas, such as legend location
    - That control the appearance of the graph, such as the style
    - For axis limits and tick marks
    - That control the display of titles and labels for the graph
3. Use the buttons on the toolbar of the editor to perform functions such as printing a view, exporting a view, and so on.

    For more information on the buttons common to all views, see *"Toolbar Buttons Common to All Views"*. For more information on specific data view buttons, see *"Data View Editor Toolbar"*

4. To affect the contents of the view, use the following panes:
    - *"Subject Areas pane"*
    - *"Catalog pane"*
    - *"Layout pane"*, as described in *"Modifying the Layout of Data in Views"*
    - *"Selection Steps pane"*
    - (for funnel graphs and gauges only) *"Settings pane"* to set thresholds

5. To drill in the data in the view, see *"Drilling in Views"*

Trellis Views

A trellis view is a kind of graph view that displays a grid of multiple graphs, one in each data cell.

A trellis view falls into one of two subtypes:

- Simple Trellis. A simple trellis displays a core inner graph multiplied across row sets and column sets, rendering many small multiples that are ideal for comparing and contrasting.

- Advanced Trellis. An advanced trellis displays a grid of small spark graphs that are ideal for monitoring trends and spotting patterns in a data set.

Editing Trellis Views

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

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1. Display the *"Results tab: Trellis editor"*. For information, see *"Editing Views"*.

2. To set the properties of the trellis, click the Trellis Properties button on the toolbar. The *"Trellis Properties dialog"* is displayed, where you can set properties:
  - Related to the grid canvas, such as legend location (simple trellis views only)
  - Related to graph size for the visualizations included in the trellis
  - That control whether the trellis listens to master-detail events
  - That control the appearance of the trellis's grid and its visualizations, such as various style choices and the way that legends are displayed
  - That control the type of scale and the appearance of scale markers for each of the trellis's visualizations (simple trellis views only)
  - That control the display of titles and labels (simple trellis views only)

3. Use the buttons on the toolbar of the editor to perform functions such as printing a view, exporting a view, and so on.

  For more information on the buttons common to all views, see *"Toolbar Buttons Common to All Views"*. For more information on specific data view buttons, see *"Data View Editor Toolbar"*

4. To affect the contents of the view, use the following panes:
  - *"Subject Areas pane"*
  - *"Catalog pane"*
  - *"Layout pane"*, as described in *"Modifying the Layout of Data in Views"*
  - *"Selection Steps pane"*

5. To specify the sort order for a column in the view, see *"Sorting Data in Views"*.

6. Right-click to perform basic view interactions. For information, see *"Right-Click Menu for Tables, Pivot Tables, and Trellises"*.

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Trellis View Terms

Term	Definition
Visualization	In the context of Oracle BIEE, a visualization is the choice of graph that appears within a data cell in a trellis view. There are many visualizations from which to choose when creating a trellis view, including bar graphs, scatter graphs, and spark graphs.
Inner Graph	A nested graph, inside the grid of a trellis graph. Each inner graph has its own dimensionality as specified in the Visualization area of the Layout pane.
Outer Edge	The outer edges are the parts of a trellis view that border the inner graphs. These include the column and row headers, the section headers, and so on.
Simple Trellis	A trellis view that displays inner visualizations that are all the same type, such as all scatter graphs. The inner visualizations all use a common axis, also known as a synchronized scale.
Advanced Trellis	A trellis view that can display multiple visualization types within its grid, for example, Spark Line graphs, Spark Bar graphs, and numbers. Each visualization type displays a different measure. You can think of an advanced trellis as a pivot table, except that for each measure you add to the pivot table, you can optionally associate a dimension and render that dimension as a spark graph visualization.
Synchronized Scale	(Applicable to Simple Trellis subtype only) A synchronized scale means that all the visualizations within the trellis are viewed on the same scale, that is, they share a common axis. Having a common axis makes all graph markers easy to compare across rows and columns.
Microchart	A tiny graph displayed in a grid along with other tiny graphs and numbers, comprising the data cell contents of an advanced trellis view. In Oracle BI EE, a microchart is always a spark graph.
Spark Graph	An embedded mini-graph that, in conjunction with other mini-graphs and numbers, illustrates a single trend. Spark graphs are also known as sparks. Sparks do not include axes or labels; they get their context from the content that surrounds them. Each type of spark graph has only one measure, which is hidden; the scale is relative to itself only. A spark graph can be of the graph subtype Spark Line, Spark Bar, or Spark Area.

What Makes a Trellis View Unique

The trellis view, also referred to as a trellis graph, is the same as a pivot table—with one major exception: the data cells within the trellis contain graphs. Whereas a stand-alone graph type such as a single bar graph or a single scatter graph works on its own, the trellis graph works only by displaying a grid of nested graphs, known as inner graphs. So a bar-graph trellis view is actually comprised of multiple bar graphs.

In a general sense within the field of business analytics, a visualization is a visual representation of data, displayed in graphs, gauges, maps, and so on. In the trellis editor, within the Layout pane, there is a drop target called Visualizations; this is where you drag the columns for the inner graphs that will comprise the trellis you are building.

The visualizations that make up a simple trellis view are all graphs, and they can be many types of the existing stand-alone graphs described in " *Graph Types*". The visualizations that make up an advanced trellis are always microcharts, of the graph subtypes Spark Line, Spark Bar, or Spark Area. Ideally, the microcharts within an advanced trellis are placed alongside numbers (representing the same measure). For more information, see *"What Are Microcharts"*.

What are the Functions of a Trellis View

This is a short description.

For the most part, a trellis view behaves like a pivot table, and the main difference between a trellis and a pivot table is the way the data cells appear.

In the row and column label cells of a trellis, you can:

- Right-click to do things like create groups and calculated items
- Right-click to hide or move measure labels
- Right-click to sort data
- Drag to reposition rows and columns

In the data cells of a trellis, you can hover the mouse pointer to show related contextual information.

Numeric data cells in a trellis behave the same as numeric data cells in a pivot table.

The ways in which the behavior of a trellis view differs from the behavior of a pivot table are the following:

- Graph data cells: There is no right-click functionality for the data cells in simple trellises, nor drilling in trellis graph data cells (left-click functionality).

- Microchart data cells: When you hover the cursor over the data cells in spark graphs, you are shown contextual information (such as first, last, minimum, and maximum values) that otherwise is not displayed as it would be in a pivot table view.

  Microcharts do not show axis labels, as regular charts do, so it is not immediately obvious what the inner graph dimensionality is. Use a microchart's tooltips to understand the data being represented inside the graph—sample individual values, as well as the overall dimensionality.

About Simple Trellis Versus Advanced Trellis

When you create a trellis view, the first thing you do is choose between two subtypes: Simple Trellis and Advanced Trellis. The Simple Trellis subtype displays a single type of inner visualization, for example, all bar graphs. The inner visualization always uses a common axis, so that all inner graphs are viewed on the same scale. (This concept of a common axis is also referred to as a synchronized scale.) Having a common axis makes all graph markers easy to compare across rows and columns.

The Advanced Trellis subtype allows for display of multiple visualization types within its grid. An advanced trellis illustrating sales trends might show a grid containing numbers in the cells of one column (revenue, for example), while another column alongside the numbers column displays Spark Line graphs in its cells, and those Spark Line graphs visualize the same measure as represented by the numbers (again revenue, but over a time period). Next to that column, a different microchart might be displayed, such as a column of Spark Bar graphs that visualize a different measure, such as unit totals.

Each measure that is visualized is assigned a different inner graph type. Each cell of the grid is scaled independently.

Think of an advanced trellis as a pivot table with spark graphs inside its data cells. But, for each measure you add, you can optionally associate a dimension and render it as a microchart visualization. This makes an advanced trellis very different from a simple trellis. In a simple trellis, all of the measures are rendered in the same visualization, along with additional dimensions.

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What are Microcharts

A microchart is, as its name implies, a tiny chart. A microchart is displayed in trellis views of the Advanced Trellis subtype. A microchart is unique as a graph type in that it can never be an independent, stand-alone graph. It can be used only within the context of a trellis view, and its meaning comes only from the fact that it is one of many small multiples.

Spark Graphs in Oracle BI EE

A microchart can be one of several graph subtypes, including Spark Line, Spark Bar, and Spark Area.

Spark graphs, also called sparks, are unique from line graphs, bar graphs, and the other stand-alone graphs available in Oracle BI EE. Spark graphs are embedded mini-graphs that illustrate a single trend. Simple in their appearance, they do not include axes or labels and they get their context from the content that surrounds them. Each type of spark graph has only one measure, which is hidden; the scale is relative to itself only.

In Oracle BIEE, the visual appearance of sparks emphasizes trends, and within those trends, the highest and lowest values. Due to the condensed manner in which sparks display trends, it is possible for many trends to be compared (along with numeric values) on a single page.

While sparks are useful for certain types of analysis, such as high-level observation of trends and spotting of patterns, it is important to note that they do not illustrate the same specificity as their larger, fuller-featured counterparts.

Working with Spark Graphs

Sparks are unique mainly because they are small and because they can display a lot of information in a very constricted space. In Oracle BI EE, a spark graph is also different from a stand-alone graph in that, as a microchart, it can only be used within trellis views.

You can modify the size of your sparks in the same way that you do with full-featured graphs, in the Graph Properties dialog.

For more information about creating trellis views that include sparks, see *"Design Considerations for Trellis Views and Microcharts"*.

Design Considerations for Trellis Views and Microcharts

The following are some ideas to consider when designing content displayed in trellis views:

- For comparisons, choose the Simple Trellis subtype.

- For trend analysis, choose the Advanced Trellis subtype.

- The inner graphs that make up a trellis should be readable and not too dense, so a trellis view is not especially useful for displaying multiple series or multiple groups. If you cannot easily target a data point with your mouse (to be shown a tooltip), then it is likely that the inner graph is too dense to be readable.

- When using the Simple Trellis subtype, note the following:
  - Designing a simple trellis is like designing a pivot table, except that the total number of cells that can be rendered is much less for a trellis.
  - The main difference between designing a simple trellis and designing a pivot table is that for a trellis, one or two of the dimensions can be associated with the visualization; so, that many less dimensions must be added to the outer edge.
  - It is best to design the trellis with a small number of outer-edge dimensions. The entire graph series should be visible at once (for easy comparison of like to like) with no need to scroll. If you must show additional dimensionality, consider adding the dimensions to the graph prompt.

    o When determining which data to show in column headers and which to show in row headers, the column headers should show one or two dimensions (each dimension with a small number of members). Most often, the dimension shown in column headers is time. Place the remaining dimensions in the row headers or in graph prompts.

- When using the Advanced Trellis subtype, note the following:
  - o The key use case for an advanced trellis is to show trend graphs alongside numeric values, in a compressed form. So a typical advanced trellis contains a combination of spark graphs alongside number representations of the same measure.
  - o Ideally, place no dimensions in the column headers, just place the measures here.
  - o The dimensionality typically associated with a spark graph is time. As there are no visible labels in a spark graph, it is important that the data visualized is intrinsically ordered. For example, a spark graph visualizing regions would be meaningless, because the ordering of the regions (which would be the specific bars, in a Spark Bar graph) is unintuitive.
  - o Just as when designing pivot tables, you generally display time on the horizontal axis, with the other dimensions displayed on the vertical axis. The eye then scans from left to right to see how the dimensionality changes over time.

When Might a Trellis Not Be the Best Visualization?

Hierarchical columns do not work well with the Simple Trellis subtype, because when a hierarchical column is displayed on the outer edge, parents and children (such as Year and Quarter) will by default be shown using a common axis scale. However, because Year and Quarter have different magnitudes, the markers in child graphs may be extremely small and hard to read against the parent scale. (Hierarchical columns do work well with the Advanced Trellis subtype, however, because each data cell is a different scale.)

Editing a Gauge View

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Display the *"Results tab: Gauge editor"*. For information, see *"Editing Views"*.
2. To set the properties of the gauge view, click the Edit Gauge Properties on the toolbar. The *"Gauge Properties dialog"* is displayed, where you can set properties:
   - o Related to the gauge canvas, such as, legend location.
   - o That control the appearance of the gauge, such as the width and height of the gauge.
   - o For gauge limits and tick marks.
   - o That control the display of titles, footers, and labels for the gauge or gauges in a gauge set.
3. Use the buttons on the toolbar of the editor to perform functions such as printing a view, exporting a view, and so on.

   For more information on the buttons common to all views, see *"Toolbar Buttons Common to All Views"*. For more information on specific data view buttons, see *"Data View Editor Toolbar"*.
4. To affect the contents of the view, use the following panes:
   - o *"Subject Areas pane"*

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- *"Catalog pane"*
- *"Layout pane"*, as described in *"Modifying the Layout of Data in Views"*
- *"Selection Steps pane"*
- *"Settings pane"* to set thresholds.

5. To drill in the data in the view, see *"Drilling in Views"*.

Narrative Views

This is a short description.

You use a narrative view to provide information such as context, explanatory text, or extended descriptions along with column values.

In a narrative view, you can include values from attribute columns, hierarchical columns, and measure columns. For a hierarchical column, you can use selection steps to display hierarchy levels with the hierarchical column. For example, create a step to select members based on hierarchy and add members of the specified level. You cannot drill in narrative views.

Editing a Narrative View

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

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1. Display the *"Results tab: Narrative editor"*. For information, see *"Editing Views"*.
2. In the Narrative box, specify the columns to include in the view. To do so, use an at sign (@), optionally followed by a number. For example, include @2 to indicate the second column per the order of the column criteria.
3. Complete other fields as needed.

Column Selector Views

A column selector is a set of drop-down lists that contain pre-selected columns. Users can dynamically select columns and change the data that is displayed in the views of the analysis.

One drop-down list can be attached to each column in the analysis, and multiple columns can be attached to each drop-down list. You can create drop-down lists for attribute columns and measure columns. Updates that you make in the column selector view affect all the data views in the analysis.

You add columns to drop-down lists from the Subject Areas pane. When you add columns in this way, they are not added to the Criteria tab for the analysis. Instead, when you display the Criteria tab, you see that the column is now referred to as a "Column Group" with the default column for the list specified also. The default column is the one on which you created the drop-down list.

Editing a Column Selector View

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

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1. Display the *"Results tab: Column Selector editor"*. For information, see *"Editing Views"*.
2. Select Include Selector for each column for which you want to include a drop-down list of columns. Ensure that the column is highlighted in the editor.
3. To add a new column to a drop-down list, double-click the column to add in the *"Subject Areas pane"*.
4. Complete the other fields as appropriate.

View Selector Views

This is a short description.

A view selector view enables users to select a specific view of the results from among the saved views for an analysis. When placed on a dashboard, the view selector is displayed as a list from which users can choose the view that they want to display below the selector.

Generally, you would include views in the view selector that are not being displayed in the Compound Layout view. For example, you might create a table, graph, gauge, and view selector view for an analysis, but include only the table and view selector view on the Compound Layout view. When the analysis is displayed on a dashboard page, users can select the graph or gauge view from the view selector view.

Editing View Selector Views

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

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1. Display the *"Results tab: View Selector editor"*. For information, see *"Editing Views"*.
2. In the Available Views list, select the views to be included in the view selector and move them into the Views Included list.
3. Complete other fields as needed.

Legend Views

You use a legend view to document the meaning of special formatting used in an analysis, such as the meaning of custom colors that are applied to gauges.

Editing a Legend View

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

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1. Display the "*Results tab: Legend editor*". For information, see "*Editing Views*".
2. In the Captions box on the toolbar, select the position for the caption relative to the legend symbol.
3. In the Legend items per row box on the toolbar, select the number of legend items to display in a row.
4. For each legend item:
   a. In the Caption box, enter the meaning of the legend symbol.
   b. In the Sample Text box, enter the text that is to be displayed within the legend symbol.

   To add additional legend items, click Add Caption

5. Complete other fields as needed.

Modifying the Layout of Data in Views

Each editor for a data view contains the "*Layout pane*", except for the map editor. The Layout pane is displayed slightly differently for each view type, such as graphs and pivot tables. The Layout pane shows how the data in a view is laid out using drop targets. For more information on drop targets, see "*Drop Targets*".

You use the Layout pane to modify the way that data is arranged in the view. Specifically, you can:

- Modify the data in the view, as described in "*Adding and Rearranging Columns in Views*"

- Set properties, as described in "*Setting Properties for View Bodies and Drop Targets*"

- Add totals, as described in "*Adding Totals to Tables and Pivot Tables*"

- Display running sums and relative values, as described in "*Displaying Running Sums and Relative Values for Measure Columns in Pivot Tables*"

- Define section sliders in graphs and gauges, as described in "*Defining a Section Slider in a Graph or Gauge*"

- Add legends to graphs by selecting the Show In Legend box in the Layout pane

Drop Targets

In the Layout pane, the columns in a data view are displayed in drop targets. Drop targets indicate where a column can be inserted, moved to, or dropped. They represent a valid position for a column.

You use drop targets to modify the way data is arranged in a data view by dragging and dropping columns to different targets within the view.

> ✎ **Note:** The Layout pane for trellis views is significantly different from the Layout panes that appear for other data views. For exceptions to the information provided here about drop targets, see "*Drop Target Guidelines for Trellises*".

Each data view contains the following drop targets:

- <view-type> Prompts — Provides an interactive result set that enables users to select the data that they want to view. The values from the columns that are displayed in this drop target are used as the initial criteria. In a view, these values are displayed in a drop-down list for selection, which is often referred to as the "page edge."

- Sections — Populates the areas that divide the view into sections. If you select the Display as Slider option in this drop target, then the values of the columns that are dropped in the Sections drop target are displayed as a section slider rather than as unique views.

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- <view-type> area — Simulates the plot area or the body of the view itself and assists you in seeing what the view looks like.

  For tables, this area contains the Columns and Measures drop target, which contains all the columns in the view. In tables, all measures are treated as columns.

  For all other data views, this area contains the following drop targets:

  - o Measures drop target — Populates the part of a view that contains summary data. Depending on the type of view, this area might include a single Measures drop target (for example, for pivot tables) or might contain subdrops targets (for example, the Bars (Y1-Axis) and the Lines (Y2-Axis) for line bar graphs). You drag and drop measure columns to these drop targets.
  - o Other drop targets — Used to summarize the columns in the measure drop target or targets. You generally drag and drop attribute and hierarchical columns to these drop targets.

    The other drop targets that are displayed in a view depend on the type of view as described in *Other Drop Targets in Data Views*.

- Excluded — Excludes columns from the view results but leaves the columns as part of the analysis. See *"Columns in the Excluded Drop Target"* for more information.

In addition, each <view-type> area, except for the Table area and the Trellis area, contains the Measure Labels element. The Measure Labels element represents the labels for all the Measures columns in the drop targets in the Measures area. You can modify how measure labels are shown in a view by dragging it from one drop target and dropping it in another. For example, in a vertical bar graph, you can show each measure label in a different color by dragging and dropping the Measure Labels element to the Vary Color By drop target.

In pivot tables, you can also edit the format of measure labels or hide them.

Other Drop Targets in Data Views

Short sentence or paragraph to describe the configuration table.

View	Drop Target or Targets
Pivot table	Includes these drop targets: • Columns — Shows a column in a column orientation. Pivot tables can contain multiple columns. • Rows — Shows a column in a row orientation. Pivot tables can contain multiple rows.
Gauge	Rows — Shows the columns that are displayed in the gauges.
Bar, line, area, line-bar, time series line, pareto, scatter, or bubble graph	Includes these sub-drop targets within the main drop target (Bars, Line, Area, Bars & Lines, Line, Points or Bubbles). Target names differ depending on graph type. For example, Group By is Bubbles for bubble graphs and Points for scatter graphs. • Group By — Clusters the axis labels into groups. For example in a vertical bar graph whose criteria includes the Region, District, and Dollars column, if this drop target contains the Regions column, then the data is grouped by region on the horizontal axis. • Vary Color By — Shows each column value or column value combination in a different color.
Radar graph	Radar Sections — Shows column values as points on each line along a radius of the circle.
Pie graph	Includes these drop targets: • Pies — Shows each column value or column value combination as a separate pie.

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View	Drop Target or Targets
	• Slices — Shows each column value or column value combination as a separate slice of the pie.
Funnel graph	Stage — Shows each column value as a stage in the funnel.
Trellis	Includes these drop targets: • Columns — Shows a column in a column orientation. Trellises can contain multiple columns. • Rows — Shows a column in a row orientation. Trellises can contain multiple rows. Includes these sub-drop targets within the main drop target Visualization for simple trellis views: • Group By — Clusters the measures into groups • Color By — Shows each measure in a different color, for example, in a vertical bar graph of a trellis, all the bars for Revenue are blue while the bars showing Billed Quantity are red. In a Scatter graph, use this drop target to vary the points by color. In a Bubble graph, use this drop target to vary the bubbles by color. • Bar Axis — In a Line-Bar graph comparing revenue and billed quantity by region, shows one of two measures, such as Revenue. • Line Axis — In a Line-Bar graph comparing revenue and billed quantity by region, shows one of two measures, such as Billed Quantity. • Pies — In a Pie graph, shows measures as pies of varying colors. • Slices — In a Pie graph, shows measures as slices of varying colors within pies. • Points — In a Scatter graph, shows measures as points. • Horizontal Axis — In a Scatter graph, shows one of two measures as a point. In a Bubble graph, shows one of three measures as a bubble. • Vertical Axis — In a Scatter graph, shows one of two measures, such as a point. In a Bubble graph, shows one of three measures as a bubble. • Bubbles — In a Bubbles graph, shows measures as bubbles of varying size. • Size — In a Bubble graph, shows one of three measures as the size of a bubble. Includes these sub-drop targets within the main drop target Visualization for advanced trellis views: • Areas — In a Spark Area microchart, shows columns displayed as areas. • Bars — In a Spark Bar microchart, shows columns displayed as bars. • Lines — In a Spark Line microchart, shows columns displayed as lines.

Columns in the Excluded Drop Target

A column in the Excluded drop target is not included in the view results but still remains as part of the analysis. A column can be placed in the Excluded drop target after views have been created for the analysis in various ways. A general rule is that a column is placed in the Excluded drop target for a view if it is not added explicitly to one or all views.

Some of the ways in which a column is placed in the Excluded drop target are as follows:

- You select the Exclude Column option from the right-click menu in a table or pivot table view.

- You select a column from the Subject Areas pane to add to views in an analysis as described in the following scenarios:
  - Criteria tab — If you add a column from the Subject Areas pane to the Selected Columns pane after displaying the analysis results and the Exclude from existing views, but display in new views option is selected

for the Display of Columns Added in the Criteria tab property in the *"Analysis Properties dialog: Data tab"*),
then the column is placed in the Excluded drop target of the existing views' Layout pane but included in any
new views that you add.

o Results tab — The behavior might differ depending on whether you add columns to a view editor or to the
Compound Layout

- View Editor — If you add a column from the Subject Areas pane to a view, then you place the column in
that view. The column is placed in the Excluded drop target for all other views in the analysis.

- Compound Layout — If you double-click a column in the Subject Areas pane, then you place the
column in a default drop target of the Layout pane for all existing views in the current Compound
Layout. The column is placed in the Excluded drop target for all other views in the analysis.

If you drag and drop a column from the Subject Areas pane to a tabular view, then you place the
column in the drop target for that view. The column is placed in the Excluded drop target for all other
views in the analysis.

If you want a column that is in the Excluded drop target to be displayed in a view, then you can easily move it. Simply display
the Layout pane for the view, and drag and drop the column from the Excluded drop target to the desired one.

Excluding columns differs from removing columns. You can use the Remove Column option from the More Options button in
the Layout pane for a view to remove a column entirely from the analysis.

Aggregation and the Excluded Drop Target

In a pivot table or graph that includes columns in the Excluded drop target, an aggregation rule is applied to aggregate
measures in the data body of the view to a single value. For example, suppose that you have the following columns in the
Selected Columns pane:

Region	City	Dollars
East	NY	1000
East	Boston	500

If the City column is placed in the Excluded drop target, then the view typically displays the following:

`East 1500`

The aggregation rule is applied to aggregate 1,000 and 500 into 1,500. In a pivot table or graph, the aggregation rule that is
specified in the *"Edit Column Formula dialog"* applies. For a pivot table, you can select a specific aggregation rule using the
More Options menu in the Layout pane.

Suppose that you wanted the table, pivot table, or graph to show the following values:

`East 1000`

`East 500`

To achieve this aggregation, include both Region and City columns in the view layout, but hide the City column using its
"Column Properties dialog: Column Format tab"

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Drop Target Guidelines for Graphs and Funnel Graphs

The following restrictions and guidelines apply to dragging columns from one drop target and dropping them in another in graphs and funnel graphs:

- A bubble graph requires at least three measures. Plot one measure on the horizontal axis, another measure on the vertical axis, and a third measure on the bubble size axis.

- In a bubble, line-bar, scatter, or funnel graph, you cannot drag and drop measure labels.

- A pareto graph can have only one measure.

  If you drop another measure on the Measures drop target, then the measures are swapped; that is, the existing measure is replaced by the newly dropped measure and is moved automatically to the Excluded drop target.

- A time series line graph requires a single date or date-time data column to be selected on the horizontal axis. It has a single vertical axis, but supports multiple data series.

- A scatter graph requires at least two measures. For example, you can plot one measure column on the horizontal axis and another measure column on the vertical axis. These measures are plotted for values on the Group By axis.

- A funnel graph uses two measures but only one is required. If you do not select a second measure, then the first measure is used for the second measure. If you have selected two measures and then select a new measure, then the new measure replaces the measure currently in the Actual Measures drop target.

Drop Target Guidelines for Trellises

The following guidelines apply to working with drop targets in trellises:

- Expanding Drop Targets in Trellises — The Layout Pane of the trellis editor is notably different in that it is vertical rather than horizontal. When drop targets contain more data than can be shown within this more narrow Layout Pane, the drop target containers expand on hover. That is, when you hover the mouse over an overfilled drop target, you see the complete selection of measures and columns, and you can move and reorder even the measures and columns that were not visible before the hover. The chosen item appears with a slight transparency as you drag it.

- Placement of Measures — The following are considerations to keep in mind as you work with measure columns in trellis views:
  - Measures can be reordered within the measures drop targets by dragging left or right.

  - In simple trellis views, measure columns can be placed only on the measure edge of Color By or Group By.

  - In some simple trellis visualizations (scatter graphs, bubble graphs, and line-bar graphs), you can swap measures. If you drag an existing measure from one axis and drop it in the target for another axis, the two measures' positions in the view are swapped.

  - Scatter graphs, bubble graphs, and line-bar graphs allow a single measure per axis, as follows:
    - Scatter graph drop targets: Horizontal Axis, Vertical Axis
    - Bubble graph drop targets: Horizontal Axis, Vertical Axis, Size
    - Line-bar graph drop targets: Bar Axis, Line Axis

  - In advanced trellis views, measures comprise the innermost column headers of the trellis.

  - When moving measures from the Color By drop target to or from the Group By drop target:
    - Dragging a single measure moves all the measures along with it. (This is known as sticky behavior.)

      Exception: Upgraded analyses automatically select the Treat as an Attribute Column box for measures (in the "*Edit Column Formula dialog: Column Formula tab*"), so this sticky measure behavior only happens if you deselect the Treat as an Attribute Column box for existing measures.

- Dragging a new measure into the view moves all existing measures to wherever you place the new measure.

o To place a measure on the non-measure edge of a visualization, or in the Rows target or Columns target, you must first convert the measure to an attribute column. You do this in the *"Edit Column Formula dialog: Column Formula tab"*.

o Attribute columns can be dragged out of the Measures drop target without causing the drop target or the measures inside it to move with the attributes.

Adding and Rearranging Columns in Views

Using the view editor and the Layout pane, you can easily modify and change the order of columns in the following ways:

- Drag and drop columns in tables and pivot tables to the desired positions in the editor using the handles and drop targets. For example, if you have two columns in the Rows section of a pivot table, reverse the order of the columns by dragging and dropping the first column after the second one. In a table, you can drag and drop columns, but you cannot stack columns, as you can in a pivot table.

  You can also drag and drop columns in this way in the Compound Layout.

- Drag and drop columns in the Layout pane. A target is active and ready for the "drop" when it appears highlighted. When you hover the mouse pointer over a column in the Layout pane, the cursor state changes from the pointer to a move cursor when you can "grab" the column and move it over a drop target. For example, you can easily move a column in a pivot table from the Rows drop target to the Sections target to create a unique pivot table for each value in the column.

  For details of dragging and dropping columns in the Layout pane of the trellis editor, see *"Drop Target Guidelines for Trellises"*.

  For more information on drop targets, see the *"Layout pane"*.

- Add a column to a graph or gauge. To do so, drag the column from the Subject Areas tab to the appropriate location in the view editor or to a drop target in the Layout pane.

- Remove columns in the Layout pane. For example, you can easily remove a column in a view by selecting Remove Column from the More Options button. Removing columns differs from excluding columns, which is described in *"Drop Targets"*.

This list provides only a partial summary of where dragging and dropping can occur. You can drag and drop columns and catalog objects whenever you see the *"Subject Areas pane"* and *"Catalog pane"*. You can also drag and drop items in views on dashboards. See *"Columns in the Excluded Drop Target"* for more information.

Setting Properties for View Bodies and Drop Targets

In the Layout pane, you can click the Properties button to display a dialog in which you specify properties for the view body (such as Pivot Table) or for a drop target (such as Sections). For example, you can specify whether to display headings, set background color, and insert page breaks.

Modifying the View Body or Drop Target Properties

You must have one of the following user type permissions:

- BI Author Limited

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- BI Author Developer

- BI Tenant Administrator

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1. Edit the analysis.
2. In the results tab, click **Edit View** for the view.
3. In the view editor, display the Layout pane and click the Properties button beside the view body (for tables and pivot tables) or drop target name.

   The Properties dialog for the view body or drop target is displayed.
4. Complete the appropriate fields and click OK.

Adding Totals to Tables and Pivot Tables

In the Layout pane, you can add totals for columns in tables and pivot tables. You can position the totals at various locations in the view. You can add totals for columns that are displayed on the various edges. For each measure, the total uses the aggregation rule for that measure. The default aggregation rule for a measure column is specified in the Oracle BI repository, or by the original author of the analysis.

If you specify a total in the Rows or Columns drop target of a pivot table, then the totals that are displayed are the result of the columns that are specified in the Measures drop target. Total values are not displayed on the Columns or Rows edges of the pivot table but rather in the data in the center of the pivot table.

Adding Totals to a View

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

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1. Edit the analysis.
2. In the results tab, click **Edit View** for the view.
3. Display the *"Layout pane"* for the view.
4. To add grand totals to the entire view:
   - For a table, in the Columns and Measures drop target, click the Totals button, then click the location such as Before.
   - For a pivot table, in the Rows or the Columns drop target, click the Totals button, then click the location such as After.
5. To turn on and off the totals that apply to all the values in the drop target, click the Totals button beside the drop target name, such as Sections. Then select the location for the total, such as Before the data items. A totals area is added to the view.

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Displaying Running Sums and Relative Values for Measure Columns in Pivot Tables

You can use the Layout pane to display running sums or the relative value of measure columns in pivot tables, as described in the following sections.

Running Sums for Measure Columns in Pivot Tables

In a pivot table, you can display numeric measures as running sums, where each consecutive cell for the measure displays the total of all previous cells for that measure. This option is a display feature only that has no effect on actual pivot table results.

Typically, running sums are displayed for duplicated attribute columns or for measure columns for which the option to show data as a percentage of the column has been selected, with the last value being 100 percent. Running sums apply to all totals. The running sum for each level of detail is computed separately.

Column headings are not affected when the running sum option is selected. You can format the column heading if you want it to indicate that the running sum option is in effect.

The following usage rules are in effect for running sums:

- A running sum is incompatible with the SQL RSUM function (the effect would be a running sum of the running sum).

- All running sums are reset with each new section. A running sum does not reset at a break within a section or continued across sections.

- If a measure does not display in a single column or in a single row, then the measure is summed left to right and then top to bottom. (The lower right cell contains the grand total.) A running sum does not reset with each row or column.

- You cannot specify rolling minimums, maximums, and averages in the Layout pane. You can include these if administrators create formulas for them in the metadata repository.

Displaying a Measure as a Running Sum

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

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1. Edit the analysis.
2. In the results tab, click **Edit View** for the view.
3. In the Layout pane for the pivot table, in the Measures area, click the More Options button for the row or column to be summed and select Display as Running Sum.

Relative Values for Measure Columns in Pivot Tables

In a pivot table, you can dynamically convert a stored or calculated measure into a percent or an index. This shows the relative value of the item, compared to the total, without the need to explicitly create a calculated item for it. You can view the measure as a percentage between 0.00 and 100.00, or as an index between 0 and 1.

For example, if you are using a pivot table to examine sales by product, then you can duplicate the sales measure and view it as a percentage of the total. This enables you to see the actual sales, and the percentage of sales, that each product accounts for.

Showing an Item as a Relative Value

The analysis you are creating or editing must include a heirarchical column.

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

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1. Edit or create an analysis that contains a heirarchical column.
2. In the results tab, edit a pivot table.
3.

> ✎ **Note:** The following step is optional. When you duplicate the measure column in the pivot table, you can see both the total for the measure and its relative value. This eliminates the need to add the column twice on the Criteria tab to see the total and its relative value in the pivot table.

   In the Layout pane for the pivot table, click the More Options button for the item you want to show as a relative value.
4. To duplicate the measure column, select Duplicate Layer.

   The measure is displayed a second time in the pivot table, with the same name.
5.

> ✎ **Note:** The Show Data As option is available only for items that are stored or calculated measures.

   Click the More Options button, select Show Data As, select Percent of or Index of, then select the appropriate option.
6. To rename the new column, click the More Options button, select Format Headings and in the Edit Format dialog, enter a value in the Caption field.

Selection Sliders in Graphs and Gauges

A section slider displays members of one or more attribute or hierarchical columns as values on a rectangular bar and provides mechanisms to select a value. You use a section slider to limit the data that is shown in a graph or gauge.

A section slider consists of the following components:

- Slider bar — Displays the members of one or more attribute or hierarchical columns as values along a rectangular bar.

  > ✎ **Note:** The administrator configures the maximum number of values that can be displayed on the slider bar. However, you can set a maximum lower than the system maximum by setting the Maximum number of section slider values field in the *"Section Properties dialog"*.

- Slider thumb — Indicates the current value of the section slider. You can drag the thumb to the desired value.

- Decrease button — Moves the slider thumb to the value to the left of the current value.

- Increase button — Moves the slider thumb to the right of the current value.

- Play button — Sequentially moves the thumb through the slider values. After being clicked, the play button changes to a pause button to allow you to stop on a particular value.

Defining a Section Slider in a Graph or Gauge

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

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1. Open the analysis that contains the graph or gauge in which you want to define a section slider.
2. Click the *"Analysis editor: Results tab"*.
3. Click the **Edit View** toolbar button in the graph, funnel, or gauge view.

   The *"Results tab: Graph editor"*, *"Results tab: Funnel editor"*, or *"Results tab: Gauge editor"* is displayed.
4. For each column to be displayed on the section slider, in the *"Layout pane"* of the Graph or Gauge editor, drag and drop the column to the Sections drop target.
5. Select **Display as Slider**.
6. Click **Done** to close the editor and return to the Results tab.
7. Click the **Save Analysis** toolbar button to save your changes.

Interactions in Views

You can specify the types of interactions that are to occur when users:

- Click in a data view. See *"Click Interactions in Views"*.

- Right-click in a table, pivot table view, or trellis at runtime. See *"Right-Click Interactions in Views"*

Click Interactions in Views

You can specify the types of interactions that are to occur when users click (that is, left-click) in a data view. The following types of interactions are available:

- None — Specifies that nothing happens when users click the column heading or a value. This option turns off drilling for attribute columns; it does not turn off drilling for hierarchical columns.

- Drill — Enables users to drill down to more detailed information. See *"Drilling in Views"*.

- Action Links — Enables users to click a hot spot in a data view and then select an action link to execute an action, such as navigating to a saved analysis. See , *"Actions"*."

- Send Master-Detail Events — Sends master -detail events in a master-detail relationship. See *"Master-Detail Linking of Views"* and *"Linking Views in Master-Detail Relationships"*.

You create interactions at the criteria level using the *"Column Properties dialog: Interaction tab"*. Interactions that you create take effect in all data views (that is, tables, pivot tables, graphs, funnel graphs, trellises, gauges, and maps).

Right Click Interactions in Views

You can specify the types of interactions that are to occur for an analysis when users right-click in a table, pivot table view, or trellis at runtime. The following right-click interactions are available:

- Drill (when not a primary interaction)
- Move Columns
- Sort Columns
- Add/Remove Values
- Create/Edit/Delete Groups
- Create/Edit/Delete Calculated Items
- Display/Hide Sub-totals
- Display/Hide Running Sum
- Include/Exclude Columns

You enable right-click interactions for an analysis using the *"Analysis Properties dialog: Interactions tab"*. Right-click interactions that you enable take effect in all data views except graphs, gauges and maps.

> ✎ **Note:** Right-click interactions are not available for graphs in trellis views (Simple Trellis and Advanced Trellis), but you can right-click on text in the trellis view in the same manner as in a pivot table. This includes data cells in an advanced trellis that have Visualization set to Text.

Drilling in Views

If the administrator has configured columns for drilling in the subject area, then you can allow users to drill in data in tables, pivot tables, graphs, trellises, gauges, and maps. Drilling is a way to navigate through data in views quickly and easily.

In Which Columns Can I Drill

You can drill in attribute columns and hierarchical columns. For information on drilling in columns, see *"Drilling in Results"*.

How Do I Allow Drilling in Columns

As the content designer, you specify whether users can drill in particular columns in views on dashboards. You control whether drilling is allowed in particular columns by specifying options in the *"Column Properties dialog: Interaction tab"*.

If drilling is not a primary interaction of a particular column (as set in the *"Column Properties dialog: Interaction tab"*), then you can allowing drilling as a right-click interaction in table and pivot table views at runtime. To do so, you select the Drill (when not a primary interaction) option in the *"Analysis Properties dialog: Interactions tab"*.

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Effects of Drilling on Filters and Selection Steps

This is a short description.

Drilling in columns affects their filters and selection steps as described in the following list. For more information, see
"Filtering and Selecting Data for Analyses."

- Hierarchical columns: No steps are added to the selection when you expand or collapse members in a hierarchical column. That is, the expanding and collapsing does not change the selection of data for the column.

  For example, suppose that you create a pivot table in which you select 2008 as the only member in the Time dimension, and you arrange the data so that this one Time member is the column header in the pivot table. You can expand to show quarters in 2008 and then the months in the last quarter. At this point the pivot table has child members for 2008, Q1 2008, Q2 2008, Q3 2008, Q4 2008, October 2008, November 2008, and December 2008. If you display the Selection Steps pane, however, you see that the selection for the Time dimension still contains only the 2008 member.

  Expanding and collapsing in a hierarchical column affects only that particular view. No other views are affected.

- Attribute columns: You can drill down from the row heading or column heading or from a member in an attribute column. Drilling on a heading adds the lower level to the view. Drilling on a member adds the lower level and affects both filters and selection steps:
  - Drilling on a member adds a filter for the current member, thereby limiting the results. For example, if you drill on the Game Station member in a table that includes the P1 Product column, you add the E1 Sales Rep Name column, which adds a filter that specifies that P1 Product equals Game Station.
  - Drilling on a member adds the lower-level column to the analysis and updates the column in the Selection Steps pane without providing a step update during design.

Sorting Data in Views

When you create an analysis, you can specify sorting for the results that are displayed in graphs, pivot tables, tables, and trellises.

Common Sort Functionality

Some sort functionality is common to graphs, pivot tables, tables, and trellises, although you cannot sort values interactively on a graph.

Graphs, pivot tables, tables, and trellises reflect the sorting that you specify in the Selected Columns pane of the Criteria tab for attribute columns and hierarchical columns. Use the Sorting menu options that are available from the Options button for a column. These sorting options provide the ability to sort by a single column or by multiple columns, each in either ascending or descending order. By creating sorts for multiple columns, you can specify multiple level sorts such as second-level and third-level sorts of the data. These sort levels are indicated with numbers and a sort icon for the column in the Criteria tab.

The options that you specify on the Criteria tab serve as the initial sorting state of the analysis. You can modify the sort later when the analysis is used in a table, pivot table, or trellis.

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When you sort items in a hierarchical column, you always sort within the parent. That is, children are never sorted outside of their parent. The children are displayed below the parent in the proper sort order; the parent is not sorted within its children.

If you include totals in a view, then those values are not sorted. They remain in the location in which you placed them, regardless of sorting.

If you sort an attribute column or hierarchical column that includes a group, then that group is always displayed at the bottom of the list. If there are multiple groups, then the groups are listed in the order in which their corresponding steps are specified in the Selection Steps pane.

Sorting Data

Sorting allows you to quickly sort rows and columns of a view, either from lowest to highest data values, or from highest to lowest. You can also return the order to the order in the data source by clearing all sorts. You can specify alphanumeric sorts on the row and column edges of pivot table views, table views, and trellis views.

You make sorting specifications in various ways, including those in the following list:

- the column and select the appropriate sort option from the menu. For more information on the sorting options menu, see "*Sorting Options Menu*".

- Right-click in a pivot table, table, or trellis, select Sort or Sort Column (whichever is available), and then select the appropriate sorting option from the menu. For more information on the sorting options menu, see "*Sorting Options Menu*".

- Hover the mouse pointer over the area to the right of the column name in the header of a pivot table, table, or trellis and click either the upward-facing triangle (Sort Ascending) or the downward-facing triangle (Sort Descending) for that column. These sort specifications override those that you make with the right-click menu.

  If you see a shaded-in sort button in the column header or the row header, then you know that the column contains a primary sort. You can add a second-level or third-level sort by hovering over another innermost column header or row header and clicking the appropriate sort button or clicking the right-mouse button.

Any sorting options that you specify in a view override those that were made in the Selected Columns pane.

Clearing Sorts

You can use various methods to clear sorts:

- For sorts that have been applied in the Selected Columns pane, click Clear All Sorts in All Columns. The sort specifications that you made in the Selected Columns pane are removed. Sorts that you specified in a view remain.

- For sorts that have been applied directly in a pivot table, table, or trellis:
    - Click a sort button in an unsorted column to remove the primary sort from the column to which it now applies and apply it to the column whose button you just clicked.
    - Select the Clear All Sorts in View option from the right-mouse menu.

Saving a View

You must have one of the following user type permissions:
- BI Author Limited

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- BI Author Developer

- BI Tenant Administrator

1.

> ✏ **Note:** You can save a view that you are working with at any time. To save a view, you must save the analysis.

If you want to save a view:
  - ○ In a new analysis or in an existing analysis, click the Save Analysis toolbar button in the *"Analysis editor"*
  - ○ In an existing analysis that you must save as another name, click the Save As toolbar button in the *"Analysis editor"*

If this is the first time that you are saving the analysis, or you are saving an existing analysis as another name, then the *"Save As dialog"* is displayed where you specify the information for saving the analysis.

Renaming a View or Compound Layout

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

1. If you want to rename:
  - ○ A view, on the toolbar of the view's editor, click the **Rename View** button.
  - ○ A compound layout, in the *"Analysis editor: Results tab"* toolbar, click the Rename Compound Layout button.

  The *"Rename View dialog"* is displayed.
2. Enter the new name for the view or compound layout.
3. Click **OK**.

Rearranging a View

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the analysis.
2. In the results tab, place the cursor just inside the top edge of the view to be rearranged.
3. Click and hold the left mouse button (if configured) on the view.

  The view is displayed as a transparent movable object.
4. Use the mouse to drag the view to the required position.

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A view can be rearranged as follows:

- o At the boundary of a view.

   Each view has four boundaries (upper, lower, left or right), and can be arranged alongside the boundaries of other views in an analysis. You can drag and drop a view to display it next to the boundary of another view.
- o At the outer boundary of the compound layout.

   Each compound layout contains one or more views arranged in either a square or a rectangle. The compound layout has four boundaries (upper, lower, left and right). You can drag and drop a view to the outer boundary of an compound layout. This action displays the view across the entire length or breadth of the compound layout.

5. Release the mouse button.

   The view is rearranged in the compound layout in the position that is indicated by the blue bar.

6. Repeat the previous steps to rearrange further views.

Printing Views

This is a short description.

You can print views using HTML or Adobe PDF (Portable Document Format). Adobe Reader 6.0 or greater is required to print using Adobe PDF.

You can also specify PDF and print options, including adding headers and footers. For more information on printing, see *"Changing Print Options for a View"*

> ✎ **Note:** The HTML method of printing relies on the print handling capabilities of your browser. If you do not get the results you want, then choose PDF to open and then print the analysis.

You can print:

- A single view from the view's editor

- An assemblage of views that are displayed in the *"Compound Layout"*

Printing a Single View or an Assemblage of Views

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Create or edit an analysis.
2. If you want to print:
    - o A single view, on the toolbar of the view's editor, click the **Print this analysis** button.

    - o The assemblage of views displayed in the Compound Layout, in the *"Analysis editor: Results tab"* toolbar, click the **Print this analysis** button.

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3. Select Printable HTML or Printable PDF.
   o For HTML, a new window shows the view or views to print.

      From the File menu, select **Print**.
   o For PDF, an Adobe PDF window shows the view or views to print.

      Use the options that are available in the Adobe PDF window to save or print the file.

Changing Print Options for a View

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
   1. Create or edit an analysis.
   2. In the "*Analysis editor: Results tab*" toolbar, click the **Print Options** button.
      The "Print Options dialog" is displayed.
   3. Specify the appropriate options in the dialog, and click **OK**.

Previewing How a View is Displayed on a Dashboard

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

   1. If you want to preview:
      o A single view, on the toolbar of the view's editor, click the **Show how results will look on a Dashboard** button.
      o The assemblage of views that are displayed in the Compound Layout, in the "*Analysis editor: Results tab*" toolbar, click the **Show how results will look on a Dashboard** button.

The dashboard preview is displayed in a new window. Any prompts are displayed and applied in the preview.

Removing a View

You must have one of the following user type permissions:

- BI Author Limited

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- BI Author Developer

- BI Tenant Administrator

1. If you want to remove a view from:
    o A compound layout, in the view in the *"Compound Layout"*, click the **Remove View from Compound Layout** button.

       Removing a view from a compound layout removes it only from the compound layout, not from the analysis.
    o An analysis, in the *"Views pane"*, select the view and then click the **Remove View from Analysis** toolbar button.

       Removing a view from an analysis removes the view from the analysis and from any compound layout to which it had been added.

Refreshing the Results in a View

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

1. In the *"Analysis editor: Results tab"* toolbar, click the **Refresh the results of the current analysis** button.

Customizing Views for Delivery to Agent Users

Delivery content is automatically formatted based on the destinations that you specify in the *"Agent editor: Destinations tab"*. You can manually control which view or views are sent to a particular destination by including them in a compound layout.

Controlling which Compound Layout is Sent to a Destination

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

1. For the appropriate analysis, create and save the view to use for delivered content.
2. On the toolbar of the *"Analysis editor: Results tab"*, click the **Create Compound Layout** button.
3. Add the view that you created to the newly created compound layout.
4. On the toolbar of the *"Analysis editor: Results tab"*, click the **Edit Analysis Properties** button.
5. In the **View for Text Delivery** box, select the compound layout to which you added the view.

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6. Click **OK**.

Master-Detail Linking of Views

This is a short description.

Master-detail linking of views enables you to establish a relationship between two or more views such that one view, called the master view, drives data changes in one or more other views, called detail views.

Suppose you have the following two views:

- A table that shows Number of Applicants by State

- A graph that shows Number of Applicants by Source with State on a section slider

Using the master-detail linking functionality, you can link the two views so that when you click a particular State in the table, the State on the section slider of the graph as well as the data in the graph changes to reflect the State that was clicked on the table.

> ✏ **Note:** Master-detail linking is not supported when you click the plot area of a graph.

Master Views

This is a short description.

A master view drives data changes in one or more detail views. A view becomes a master when you set up the interaction of a column in the view to send master-detail events on designated channels. This column is known as the master column.

The master column is the column whose values when clicked send a master-detail event, which passes information to update the data in a detail view.

The following types of views can be master views:

- Graph

- Funnel graph

- Gauge

- Map

- Pivot table

- Table

- Trellis (only the outer edges, not the inner visualizations)

A master view can be in the same analysis as the detail view or in a different analysis. A master view can update data in one or more detail views.

What Types of Columns Can Be Master Columns

Any type of column — hierarchical, attribute, or measure — can be a master column. However, the master column cannot be displayed on the page edge or the section slider in the master view. It must be displayed in the body of the view.

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✎ **Note:** While hierarchical columns are supported as master columns, if a user clicks a hierarchy level, then a change takes effect in the detail view only if the level is expanded there as well.

What Information Do Master-Detail Events Pass

When a master-detail event is raised, it passes the definition of the cell (or item) in the master view that was clicked. The specific information it passes depends on the type of column:

- For an attribute column, it passes the clicked value and the contextual information to the left and above the axis member.

  For example, in *Master-Detail Event Information for an Attribute Column* if the attribute column District is the master column, and you click CHICAGO DISTRICT (Bold), then the master-detail event information passed is Region=CENTRAL REGION and District=CHICAGO DISTRICT.

Master-Detail Event Information for an Attribute Column			
Region	District	Year	Hires
Central Region	Chicago District	1998	30
		1999	45
		2000	53
	Cincinati District	1998	7
		1999	20
		2000	13
	Kansas City District	1998	51
		1999	43
		2000	46
Eastern Region	Boston District	1998	17
		1999	37
		2000	25
	New York District	1998	50
		1999	52

- For a measure column, it passes all the contextual information for the data value.

  For example, in *Master-Detail Event Information for a Measure Column*, if the measure column Hires is the master column, and you click 53 (Bold), then the master-detail event information passed is Region=CENTRAL REGION, District=CHICAGO DISTRICT, and Year=2000.

Master-Detail Event Information for a Measure Column			
Region	District	Year	Hires
Central Region	Chicago District	1998	30
		1999	45

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Master-Detail Event Information for a Measure Column			
Region	District	Year	Hires
		2000	53
	Cincinati District	1998	7
		1999	20
		2000	13
	Kansas City District	1998	51
		1999	43
		2000	46
Eastern Region	Boston District	1998	17
		1999	37
		2000	25
	New York District	1998	50
		1999	52

The master-detail event information defines the position of a page edge or a section slider in a detail view.

What Are Channels

A channel links a master view to a detail view. It is the vehicle that carries master-detail events from the master view to the detail view. The same channel must be used for both the master view and the detail view in a master-detail relationship, for example, Channel1.

Detail Views

A detail view is a view that listens for and responds to master-detail events sent by a master view on a specified channel. A view becomes a detail view, when you set up the view to listen to master-detail events.

A detail view includes one or more columns whose values are changed directly by the information passed by a master-detail event. These columns are known as detail columns. A detail column must:

- Be on the page edge or the section slider of the detail view. Whether a detail column is displayed on the page edge or a section slider, depends on the type of view:
  - For pivot tables and tables, it must be on the page edge
  - For graphs and gauges, it can be on the page edge, or on the section slider

    Note: If a detail column is on a section slider and a page edge is present, the detail column is not updated by the information in the master-detail event. For example, if the information in the event is Region=CENTRAL and Year=2009, and the page edge of the detail view has Region and the section slider has Years, then only the Region is updated.

  - Match a column in the master view

When a detail view contains multiple detail columns, it is listening for and responding to master-detail events on multiple channels.

The following types of views can be detail views:

- Graph
- Funnel graph
- Gauge
- Table
- Pivot table
- Trellis (only the outer edges, not the inner visualizations)

A detail view:

- Can listen for master-detail events from multiple master views
- Can be in the same analysis as the master view or in a different analysis
- Cannot act as a master to another view

How Does Master-Detail Linking of Views Work

When a master view and a detail view are linked and a user clicks a cell (or item) in the master column, a master-detail event is generated on the designated channel and the master-detail event information is passed to the detail view.

The detail view (which is listening on the designated channel for master-detail events) receives the event and the master-detail event information. It reviews the master-detail event information to determine which column in this information matches the detail column. When it finds a match, it takes the column values in the master-detail event information, updates the detail column, and then refreshes the entire detail view.

> ✎ **Note:** If a master column is on a section slider, then any detail view that is not visible initially in the browser is not updated and refreshed until the view becomes visible when you scroll down. For more information on section sliders, see *"Defining a Section Slider in a Graph or Gauge"*.

Linking Views in the Master-Detail Relationships

To link views in master-detail relationships, you must define the master view and the detail view.

For more information on master-detail linking, see *"Master-Detail Linking of Views"*

Defining the Master View

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

1. Create or edit the analysis whose view (or views) you want to define as the master view.

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2. For the column that is to be the master column, in the *"Analysis editor: Criteria tab"*, click the **Options** button and then select **Column Properties**.

   The *"Column Properties dialog"* is displayed.

3. Click the *"Column Properties dialog: Interaction tab"*.

4. In the **Primary Interaction** box in the Value area, select **Send Master-Detail Events**.

   The **Specify channel** field is displayed.

5. In the **Specify channel** field, enter a name for the channel on which the master view sends master-detail events. You can use any appropriate name, for example, Sales Analysis Channel, Channel 1, or channel 1.

6. Add the view to use as a master view. Note that any view that you add that includes the master column can be used as a master view.

7. Click **OK**.

Defining the Detail View

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

1. Create or edit the analysis whose view you want to define as the detail view.
2. Create the view that is to be the detail view, for example, a graph.
3. Edit the view.
4. Click the view's Property button on the toolbar of the view's editor. For example for a graph, click the Graph Properties toolbar button in the Graph Editor.

   The view's property dialog is displayed, for example, for a graph, the *"Graph Properties dialog"*.

5. In the "Graph Properties dialog: General tab" (for graph or funnel graph), the *"Gauge Properties dialog: General tab"* (for a gauge), the *"Table Properties dialog: Style tab"* (for a table), or the *"Pivot Table Properties dialog"* (for a pivot table, select the **Listen to Master-Detail Events** box.

6. In the Event Channels field, enter the name of the channel on which the detail view is to listen for master-detail events. The name must match (including case) the name of the channel on which the master view sends master-detail events. (For more information on the channel in the master view, see *"Defining the Master View"*.

7. Click **OK**.

8.

   🖉 **Note:** You must drag and drop all detail columns to the same drop target. You cannot have some on the Prompts drop target and some on the Section drop target.

   In the *"Layout pane"*, drag the column (or columns) to be the detail column (or columns) to either the Prompts drop target or the Section drop target as follows:

   o If the detail view is a pivot table or table, then drag the column or columns to the Prompts drop target.

   o If the detail view is a graph or a gauge, then drag the column or columns to the Prompts drop target or to the Sections drop target, whichever you prefer, unless the graph or gauge has a column on the Prompts drop target. Then, you must drag the column or columns to the Prompts drop target.

   For more information on drop targets, see *"Drop Targets"*

9. If you dragged and dropped one or more detail columns to the Section drop target, then select the **Display as Slider** box.

7 Building and Using Dashboards

Dashboards

Dashboards provide personalized views of corporate and external information.

A dashboard consists of one or more pages. Pages can display anything that you can access or open with a Web browser, including the following:

- The results of analyses

  The results of an analysis is the output returned from the Oracle BI Server that matches the analysis criteria. It can be shown in various views, such as a table, graph, and gauge. Users can examine and analyze results, print as PDF or HTML, save as PDF, or export them to a spreadsheet.

- Alerts from agents

- Action links and action link menus

- Images

- Text

- Views of folders in the Oracle BI Presentation Catalog

- Links to Web sites

- Links to documents

- Embedded content (such as Web pages or documents)

When you open a dashboard, the content of the dashboard is displayed in one or more dashboard pages. Dashboard pages are identified by tabs across the top of the dashboard. A toolbar at the top right contains buttons that let you:

- Edit the dashboard, if you have the appropriate permissions and privileges.

  For more information on the Dashboard Builder, see *"Dashboard Builder"*.

- Display various options for working with a *"Dashboard page"*, such as printing the current page. See *"Opening and Using a Dashboard"*.

Dashboard Builder

The Dashboard builder lets you add dashboard pages to a dashboard and edit the pages in a dashboard. You can add objects to and control the layout of dashboard pages.

Pages contain the columns and sections that hold the content of a dashboard. Every dashboard has at least one page, which can be empty. Dashboard pages are identified by tabs across the top of the dashboard. Multiple pages are used to organize content. For example, you might have one page to store results from analyses that you refer to every day, another that contains links to the Web sites of your suppliers, and one that links to your corporate intranet.

The objects that you can add to a dashboard page include:

- Dashboard objects — Items that are used only in a dashboard. Examples of dashboard objects are sections to hold content, action links, and embedded content that is displayed in a frame in a dashboard. See Table E–2, *"List of Dashboard Objects"*.

- Catalog objects — Objects that you or someone else has saved to the Oracle BI Presentation Catalog (for example, analyses, prompts, and so on) and for which you have the appropriate permissions.

  In a dashboard, the results of an analysis can be shown in various views, such as a table, graph, and gauge. (The results of an analysis are the output that is returned from the Oracle BI Server that matches the analysis criteria.) Users can examine and analyze results, save or print them, or export them to a spreadsheet.

What Controls the Look of a Dashboard

The look of a dashboard, such as background colors and the size of text, is controlled by:

- Skins — Skins control the way the Oracle BI EE interface is displayed, such as background colors, corporate logos, and the style sheets to use. Skins can be automatically assigned to users when they log on. Administrators can customize the default skin and create new skins.

- Styles — Styles control how dashboards and results are formatted for display, such as the color of text and links, the font and size of text, the borders in tables, the colors and attributes of graphs, and so on. Styles are organized into folders that contain Cascading Style Sheets (files with a .css extension), images, and graph templates. Administrators can customize some style sheets and create new style sheets. Users can override some elements in style sheets, such as table borders and text size, when formatting results in the Results tab.

- Cosmetic formatting — Cosmetic formatting affects the visual appearance of results and dashboards. You can apply it to results, columns, and sections.

  For more information, see *"Formatting Dashboard Pages"*.

Creating a Dashboard

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, click **New**, then select **Dashboard**.
   The *"New Dashboard dialog"* is displayed.
2. In the dialog, enter a name and description for the dashboard.

3.

> 🖉 **Note:** RFM Add information about dashboard folders and behavior If you save the dashboard in the
> Dashboards subfolder directly under /My Company Shared/first level subfolder, then the dashboard is
> listed in the Dashboard menu in the global header. If you save it in a Dashboards subfolder at any other
> level (such as /My Company Shared/Sales/Eastern), then it is not listed. If you choose a folder in the
> Dashboards subfolder directly under /My Company Shared/first level subfolder in which no dashboards
> have been saved, then a new "Dashboards" folder is automatically created in that folder in which to
> save the new dashboard. For example, if you choose a folder named /Shared Folders/Sales in which no
> dashboards have been saved, a new Dashboards folder is automatically created and the Location entry
> changes to /Shared Folders/Sales/Dashboards. (A new "Dashboards" folder is not automatically created if
> you choose a folder at any other level.)

Select the location for the dashboard.

4. Specify whether you want to add content to the new dashboard now or later.
5. Click **OK**.

If you specified to add content:

- Now, then the new dashboard, which contains one blank page, is displayed in the "*Dashboard builder*" for editing.

- Later, then an empty dashboard is created (but not displayed) to which you can add content later.

Editing a Dashboard

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Navigate to the dashboard to edit and click the Edit link.

   The dashboard is displayed in the "*Dashboard builder*".
2. Perform one or more of the following tasks, as needed:
   - Add a dashboard page. See "*Adding New Pages to a Dashboard*"

   - Delete a dashboard page. See "*Deleting the Current Dashboard Page*" or *Deleting One or More Dashboard Pages*

   - Add content. See "*Dashboard Content*".

   - Use the options available on the **Tools** toolbar button of the Dashboard builder to:
     - Set dashboard and dashboard page properties.
     - Specify page settings, and header and footer content for the PDF output, when printing a dashboard.
     - Set the report links for a dashboard page.
     - Specify whether to allow users to create personal saved customizations on the page.
     - Publish the page to a shared dashboard location so that you can share the page with others. See "*Publishing a Dashboard Page*".

   For more information about these options, see "*Dashboard builder*"

3. Perform one of the following steps at any time:
   - To preview the dashboard page, click the **Preview** toolbar button.

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- To save your changes, click the **Save** toolbar button.

- To exit the Dashboard builder and return to the Dashboard, click **Run**

Adding New Pages to a Dashboard

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the dashboard. For information, see *"Editing a Dashboard"*.
2. Click the **Add Dashboard Page** toolbar button in the Dashboard builder.

   The *"Add Dashboard Page dialog"* is displayed.
3. In the dialog, enter a name and description for the page, and click **OK**.

   The page is displayed as a new tab in the *"Dashboard builder"*.
4. Click the **Save** toolbar button.

After you add a new page, you can add content to it. See *"Adding Content to a Dashboard"*

Dashboard Content

You can add the following content to dashboards:

- Dashboard objects, including objects that let you lay out the content, such as columns and sections, as well as objects such as text, folders, action links, and so on. *Table E–2* lists and describes the dashboard objects that you can include on a dashboard page.

- Objects that you or someone else has saved to the Oracle BI Presentation Catalog and for which you have the appropriate permissions, such as analyses, prompts, and so on.

✎ **Note:** Dashboard modification is reserved for users with the appropriate permissions and privileges.

Adding Content to a Dashboard

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the dashboard. For information, see *"Editing a Dashboard"*.
2. Add the objects to include on the page. To add an object, select it from the *"Dashboard Objects pane"* or the *"Catalog pane"*, and then drag and drop the object to the *"Page Layout area"*.

   For information on dragging and dropping objects, see *Dragging and Dropping Objects to the Page Layout Area in the Dashboard Builder*

Tip: To locate an object in the Catalog pane, you can browse either by the catalog folder in which the object is stored or by the dashboard on which the object is displayed.

When you drag and drop a scorecard object to the Page Layout area, the "Dimension Pinnings dialog" might be displayed, where you pin (or set) values for KPI dimensions that are associated with the scorecard object. For more information about pinning, see *"Dimensions and Pinned Dimension Values"*

3. Set the properties of each object, as appropriate. To do so, hover the mouse pointer over the object in the Page Layout area to display the object's toolbar and click the **Properties** button.

   What is displayed depends on the type of object. For some objects, a properties dialog is displayed. For other objects, a menu of options is displayed. For more information, see *"Properties Buttons for Objects"*

4. Click the Save toolbar button.

Dragging and Dropping Objects to the Page Layout Area in the Dashboard Builder

When you drag and drop objects to the *"Page Layout area"* of the *"Dashboard builder"*, keep in mind the following:

- As you drag an object in the Page Layout area, a blue bar is displayed to indicated the drop location relative to another object. When you hover over a valid target in which to drop the object, the border of the target container changes to orange.

- When you drop an object that does not have a name to the Page Layout area, it is assigned a default name, such as Section 1, Link 1, and so on. You can rename some objects to assign meaningful, descriptive names.

- When you hover the mouse pointer over an object that has been dropped to the Page Layout area, it is highlighted with an orange border and its toolbar is displayed.

- Columns are used to align content, while sections within columns hold the actual content. If you drag and drop an object to an empty Page Layout area, or drag and drop an object to a column without first adding a section to hold it, then the proper containers for it are created automatically. For example, if you drag and drop a section to an empty Page Layout area, a column is created automatically. If you drag and drop an analysis, then both the column and section are created automatically.

- When you drag and drop an analysis to the Page Layout area, the compound view is shown by default. If you want to show another view, then click the **Properties** button for the analysis, select **Show View**, and select the view that you want.

- When you drag a second object to a section, you can drop it either horizontally or vertically within the section, which sets the layout for the section. Additional objects that you drag and drop have that layout. To change the layout after it has been set, you can use the **Horizontal Layout** and **Vertical Layout** buttons on the section toolbar.

- If you drag a section from one column into another column, then any content in that section is also included.

Changing the Properties of a Dashboard and its Pages

You can change the properties of a dashboard and its pages. Specifically, you can:

- Change the style and description of the dashboard
- Add hidden named prompts to the dashboard and to its pages
- Specify which links (**Analyze, Edit, Refresh, Print, Export, Add to Briefing Book,** and **Copy**) are to be included with analyses at the dashboard level. Note that you can set these links at the dashboard page level and the analysis level, which override the links that you set at the dashboard level. For more information, see *"Report Links dialog"*
- Rename, hide, reorder, set permissions for, and delete pages.
- Specify which accounts can save shared customizations and which accounts can assign default customizations for pages, and set account permissions.
- Specify whether the **Add to Briefing Book** option is to be included in the Page Options menu for pages.

Changing the Properties of a Dashboard and its Pages

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the dashboard. For information, see *"Editing a Dashboard"*.
2. Click the **Tools** toolbar button and select **Dashboard Properties**.

   The *"Dashboard Properties dialog"* is displayed.
3. Make the property changes that you want and click OK.
4. Click the Save toolbar button.

Changing the Properties of an Object Added to a Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the dashboard. For information, see *"Editing a Dashboard"*..
2. Navigate to the page that contains the object.
3. Hover the mouse pointer over the object in the Page Layout area to display the object's toolbar and click the **Properties** button.

   What is displayed depends on the type of object. For some objects, a properties dialog is displayed. For other objects, a menu of options is displayed. For more information on the properties that you can change, see *"Properties Buttons for Objects"*

4. Make the property changes that you want.
5. Click the **Save** toolbar button.

Deleting Objects on Dashboard Pages

If you add an object that you later decide that you do not want, then you can delete it. Keep the following points in mind when deleting objects:

- When you delete an object that contains other objects, such as a column or section, you also delete all objects in that container.

- When you delete a column, other columns on the page might resize automatically to maintain column alignment.

- For objects that are saved in the catalog, the object is deleted from the dashboard page only. It is not deleted from the catalog. (Users with the appropriate permissions can edit the contents of the catalog. For information, see Chapter 13, "*Managing Objects in the Oracle BI Presentation Catalog.*")

Deleting an Object on a Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the dashboard. For information, see "*Editing a Dashboard*".
2. Navigate to the page that contains the object to delete.
3. Hover the mouse pointer over the object in the Page Layout area to display the object's toolbar and click the Delete button.

Deleting the Current Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the dashboard. For information, see "*Editing a Dashboard*".
2. Navigate to the page to delete.
3. Click the **Delete Current Page** toolbar button.
4. Confirm the deletion.

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Deleting One or More Dashboard Pages

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the dashboard. For information, see *"Editing a Dashboard"*.
2. Click the **Tools** toolbar button and select **Dashboard Properties**.

   The *"Dashboard Properties dialog"* is displayed.
3. For each page to delete:
   a. In the **Dashboard Pages** area, select the page.
   b. Click **Delete** in the Dashboard Pages toolbar.
   c. Confirm the deletion.
4. Click **OK**.

Saving Dashboards by Other Names and In Other Locations

You can save a dashboard:

- By another name

  The new name for the dashboard must not exist in the destination folder, otherwise, the save operation fails.

- Anywhere in the Oracle BI Presentation Catalog

  If you save the dashboard in the Dashboards subfolder directly under /Shared Folders/first level subfolder, then the dashboard is listed in the Dashboard menu in the global header. If you save it in a Dashboards subfolder at any other level (such as /Shared Folders/Sales/Eastern), then it is not listed. The dashboard is also not listed if you save it in a subfolder under the Dashboards subfolder, such as /Shared Folders/Sales/Dashboards/Eastern.

  If you choose a folder in the Dashboards subfolder directly under /Shared Folders/first level subfolder in which no dashboards have been saved, then a new "Dashboards" folder is automatically created in that folder in which to save the new dashboard. For example, if you choose a folder named /Shared Folders/Sales in which no dashboards have been saved, a new Dashboards folder is automatically created and the Location entry changes to /Shared Folders/Sales/Dashboards. (A new "Dashboards" folder is not automatically created if you choose a folder at any other level.)

Saving a Dashboard by Another Name or in Another Location

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the dashboard. For information, see *"Editing a Dashboard"*
2. Click the **Save Dashboard As** toolbar button to display a dialog, where you specify the save criteria.

Opening and Using a Dashboard

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Navigate to the dashboard to open and click the Open link.

   The dashboard is opened to the first *"Dashboard page"*. If no content has been added, then an empty dashboard page notification message is displayed.
2. (optional) Perform any of the following tasks:
   - Display the dashboard in the *"Dashboard builder"* for editing.
   - Navigate among dashboard pages by clicking the page tabs.
   - Print a page.
   - Refresh a page.

     > **Note:** Perform this task to ensure that the refresh operation bypasses saved information in the Oracle BI Presentation Services cache and is issued to the Oracle BI Server for processing. When you select a specific dashboard or analysis, Presentation Services checks its cache to determine if the identical results have recently been requested. If so, Presentation Services returns the most recent results, thereby avoiding unnecessary processing by the BI Server and the back-end database. If not, the analysis is issued to the BI Server for processing. You cannot force the analysis past the BI Server's cache.

   - Add a page to a briefing book.

     For information, see *"Adding Content to a New or Existing Briefing Book"*.

     - > **Note:** BI Consumers cannot add pages to briefing books.

     Create a bookmark link or a prompted link to the page.

     For information, see *"Dashboard Page Links"* and *"Creating a Dashboard Page Link"*.
   - Apply saved customizations.

     For information, see *"What Are Saved Customizations for Dashboard Pages"* and *"Applying a Saved Customization"*.

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    o Edit saved customizations.

        For information, see *"What Are Saved Customizations for Dashboard Pages"* and *"Editing a Saved Customization"*.

    o Save the current customizations.

        For information, see *"What Are Saved Customizations for Dashboard Pages"* and *"Saving a Customization"*"Saving Customizations".

    o Clear the current customizations. For information, see *"What Are Saved Customizations for Dashboard Pages"*"" and "Clearing Your Current Customization".

What are Saved Customizations for Dashboard Pages

Saved customizations allow users to save and view later dashboard pages in their current state with their most frequently used or favorite choices for items such as filters, prompts, column sorts, drills in analyses, and section expansion and collapse. By saving customizations, users need not make these choices manually each time that they access the dashboard page.

Users with the appropriate permissions and dashboard access rights can perform the following activities:

- Save various combinations of choices as saved customizations, for their personal use.

- Specify a saved customization as the default customization for a dashboard page, for their personal use.

- Switch between their saved customizations.

For information on using saved customizations, see "Applying Saved Customizations" and "Clearing Your Current Customization".

For information on saving customizations and editing saved customizations, see "Saving Customizations" and *"Editing a Saved Customization"*

Saving a Customization

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Open the dashboard in which you want to save a customization. For information, see *"Opening and Using a Dashboard"*.
2. Navigate to the page on which you want to save a customization.
3. Make your customizations.
4. Click the Page Options toolbar button on the dashboard page and select Save Current Customization.

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The "Save Current Customization dialog" is displayed.

5. Enter a descriptive name for the customization.
6. Specify for whom the customization is to be saved:

   Currently the only option available is **Me**.
7. Optionally, to assign this customization as your default customization, select **Make this my default for this page**.
8. Click OK.

Applying a Saved Customization

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Open the dashboard in which you want to apply a saved customization. For information, see *"Opening and Using a Dashboard"*.
2. Navigate to the page that contains the customization to apply.
3. Click the **Page Options** toolbar button and select **Apply Saved Customization**.

   Your personal saved customizations, if any, are shown at the beginning of the list. Your current default customization is shown in bold type.

4. Click a saved customization in the list to apply it to the dashboard page.

Editing Saved Customizations

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Open the dashboard in which you want to edit a customization. For information, see *"Opening and Using a Dashboard"*.
2. Navigate to the page that contains the customization to edit.
3. Click the **Page Options** toolbar button on the dashboard page and select **Edit Saved Customizations**.

   The *"Edit Saved Customizations dialog"* is displayed.
4. Rename customizations, change which customization to use as your default, change permissions for those customizations that have been shared with others, and delete customizations, as appropriate.

5. Click **OK**.

Publishing Dashboard Pages

You can publish a dashboard page to a shared dashboard location so that you can share the page with others.

When you publish a dashboard page:

- Personal content (such as analyses, prompts, and so on) is copied to a destination location that you specify and references updated as appropriate.

- References to shared content are retained.

- If you have made changes to the page but have not saved them, then the unsaved changes are published along with the saved changes.

- Ensure that other users who might display the published dashboard page have the appropriate privileges for the objects on the page. For example, if the page contains a BI Publisher report, then users must have the appropriate privilege to see that report.

Publishing a Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

1. Edit the dashboard that contains the page to publish. For information, see *"Editing a Dashboard"*.
2. Navigate to the page to publish.
3. Click **Tools** and then select Publish Page to Dashboard.

   The *"Publish Page to Dashboard dialog"* is displayed.
4. In the Dashboard field, specify the name of the destination dashboard.
5. If the Publish Dashboard Page warning is displayed to indicate that content (such as the page, analyses, prompts, and so on) exists in the destination location, then click:
   - **OK** to continue with the publishing operation and replace the existing content.
   - **Cancel** to discontinue the publishing operation and not replace the existing content.
6. Click **OK.**

The dashboard page is copied to the destination location.

Dashboard Page Links

You can create links to dashboard pages, if allowed at your organization. This lets you, for example, save a link as a bookmark or copy and send a link to other users in email.

There are two types of links that you can create — bookmark links and prompted links.

Bookmark Links

A bookmark link captures the path to a dashboard page and all aspects of the page state, for example:

```
http://localhost/10.1.3.2/saw.dll?Dashboard&_
scid=7ndOC-SjmWo&PortalPath=%2Fusers%2Fadministrator%2F_
portal&Page=p2&PageIdentifier=7fsg0r2sdssvgen4&BookmarkState=r78an1mbj0fj4lmqhdjfn
dvvai
```

After you create a bookmark link, you can:

- Save the link as a bookmark so that you can return to the exact same page content at a later time.

- Copy and send the link to other users who then can view the exact same content that you are viewing, providing they have the same permissions as you and have access to the page.

When you create a bookmark link, the state of a dashboard page is saved in the catalog as a hidden bookmark object for the amount of time that your organization specifies. The default is 30 days. Because the state of a dashboard page is saved when you create a bookmark link, you can continue to modify the content of the page after you create the link.

Prompted Links

A prompted link captures the path to a dashboard page and a simplified presentation of the dashboard prompts, for example:

```
...Action=Navigate&col1=Products.Color&val1="Armory"+"Clear"&col2=Periods."Month"&
op2=gt&val2="05/01/1998%2012:00:00%20AM"
```

When you create a prompted link, you can manually or programmatically manipulate the link, such as by adding different values for the prompts.

Prompted Link Syntax

The prompted link syntax is as follows:

```
<Content Path>, Action=Navigate, Column1 (col1), Operator1 (op1), Values1 (val1),
Column2 (col2), Operator2 (op2), Values2 (val2)…
```

When manipulating this syntax:

- Use plus signs to separate values.

- Use the same operators as those for the Go URL. For a list of these operators, see Oracle Fusion Middleware Integrator's Guide for Oracle Business Intelligence Enterprise Edition

- Optionally omit the operator parameter for equal (eq).

- Optionally omit the double quotes if there are no white spaces inside the values.

Creating a Dashboard Page Link

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

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Home > **Oracle Business Intelligence** > **Catalog**

1. Open the dashboard in which you want to create a link to a dashboard page. For information, see *"Opening and Using a Dashboard"*.
2. Navigate to the page for which you want to create a link.
3.

   > ✏ **Note:** If you drill in an analysis that has been set to replace the dashboard with the new results (rather than show the new results directly in the dashboard), then the **Create Bookmark Link** option is displayed as a link below the new results rather than as an option on the Page Options menu. (To specify how drilling works in an analysis, you use the **Drill in Place** option on the Properties menu for a section. For more information, see *"Properties Buttons for Objects"*.

   Click the Page Options toolbar button on the dashboard page and:
   - To create a bookmark link, select Create Bookmark Link.
   - To create a prompted link, select Create Prompted Link.

The link is displayed in the Address Bar of the browser. If the link is a:

- Bookmark link, then you can save the it as a bookmark or copy and send it to other users.

- Prompted link, then you can manually or programmatically manipulate the link.

Briefing Book

This is a short description.

A briefing book is a collection of static or updatable snapshots of dashboard pages and individual analyses.

You can:

- Add the content of dashboard pages (including pages that contain BI Publisher reports) or individual analyses to new or existing briefing books. See *"Adding Content to a New or Existing Briefing Book"*

- Edit briefing books to reorder content, delete content, and change the content type, navigation link properties, and content description. See *"Editing a Briefing Book"*

- Download briefing books in PDF or MHTML format for printing and viewing. See *"Downloading a Briefing Book"*. The PDF version of a briefing book contains an automatically generated table of contents. For information about the table of contents, see *"Briefing Book PDF Version Table of Contents"*

- Add a list of briefing books to a dashboard page. See *"Adding a List of Briefing Books to a Dashboard Page"*

- Update, schedule, and deliver briefing books using agents, if your organization licensed Oracle Business Intelligence Delivers. See *"Delivereing Briefing Books via Agent"*

Briefing Book PDF Version Table of Contents

The PDF version of a briefing book contains a table of contents that is automatically generated. It contains an entry for each dashboard page, analysis, and report in the briefing book. Each of these entries includes a time stamp and the page number within the PDF file. The time stamp value depends on how the content was saved to the briefing book. If the content was saved as updatable, then the time stamp is current. If the content was saved as a snapshot, then the time stamp is the time of the snapshot.

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Indented beneath each entry for a dashboard page are any briefing book links included on that page, up to a maximum of nine links. These entries do not include timestamps. For example:

```
Table of Contents
My Dashboard Page 7/11/2008 9:15:20 AM . . . . . . .1
  Years to Dollars Dashboard . . . . . . . . . . .2
```

The administrator can modify the template for the table of contents so that the table of contents that is generated in your briefing books might have a different look.

> ✎ **Note:** The table of contents is always generated in English. Other languages are not supported. Therefore, you might want to translate the tables of contents that are generated in briefing books.

Adding Content to a New or Existing Briefing Book

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Open the dashboard or analysis that contains the content to add to a briefing book.
2. Navigate to the page to add or that contains the analysis to add.
3. Perform one of the following actions:
    - To add the contents of the dashboard page to a briefing book, click the **Page Options** toolbar button on the dashboard page and select **Add To Briefing Book**

        .

        > ✎ **Note:** The **Add to Briefing Book** option is not available on an empty dashboard page or if the **Show Add to Briefing Book** box in the "*Dashboard Properties dialog*" has not been selected for the page.

    - To add the results of an individual analysis to a briefing book, locate the analysis on the dashboard and click the Add to Briefing Book link.

        > ✎ **Note:** This link is displayed only if the **Add to Briefing Book** option was selected in the Report Links dialog when the analysis was added to the dashboard. For information about setting the **Add to Briefing Book** option, see "Report Links dialog".

    The "*Save Briefing Book Content dialog*" is displayed.
4. Click **Browse** to display the "*Save As dialog*".
5. In the Save As dialog, to save the contents to:
    - A new briefing book, specify the location in which to save the briefing book in the **Save In** field, enter a name for the briefing book in the **Name** field, optionally enter a description in the **Description** field, and click **OK**.
    - An existing briefing book, select the briefing book and click **OK**.
6. In the Save Briefing Book Content dialog, complete the remaining fields as appropriate.
7. Click **OK**.

The content is added to the briefing book.

Editing a Briefing Book

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. To edit a briefing book:
   - In the catalog, in the global header, click **Catalog** to display the *"Catalog page"*
   - On a dashboard page, open the dashboard page that contains the briefing book.
2. Navigate to the briefing book to edit and click **Edit**.

   The *"Edit Briefing Book dialog"* is displayed.
3. To change content:
   a. Select the content.
   b. Click **Edit** to display the *"Page Properties dialog"*.
   c. Change the content type, the number of navigation links to follow for updatable content, or the content description as needed.
   d. Click **OK**.
4. To reorder content, select the content and then drag and drop it to the desired location.
5. To delete content, select the content and click **Delete**.
6. Click **OK**.

Downloading a Briefing Book

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Navigate to the briefing book to download.
2. Perform one of the following actions:
   - To download the briefing book in PDF format, click PDF and then open or save the file.

   > ✎ **Note:** The Adobe Reader application is required to view or print a briefing book PDF file.

   - To download the briefing book in MHTML format, click Web Archive (.mht) and then open or save the file.

Downloaded briefing books are saved with an .mht file extension and can be opened in a browser. You can then email or share the briefing book.

Adding a List of Briefing Books to a Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

1. Edit the dashboard. For information, see "*Editing a Dashboard*".
2. Navigate to the page to which you want to add a list of briefing books.
3. From the "*Dashboard Objects pane*", drag and drop a folder object into a section.
4. Hover the mouse pointer over the folder object in the Page Layout area to display the object's toolbar and click the **Properties** button.

    The "*Folder Properties dialog*" is displayed.
5. In the **Folder** field, enter the folder that contains the briefing books to list.
6. In the **Expand** box, specify whether to show an expanded view of the folder.
7. In the **Show RSS Link** box, specify whether to add an RSS feed option to the folder.
8. Click **OK** and then click Save to save the dashboard.

The folder is added to the dashboard.

Delivering Briefing Books via Agent

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Create or edit the agent to be used to deliver the briefing book. For information, see "*Creating Agents*".
2. In the "*Agent editor: Delivery Content tab*", click **Browse** to select the briefing book.

When the agent runs, the briefing book is delivered.

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8 Filtering and Selecting Data for Analyses

Inline or Named Objects

As you work with certain objects, you can create other objects that are saved with those objects. When you save one object with another, that object is saved "inline." You can save filters, groups, and calculated items inline. For example, you can create a group as part of an analysis. When you save the analysis, the group is saved "inline" or along with the analysis.

In addition to saving these objects inline, you can save them as individual objects with the subject area in the Oracle BI Presentation Catalog. When you save an object on its own, its becomes a "named" object. Named objects provide reusability, because you can create one object and use it multiple times with any analysis, dashboard (for filters), or dashboard page (for filters) that contains the columns that are specified in the named object. When the named object is updated and saved, those updates are immediately applied to all objects where the named object is used.

For example, after you save a group inline with an analysis, you can save the group as its own object in the catalog. You can then apply that named group from the Catalog pane to other analyses.

Folder Structure for Named Objects

Named filters, groups, and calculated items are generally saved to their related subject area folder. By saving the objects to a subject area folder, you ensure that they are available when you create an analysis for the same subject area.

Named objects saved in the /My Folders folder are available only to you. Objects saved in the /Shared Folders folder are available to other users who have permission to access the folders. If a subject area folder does not exist in your /My Folders folder or within the /Shared Folders folder, then the subject area folder is created automatically. When you save the object, the *"Save As dialog"* displays a default save path to /My Folders/Subject Area Contents/<subject area>. However, the dialog's Folders area continues to display all instances of the subject area folder in the catalog.

Saving Groups and Calculated Items as Inline or Named

You can save groups and calculated item as an inline or named object:

- When you create a group or calculated item while editing and saving a view or while working in the *"Compound Layout"*, the group or calculated item is saved inline with the analysis.
- When you work in the Selection Steps pane:
  - ○ You can save a group or calculated item that is within a step as a named object in the catalog.
  - ○ You can save a set of steps or the resulting members list for a column as a named object. You cannot save a set of steps as a group if one of the steps includes a calculated item.

See *"Adding a Group to Another Analysis"* for information on adding a saved group to an analysis.

Saving a Calculated Item or Group as a Named Object to the Catalog

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the analysis.
2. In the Results tab, Display the *"Selection Steps pane"*.
3. Click the link for the calculated item or group, then click **Save Calculated Item As** or **Save Group As** to display the *"Save As dialog"*.
4. Complete the dialog to save the object to the catalog.

Saving a Set of Steps as a Group to the Catalog

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Display the *"Selection Steps pane"*.
2. Click the **Save Selection Steps** button to the far right of the column name.
3. Complete the *"Save Selection Steps dialog"* to save the group as an object to the catalog.

Filters and Selection Steps

You use both filters and selection steps to limit the results that are displayed when an analysis is run, so that the results answer a particular question. Together with the columns that you select for an analysis, filters and selection steps determine what the results contain. Based on the filters and selection steps, only those results that match the criteria are shown. For example, depending on the industry in which you work, you can use filters and selection steps to learn who are the top ten performers, what are the dollar sales for a particular brand, which are the most profitable customers, and so on.

Another kind of filter, called a prompt, can apply to all items in a dashboard. Prompts can be used to complete selection steps and filters at runtime. For information, see *"Prompting in Dashboards and Analyses."*

Oracle BI provides the Filters view and Selection Steps view, which you can add to an analysis to display any filters or selection steps applied to the analysis. Adding these views can help the user understand the information displayed in the analysis. For more information about how to add views to an analyses, see *"Adding Views for Display in Dashboards"*.

How Do Filters and Selection Steps Differ?

Filters and selection steps are applied on a column-level basis and provide two methods for limiting the data in an analysis. A filter is always applied to a column before any selection steps are applied. Steps are applied in their specified order. Filters and selection steps differ in various ways.

Filters

Filters can be applied directly to attribute columns and measure columns. Filters are applied before the query is aggregated and affect the query and thus the resulting values for measures. For example, suppose that you have a list of members in which the aggregate sums to 100. Over time, more members meet the filter criteria and are filtered in, which increases the aggregate sum to 200.

Selection Steps

Selection steps are applied after the query is aggregated and affect only the members displayed, not the resulting aggregate values. For example, suppose that you have a list of hierarchical members in which the aggregate sums to 100. If you remove one of the members using a selection step, then the aggregate sum remains at 100.

You can create selection steps for both attribute columns and hierarchical columns. Selection steps are per column and cannot cross columns. Because attribute columns do not have an aggregate member, the use of selection steps versus filters for attribute columns is not as distinctive as for hierarchical columns. While measure columns are displayed in the Selection Steps pane, you cannot create steps for them so steps do not affect them. Measures are used to create condition steps for attribute and hierarchical columns, such as Sales greater than $1 million.

Working with Selections of Data

As you specify which data members to include in an analysis, you create selections of data from the data source. Each selection specifies the criteria for a set of members for a particular column, such as Product or Geography. Each selection consists of one or more steps. A step is an instruction that affects the selection, such as add Product members whose values contain the text "ABC." The order in which steps are performed affects the selection of data. Each step acts incrementally on the results from previous steps, rather than acting on all the members for that column.

You can view these selection steps in the *"Selection Steps pane"*. Steps are created using the following means:

- When you add a column to an analysis, a selection step is created automatically to start with all members, unless you explicitly add specific members. As you drag and drop column members in the Results tab to add to the analysis, steps are also created automatically. For example, suppose that you drag and drop the FY2007 and FY2008 members from the Year hierarchical column to a pivot table. The selection step "Add FY2007, FY2008" is created.

- As you add groups and calculated items, steps are created automatically.

- When you use right-click interactions (such as Add Related or Keep Only) to refine the selection of data for a particular hierarchical column or attribute column, steps are created automatically.

- You can create steps directly using the Selection Steps pane, to refine the selection of data for a particular hierarchical column or attribute column. You can display the Selection Steps pane from various places including the Results tab, the Criteria tab, and some view editors.

Selection steps can be one of the following types:

- Explicit list of members — A step can include a list of members for a column, such as Boston, New York, Kansas, South. For hierarchical columns, the members can be from different hierarchy levels. For attribute columns, the members can be from only that column.

- Condition step — A step can specify that members are selected from a column based on a condition, which can be one of various types including based on measures or on top/bottom values. This member list is dynamic and determined at runtime.

- Based on hierarchy step — A step for hierarchical columns that enables you to select the type of relationship with which to select members. You can select a family relationship (such as children of or parent of), a specific hierarchy level (for level-based hierarchies only), or a level relationship (for level-based hierarchies only).

- Groups and calculated items — A step can include a group or calculated item. Groups and calculated items can be used only with Add steps; they cannot be used in Keep Only or Remove steps.

  For information, see *"Groups and Calculated Items"*.

Creating Selection Steps

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the analysis.
2. Display the *"Analysis editor: Results tab"*.
3. If the Selection Steps pane is not visible, then click the **Show Selection Steps** pane button on the toolbar to display it.

   The pane might also be collapsed at the bottom of the Results tab. Click the plus sign icon to expand it.
4. For the column whose steps you want to define, click the Then, New Step link.
5. From the menu, select the option for the step type to create and complete the resulting dialog.

Selection steps are automatically created when you use the right-click interactions (such as **Add Related** or **Keep Only**) to refine the selection of data for a particular hierarchical column or attribute column in a view. See *"Right-Click Menu for Tables, Pivot Tables, and Trellises"*.

After you add selection steps to the analysis, you can go to the *"Analysis editor: Results tab"* and add the Selection Step view to the analysis. If you add the Selection Steps view, at runtime the user can view the selection steps that are applied to the analysis. For more information about adding the selection steps view, see *"Results tab: Selection Steps editor"*.

> ✏ **Note:** The BI Author Limited cannot create a selection steps view.

Editing Selection Steps

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Hover the mouse pointer over the step in the Selection Steps pane and click a button on the resulting toolbar.

   You can perform various tasks such as displaying a dialog for editing the step, deleting the step, or changing the order of the step in the list of steps.

   For a group or calculated item, click its name to display a menu with options for editing and saving.

Selection Steps as a Group Object

If you have created a set of selection steps, then you can save and reuse the set as a group object, as described in *"Saving Groups and Calculated Items as Inline or Named"*.

Selection Steps and Double Columns

If your repository is configured for double columns, then you can create a selection step on a double column. To do so, select the display values for that column and the step is automatically evaluated using the code values that correspond to those display values.

If you use double columns, then use care with the *"New Calculated Item dialog"*. You can include a positional operator in the custom formula for the calculated item, such as $1, which specifies the column from the first row in the data set. When you include a positional operator, the display values cannot be mapped to the code values when evaluating the formula.

For information on double columns, see *"Understanding the Double Column Feature"*.

Creating a Column Filter

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer

ORACLE®

- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1.

> ✎ **Note:** If your repository is configured for double columns, and you want to use an operator other than **is equal to / is in, is not equal to / is not in**, or **is between** and specify code values rather than display values, then you should explicitly choose the code column rather than the display column. For information on double columns, see "*Understanding the Double Column Feature*".

To create a named filter, use the following sub-procedure:

a. From the Oracle Business Intelligence Home page, locate the global header, hover over the **New** menu, and from the menu select **Filter**. The Select Subject Area dialog is displayed.

b. From the Select Subject Area dialog, choose the subject area for which you want to create a filter. The "*Filter editor*" is displayed.

c. From the "*Subject Areas pane*", double-click the column for which you want to create the filter. The "*New Filter dialog*" is displayed.

2. To create an inline filter, use the following sub-procedure:

a. Either create an analysis or access an existing analysis for which you want to create a filter. Click the Criteria tab.

b. Locate the "*Filters pane*" and from the Filters Pane's toolbar, click the **Create a filter for the current subject area** button. The analysis' selected columns are displayed in the cascading menu.

c. Select a column name from the menu. Or select the More Columns option to access the "*Select Column dialog*" from which you can select any column from the subject area.

   After you selected a column, the "*New Filter dialog*" is displayed.

3.

> ✎ **Note:** If you want to add a filter for a column located in a different subject area, then you must first add that subject area to the analysis by clicking the **Add/Remove Subject Area** button in the "*Subject Areas pane*".

In the **Operator** field, choose an operator for the filter. The operator list from which you can choose is populated based on the type of column that you selected. For more information about each operator, including the **is prompted** and **is based on the results of another analysis** operator options, see "*Operators*".

4. In the Value field, specify one or more values to use when applying the filter or condition. You can:

   ○ Type values, using a semicolon to separate the values.

   ○ Select values from the list or calendar.

      To search for specific values, click Search in the list box. The "*Select Values dialog*" is displayed, where you can search for and select values.

If your repository is configured for double columns, and you are creating the filter on a display column, then by default, you specify display values. However, if your organization allows the display of code values, then you can specify code values rather than display values, but only if you use one of the following operators:

   ○ **is equal to / is in**

   ○ **is not equal to / is not in**

   ○ **is between**

To specify code values, select the Select by Code Column box and then specify the values.

5. If your repository is configured for double columns, and you are creating the filter on a display column and want to filter on display values rather than code values, then deselect the Filter by Code Column box.

6. Click the **Add More Options** button to add a SQL expression, Session variable, Repository variable, or Presentation variable to the filter. Note that if you are setting the filter's value with a SQL expression or variable, you should leave the Value field blank. For more information on variables, see *"Using Variables"*.

7. Select the **Protect Filter** box to protect the filter's value from being overridden by a matching prompt's value or when the user navigates to another report within the analysis. When you navigate from one report to another report within an analysis, any prompt values that you specified in the first report can be transferred to the second report.

8.

> ✏ **Note:** This is a one-way conversion. After you select the **Convert this filter to SQL** box, you can no longer view and edit the filter in the Edit Filter dialog. After you convert the filter to SQL statements, you can only view and edit the filter item as SQL statements in the Advanced SQL Filter dialog.

To convert the filter to SQL statements, select the **Convert this filter to SQL** box. The "Advanced SQL Filter dial *User Interface Reference* on page 487 og" is displayed.

For more information about this option, see *"Creating and Editing the SQL Statements for a Column Filter in an Analysis"*

.

9. When you are finished specifying the filter's criteria, click **OK**.

10. Save the filter in one of the following ways:
   o From the Analysis Editor, you can select **Save Analysis** to save the filter as an inline filter.
   o From the Filter Editor, you can select **Save Filter** to save the filter as a named filter.

For more information, see *"Inline or Named Objects"*.

Editing a Column Filter

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

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1. To open a named filter, use the following sub-procedure:
   a. In the global header, click **Catalog**. The *"Catalog page"* is displayed.
   b. Navigate to the filter to edit and click the **Edit** link. The *"Filter editor"* is displayed.
2. To open an inline filter, use the following sub-procedure:
   a. In an analysis, click the Criteria tab.
   b. In the *"Filters pane"* locate the filter that you want to edit and click its **Edit Filter** button. The *"Filter editor"* is displayed.
3. Make the desired changes.
4. Save the filter.

Combining and Grouping Column Filters

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Create or open a named filter or analysis that contains an inline filter.
2.

   ✏ **Note:** If you want to group filters, then the filter must contain three or more filter items.

   If you are working with a named filter, then locate the Saved Filter pane and confirm that the filter contains two or more filter items. If you are working with an inline filter, then locate the Filters Pane and confirm that the filter contains two or more filter items.

   After you add the second filter item, the **AND** operator is displayed before the second filter item.
3. To change an **AND** operator to an **OR** operator, click the word **AND**. You can toggle between **AND** and **OR** this way. Note the following information:

   o The **AND** operator means that the criteria specified in each filter must be met. This is the default method for combining column filters.
   o The **OR** operator means that the criteria that is specified in at least one of the column filters must be met.
4. As you add filter items, click **AND** and **OR** operators as necessary to construct the appropriate filter combinations.
5. Save the filter in one of the following ways:

   o From the Analysis Editor, you can select **Save Analysis** to save the filter as an inline filter.

   o From the Filter Editor, you can select **Save Filter** to save the filter as a named filter.

   For more information, see "*Inlined or Named*"

   .

Creating a Filter Based on the Results of a Saved Analysis

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Create or open a named filter or analysis that contains an inline filter.
2. If you are working with a named filter, then locate the Saved Filter pane and from the "*Subject Areas pane*", select the column for which you want to create a filter.

   If you are working with an inline filter, then locate the Filters Pane, and from the Filters Pane toolbar, click the **Create a filter for the current Subject Area** button and select the column for which you want to create the filter.

The "*New Filter dialog*" is displayed.

3. In the **Operator** field, select **is based on the results of another analysis**.

    The Saved **Analysis, Relationship**, and **Use values in Column** fields are displayed.

4. In the **Saved Analysis** field, either enter the complete path to the saved analysis or click the **Browse** button to locate the analysis upon which to base the filter.

    The column names from the saved analysis are displayed in the **Use Values in Column** drop-down list.

5. Select a column name from the **Use Values in Column** field, and in the **Relationship** field, select the appropriate relationship between the results and the column to be filtered.

6. Click **OK**.

Creating and Editing the SQL Statements for a Column Filter in an Analysis

You can create and edit the logical SQL WHERE clause to be used as a filter. While generally not necessary, this feature is available for users who want advanced filtering capability. For descriptions of SQL clauses, see Appendix D, "Logical SQL Reference."

> ✎ **Note:** After you convert a filter to SQL statements, you can view and edit the filter item as SQL statements in the Advanced SQL Filter dialog, only. You can no longer view and edit the filter in the Edit Filter dialog.

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Create or open a named filter or an analysis that contains an inline filter.

2. If you are working with a named filter, then locate the Saved Filter pane and from the "*Subject Areas pane*", select the column for which you want to create a filter.

    If you are working with an inline filter, then locate the Filters Pane, and from the Filters Pane toolbar, click the **Create a filter for the current Subject Area** button and select the column for which you want to create the filter.

    The "*New Filter dialog*" is displayed.

3. Specify the filter's criteria and select **Convert this filter to SQL**.

4. Click **OK**.

    The "*Advanced SQL Filter dialog*" is displayed.

5. Enter your modifications in the **SQL** field, and click **OK**. Not that after you convert the filter to a SQL statement, you can no longer view and edit the filter in the Edit Filter dialog.

Groups and Calculated Items

You can create a group or calculated item as a way to display data in a table, pivot table, trellis, or graph. Groups and calculated items allow you to add new "members" to a column, when those members do not exist in the data source. These members are also known as "custom members."

- A group is a static list of members that you select or a static or dynamic list that is generated by selection steps. A group is represented as a member. You can drill in a group that was created for a hierarchical column but not in one that was created for an attribute column.

  A group uses the existing aggregation function of the measure column with which it is displayed. The aggregation is performed up from the lowest detail level in the Oracle BI Server, but no values are double-counted.

- A calculated item is a computation between members, which is represented as a single member that cannot be drilled. When you create a calculated item, you add a new member in which you have selected how to aggregate the item, such as Sum or Average or a custom formula. The calculation is performed at the aggregated level, not at the lowest detail level.

Both groups and calculated items become selection steps for the analysis. Therefore, they apply to all views for that analysis. Both groups and calculated items can be saved as inline or named objects. For information, see *"Inline or Named Objects"*.

What are Groups?

A group (also known as a "saved selection" in other products) is a user-defined member of a column. A group can be a list of members or a set of selection steps that can be executed to generate a list of members. All the members must be from the same attribute column or hierarchical column, and in a hierarchical column, members can be from different hierarchy levels. Groups are always displayed at the bottom of the column list in the order in which they were added (as shown in the Selection Steps pane). Groups can contain members or other groups.

You can save a group to the catalog and reuse it. For example, you can apply a group to analysis and dashboard column prompts or variable prompts. If a group is applied to a prompt, then the prompt presents either the group as a choice list option or members of the group as choice list options to the user at runtime. See *"Overriding a Selection Step With a Column Prompt"* for information on overriding selection steps with prompts when the user selects groups or column members.

What are Calculated Items?

A calculated item is a calculation between members, which is represented as a single member. A calculated item enables you to override the default aggregation rule that is specified in the Oracle BI repository, and for an existing analysis, the aggregation rule chosen by the designer. You can define a calculated item using a custom formula (which is the default) or by combining selected members with a function (for example, SUM).

A calculated item is a user-defined member of a column. A calculated item can contain members or other calculated items. Calculated items are always displayed at the bottom of the column list in the order in which they were added (as shown in the Selection Steps pane). You can save a calculated item to the catalog and reuse it.

A calculated item is useful when you want to view and manipulate a set of members as a single entity. For example, you might define calculated items for the following:

- Key accounts in a geographic region

- High-end products

- Non-standard time periods, such as the first three weeks in September

You can create calculated items for columns in various places. Calculations differ from the default aggregation rules that are applied to measures, as described in *"Adding Totals to Tables and Pivot Tables"*. Internally, calculated items are processed as SQL SELECT statements, and the indicated functions are performed on the result set. For more information about SQL functions, see Appendix D, "Logical SQL Reference."

Creating a Calculated Item or Group

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the analysis.
2. From the Results tab, perform one of the following actions:
    o Click the button to create a calculated item or group.

      The button is available in multiple locations. The following list provides a few of these locations:

      - On the toolbar of the view editor, click the **New Calculated Item** button or the **New Group button**.
      - In the Layout pane, in the <view-type> Rows or Columns area, click the **More Options** button to the right of a column name, then select **New Calculated Item**.
    o Click the **Then, New Step** link in the *"Selection Steps pane"*

    o In a table, pivot table, or trellis, select the members and groups, or members and calculated items to include, then right-click and select **Create Group** or **Create Calculated Item**. See *"Right-Click Menu for Tables, Pivot Tables, and Trellises"*
3. Complete the appropriate dialog, either *"New Calculated Item dialog"* or *"New Group dialog"*.
4. When the calculated item or group is complete, click **OK**.

    If any errors are detected, then a message is displayed. Correct the error and click **OK** again.

Editing Groups and Calculated Items

You can edit groups and calculated items in various ways:

- In the *"Selection Steps pane"*, click the link for the calculated item or group, then click Edit to display the appropriate dialog.

- If you have saved the object to the catalog, then select the object in the Catalog pane and click Edit to display the appropriate dialog.

- In a table, pivot table, or trellis, right-click the group or calculated item and select Edit Group or Edit Calculated Item.

The value of a group or calculated item might be affected by filters and selection steps, as described in the following list:

- Filters — A group or calculated item is evaluated using only those members that have not been removed using filters. For example, if you have a calculated item for SUM(EAST + WEST) but WEST is removed through a filter, then only

the EAST sum is included for the calculated item. If all members have been removed, then a null value is returned, which shows as an empty cell in a table, pivot table, or trellis.

- Selection steps — When you create selection steps, you can add a group or a calculated item in a step. Subsequent Keep Only or Remove steps might reference members that were included in the group or calculated item.
    - A group list is affected by members that are kept or removed in subsequent steps, but the group outline value remains the same. For example, suppose the MyNewYork group contains Albany and Buffalo and its value is 100. Suppose Albany is removed in a later step. The value of the MyNewYork group remains at 100, but Albany is no longer listed with the group.
    - A calculated item is not affected by members that are kept or removed in subsequent steps.

Nesting Groups and Calculation Items

As you work with groups and calculated items, you might want to "nest" them; that is, create a group within a group, for example. The following list provides various scenarios for nesting groups and calculated items:

- Groups can be nested; that is, they can include other groups. Nested groups are "flattened." For example, suppose that the my_favorite_countries group includes the my_favorite_cities group. When you display and expand the my_favorite_ countries group in a table, you do not see the my_favorite_cities group. Instead, you see the member values of the my_favorite_cities group.

- Calculated items can be nested; that is, they can include other calculated items.

- Groups cannot contain calculated items nor can calculated items contain groups.

- When you work with selection steps:
    - You can save selection steps that include groups or calculated items as either a series of steps whose results are generated at runtime or as results that are static and are redisplayed each time.
    - You can apply a group that is a saved selection of steps, using the Catalog pane. If you do so when the saved selection contains a step for a calculated item, then you can only add the members of the group. You cannot add the group itself.

Adding a Group to Other Analyses

You can add a group to the same column on which it was created in another analysis. The group can be either a list of members or a set of selection steps. For information on these groups, see " *Selection Steps as a Group Object*"

The following procedure describes how to add the group using the Results tab, but you can do so anywhere that the Catalog pane is displayed. You can also add a group using the following means:

- In the Edit Member Step dialog, select **Start with Group or Calculated Item** in the **Action** box, then select the group from the Catalog pane in the Available list.

- In the Selection Steps pane, click **Then, New Step** for the appropriate column, select **Add Groups or Calculated Items**, select **Select Existing Groups and Calculated Items**, and select the group in the resulting dialog.

Adding a Group to Another Analysis Using the Catalog Pane

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the analysis.

   The analysis must contain the same column to which you want to apply the selections from a group.
2. On the Results tab, locate the Catalog pane and navigate to the appropriate folder that holds the saved group.
3. Select the group and click the **Add More Options** button on the toolbar of the Catalog pane.
4. Select one of the following:
   - **Add** to add the group itself, which generates an outline value for the group. In the table, pivot table, or trellis, you see the group name, which can be expanded to see its member values. (Default)
   - **Add Members** to add only the groups members to the analysis. You do not see the outline value.

The group or its members are included as an "Add" step on the Selection Steps pane. You can reorder the steps as appropriate.

Examples of Calculated Items

The examples and explanations in this section assume that you have a basic understanding of SQL statements and their syntax. The syntax shown in these examples applies to the Custom Formula function in the "*New Calculated Item dialog*"."The examples are hypothetical. Not all possible calculated items are shown.

Example 1 - Say you have a report with Org Level 1 and # Requisitions and you generate the results

1. Click on New Calculated Item
2. In Display Label, enter a name
3. Select the Sum function
4. Select Values From Org Level 1
5. Select a few Organizations
6. Click Ok and the Calculated Item will appear in the table

Example 2 - Say you have a report with Org Level 1 and # Requisitions and you generate the results

1. Click on New Calculated Item
2. In Display Label, enter a name
3. Select the Custom Formula function
4. In Selected Values, enter the formula : sum($1,$2,$3)
5. Click Ok and the Calculated Item will appear in the table (it will sum the first 3 rows)

9 Prompting in Dashboards and Analyses

Inline and Dashboard Prompts

The two differences between inline prompts and dashboard prompts is where they are stored and their run-time behavior.

A prompt that is created at the analysis level is called an inline prompt because the prompt is embedded in the analysis and is not stored in the Oracle BI Presentation Catalog and, therefore, cannot be added to other analyses. Inline prompts allow the end users to specify the data values that determine the content of the analysis. An inline prompt can be a column prompt, variable prompt, image prompt, or currency prompt. When you create an inline prompt, you select the columns and operators for the prompt and specify how the prompt is displayed to the users and how the users select the values. The user's choices determine the content of the analyses that are embedded in the dashboard. An inline prompt is an initial prompt, meaning that it only displays when the analysis is rendered. After the user selects the prompt value, the prompt fields disappear from the analysis and the only way for the user to select different prompt values is to re-run the analysis.

A prompt that is created at the dashboard level is called a dashboard prompt because the prompt is created outside of a specific dashboard and is stored in the catalog as an object, which can then be added to any dashboard or dashboard page that contains the columns that are specified in the prompt. Dashboard prompts allow the end users to specify the data values that determine the content of all of the analyses and scorecard objects contained on the dashboard.A dashboard prompt can be a column prompt, variable prompt, image prompt, or currency prompt. Dashboard prompts are reusable, because you can create one prompt and use it many times. When the prompt object is updated and saved, those updates are immediately displayed in all dashboards where the prompt is used. A dashboard prompt is a specific kind of filter that, when created, saved, and applied to a dashboard or dashboard pages, can filter all or some of the analyses and scorecard objects that are embedded in a dashboard or analyses and scorecard objects that are embedded on the same dashboard page. A dashboard prompt is interactive and is always displayed on the dashboard page so that the user can prompt for different values without having to re-run the dashboard. Users can create and save dashboard prompts to either a private folder or to a shared folder.

Note that for a dashboard using a column that was renamed in the Business Model, the existing dashboard prompts based on the renamed column do not work with newly created analyses. The workaround for this issue is to use Catalog Manager to rename the column in the catalog.

For more information about creating a column prompt, see *"Creating a Column Prompt"*.

Column Prompts

This topic describes column prompts; however, Oracle BI also enables you, as the content designer, to create currency prompts, image prompts, and variable prompts. For more information about these types of prompts, see *"Other Prompt Types"*.

A column prompt is the most common and flexible prompt type. A column prompt enables you to build very specific value prompts to either stand alone on the dashboard or analysis or to expand or refine existing dashboard and analysis filters. Column prompts can be created for hierarchical, measure, or attribute columns at the analysis or dashboard level.

You can create intelligent prompts that are specialized for the user's business needs and roles so that the user can quickly and accurately find the appropriate data that is needed to make a key business decision.

How do Column Prompts and Selection Steps Interact?

Selection steps allow the user to provide or refine the data from attribute columns and measures columns and to provide a kind of filter for hierarchical columns. Note that selection steps are applied after data aggregation. When you create selection steps for a column, you have the option of overriding one step of the selection with a dashboard or analysis column prompt. All selection steps before and after the override step are processed as specified, and the override step is processed using the user-specified data values that are collected by the column prompt. Column prompts that are created for hierarchical columns allow you to include only the Choice List input option.

For more information about selection steps, see *"Filters and Selection Steps"* and *"Working with Selections of Data"*. For more information about creating a prompt that works with selections, see *"Overriding a Selection Step With a Column Prompt"*.

Other Prompt Types

In addition to column prompts, you can create currency prompts, image prompts, and variable prompts. The following list contains information about these prompt types.

For information about column prompts, see *"Column Prompts"*.

- Variable Prompt — A variable prompt enables the user to select a value that is specified in the variable prompt to display on the dashboard. A variable prompt is not dependent upon a column, but can still use a column. For example, you can use variable prompts to allow the user to specify existing data to perform sales projections. For example, you can create a variable prompt called Sales Projections and specify the variable prompt values as 10, 20, and 30 percent. Then you create an analysis that contains the Region and Dollars columns. Within the Dollars column formula, you select the multiply operator and insert the Sales Projection variable. When users run this analysis, they can select a percentage by which to recalculate the Dollars column. For more information about creating a variable prompt, see *"Creating a Variable Prompt"*.

Types of User Input Options Available for Use With a Column or Variable Prompt

At design time, you must specify the prompt's user interface component. This component enables the user to enter a prompt value at runtime. You can select from several user input options. The **Radio Button** option enables the user to specify only one prompt value. The **Check Boxes, Choice List, List Box**, and **Text Field** options allow the user to select either one or multiple prompt values. The Slider option enables the user to select multiple values by specifying a range of values, or all values that are lesser than or greater than a specified value (for example, include everything equal to 200 and greater). Note that the input option types that are available depend upon the column type that you are working with. The following sections provide information about each input option.

Check Boxes

The **Check Boxes** input option provides the user with a visible list of all prompt values where a small, selectable box displays before each value item. This input option is suitable for a prompt that contains a smaller set of data. Note that the List Box input option is suitable for a prompt that contains a larger set of data. This user input type automatically enables the

user to select one or more prompt values. To select a specific prompt value, the user scans the list and clicks the box that corresponds to a particular item.

Choice List

The **Choice List** input option provides the user with a collapsed list of all prompt values. This option is useful for a long list of values where you want to provide the user with the ability to search for a specific value. You can set up this user input type to accept only one prompt value or multiple prompt values.

This input option provides a field and list that, when the user clicks the down-arrow button, expands and contains a list of all prompt values. To select a specific prompt value from the expanded list, the user scrolls through the list (or searches the list) and clicks the box that corresponds to a particular value. If you are using this input option with hierarchical columns, then a search dialog is displayed where the user can search for the prompt values.

The number of choices that display in the Choice List is determined by the MaxDropDownValues configuration setting. The administrator can modify the setting. For information about this configuration setting, see "Manually Changing Presentation Settings" in Oracle Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition.

List Box

The **List Box** input option provides the user with a visible list of all prompt values. This input option is suitable for a prompt that contains a large set of data. Note that the **Check Boxes** input option is suitable for a prompt that contains a smaller set of data. You can set up this user input type to allow the user to select only one prompt value or multiple prompt values by using Ctrl+ click or Shift+ click.

To select a specific prompt value, the user scans the list and selects the prompt value name (for example, Chicago), similar to how a user would click a hyperlink. The **List Box** option is very similar to the **Check Boxes** option, but the **List Box** option does not include a box before each value item.

Radio Buttons

The **Radio Buttons** input option provides the user with a visible list of all prompt values where a **Radio Button** is displayed before each prompt value. This option type is useful for short lists of values where the user is to select only one prompt value. To select a prompt value, the user scans the list and selects the radio button that corresponds to a particular item.

Slider

This option is not available for Variable Prompts. Note that the Prompt Width option, which sets the prompt's field size, and the "Wrap Label to Fit" Prompts page setting option cannot be specified for or applied to this user input type.

You can use the **Slider** input option for numeric data values only. Depending upon the operator that you select, this option enables the user to select multiple values by specifying a range of values, or all values that are lesser than, greater than, or equal to a specified value. You select the **Slider** option to provide the user with a number line representation of the range of prompt values. The number line displays the prompt values in a range, for example 10,000 to 20,000. To select a prompt value, the user can either click a value on the number line or click and drag the thumb to select the desired value. A spinner box is also provided with up and down-arrow buttons that the user can click to select the desired value. If you selected the **Slider** option and the **is between** operator for the prompt, then the user can click and drag two thumbs to select the desired range of values for the prompt. Two spinner boxes are provided where you can either type or use the up and down-arrow buttons to specify a range of values.

Text Field

The **Text Field** input option provides the users with a field into which they can type a specific prompt value. You cannot use this option for multiple prompt values. Only the field and the field label display for this option. This option is useful in instances where the user knows the prompt value and does not have to search for it, or for prompts with numeric values. Note that the prompt value that you enter must match the column's value. For example, if a column's data values include EASTERN REGION (in all capital letters), then the user must type EASTERN REGION into the text field. Numeric values cannot contain commas. If your repository is configured for double columns, and you are creating a prompt on a display column and specify **Text Field**, then filtering occurs on display values, not on code values.

Dashboard Prompt and Analysis Prompt Interaction

You can combine and wire prompts in various ways to create dashboards and reports that allow users to quickly and easily request precise, meaningful data. Combining and wiring prompts enables you to specify how dashboard prompts interact with analysis prompts. Note that currency prompts and variable prompts cannot be combined or wired.

For example, you can create analysis A that contains information about the amount of product that is sold by region and to the Region column add the **Is protected** option and then add a Region prompt. You can then create analysis B that contains information about sales person by region and analysis C that contains information about city by region. You then create and save a dashboard prompt for Region. When you create a dashboard and add analyses A, B, and C and the Region dashboard prompt and run the dashboard, the dashboard prompt input drives only what is displayed in analyses B and C. In this scenario, analysis A does not use the Region value that is specified in the dashboard prompt because you set analysis A's Region column filter value to **Is protected**. Therefore, the only way that analysis A accepts a prompt value is if the user specifies a prompt value in Region A's prompt fields.

Methods of Combining and Wiring Oracle BI EE Analysis and Dashboard Prompts	
Name	Location
Auto wiring	Oracle BI Enterprise Edition's auto wiring functionality assumes that you intended to create a functioning prompt for the column and, therefore, activates and applies the prompt. Oracle BI EE applies the auto wiring method when you create an analysis and add a column prompt or image prompt. This auto wiring method does not require the **is prompted** filter operator. Any unprotected filter can be used. Note that setting the filter operator to is prompted provides a more precise level of control between prompts and filters than the auto wiring method. For more information, see the "Filter value is set to ***Prompt User**" row in this table.
Constrained Prompts	Use this method with several columns in a prompt to constrain the user's prompt choice based on subsequent choices. Constrained prompts can be set up on the "Prompt options dialog" to specify which prompt narrows the choices. For example, if one column filters on region and the next column filters on city, then the city column can be constrained to show only cities in the selected region.
Filter operator is set to is **prompted**	Use this method to build complex prompts that interact with filters. When you use this method, you have full control over how the dashboard prompts, inline prompts, and filters are applied to the embedded analysis.

Methods of Combining and Wiring Oracle BI EE Analysis and Dashboard Prompts	
Name	Location
Selection Steps Override with Prompts Option	Use this method to use an analysis or dashboard column prompt to provide the data choices for a specific member selection step on a hierarchical or attribute column. Since you cannot use filters with hierarchical columns, selection steps are the only way that you can use prompts with hierarchical columns. Only one selection step per column selection step set can be overridden with a prompt. All selection steps before and after the overridden step are processed as specified.

For more information about selections steps, see *"Filters and Selection Steps"* and *"Working with Selections of Data".* For more information about creating a prompt that works with selections, see *"Overriding a Selection Step With a Column Prompt"*. |
| Protected versus Unprotected filters | Use this method to determine whether the dashboard prompt can supply the inline prompt's value when the corresponding column's filter value is set to something other than Is prompted. The unprotected and protected filter settings can be used when a dashboard prompt and inline prompt reside on the same dashboard and both prompts were created for the same column.

When the column's filter value is unprotected, the dashboard prompt value determines the analysis' results. If the filter value is set to something other than **Is prompted** (for example, **Is equal to/is in**) and the filter is set to protected filter, then the dashboard prompt cannot determine the report results.

For more information about protecting a filter, see *"Filters pane"*. |

Order Prompts with Default Values are Applied

Because prompting enables you to build flexible dashboards and analyses, it is important to understand how Oracle BI initiates a complex dashboard's prompts.

The following list presents the order in which, at runtime, Oracle BI applies prompts with default values:

1. Hidden prompts whose scope is the dashboard page.

   For more information about hidden prompts, see *"Adding a Hidden Dashboard Prompt to a Dashboard or Dashboard Page"*.
2. Hidden prompts whose scope is the whole dashboard.
3. Prompts whose scope is the dashboard page. The precedence order of dashboard page prompts is unspecified.
4. Prompts whose scope is the whole dashboard.
5. Prompts, either inline or named, whose scope is the analysis.

Prompts Auto-Complete

Oracle BI provides auto-complete functionality for prompts, which suggests and highlights matching prompt values as the user types in the prompt selection field.

Auto-complete is only available for the Choice List prompt type when the prompt designer selected the "Enable User to Type Value" option in the *"New Prompt dialog"*. Note that auto-complete is not available for hierarchical prompts.

The auto-complete functionality has been configured to be case-insensitive.

The matching level determines how Oracle BI matches the column's values to what the user types. The matching level has been set to Match All.

- **Match All** — As the user types, Oracle BI EE suggests the column values that contain any letter that the user is typing. For example, auto-complete is case-insensitive and the matching level is Match All and the user types "l," then Oracle BI suggests "LCD 36X Standard," "LCD HD Television," "7 Megapixel Digital Camera," and "Plasma HD Television."

The auto-complete functionality highlights matching values when the user accesses the *"Select Values dialog"* to search for a prompt value. However, the matching level is not determined by the preference set by the administrator. Instead, the user selects the matching level in the "Select Values dialog."

The dashboard designer can exclude the auto-complete functionality from dashboards, and user can turn auto-complete off by using the *"My Account dialog"*. Note the following relationships between auto-complete settings:

- System Setting — The administrator modifies the system configuration file to enable the auto-complete functionality for Oracle BI. When this functionality is turned on, all users can access the auto-complete prompts functionality. If this functionality is turned off, then all auto-complete fields are disabled on the Oracle BI user interface. Auto-complete is enabled.

- Dashboard Setting — If auto-complete is enabled for Oracle BI, then the dashboard designer can remove the auto-complete functionality from individual dashboards by setting the **Prompts Auto-Complete** field to Off in the *"Dashboard Properties dialog"*. However, the auto-complete prompts functionality will be available for other dashboards where the **Prompts Auto-Complete** setting is set to User Preference.

- User Preference Setting — If auto-complete is enabled for Oracle BI and for individual dashboards, users can disable the auto-complete prompts functionality for their accounts by setting the **Prompts Auto-Complete** field in the *"My Account dialog: Preferences tab"* to Off. Setting this option to Off overrides the system and dashboard settings, and no auto-complete functionality will appear for the user.

Creating a Column Prompt

This procedure does not include information about selection steps or hierarchical columns. For information about column prompts and selection steps, see *"Overriding a Selection Step With a Column Prompt"*.

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. To create an inline prompt, use the following sub-procedure.

   a. Create a new analysis or access an existing analysis for which you want to create a prompt. Click the Prompts tab. The *"Definition pane"* is displayed.

   b.

      ✏️ **Note:** If the appropriate column is not available from the list, then you can click the More Columns options in the cascading list and select the appropriate column from the *"Select Column dialog"*.

   Click the **New** toolbar button in the Definition Pane to access the prompt type selection list. From the list, select **Column Prompt**. The analysis' selected columns are displayed in the cascading menu that is adjacent to the Column Prompt selection item.

   c. Select a column. The *"New Prompt dialog"* displays.

   If you want to create the prompt for a column that is not displayed in the column list, then select the **More Columns...** option. The *"Select Column dialog"* is displayed where you can browse for and select a column.

   If your repository is configured for double columns, then ensure that you select the correct display column. For information on double columns, see *"Understanding the Double Column Feature"*.

   The number of columns that you include in a prompt can affect performance. In general, you should limit the number of columns to as few as possible.

   If you are creating a dashboard prompt and want to add or remove related subject areas, then click the **Select subject area** button in the *"Select Column dialog"* to display the *"Add/Remove Subject Areas dialog"*.

2. To create a dashboard prompt, use the following sub-procedure.

   The BI Author Limited author cannot create or edit a dashboard prompt.

   a. Navigate to the Oracle BI Enterprise Edition Home page, locate the global header, hover the mouse pointer over the **New** menu to access the menu, and select **Dashboard Prompt**. From the Select Subject Area menu, select the subject area for which you want to create a prompt. The *"Definition pane"* is displayed.

   b. Click the **New** toolbar button in the Definition Pane to access the prompt type selection list. From the list, select **Column Prompt**. The *"Select Column dialog"* is displayed.

   c. Select a column and click **OK**. The *"New Prompt dialog"* displays.

   If your repository is configured for double columns, then ensure that you select the correct display column. For information on double columns, see *"Understanding the Double Column Feature"*.

   The number of columns that you include in a prompt can affect performance. In general, you should limit the number of columns to as few as possible.

   If you are creating a dashboard prompt and want to add or remove related subject areas, then click the **Select subject area** button in the *"Select Column dialog"* to display the *"Add/Remove Subject Areas dialog"*.

3. (Optional) Click the **Edit Formula** button to display the *"Edit Column Formula dialog: Column Formula tab"* where you can modify the formula for the column.

4. In the **Label** field, change the default label, if necessary, by entering a caption for the column filter prompt. The caption displays as the prompt's field label. You can include HTML markup tags in the caption, such as <b>, <font>, and <table>.

5. In the **Description** field, enter a short description for the prompt. This description is displayed as tooltip text, which is displayed when the user hovers the mouse pointer over the prompt's label in the dashboard or analysis.

6. From the **Operator** list, select the operator to use.

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7. In the **User Input** field, select how you want the prompt interface to ask the user for input (for example, prompt the user with a radio button to select only one prompt value). Note that the column type determines the user input options from which you can select.

8. Within the Options section, select prompt options to specify how you want the list values to be displayed to the user, and how you want the user to interact with the prompt. The prompt options vary depending on the user input type and list values type that you selected. For more information about the individual prompt options, see *"New Prompt dialog"*.

9. In the **Default selection** field, select the prompt value or values that users see initially. If you select a default type, then a field is displayed where you can either select specific values, or specify how you want the default values to be determined. For example, if you select **SQL Results**, you must then supply a SQL statement to generate the list of values.

10. Click **OK**. The prompt is displayed in the *"Definition pane"*.

11. Save the prompt. Note the following options:
    o If you are creating a dashboard prompt, then click the **Save** button in the Prompt's Editor, specify the folder in which you want to save the prompt, and give the prompt a descriptive name. Note that dashboard prompts that are saved in personal folders are available only to you. Dashboard prompts that are saved in shared folders are available to other users that have permission to access the object.
    o If you are creating an inline prompt, then save the analysis.

12. Use the arrow buttons in the Definition Pane to reorder the selected prompt. Reordering the prompts controls the order in which the choices are displayed to users at runtime, so ensure that the order is logical, especially if you are creating constrained prompts.

13. Select the type of layout you want on the prompts page by clicking either the **New Row** button or **New Column** button in the Definition pane's toolbar. In the Definition table, click the check box corresponding to the prompt item that you want to display in a new row or column.

14. To preview how the prompt is displayed on the dashboard, either use the *"Display pane"* to preview the prompt with sample data, or click the Preview button (if available) in the Definition Pane toolbar to view the prompt with actual prompt values.

> ✎ **Note:** If the **Preview** button is not available, then the administrator has suppressed its display.

Overriding a Selection Step with a Column Prompt

This procedure does not include information about selection steps or hierarchical columns. For information about column prompts and selection steps, see *"Overriding a Selection Step With a Column Prompt"*.

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

1. To create an analysis with selection steps, either create a new analysis or access an existing analysis to which you want to add selection steps. The Analysis Editor is displayed.

   For more information about creating an analysis, see *"Specifying the Criteria for Analyses"*.

2. After you have specified the columns for the analysis, navigate to the Selection Steps pane and specify the selection steps for the analysis.

   For information about specifying selection steps, see *"Working with Selections of Data"*.

3. Determine which selection step you want to override with a column prompt and click its **Edit** button. The New Member Step dialog is displayed.

4. Select the Override with prompt box. Click OK and save the analysis.

> ✎ **Note:** The **Override with prompt** box is not available in certain circumstances. It is unavailable for a rank template (for example, **is ranked first** or **is ranked last**) within a conditional selection step. It is also unavailable for a match template for a hierarchical column.

5. If needed, create either a named or inline prompt. For information, see *"Creating a Column Prompt"*.

Creating a Variable Prompt

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. To create a named variable prompt, use the following sub-procedure.

   The BI Author Limited author cannot create or edit a dashboard prompt.

   a. Navigate to the Oracle BI Enterprise Edition Home page, locate the global header, hover over the **New** menu to access the menu, and from the menu select **Dashboard Prompt**. The Select Subject Areas menu is displayed.

   b. From the Select Subject Area menu, select the subject area for which you want to create the prompt. The *"Definition pane"* is displayed.

2. To create an inline prompt, either create a new analysis or access an existing analysis for which you want to create a prompt. In the *"Analysis editor"*, click the Prompts tab. The *"Definition pane"* is displayed.

3. Click the New button in the Definition Pane. From the list, select Variable Prompt.

   The *"New Prompt dialog"* is displayed.

4. In the Prompt for field, select the variable type that you are creating and then enter the name of the variable.

5. In the **Label** field, enter a caption for the variable filter prompt. The caption is displayed as the prompt's field label. You can include HTML markup tags in the caption, such as <b>, <font>, and <table>.

6. In the **Description** field, enter a short description for the prompt. This description is displayed as tooltip text, which is displayed when the user hovers the mouse pointer over the prompt's label in the dashboard or analysis.

   The descriptions are also displayed when administrators view the stored prompt object from the Catalog Manager.

7. In the **User Input** field, select how you want the prompt interface to ask the user for input. For example, prompt the user with a radio button to select only one prompt value.

8. If you selected either the **Choice List, Check boxes**, **Radio buttons**, and **List box** user input type, then you must also specify the prompt's list of values. For more information, see "New Prompt dialog".

9. Within the Options section, select the prompt options. The prompt options vary depending on the user input type that you selected. The prompt options allow you to further specify how you want the user to interact with the prompt (for example, whether user input is required).

10. In the **Default** selection field, select the prompt value that users see initially. If you select a specific value, then the **Default Value** field is displayed in which you can enter a value.

11. Click **OK**. The prompt is displayed in the "Definition pane".

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12. Save the prompt. Note the following options:
    o If you are creating a dashboard prompt, then click the Save button in the prompt's editor, specify the folder in which you want to save the prompt, and give the prompt a descriptive name. Note that dashboard prompts that are saved in personal folders are available only to you. Dashboard prompts that are saved in shared folders are available to other users that have permission to access the object.
    o If you are creating an inline prompt, then save the analysis.

13. Use the arrow buttons in the Definition Pane to reorder the selected prompt. Reordering the prompts controls the order in which the choices are displayed to users at runtime, so ensure that the order is logical, especially if you are creating constrained prompts.

14. If you want to add a new row or column to the prompts page, then click the New Row button or New Column button in the Definition pane's toolbar. In the Definition table, click the check box corresponding to the prompt that you want to display in a new row or column.

15. To preview how the prompt is displayed on the dashboard, either use the *"Display pane"* to preview the prompt with sample data, or click the Preview button (if available) in the Definition Pane toolbar to view the prompt with actual prompt values.

Editing a Prompt

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. To open a dashboard prompt, use the following sub-procedure:

    The BI Author Limited author cannot create or edit a dashboard prompt.

    a. In the global header, click **Catalog**. The *"Catalog page"* is displayed.
    b. Navigate to the prompt to edit and click the **Edit** link. The *"Prompt editor"* is displayed.

2. To open an inline prompt, use the following sub-procedure:
    a. In an analysis, click the Prompts tab.
    b. In the *"Definition pane"* highlight the prompt to edit and click the Edit button. The *"Prompt editor"* is displayed.

3. Make the desired changes.
4. Save the prompt.

Adding a Dashboard Prompt to a Dashboard or Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Create a new dashboard or open an existing dashboard and click the Edit Dashboard button. For more information about creating or editing a dashboard, see *"Creating a Dashboard"*.

   Tip: When adding a column object to a dashboard, you can drag and drop the column to display vertically on the dashboard. You can then add dashboard prompts to this column, and at runtime, the dashboard's prompts displays in a pane on the side of the dashboard.

2. In the Dashboard builder's Catalog pane, locate and drag and drop an object such as an analysis or KPI watchlist onto a section in the dashboard.

3. In the Dashboard builder's Catalog pane, locate and drag and drop the dashboard prompt onto a section in the dashboard.

   Tip: If you do not want a new browser window to open after the user selects prompt values, then click the dashboard section's **More Option** button and select **Drill in Place**.

4. Hover the mouse pointer over the prompt object in the Page Layout area to display the object's toolbar, click the **Properties** button, and select **Scope**. Note the following options:
   - o If you select **Dashboard**, then the prompt affects all dashboard pages that contain the prompt. The prompt value that the user selects for the dashboard level prompt overrides values for page level dashboard prompts.
   - o If you select Page, then the dashboard prompt affects only the page or pages to which you add the prompt.

5. Hover the mouse pointer over the prompt object in the Page Layout area to display the object's toolbar, click the **Properties** button, and select **Prompt Links....** The *"Prompt Links dialog"* displays where you specify whether to display the **Edit** and **Copy** links with the prompt at runtime

Adding a Hidden Dashboard Prompt to a Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Create and save a dashboard prompt, which contains specific data values, to use as a hidden prompt. For more information about creating prompts, see *"Creating a Column Prompt"*.

2. Create a new dashboard or open an existing dashboard and click the **Edit Dashboard** button. For more information about creating or editing a dashboard, see *"Creating a Dashboard"*.

3. In the *"Dashboard builder"*, click the **Tools** button and select **Dashboard Properties**. The *"Dashboard Properties dialog"* is displayed.

4. 4. If you want to add the hidden prompt to the whole dashboard, then click the **Filters and variables Edit** button. The *"Dashboard Filters and Variables dialog"* is displayed.

   If you want to add the hidden prompt to a dashboard page, then select the page from the "Dashboard Pages" table and click the **Select a prompt to capture default filters and variables** button, which is located above the "Dashboard Pages" table. The "Filters and Variables - page dialog" is displayed.

5. Click the **Embed New Hidden Dashboard Prompt** button to browse for and select the dashboard prompt. Click **OK**.

   ✏️ **Note:** You can add one or more hidden dashboard prompts to the dashboard or dashboard page.

6. In the Dashboard Properties page, click the OK button to save the dashboard's properties.

At runtime, the hidden dashboard prompt sets the default values for all of the corresponding prompts on the dashboard or dashboard page, and the unprotected inline prompts that are located on the analyses on the dashboard or dashboard page.

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10 Formatting Analyses, Views, and Dashboard Pages

Format

After you create and run an analysis, default formatting rules are applied to the analysis' results. Default formatting rules are based on cascading style sheets and XML message files. You can create additional formatting to apply to specific results. Additional formats help you to highlight blocks of related information and call attention to specific data elements. You can also use additional formatting to customize the general appearance of analyses and dashboards.

You can apply formatting to the following:

- Columns in analyses, as described in "Applying Formatting to Columns in Analyses".

- Views, as described in "Applying Formatting to Views".

- Dashboard pages, as described in *"Formatting Dashboard Pages"*.

Formatting Columns in Analyses

As you work with columns in an analysis, you can specify their formatting. The formatting that you apply is visible when the column is displayed in views such as tables and pivot tables. For information, see *"Column Format in Analyses"*.

Formatting Views

You can apply formatting to views in the following ways:

- In the View editor: When you edit a view in its editor, you can generally display various dialogs that allow you to format either the view itself or its pieces, as applicable. Formatting options are unique to the view type. Formatting that you specify in the view editor overrides any formatting that was specified for columns.

- In the Compound Layout: When you use the *"Compound Layout"*, you can click a button on the toolbar of the container for each view to display a formatting dialog. Use that dialog to apply formatting to the view's container, such as to place a green background on the container for a table.

Formatting Dashboard Pages

You can apply formatting to the page layout columns and sections of dashboard pages. When you edit a dashboard page, you can edit the properties of its columns and sections and apply cosmetic formatting. For information, see *"Cosmetic Formatting"* and *"Building and Using Dashboards"*.

Column Format in Analyses

When you build an analysis, you can edit properties for columns to control their appearance and layout. You can also specify formatting to apply only if the contents of the column meet certain conditions. By default, the specifications for a column apply only to the current analysis.

Because groups and calculated items are simply members of their respective columns, they inherit the formatting from the column and follow the same precedence order as for other members, unless you specifically apply formatting to the groups or calculated items.

What Kinds of Formatting Can I Apply?

You can use the tabs in the *"Column Properties dialog"* to customize how content is displayed for columns in views. Hierarchy levels provide an additional detail of formatting for hierarchical columns.

The following list provides examples of the kinds of formatting that you can apply:

- Apply cosmetic formatting to the column or hierarchy level, such as font family and size.

- Assign alternate folder and column heading names and apply custom formatting to them.

- Control the display of duplicate data, such as repeating column labels.

- Override the default formatting for columns and data values with custom formatting.

- Apply conditional formatting to the column or hierarchy level, which enables different formatting to be applied based on the values. For example, values greater than $1 million can be formatted with a green color.

Cosmetic Formatting

Cosmetic formatting affects the visual appearance of data in columns and hierarchy levels, views, and columns and sections on dashboard pages. You can apply cosmetic formatting, copy and paste cosmetic formatting attributes, and save a formatted analysis to use with the columns of another analysis.

You can display various dialogs that provide access to and control over various cosmetic attributes. Depending on the object that you are formatting, the dialog displays different options, such as font, cell, and border controls, background color, additional formatting options such as cell padding, and custom CSS style options for HTML.

Using a Saved Analysis to Modify the Cosmetic Appearance of Other Analyses

After you have customized the cosmetic appearance of an analysis using the Criteria tab and the Results tab and have saved it, you can import the formatting from the saved analysis and its views to new or existing analyses.

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Import Formatting Button

You can use a saved analysis to modify the cosmetic appearance of other views by clicking the **Import Formatting** button. This button is available on the following toolbars:

- The Compound Layout toolbar — When you click this button, the formatting is applied to all applicable views in the layout. See *"Applying Formatting from Containers"*.

- The view editor toolbar — When you click this button, the formatting is applied only to the view that you are editing. See *"Supported View Types"*

Supported View Types

The following list describes the components that support the use of a saved analysis for formatting other views:

- View Types — You can import formatting from the following view types:
  - Legend — Imports formatting for the legend title, the caption, and the legend container. Textual content is not imported.
  - Narrative — Imports only the text font color. Textual properties such as prefix, postfix, and narrative texts are not imported.
  - Pivot table, table, and trellis — Imports formatting for the columns, greenbar specifications, sub-totals and grand totals, and section properties.
  - Static Text — Imports only the text font color. Textual content is not imported.
  - Title — Imports formatting for the title, logo, subtitle, start time, and Help URL.
  - View Selector — Imports only the caption formatting.

- Compound Layout — You can import formatting that was specified after clicking the Format Container button for the view in the Compound Layout.

How Imported Formatting is Applied

Formatting is applied slightly differently depending on whether you are importing formatting that was applied to columns, to views, or to view containers in the Compound Layout.

Applying Formatting from Columns This functionality works best for views when attribute, measure, or hierarchical column numbers align precisely or for a single column template that can be applied to all columns. If a single column exists in the saved analysis, then its formatting is applied to all columns in the tables, pivot tables, and trellises of the target analysis.

For multiple columns, formatting is applied positionally, from left to right for column headings and values. A column that exceeds the number in the saved analysis gets the closest column's format repeated. For example, suppose the saved analysis contains four columns formatted with these colors in this order: red, green, blue, yellow. In the target analysis, its six columns would acquire these colors in this order: red, green, blue, yellow, yellow, yellow.

Applying Formatting from Views Formatting is applied to a view only if a view of that type exists in the target analysis. The imported formatting applies to all views of that type in the target analysis. For example, suppose that a saved analysis contains a legend to which you have customized formatting. If you import that formatting into a target analysis that contains three legends, then all three legends inherit that formatting.

Applying Formatting from Containers In the Compound Layout, you can specify formatting properties (such as background color, borders, and padding) for view containers. When you import that container formatting using a saved analysis, the views in the target analysis inherit the exact container formatting properties as the views in the saved analysis.

The layout of the views in the two analyses need not be exactly the same for container formatting to work correctly. If the target analysis contains more views than the source analysis, then the extra views inherit the imported formatting. For example, suppose a saved analysis contains two tables that are stacked on top of each other in the Compound Layout. Suppose the target analysis contains four tables that are laid out two by two. The source analysis has only one "layout column" of two table views. The two tables in each of the first and second "layout columns" of the target analysis inherit the applied formatting.

Importing Formatting Using a Saved Analysis

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the analysis.
2. Display either the analysis in which you want to import formatting in the *"Analysis editor: Results tab"*, or display the view in its editor.
3. Click the Import Formatting toolbar button.
4. In the *"Select Analysis dialog"*, navigate to the saved analysis and click OK.

Applying Conditional Formatting to Tables, Pivot Tables, and Trellises

In tables, pivot tables, trellises, and graphs, conditional formatting helps direct attention to a data element if it meets a certain condition. For example, you can show below-quota sales figures in a certain color, or display an image such as a trophy next to the name of each salesperson who exceeds quota by a certain percent.

This section describes how to apply conditional formatting in tables, pivot tables, and trellises. For information on graphs, see *"Graph Formatting Based on Columns"*.

How is Conditional Formatting Applied?

You apply conditional formatting by selecting one or more columns or hierarchy levels in the analysis to use, specifying the condition to meet, and then making specifications for font, cell, border, and style sheet options to apply when the condition is met. The conditional formats can include colors, fonts, images, and so on, for the data and for the cell that contains the data. Your specifications apply only to the contents of the columns or hierarchy levels in the tables and pivot tables for the analysis with which you are working.

You can add multiple conditions so that the data is displayed in one of several formats, based upon the value of the data. For example, below-quota sales can be displayed in one color, and above-quota sales can be displayed in another color. When you specify multiple conditions, all the conditions are verified and the formats are merged for the conditions that are true. In the event of a conflict when trying to merge multiple formats, the condition that is last verified as true affects the format that is displayed.

Can Conditional Formats Be Based on Another Column?

You can create conditional formats to apply to one column based on the values of a second column, for display in tables, pivot tables, and trellises. For example, you can create a conditional format to color the Region column green when values of the Sales column are greater than $30 million.

You can create a condition using a column that is not displayed in views for the analysis, if you use the **Hide** option on the Column Format tab of the Column Properties dialog. If you place the column in the Excluded drop target of the Layout pane, then you cannot create a condition using that column.

Conditional formatting is applied based on the underlying value, even if you select the **Show Data As** options in the Layout pane to show the data as percentages or indexes.

What Factors Affect Conditional Formats?

Layout, Order and Conditional Formats

The layout of the columns in the view affects the conditional formatting of the values of one column when the conditional format is based on another column. Changing the layout of the columns in the view can change the display of the conditional formats. For example, suppose that you specify a conditional format on the Region column where Year is 1999. If Year and Region are on opposite edges of the pivot table, then no conditional formatting is visible.

The order of the columns as they are displayed in the view also affects conditional formatting. The order in the view affects the "grain" at which the values are displayed. You can think of "grain" as a level of aggregation. The conditional format applies when the column to format is displayed at a finer grain or the same grain as the column on which the format is based. If the column being formatted is of a higher grain than the column on which the format is based, then the format applies only if the condition is based on a measure column. If the format is based on an attribute column and the column to format is displayed at a higher grain, then the conditional format does not apply.

For example, consider the table in Figure 7–2. A conditional format has been specified to color the Region column magenta when Year is 1999. Notice that no magenta coloring is visible, because Region is the first column in the table and so is displayed at a higher grain. (The Region column has its value suppression set to Default.) See "*Value Suppression and Conditional Formats*" for more information.

Suppose that you change the order of the columns so that Year is the first column in the table. Then the Year column is displayed at a higher grain, and the appropriate conditional formatting is applied to the Region column. Figure 7–3 shows a table with the appropriate conditional formatting.

Conditional formats can be displayed on any edge of the table, pivot table, or trellis. On the Prompts drop target (also known as the "page edge"), the conditional format applies only to the column member that is currently selected for that target. For example, suppose that you have a Region column that has the members North, South, East, and West. Suppose the Region column is on the Prompts drop target for a pivot table and the conditional format is set to color the region name green if Sales is greater than $10 million. If East and West are the only regions that meet that condition, then each one is colored green only when it is selected for the Prompts drop target.

Value Suppression and Conditional Formats

For tables, the value suppression setting in the "*Column Properties dialog: Column Format tab*" affects conditional formatting. If you set value suppression to **Repeat**, then the column that you are formatting is displayed at the detail grain of the view. No aggregation is needed on the column on which the format is based for applying the conditional format.

For example, consider the table in Figure 7–2. A conditional format has been applied to color the Region column magenta when Year is 1999. Notice that no magenta coloring is visible, because the value suppression is set to **Default**, which does not allow for repeating column values for the members of Region.

If the value suppression is set to Repeat, then column members are repeated and the appropriate conditional formatting is applied. Figure 7–4 shows a table with repeat value suppression.

Applying Conditional Formatting

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the analysis in which you want to edit formatting and behavior in the *"Analysis editor: Criteria tab"*.
2. Add or locate the column or hierarchy level to modify. Click the **Options** button to the right of the column name in the Selected Columns pane, and click **Column Properties** or **Hierarchy Level Properties**. The *"Column Properties dialog"* is displayed.
3. Click the *"Column Properties dialog: Conditional Format tab"*.
4. Click **Add Condition**, then select the column to which to apply the condition.
5. Complete the *"New Condition dialog"*. You can click the **Edit Condition** button to the right of the condition name to display the *"Edit Condition dialog"*.

   > ✏️ **Note:** When you access the *"New Condition dialog"* from the Conditional Format tab, the dialog shows only the options that apply to conditional formats. For example, the Operator list shows the subset of operators that are used in conditional formats, and you can apply only presentation variables.

6. Complete the *"Edit Format dialog"* to apply formatting for the condition.

Conditional Formatting for Ranking

The following example describes how conditional formatting can be applied to results to show ranking.

Suppose an analysis includes ten ranking categories, with a value of 1 in the column indicating the worst ranking, and a value of 10 indicating the best ranking. You could create three conditional formats to show the following:

- One image to indicate a low rank for columns that contain 1, 2, or 3.

- Another image to indicate an average rank for columns that contain 4, 5, 6, or 7.

- A third image to indicate a high rank for columns that contain 8, 9, or 10.

In the Graphics dialog, selecting the Images Only image placement option would cause the columns to be displayed with only images, and not the ranking numbers, in the results.

Custom Format Strings For Date and Time Fields

Custom format strings provide additional options for formatting columns or hierarchy levels that contain time stamps, dates, and times. To set custom format strings to a column or hierarchy level, you use the Custom Date Format field (for date and time fields) or the Custom Numeric Format field (for numeric fields) in the *"Column Properties dialog: Data Format tab"*.

Custom Format Strings for Date and Time Fields

You can set custom format strings to a column or hierarchy level in the Custom Date Format field in the *"Column Properties dialog: Data Format tab"*.

General Custom Format Strings
Short sentence or paragraph to describe the configuration table.

General Format String	Result
[FMT:dateShort]	Formats the date in the locale's short date format. You can also type [FMT:date].
[FMT:dateLong]	Formats the date in the locale's long date format.
[FMT:dateInput]	Formats the date in a format acceptable for input back into the system.
[FMT:time]	Formats the time in the locale's time format.
[FMT:timeHourMin]	Formats the time in the locale's time format but omits the seconds.
[FMT:timeInput]	Formats the time in a format acceptable for input back into the system.
[FMT:timeInputHourMin]	Formats the time in a format acceptable for input back into the system, but omits the seconds.
[FMT:timeStampShort]	Equivalent to typing [FMT:dateShort] [FMT:time]. Formats the date in the locale's short date format and the time in the locale's time format. You can also type [FMT:timeStamp].
[FMT:timeStampLong]	Equivalent to typing [FMT:dateLong] [FMT:time]. Formats the date in the locale's long date format and the time in the
	locale's time format.
[FMT:timeStampInput]	Equivalent to [FMT:dateInput] [FMT:timeInput]. Formats the date and the time in a format acceptable for input back into the system.
[FMT:timeHour]	Formats the hour field only in the locale's format, such as 8
	PM.
YY or yy	Displays the last two digits of the year, padded to the left with zero, if necessary, for example, 01 for 2001.
YYY or yyy	Displays the four- digit year, padded to the left with zero, if necessary, for example, 0523.
YYYY or yyyy	Displays the four- digit year, for example, 2011
M	Displays the numeric month, for example, 2 for February.
MM	Displays the numeric month, padded to the left with zero for single-digit months, for example, 02 for February.
MMM	Displays the abbreviated name of the month in the user's locale, for example, Feb.

General Format String	Result
MMMM	Displays the full name of the month in the user's locale, for example, February.
D or d	Displays the day of the month, for example, 1.
DD or dd	Displays the day of the month, padded to the left with zero for single-digit days, for example, 01.
DDD or ddd	Displays the abbreviated name of the day of the week in the user's locale, for example, Thu for Thursday.
DDDD or dddd	Displays the full name of the day of the week in the user's locale, for example, Thursday.
DDDDD or ddddd	Displays the first letter of the name of the day of the week in the user's locale, for example, T for Thursday.
h	Displays the hour in 12-hour time, for example 2.
H	Displays the hour in 24-hour time, for example, 23.
hh	Displays the hour in 12-hour time, padded to the left with zero for single-digit hours, for example, 01.
HH	Displays the hour in 24-hour time, padded to the left with zero for single digit hours, for example, 23.
m	Displays the minute, for example, 7.
mm	Displays the minute, padded to the left with zero for single-digit minutes, for example, 07.
s	Displays the second, for example, 2.
	You can also include decimals in the string, such as s.# or s.00 (where # means an optional digit, and 0 means a required digit).
ss	Displays the second, padded to the left with zero for single-digit seconds, for example, 02.
	You can also include decimals in the string, such as ss.# or ss.00 (where # means an optional digit, and 0 means a required digit).
t	Displays the first letter of the abbreviation for ante meridiem or post meridiem in the user's locale, for example, a.
tt	Displays the abbreviation for ante meridiem or post meridiem in the user's locale, for example, pm.
gg	Displays the era in the user's locale.

ODBC Custom Format Strings

ODBC Format String	Result
[FMT:dateODBC]	Formats the date in standard ODBC yyyy-mm-dd format
	(4-digit year, 2-digit month, 2-digit day).
[FMT:timeODBC]	Formats the time in standard ODBC hh:mm:ss format (2-digit hour, 2-digit minute, 2-digit second).
[FMT:timeStampODBC]	Equivalent to typing [FMT:dateODBC] [FMT:timeStampODBC]. Formats the date in yyyy-mm-dd format, and the time in hh:mm:ss format.
[FMT:dateTyped]	Displays the word date and then shows the date, in standard ODBC yyyy-mm-dd format. The date is shown within single quote characters (').
[FMT:timeTyped]	Displays the word time and then shows the time, in standard ODBC hh:mm:ss format. The time is shown within single quote characters (').

ODBC Format String	Result
[FMT:timeStampTyped]	Displays the word timestamp and then the timestamp, in standard ODBC yyyy-mm-dd hh:mm:ss format. The timestamp is shown within single quote characters (').

11 **Delivering Content**

Agent

Agents

Agents enable you to automate your business processes. You can use them to provide event-driven alerting, scheduled content publishing, and conditional event-driven action execution.

You can choose:

- A schedule that the Agent runs on
- A data condition that determines what the Agent does
- An analysis that can be distributed
- Actions that can be automatically executed depending on whether the data condition is met

Agents can dynamically detect information-based problems and opportunities, determine the appropriate individuals to notify, and deliver information to them through a wide range of devices (email, and so on).

> ✏️ **Note:** Do not save Agents with the same name as a report or the report will be overwritten and lost. The delivery content of an agent is localized according to the preferred locale of the recipient. (Users specify their preferred locale in the "*My Account dialog: Preferences tab*".)

Alerts

An alert is a notification generated by an agent that delivers personalized and actionable content to specified recipients and to subscribers to the agent.

You can see the alerts that have been delivered to you throughout Oracle BI, for example:

- In the Alerts section of the Home page.
- On the first page of My Dashboard. (An Alerts section is automatically added to the first page of My Dashboard, if you do not manually place one there.)
- On a dashboard page, if the content designer adds an Alerts section to the page. See "*Dashboard Content*".
- In the Alerts dialog displayed from the Alerts! button in the global header.
- In specified delivery devices, such as a phone. See "*Devices and Delivery Profiles*"

For more information, see "*Accessing and Managing Your Alerts*".

How Agents Work

In the simplest format, an agent automatically performs a specified catalog analysis based on a defined schedule, and examines the results for a specific problem or opportunity. If the specific problem or opportunity is detected in the results, then an alert is generated and delivered to specified recipients and to subscribers to the agent, using the delivery options that are specified for each person.

For more information on alerts, see *"Alerts"* For more information on delivery options, see *"Devices and Delivery Profiles"*

To handle more complex requirements, agents can invoke actions that trigger other agents. For example, an agent might run an analysis to identify all current product orders over a specified dollar amount that cannot be filled from a regional warehouse. The results can be passed to another agent that runs an analysis to locate alternative sources for these products.

You might automatically be a recipient of alerts generated by some agents, and agents created by others might be available for you to subscribe to. You can also create your own agents if you have the appropriate permissions and responsibilities. Depending on the level of authority that you have, you can selectively share agents with others or make agents available for all users.

Agent Editor

The Agent editor lets you create agents to deliver personalized and actionable content to users. It also lets you view a summary of the current settings of agents.

The Agent editor contains the following tabs:

- General — Lets you specify the priority of the content that an agent is to deliver and how to generate the delivery content (that is, what user to run the query as).

- Schedule — Lets you specify whether the agent is to be run based on a schedule, how often it runs, and when its running is to start and end.

- Condition — Lets you specify whether an agent always delivers its content and executes its actions, or conditionally delivers its content and executes its actions.

- Delivery Content — Lets you specify the content to deliver with an agent, such as a dashboard page or a saved analysis.

- Recipients — Lets you specify who is to receive the delivery content of the agent and who is allowed to subscribe to the agent.

- Destinations — Lets you specify where the content is to be delivered.

- Actions — Lets you specify one or more actions to execute when an agent finishes.

You access the Agent editor when you create or edit an agent. See *"Creating an Agent"*.

Customization in Agents

Using customization in agents enables you to create generic agents that you can use for more than one circumstance. This helps you to reduce the number of agents and conditions that you must create for your organization. It also lets you provide the specific alert required for a particular circumstance.

Customization in an agent is accomplished by overriding the operators and values of prompted filters associated with analyses that are used in the agent. (A prompted filter is a filter whose operator is set to Is Prompted. For more information on prompted filters, see *"Creating a Column Filter"*.)

You use analyses in an agent when you specify that the agent is to:

- Conditionally deliver its content and execute its actions using a condition (either named or inline) that is based on an analysis. For more information on conditions, see *"Working with Conditions."*

- Deliver an analysis as its content.

Prompted filters can be customized at various points, depending on how the analysis with which it is associated is used:

- If the analysis is used as the basis for a named condition, then the chain for customization is as follows:
    a. In the analysis
    b. In the named condition
    c. In the agent customization of the condition

- If the analysis is used as the basis for an inline condition created in an agent, then the chain of customization is as follows:
    a. In the analysis
    b. In the agent customization of the condition
    c. In the subscription customization of the agent condition

- If the analysis is specified as the delivery content for an agent, then the chain for customization is as follows:
    a. In the analysis
    b. In the agent customization of the delivery content
    c. In the subscription customization of the delivery content

When using customization in an agent, keep the following points in mind:

- Once a filter is overridden, it cannot be overridden again further in the customization chain. For example, if you override a filter in the agent customization of the delivery content, then the subscriber cannot override it later in the subscription customization of the delivery content.

- If any filters in an analysis are combined (that is, constructed using AND and OR), then this AND and OR structure is not displayed in the customization.

- If the same filters are used more than once in an agent, then only a unique set of the filters is displayed for customization. The customized values that you specify are applied to all instances of the repeated filter. Exception: If the analysis is the result of combining two or more analyses based on a union operation, then unique filters from each part of the union are displayed for customization. For more information on combining analyses, see *"Combining Columns Using Set Operations"*.

- Filters passed between agents participating in a chain do not support customization. The filters passed from the parent agent are those without subscriber customizations. The filters passed to the child agent replace the respective prompted filters before subscriber customizations are applied.

Creating an Agent

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. In the global header, click New and select Agent.

    o You can also display the Agent editor by selecting **Agent** from the **Create . .** . area of the *"Home page"*

    o You can also create an agent from an analysis. For how, see *"Creating Agents from Analyses"*

    The *"Agent editor"* is displayed.

2. In the *"Agent editor: General tab"*, specify the priority of the content that the agent is to deliver and how to generate the delivery content (that is, what user to run the query as).

3. In the *"Agent editor: Schedule tab"*, specify whether the agent is to be run based on a schedule, how often it runs, and when its running is to start and end.

4. In the *"Agent editor: Condition tab"*, specify whether the agent always delivers its content and executes its actions, or conditionally delivers its content and executes its actions.

    For more information on conditions, see *"Working with Conditions."*

5. In the *"Agent editor: Delivery Content tab"*, specify the content to deliver with the agent, such as a dashboard page or a saved analysis.

6. In the *"Agent editor: Recipients tab"*, specify who is to receive the delivery content of the agent and who is allowed to subscribe to the agent.

7. In the *"Agent editor: Destinations tab"*, specify where the content is to be delivered.

8. In the *"Agent editor: Actions tab"*, specify one or more actions to execute when the agent finishes.

9. Save the agent. See *"Saving Agents"*.

    After you have saved the agent, you can run the agent by clicking the **Run Agent Now** toolbar button. This is helpful, for example, to test the agent.

Saving Agents

You can save agents in existing folders or in new folders that you create as follows.

- If an agent is available for subscription, then you must save it in a subfolder in /Shared Folders, for example, /Shared Folders/Shared Agents/Sales/Agent1. (Note that you cannot save an agent directly in /Shared Folders, for example, / Shared Folders/Agent1.)

- If an agent is not available for subscription, then you can save it in a subfolder in /Shared Folders, in /My Folders, or in a subfolder in /My Folders, for example, /My Folders/Sales/Agent1. (Note that you cannot save an agent directly in /Shared Folders, for example, /Shared Folders/Agent1.)

For more information about subscribing to agents, see *"Subscribing to an Agent"*.

Saving an Agent

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the *"Agent editor"* toolbar, click one of the following buttons:
   - To save a new agent or to save an existing agent with the same name in the same folder, click the **Save this Agent** button.
   - To save an existing agent with another name or in another folder, click the **Save this Agent as** button.
2. Complete the *"Save Agent dialog"*, if displayed, and click OK.

Subscribing to an Agent

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

The agent owner must have made the agent available for subscription.

> ✎ **Note:** To make an agent available for subscription, in the *"Agent editor: Recipients tab"*, the **Publish Agent for Subscription** option must be selected, and users, and Catalog groups and Application roles that are allowed to subscribe must be identified.

Home > **Oracle Business Intelligence**
1. In the global header, click **Catalog** and navigate to the agent to which you want to subscribe.
2. Click the **More** link for the agent and select **Subscribe**.

Displaying a List of the Agents that you Subscribe to or That You Own

Home > **Oracle Business Intelligence**
1. In the global header, click **Home**. The *"Home page"* is displayed.
2. In the **Browse/Manage. . .** area:
   - To show a list of the agents that you currently subscribe to, click the **My Agent Subscriptions** folder/binocular button.

     The *"Catalog page"* is displayed with a list of the agents to which you are currently subscribed. (Note that agents that you have been designated a recipient of are not included in this list.) You can then perform various tasks, such as customizing your subscription, unsubscribing from the agent, or printing a summary of the agent settings.

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      o To show a list of the agents that you own, click the **My Agents** folder/binocular button.

The *"Catalog page"* is displayed with a list of the agents saved in your personal folder (My Folders). You can then perform various tasks, such as running the agent or editing the agent.

Unsubscribing from an Agent

Home > **Oracle Business Intelligence**

1. In the global header, click **Home**. The *"Home page"* is displayed.
2. In the **Browse/Manage. . .** area, click the **My Agent Subscriptions** folder/binocular button.

   A list of the agents to which you are currently subscribed is displayed. (Note that agents that you have been designated a recipient of are not included in this list.)
3. Navigate to the agent from which you want to unsubscribe.
4. Click the **More** link for the agent and select **Unsubscribe**.

Customizing Your Agent Subscriptions

Suppose an agent has been set up to allow users to customize the subscription and the agent uses an analysis that includes a prompted filter for either its condition, the delivery content, or both. You can customize the filter values for the conditional analysis, the delivery content analysis, or both to suit your needs.

To allow users to customize an agent subscription, you must select the **Allow Subscribers to Customize Agents** option in the *"Agent editor: Recipients tab"*.

Customizing an Agent Subscription

The agent creator must have allowed subscribers to customize agents.

Home > **Oracle Business Intelligence**

1. In the global header, click **Home**. The *"Home page"* is displayed.
2. In the **Browse/Manage. . .** area, click the **My Agent Subscriptions** folder/binocular button.

   A list of the agents to which you are currently subscribed is displayed. (Note that agents that you have been designated a recipient of are not included in this list.)
3. Navigate to the agent whose subscription you want to customize.
4. Click the **More** link for the agent and select **Customize Subscription**.

   The *"Customize Subscription to Agent dialog"* is displayed.
5. Customize the prompted filters or the parameters as needed. (Depending on how the agent has been set up, you can customize the prompted filters or the parameters for the condition, the delivery content, or both.)

   To customize a prompted filter or parameter:

   a. Click the **Modify the operator/value for this parameter** button.

   The *"Edit Parameter Filter dialog"* is displayed.

   b. Edit the values as needed.

   c. Click **OK**.
6. Click OK in the Customize Subscription to Agent dialog.

> ✎ **Note:** The customized filter values that you set in the previous steps are not automatically displayed in agent results. To display the customized values, see *"Displaying Customized Filter Values in Agent Results"*.

Displaying Customized Filter Values in an Agent Result

If you have customized filter values in an agent subscription and want to display the filter values in the agent results, then you must add a Filters view to the analysis.

Home > **Oracle Business Intelligence**

1. Edit the analysis that is being customized.
2. Display the *"Analysis editor: Results tab"*.
3. Add the Filters view to the analysis. For how, see *"Adding Views to the Results of Analyses"*

Disabling and Enabling Agents' Schedules

You can temporarily disable (and then enable) an agent's schedule. Disabling an agent's schedule stops the agent from running on its defined schedule. It does not stop it from being run by other means, for example, by the **Run Agent Now** toolbar button in the *"Agent editor"*.

Disabling an agent's schedule is useful if you have defined a schedule for an agent but find you want to stop it for a certain period of time.

In addition, an agent's schedule may be temporarily disabled by default. For example, if you copy a folder that contains one or more agents, then the schedule of each agent copy is disabled by default, and the agent does not run on its defined schedule until you enable it.

Disabling or Enabling an Agent's Schedule

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. In the global header, click **Catalog** and navigate to the agent whose schedule you want to disable or enable.
2. Click the **More** link for the agent and select one of the following options:
   - **Disable Schedule** to disable the agent's schedule
   - **Enable Schedule** to cause the agent to run on schedule again

   You also can disable and enable an agent's schedule by using the **Enabled** box in the *"Agent editor: Schedule tab"*.

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Devices and Delivery Profiles

Devices and delivery profiles control how you will be reached when an alert is generated by an agent and which devices receive the content:

- Device — A device is the medium used to deliver content to you. The content of an agent can be delivered to a range of devices, such as an email.

- Delivery profile — A delivery profile specifies which devices to use to deliver content to you, based on the priority of the content. You can define several delivery profiles to meet your needs, and switch among them. However, only one profile can be active at any given time.

You configure your devices and your delivery profiles from the *"My Account dialog: Delivery Options tab"*. For more information, see *"Configuring Your Devices and Delivery Profiles"*.

Depending on the destinations that are specified for an agent, content can be delivered to the:

- Home page and dashboard.

- Active delivery profile or specific devices.

  When the destinations are specific devices, content is delivered to the devices that you have configured rather than to the devices in your active delivery profile. For example, if an Agent is defined to be delivered to Email devices, then the default Email device that you configured is used rather than any Email devices that you configured in your active delivery profile.

Delivery content is assigned a specific priority. The default priority is normal. When you select devices for your active profile, you can indicate what priority content should be sent to that device. For example, if you have added a cell phone to your delivery profile, then you might associate it with high priority content only. When you know that you will be away from the office frequently and out of email range, you can select to receive only low priority content through your office email.

Configuring your Devices and Delivery Profiles

Home > **Oracle Business Intelligence**

1. In the global header, click **Signed In As** username, (where username is the name that you use to log in to Oracle BI Enterprise Edition) and then select **My Account** to display the *"My Account dialog"*.
2. Click the Delivery Options tab.
3. In the Devices area, add or edit the appropriate devices.

   To add a device, perform the following steps:

   a. Select the device category button (for example, **Email**) for the device to add.
   b. Click the **Create Device** button to display the *"Create Device dialog"*.
   c. In the **Name** field, enter the name of the device, for example, Work Email.
   d. In the **Category** box, select the device category.
   e. In the **Device Type** box, select the type of device.
   f. In the **Address/Number** field, enter the address for the device, for example, an email address for email.
   g. Click **OK** to return to the My Account dialog: Deliver Options tab.

      The device is displayed in the Devices list for the appropriate category (for example, **Email**).
   h. If you want this device to be the default device, then select the **Default** option to the right of the device name.

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To edit a device, perform the following steps:

    a. Select the device in the list.

    b. Click the **Edit Device** button to display the *"Edit Device dialog"*.

    c. Make your edits and click **OK** to return to the My Account dialog: Deliver Options tab.

4. Add or edit the appropriate delivery profiles.

To add a delivery profile, perform the following steps:

    a. Click the **Create Delivery Profile** button to display the *"Create Delivery Profile dialog"*.

    b. In the Name field, enter a delivery profile name.

    c. To the right of each delivery device to use when this profile is the active profile, select one or more of the priority options — **High, Normal,** or **Low**. These priorities are used together with the priority of the delivery content to determine the destination for delivery content. For more information on the priority of the delivery content, see *"Agent editor: General tab"*.

    d. Click **OK** to return to the My Account dialog: Deliver Options tab.

       The profile is displayed in the Delivery Profiles list.

    e. If you want the delivery profile to be your active profile, then select the **Active** option to the right of the profile name.

To edit a delivery profile, perform the following steps:

    a. Select the delivery profile in the list.

    b. Click the **Edit Profile** button to display the *"Edit Delivery Profile dialog"*.

    c. Make your edits and click **OK** to return to the My Account dialog: Deliver Options tab.

5. Click **OK**.

Accessing and Managing Your Alerts

You can access a list of your alerts. The list shows the name of each alert along with its delivery date and time, and number of occurrences.

Using this list, you can:

- View the content for an alert.

- Clear an alert and all its occurrences.

- Edit the agent that generated the alert, if you have permission to modify the agent.

- Run the agent that generated the alert, if you have permission to execute the agent.

- Clear all your alerts and all their occurrences.

For more information about alerts, see *"Alerts"*

Accessing or Managing Alerts

Home > **Oracle Business Intelligence**

1. In the global header, click **Alerts!**.

    The *"Alerts dialog"* is displayed.

2. View and manage your alerts as needed.

You can also access and manage your alerts from the Alerts section on the *"Home page"*.

12 **Working with Conditions**

Working with Conditions

Conditions

Conditions are objects that return a single Boolean value based on the evaluation of an analysis or of a Key Performance Indicator (KPI).

What a condition evaluates depends on whether it is based on an analysis or on a KPI, as follows:

- For an analysis, it evaluates the row count of the analysis.
- For a KPI, it evaluates the status of the KPI.

    For example, a condition might evaluate whether the results of an analysis return a number of rows greater than 0:

- If the analysis returns at least one row, then the condition evaluates to true.
- If the analysis does not return any rows, then the condition evaluates to false.

Condition Uses

You use conditions to determine whether:

- Agents deliver their content and execute their actions
- Actions links (which when clicked run actions) are displayed in dashboard pages
- Sections and their content are displayed in dashboard pages

For example, a sales manager wants to deliver a Monthly Sales Report to his direct reports only when sales drop below $2 million. You might create a condition that is based on an analysis that shows sales that are below $2 million and add it to an agent whose delivery content is the Monthly Sales Report. When the condition evaluates to true (that is, the analysis contains rows where sales are below $2 million), the agent is triggered to deliver the Monthly Sales Report.

You can also use a different kind of condition to determine whether action links are enabled in analyses. For information, see *"Conditionally Enabled Actions Added to Analyses"*.

Condition Elements

A condition consists of the following elements:

- An analysis or KPI.
- The criteria to use when evaluating the condition:
    - For an analysis, the criteria is a row count and an operator to apply to the row count; for example, the row count equals 100.
    - For a KPI, the criteria is a KPI status, for example, the KPI status is OK.
- Values for any prompted filters that are associated with the analysis or values for KPI dimensions that were set to **Set in watchlist** in the KPI.

Condition Types

Named Conditions

A named condition is a condition that you define and then save by name in the Oracle BI Presentation Catalog so that you can reuse it in agents and dashboard pages.

You create a named condition when you create a new condition from the:

- New menu in the global header by selecting **Condition** under **Analysis and Interactive Reporting**
- Home page by clicking the **More** link under **Analysis and Interactive Reportin**g in the Create area and selecting **Condition**

You also create a named condition from the *"Agent editor: Condition tab"* when you save an inline condition to the catalog. For information on inline conditions, see *"Inline Conditions"*

Inline Conditions

An inline condition is a condition that you define at the point of use and do not save by name in the catalog. Instead it is saved as part of the dashboard page or agent.

An inline condition is automatically deleted when the dashboard page or agent that contains it is deleted. This simplifies catalog management for conditions that make sense only within particular Oracle BI content.

You can create an inline condition when you:

- Create or edit an agent and specify (in the *"Agent editor: Condition tab"*) that the agent is to deliver its content and run associated actions conditionally. See *Using a Condition to Determine Whether an Agent Delivers Content or Executes an Action*.

  For information on creating agents, see *"Creating an Agent"*.

- Add an action link to a dashboard page and specify that the action link is to be displayed conditionally. See *"Using a Conditio to Determine Whether Action Links are Displayed in Dashboard Pages"*. For information about adding action links to dashboard pages, see *"Actions in Dashboard Pages"*.

- Add a section to a dashboard page and specify that the section is to be displayed conditionally. See *"Using a Condition to Determine Whether Sections Are Displayed in Dashboard Pages"*.

  For information about adding sections to dashboard pages, see *"Dashboard Content"*.

Creating a Named Condition

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, click **New** and then select **Condition**.

The *"New Condition dialog"* is displayed.

2. Complete the New Condition dialog. For more information, see *"Specifying the Settings for a Condition"*.

Using a Condition to Determine Whether an Agent Delivers Content or Executes an Action

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the agent.
2. Click the *"Agent editor: Condition tab"*.
3. Select the **Use a condition** box.
4. If you want to:
   o Create a new condition, click **Create** to display the *"Create Condition dialog"* and then complete the dialog.

      For information on completing the dialog, see *"Specifying the Settings for a Condition"*.
   o Select an existing condition, click **Browse** to display the *"Select Condition dialog"* and then complete the dialog.
   o Save the agent.

Using a Condition to Determine Whether Action Links are Displayed in Dashboard Pages

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the dashboard. For information, see *"Editing a Dashboard"*.
2. Click the tab of the page that contains the action link to display conditionally.
3. Hover over the action link object in the Page Layout area to display the action link object's toolbar and click the **Properties** button, or, if the action link is in an action link menu:
   a. Hover over the action link menu object in the Page Layout area to display the action link menu object's toolbar and click the **Properties** button.

      The *"Action Link Menu Properties dialog"* is displayed.
   b. Select the action link to conditionalize and click the **Edit** button.

      The *"Action Link Properties dialog"* is displayed.
4. In the Show component, click the **Conditionally** box.

   The **Condition** component is displayed.

5. If you want to:

   o Create a new condition, click the **New Condition** button to display the *"New Condition dialog"* and then complete the dialog.

      For information on completing the dialog, see *"Specifying the Settings for a Condition"*.

6. Click **OK** in the Action Link Properties dialog.

7. If the action link is in an action link menu, then click **OK** in the Action Link Menu Properties dialog.

8. Save the dashboard.

Using a Condition to Determine Whether Sections are Displayed in Dashboard Pages

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the dashboard. For information, see *"Editing a Dashboard"*.

2. Click the tab of the page that contains the section to display conditionally.

3. Hover over the section in the Page Layout area to display the section's toolbar, click the **Properties** button for the section, and select **Condition**. The *"Section Condition dialog"* is displayed.

4. If you want to:

   o Create a new condition, click the **New Condition** button to display the *"Create Condition dialog"* and then complete the dialog.

      For information on completing the dialog, see *"Specifying the Settings for a Condition"*.

   o Select an existing condition, click the **Select Condition** button to display the *"Select Condition dialog"* and then complete the dialog.

5. Click **OK** in the Section Condition dialog.

6. Save the dashboard.

Specifying the Settings for a Condition

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Create a condition.

2. In the **Create condition based on** box, select whether the condition is to be based on an **Analysis** or **KPI**.

3. For:

   o (optional) An analysis, edit any prompted filters, as desired.

   o A KPI, specify the values for any KPI dimensions.

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> ✏ **Note:** If you specify values for any prompted filters, then these values cannot be overridden at the point of use.

4. Specify the evaluation criteria as follows:
   ○ For an analysis, in the **Condition true if number or rows** area:
     - In the **Operator** box, select the operator to apply to the row count.
     - In the **Row Count** box or boxes, specify the row count to be evaluated.
   ○ For a KPI, in the **Condition true if KPI** box, select the KPI status.
5. (optional) Click **Test Condition** to test the condition.
6. If you want to save the condition as:
   ○ An inline condition, click OK.

   ○ A named condition, click Save As to display the *"Save As dialog"*, where you can save the condition by name to the catalog.

   > ✏ **Note:** If a condition is based on an analysis or KPI that is private, you cannot save it in the /Shared Folders folder.

Editing a Named Condition

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Navigate to the condition in the catalog.
2. Click the **Edit** link to display the *"Edit Condition dialog"*.
3. Make the desired changes.

Editing, Customizing, Testing, Saving, and Disabling a Condition Used in an Agent

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the agent.
2. Click the *"Agent editor: Condition tab"*.

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3. To:

- o Edit an inline condition, click **Edit Condition** to display the *"Edit Condition dialog"*, and make the desired changes. For more information on completing the Edit Condition dialog, see *"Specifying the Settings for a Condition"*.

- o To customize the prompted filters of a named condition, click **Customize** to display the *"Customize Condition dialog"*, and make the desired customizations.

- o To test a condition, click **Test**. The evaluation results are displayed.

- o To save an inline condition to the catalog as a named condition, click **Save To Catalog** to display the *"Save As dialog"*.

- o To disable a condition, click **Do not use a condition (always deliver content and run actions)**.

4. Save the agent.

Editing, Testing, Saving, and Removing a Condition Used in an Action Link in a Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the dashboard page that contains the action link.

2. Hover over the action link object in the Page Layout area to display the action link object's toolbar and click the Properties button, or, if the action link is in an action link menu:

   a. Hover over the action link menu object in the Page Layout area to display the action link menu object's toolbar and click the **Properties** button.

   The *"Action Link Menu Properties dialog"* is displayed.

   b. Select the action link that contains the condition and click the **Edit** button.

   The *"Action Link Properties dialog"* is displayed.

3. Click the **More** button to the right of the **Condition** field and then:

   - o To edit a condition, select Edit Condition to display the *"Edit Condition dialog"* and make the desired changes. For more information on completing the Edit Condition dialog, see *"Specifying the Settings for a Condition"*.

   - o To test a condition, select **Test Condition**. The evaluation results are displayed.

   - o To save an inline condition to the catalog as a named condition, select **Save Condition As** to display the *"Save As dialog"*.

   - o To remove a condition, select **Remove Condition**.

4. Click **OK** in the Action Link Properties dialog.

5. If the action link is in an action link menu, then click **OK** in the Action Link Menu Properties dialog.

6. Save the dashboard.

Editing, Testing, Saving, and Removing a Condition Used in a Section in a Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the dashboard page that contains the section.
2. Hover over the section in the Page Layout area to display the section's toolbar, click the **Properties** button for the section, and select **Condition**. The *"Section Condition dialog"* is displayed.
3. Click the **More** button to the right of the **Condition** field and then:
    - o To edit a condition, select **Edit Condition** to display the *"Edit Condition dialog"* and make the desired changes. For more information on completing the Edit Condition dialog, see *"Specifying the Settings for a Condition"*.
    - o To test a condition, select **Test Condition**. The evaluation results are displayed.
    - o To save an inline condition to the catalog as a named condition, select **Save Condition As** to display the *"Save As dialog"*.
    - o To remove a condition, select **Remove Condition**.
4. Save the dashboard.

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13 KPIs and KPI Watchlists

Key Performance Indicators

KPI

KPIs are measurements that define and track specific business goals and objectives that often roll up into larger organizational strategies that require monitoring, improvement, and evaluation. KPIs have measurable values that usually vary with time, have targets to determine a score and performance status, include dimensions to allow for more specific analysis, and can be compared over time for trending purposes and to identify performance patterns.

See the following list of specific uses for KPIs in Oracle BI:

- Evaluate metrics against their targets and alert the appropriate users through agents when targets are not met.

- Create an analysis from a KPI and add that analysis to a dashboard. An analysis that is created from a KPI can allow the user to drill into different levels of details based on the KPI's dimensions.

- In Oracle Scorecard and Strategy Management, use KPIs to evaluate and monitor the performance of the objectives that form the strategy and the initiatives (tasks or projects) that are needed to meet your objectives. For information about scorecards and how to create them, see *"Scorecarding."*

  .

KPI Evaluation

A KPI's status and score are determined by comparing its actual value against the thresholds that you define. The performance status of a KPI is represented by the status icon that you assign to each range.

For example, for a product sales KPI in which high values are desirable, you can define the ranges that are described in the *Sample Evaluation*. Thresholds are the numeric values that separate the ranges.

Sample Evaluation

Evaluation Range Rule	Threshold	Name	Status Icon
Values exceeding 125 (125 < x) indicate ideal performance	126 and above	Ideal	Blue Square
Values between 100 and 125 (100 < x <= 125) indicate good performance	125	Good	Green Square
Values between 80 and 100 (80 < x <= 100) indicate acceptable performance	100	Acceptable	Yellow Square
Values between 50 and 80 (50 < x <=80) indicate a warning of poor performance	50	Warning	Light Red Square

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Evaluation Range Rule	Threshold	Name	Status Icon
Values less than 50 (x <= 50) indicate critical performance	50 and below	Critical	Dark Red Square

KPI Uses

KPIs are created with the KPI Editor, which can be accessed as a standalone editor or within the *"Scorecard editor"*. After you create and save KPIs, you can use them in the following ways:

- Building blocks of scorecards — You can create and assign KPIs to measure the progress and performance of your organization's strategies. Within a scorecard, you can define the objectives (goals such as "Decreased Operational Costs") and initiatives (processes or tasks such as "Form Cost Minimization Team") to which you assign KPIs to measure progress and performance. For information about objectives, see *"Objectives"*. For information about initiatives, see *"Initiatives"*.

- As an analysis — You can generate an analysis from a KPI. When you do so, Oracle BI EE saves the analysis to the catalog. You can include the analysis on a dashboard or as a related document in a scorecard, KPI watchlist, or KPI. Any dimension values that you pinned to the KPI before you output it as an analysis are included in the analysis. Drill-down is available on the analysis. Oracle BI EE refreshes the data for the analysis every time a user opens the analysis.

- Included in KPI watchlists — You can create a watchlist that contains a group of KPIs or to present one KPI several times with dimension values that are pinned to it. After you save the watchlist, it is available as a catalog object that you can add to dashboards or scorecards. When users access the watchlist, they can change the dimension values for the KPIs that are included in the watchlist.

- Facilitate user interaction — If KPIs were added to a KPI watchlist or if they were added to objectives or initiatives inside a scorecard, then you can post comments to a KPI and read and reply to other users' comments. You can also contact the KPI's business owner with questions or comments about the KPI. And, if you are the business owner, you can override a KPI's status.

- Initiate actions — You can add an action link that when clicked in the KPI runs an associated action. For example, if the performance of a KPI for Internal Spending is too high, indicating excessive spending, then you could create an action link that when clicked, sends an email to the appropriate employees.

- Trigger agents — You can use a KPI's values, performance levels, and status to trigger a condition that initiates an agent alert. For example, you can define an agent that notifies you when the value of a Internal Costs KPI exceeds a certain dollar amount.

Dimensions and Pinned Dimension Values

Dimensions are categorizations of data, and the categorizations reflect how a business analyst wants to analyze data. When analysts say they want to see numbers "by" something or "over" something, they are identifying the dimensions of the data. Common dimensions are geography, organization, job type, and time.

For KPIs, you can select any attribute column from the subject area as a dimension. When you design the KPI, you can either pin a specific data value to one or more dimensions (for example, Region=Central), or you can specify that you want all or some dimension values pinned when the KPI is added to a watchlist or scorecard and when a watchlist or scorecard is added to a dashboard. Pinning filters the data that the user sees, and after a value is pinned by the designer, the user cannot change the value.

When adding a KPI without a pre-pinned value to a watchlist, the designer can pin a specific value or specify a session or repository variable to set the dimension's value. If the designer does not pin a value or variable to a dimension, then the KPI user can select a value at runtime from the point of view area in either the KPI watchlist, from the scorecard that contains the KPI, from the variable prompt on a dashboard, or from the column prompt on the dashboard.

If a KPI with dimensions is output to an analysis, then the dimensions are displayed as columns and drills. If the dimension values are pinned, then the analysis is limited to the data that is determined by the pinned values.

Creating a KPI

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. To create a new KPI, do one of the following:
   - In the global header, hover the mouse pointer over the New menu, select KPI, and from the Select Subject Area dialog, select a subject area for the KPI. The *"KPI editor"* is displayed.
   - From a scorecard, go to the Scorecard Documents pane or the Catalog pane, click the New Object icon list, select KPI, and from the Select Subject Area dialog, select a subject area for the KPI. The *"KPI editor"* is displayed.
2. On the *"KPI editor: General Properties page"*, specify the business owner, actual value, and target value, and indicate whether to enable trending to determine performance patterns. Oracle recommends that you enable trending because trending enables Scorecard to automatically display historical trend charts.
3. On the *"KPI editor: Dimensionality page"*, select the dimensions (for example, Requisitions by Location and by Job Type) that you want to use to aggregate the KPI's actual and target values. Note that you should include a time dimension for most KPIs. Exceptions include constants or metrics that are defined as current snapshots, such as "Candidates Currently Scheduled for Interview."
4. On the *"KPI editor: States page"*, indicate the desired goal based on KPI values (for example, "High Values are Desirable"), define the ranges that evaluate KPI values to determine performance status and score, and associate performance levels with actions.
5. On the *"KPI editor: Related Documents page"*, add any external links or business intelligence objects to the KPI.
6. On the *"KPI editor: Custom Attributes page"*, include as many as five custom columns. For example, you might add a column that shows units from a year ago.
7. Save the KPI. Note the following items:
   - If you are creating a standalone KPI, then click **Finish** to save the KPI.
   - If you are creating a new KPI, then the *"Save As dialog"* is displayed where you specify the KPI's name and where you want to save the KPI. If you want the KPI to display within a scorecard's "Scorecard Documents pane", then save the KPI to the scorecard object's folder within the catalog.
   - If you are creating a KPI from a scorecard, then click **Save** from the *"Scorecard editor"*.

Editing KPIs

Use the following procedures to open and edit a saved KPI. KPIs are stored in the catalog, but can be added to KPI watchlists, scorecards, and dashboards. When you edit and save a KPI, the changes propagate to wherever the KPI is displayed.

Editing a KPI from the Catalog

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, click **Catalog**. The *"Catalog page"* is displayed.
2. Navigate to the KPI to edit and click the Edit link for the object. The *"KPI editor"* is displayed.
3. Make the desired changes.
4. Save the KPI.

Editing a KPI from a KPI Watchlist

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit a KPI watchlist.
2. Right-click the KPI that you want to open.
3. Select Open KPI Definition. The *"KPI editor"* is displayed.
4. Make the desired changes.
5. Save the KPI.

Generating Analyses from KPIs

Use the following procedures to generate an analysis from a KPI. An analysis is a query against an organization's data that provides answers to business questions. For more information about analyses, see Chapter 2, *"Creating Analyses"*.

You can generate an analysis from a KPI that is included in a KPI watchlist, scorecard, or scorecard diagram view on a dashboard. After you generate the analysis, it is stored in the catalog's Drills folder (/My Folders/Drills). Note that because the My Folders/Drills folder is used for temporary storage, the analysis might not persist after your session ends. To preserve the analysis, copy it to another directory. For example, to preserve an analysis that you plan to use in a shared dashboard, copy it to a folder in /Shared Folders.

After the analysis is generated, the analysis can then be placed onto a dashboard, opened from the catalog as an analysis, or attached as a related document in a scorecard, KPI watchlist, or KPI. Every time a user opens the analysis, its data is refreshed.

Generating an Analysis from a KPI on a Watchlist

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Locate and open the KPI watchlist from the catalog, scorecard, or dashboard that contains the KPI watchlist.

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2. Go to the Performance tab and within the New KPI Watchlist table, select the row that contains the KPI that you want to output to an analysis.

3. From the Objects list, select Analyze. A new browser tab opens and displays the analysis, and Oracle BI saves the analysis to the catalog's Drills folder (/My Folders/Drills).

Outputting an Analysis from a KPI on a Scorecard

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Expand the scorecard's strategy tree, initiative tree, Scorecard Documents pane, or Catalog pane and select a KPI.

2. Right-click the KPI and select **Analyze**. A new browser tab opens and displays the analysis, and Oracle BI saves the analysis to the catalog.

Creating Agents from KPIs

Use the following procedure to create an agent from a KPI using the **Create Agent** option. This option is available from the **More** list on the *"Catalog page"* and from the **New Object** list in the Scorecard Editor's *"Catalog pane"*. When you create an agent using this method, Oracle BI does the following:

- Uses the KPI dimensions, dimension values that you specify, and status to create a condition that is based on the KPI and adds the condition to the *"Agent editor: Condition tab"*.

- Outputs the KPI as an analysis, saves the analysis to the catalog, and attaches the analysis to the *"Agent editor: Delivery Content tab"*.

For more information about agents, see *"Delivering Content"*.

Creating an Agent from a KPI

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Locate the KPI from which you want to create an agent using one of the following methods:
   - From the *"Catalog page"*, browse for and locate the KPI. In the "Catalog area", click the KPI's **More** list and select **Create Agent**. The "Create New Agent dialog" is displayed.
   - From anywhere in scorecard (Strategy pane, Initiatives pane, Scorecard Documents pane, Catalog pane, or any tab within the Scorecard Editor), select a KPI, right-click, and select Create Agent. The *"Create New Agent dialog"* is displayed.

2. In the **Name** field, enter a name for the agent and complete the Create New Agent dialog. Click **OK**.

   The *"Agent editor"* is displayed and the information that you specified in the Create New Agent dialog defaults into the *"Agent editor: Condition tab"* and the *"Agent editor: Delivery Content tab"*.

3. Complete and save the agent. For more information, see *"Creating Agents"* .

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KPI Business Owner Contact

Use the following procedures to send a message to a KPI's business owner. The business owner is the person who is responsible for managing the KPI. Upon the creation or modification of the KPI, the content designer selects the business owner from the Oracle BI user list.

Oracle BI uses the delivery devices and profiles that the business owner has specified in the *"My Account dialog: Delivery Options tab"* to determine where to deliver the message.

Contacting the KPI's Business Owner from a KPI Watchlist

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. Locate and open the KPI watchlist from the catalog, open a dashboard that contains a KPI, or open the scorecard that contains the KPI watchlist.
2. Go to the **Performance** tab and within the New KPI Watchlist table, select the row that contains the KPI whose owner you want to contact.
3. From the **Objects** list, select **Contact Owner**. The *"Contact Owner dialog"* is displayed.
4. In the **Message** field, enter a message to the KPI's owner.
5. Click **Send**.

Contacting the KPI's Business Owner from a Scorecard

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. Expand the scorecard's strategy tree, initiative tree, or scorecard documents folder and select a KPI.
2. Right-click the KPI and select **Contact Owner**. The *"Contact Owner dialog"* is displayed.
3. In the **Message** field, enter a message to the KPI's owner.
4. Click **Send**.

Overriding Statuses of KPIs

A KPI's status can be overridden only by the business owner. The business owner is the person responsible for managing the KPI. Upon the creation or modification of the KPI, the content designer selects the business owner from the Oracle BI user list.

The business owner can override a status if the KPI's values are old, unavailable, or otherwise do not accurately reflect the true status of what the KPI is measuring. A KPI's status remains overridden until the business owner removes the override status. For example, if there is a scorecard that contains a KPI that measures a store's sales and a fire destroys the store, causing it to be non-operational, the business owner overrides the KPI's status so that the scorecard is not unbalanced. The business owner keeps this override in place until the store is again operational.

For detailed instructions about overriding a KPI's status, see *"Status Overrides"*.

Adding Comments to KPIs

Any recipient of the KPI can add comments to a KPI's columns. Recipients can also review and respond to comments entered by other users. When you access a KPI's comments, a cumulative, chronological list of comments is displayed.

For more information on adding and reviewing comments, see *"Comments"*.

KPI Watchlists

KPI Watchlists

KPI watchlists are collections of KPIs that you build by adding the KPIs that are stored in the catalog. After you build and save a KPI watchlist, it is stored as a catalog object and can be added to dashboards and scorecards. Because KPIs cannot be viewed directly from the catalog by end users, KPI watchlists are one of the ways, along with outputting a KPI to an analysis and including a KPI on a scorecard, that KPIs are distributed to end users.

KPI watchlists provide the following KPI performance information:

- Current status

- Trend status that indicates if performance has increased, decreased, or remained the same, and if any changes are desirable

- Actual and target values.

- Variance value and percent by which the current value deviates from the target

- Change value and percent identify how much the current value differs from that from the previous period

KPI watchlists are useful because you can quickly build formal or informal lists for specific uses and for specific users, or, if end users are given the proper privileges, they can build their own KPI watchlists that meet their specific information needs. For example, the KPI watchlist designer might create a KPI watchlist that contains KPIs that support a specific scorecard's strategy and initiatives. Or end users might create KPI watchlists to monitor their individual objectives.

The KPI watchlist designer can add one KPI several times to a KPI watchlist, and each time that the KPI is added, pin different dimensions to it so that the end user can quickly see the whole picture rather than having to specify dimensions and reloading the KPI.

The KPI watchlist designer can add one KPI several times to a KPI watchlist, and each time that the KPI is added, pin different dimensions to it so that the end user can quickly see the whole picture rather than having to specify dimensions and reloading the KPI.

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Creating a KPI Watchlist

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. To create a new KPI watchlist, do one of the following:
    o From the Home page, locate the global header, hover the mouse pointer over the **New** menu, and select **KPI Watchlist**. The *"KPI Watchlist editor"* is displayed.
    o From a scorecard, go to the Scorecard Documents pane, click the **New Object** icon list, and select **KPI Watchlist**. The *"KPI Watchlist editor"* is displayed.
2. If you are creating a KPI watchlist from the global header, then select any KPI from the catalog pane and drag it to the watchlist table.

    If you are creating a KPI watchlist within the Scorecard Editor, then select a KPI from any pane within the Scorecard Editor and drag it to the watchlist table. The *"Add KPI dialog"* is displayed.
3. Enter a label for the KPI and if the KPI contains dimensions, then pin values to the dimensions as needed. Click OK. For more information about pinning, see *"Dimensions and Pinned Dimension Values"*
4. To edit the KPIs included on the watchlist, edit the KPI's watchlist entry, or remove the KPI from the watchlist, select a KPI from the table, click Objects, and select an option. For more information, see *"KPI Watchlist editor: Performance tab"*.
5. To add or remove columns from the watchlist table, click **View** and select **Show More Columns...**. The *"Show More Columns dialog"* is displayed.
6. Click the KPI Watchlist Editor's Details tab to provide a description of the watchlist, identify a business owner, and add links to related business intelligence objects or external links. For more information, see *"KPI Watchlist editor: Details tab"*.
7. Click **Save**.

    If you are creating a new KPI watchlist, then the *"Save As dialog"* is displayed where you specify the KPI watchlist's name and where you want to save the watchlist.

    If you want the watchlist to display within a scorecard's *"Scorecard Documents pane"*, save the watchlist to the scorecard object's folder within the catalog.

Editing a KPI Watchlist

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, click **Catalog**. The *"Catalog page"* is displayed.
2. Navigate to the KPI watchlist to edit and click the **Edit** link for the object. The *"KPI Watchlist editor"* is displayed.
3. Make the desired changes.
4. Save the KPI watchlist.

14 **Scorecarding**

Scorecarding

Scorecard and Strategy Management

Oracle Scorecard and Strategy Management is a performance management tool that lets you describe and communicate your business strategy. You can drive and assess your corporate strategy and performance from the top of your organization down, or from the bottom up.

Oracle Scorecard and Strategy Management also enables you to either align your objectives and initiatives with traditional balanced scorecard perspectives, or to create your own to reflect your fundamental business competencies.

Use Oracle Scorecard and Strategy Management to:

- Simultaneously define the objectives (that is, goals such as Decreased Time to Hire) and initiatives (that is, processes or tasks such as Train Hirning Managers to Streamline the Interview and Hire Process) that form your strategy to which you assign KPIs to measure progress and performance. For more information on:
    - ○ Objectives, see *"Objectives"*
    - ○ Initiatives, see *"Initatives"*.
    - ○ KPIs, see *"KPIs and KPI Watchlists"*

- Align objectives and initiatives with customized or traditional perspectives . This later enables you to depict the extent to which corporate strategy supports these perspectives. For information on perspectives, see *"Perspectives"*.

- Define target numeric ranges to evaluate the values of KPIs within corporate or department-level objectives and initiatives. For more information, see *"Assessment Mappings"*.

- Graphically communicate strategy and strategic dynamics using strategy maps, cause & effect maps, custom views, and strategy trees. For more information, see:
    - ○ *"Strategy Trees"*
    - ○ *"Strategy Maps"*
    - ○ *"Cause & Effect Maps"*
    - ○ *"Custom Views"*

- Discuss the implementation and status of objectives and initiatives by adding, reading, and replying to comments. For information on comments, see *"Comments"*.

✐ **Note:** Because you use KPIs in scorecards to measure progress and performance over time, best practice is to include appropriate time dimensions when defining KPIs to be used within scorecards.

Scorecard Editor

The "*Scorecard editor*" lets you create a scorecard of your entire organization or of individual departments. It consists of numerous panes and tabs:

- On the left side of the editor are the panes that you use to create the objects that comprise your scorecard. For example, it includes the Strategy pane, which you use to create, organize, and leverage the objectives that form the strategic structure (also called the strategy tree) of the corporate entity (department, for example) that you want to evaluate.

- On the right side of the editor is the tab area. When you first create a scorecard, you are presented with the Overview tab. This tab enables you to view summary information for the selected initiative, objective, or KPI. As you create your scorecard objects, detailed tabs are generated dynamically for each object. For example, when you create an objective, a tab is generated for that objective. You use this tab to define the objective and to view detailed information about the objective, such as which KPIs are to be used to evaluate it and which initiatives drive it.

- At the top of the editor are toolbar buttons and the point of view area. The point of view area displays the dimensions of the KPIs that are used in the Scorecard to measure the progress and performance of initiatives and objectives. You use this area to pin (or set) values for the dimensions. When you pin a dimension, the data in the scorecard is filtered to give you a new point of view (that is, a new view of the data). See "*Point of View Area*".

Scorecard Editor Edit and View Modes

The "*Scorecard editor*" has two modes:

- Edit mode - Enables you to create or edit mission statements, vision statements, initiatives, perspectives, objectives, KPIs, KPI watchlists, smart watchlists, and views, and create agents from KPIs.

- View mode - Enables you to navigate and view mission statements, vision statements, initiatives, perspectives, objectives, KPIs, KPI watchlists, and views but not add or modify them. You also can add comments, override statuses, create agents from KPIs, and view and in some cases modify smart watchlists.

In addition, the information that you can access and the tasks that you can perform in these mode depends on the following:

- The privileges that are assigned to your account
- The permissions that are associated with the individual scorecard objects and folders

Scorecard Objects

Scorecard objects are items that you create or arrange to:

- Represent and evaluate corporate strategy, including
  - Objectives: For information, see "*Objectives*"
  - Initiatives: For information, see "*Initiatives*".
  - Perspectives: For information, see *Perspectives*.

      o KPIs: For information, see *"KPI"*

- Present and analyze corporate strategy, including:
  - o Vision statements: For information, see *"Vision Statement"*
  - o Mission statements: For information, see *"Mission Statement"*
  - o Strategy trees: For information, see *"Strategy Trees"*
  - o Strategy maps: For information, see *"Strategy Maps"*
  - o Cause and effect maps: For information, see *"Cause & Effect Maps"*
  - o Custom views: For information, see *"Custom Views"*
  - o KPI watchlists: For information, see *"KPI Watchlists"*
  - o Smart watchlists: For more information, see *"Smart Watchlists"*
  - o Agents: For information, see *"Creating Agents From KPIs"*.

Creating Scorecards

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Create a new scorecard to contain the scorecard objects that you must represent, evaluate, present, and analyze your corporate strategy, such as objectives, initiatives, perspectives, and so on. See *"Creating a Scorecard"*.
2. Create perspectives to represent your key business competencies (Financial or Research and Development, for example) that you can use to align initiatives and objectives. See *Perspectives* and *"Creating a Custom Perspective"*.
3. Create the KPIs that gather core business data (Product Sales, for example) and specify the KPI targets, target ranges, and actions. See *"KPI"* and *"Creating a KPI"*.
4. Create the KPI watchlists that you want to use to monitor KPIs. See *"KPI Watchlists"*
5. Create and arrange the objectives (goals or desired outcomes) for your entire organization, or for a department. This includes assigning the KPIs that measure the progress and performance of objectives. Note that the top-level objective (that is, the root objective) in the Strategy pane represents the entity (your entire organization or a department) that you are scorecarding. See *"Objectives"* and *"Creating an Objective"* .
6. Create and arrange the initiatives required to meet objectives. You also can assign KPIs to initiatives. See *"Initiatives"* and *"Creating an Initiative"*.
7. Weight individual objectives and initiatives to specify how they impact the overall performance of the entity that you are scorecarding. See *"Understanding Initiative or Objective Performance Assessment"* and *"Assigning Weights to Child Objectives, Initiatives and KPIs"*.
8. Set assessment mappings. See *"Defining Assessment Mappings for a Scorecard"*.
9. If appropriate, override the status of KPIs, initiatives, and objectives. See *"Status Overrides"*.
10. Depict relationships between objectives using strategy maps, cause & effect maps, strategy trees, and custom views.

    See *"Strategy Maps"*, *"Creating a Strategy Map"*, *"Cause & Effect Maps"*, *"Creating a Cause & Effect Map"*, *"Strategy Trees"*, *"Creating Strategy Trees"*, *"Custom Views"*, and *"Creating a Custom View"*.
11. Create views into a scorecard based on criteria that you specify by creating smart watchlists. See *"Smart Watchlists"* and *"Creating a Smart Watchlist"*.

12. Use comments (also know as annotations) to associate explanatory text with the values of KPIs, objectives, or initiatives for a specific set of dimension values. See *"Comments"*.

13. Add scorecard views to dashboards. See *"Adding Scorecard Objects to Dashboards"*.

14. Create agents from KPIs. (Agents enable you to automate your business processes.) See *"Creating Agents From KPIs"*.

15. Optionally define the mission and vision statements that translate your corporate direction into over-arching strategic themes and thrusts that you later support by creating objectives. See *"Mission Statement"*, *"Defining a Mission Statement"*, *"Vision Statement"*, and *"Defining a Vision Statement"*.

Creating a Scorecard

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. In the global header, click New and then select Scorecard.

   The *"New Scorecard dialog"* is displayed.

2. Specify a name for the scorecard.

3. (optional) Specify a description of the scorecard.

4. Select the location in which to save the scorecard.

5. Specify whether to use the default Balanced Scorecard perspectives.

6. Click **OK**. The new scorecard is created.

Perform the remaining tasks for creating a scorecard, as described in *"Creating Scorecards"*

Opening or Editing a Scorecard

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

✏️ **Note:** Only users with the BI Author Developer or BI Tenant Administrator privilige will be able to edit a scorecard.

Home > **Oracle Business Intelligence**

1. In the global header, click **Catalog** to display the *"Catalog page"*.

2. Navigate to the scorecard that you want to open or edit and click one of the following links:

   - **Open** — The scorecard is displayed in the *"Scorecard editor"* in view mode.

   - **Edit** — The scorecard is displayed in the *"Scorecard editor"* in edit mode.

   For more information on the view and edit modes, see *"Scorecard Editor Edit and View Modes"*

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3. Make the desired changes.
4. Save the scorecard.

Vision Statement

A vision statement is a short statement that describes what your organization wants to become sometime in the future. For example, it might be to become the most successful business in the South America Polypropylene Market. (A vision statement is optional.)

Often, from this statement, you define the key goals and priorities that form your mission statement. For more information, see *"Mission Statement"*

For information on defining a vision statement, see *"Defining a Vision Statement"*.

Defining a Vision Statement

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the scorecard for which you want to define a vision statement. For information, see *"Opening or Editing a Scorecard"*.
2. In the *"Scorecard Documents pane"*, click the **Create Object** toolbar button and then select **Vision.**
   The "Vision tab: Document tab" is displayed:
3. Enter and format the vision statement. You can apply such formatting options as bold, italic, underlining, indents, justification, and font size changes.
4. Click the *"Vision tab: Details tab"*.
5. Assign the business owner and specify related documents, as appropriate. See *"Related Documents area"*.
6. Click Save to display the *"Save As dialog"*. In the Save As dialog, you can rename the vision statement rather than use the default name.

Mission Statement

A mission statement specifies the key business goals and priorities that are required to achieve your vision. (A mission statement is optional.)

For information on defining a mission statement, see *"Defining a Mission Statement"*.

You define your vision in a vision statement. For more information on vision statements, see *"Vision Statement"*

Defining a Mission Statement

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard for which you want to define a mission statement. For information, see *"Opening or Editing a Scorecard"*.
2. In the *"Scorecard Documents pane"*, click the **Create Object** toolbar button and then select **Mission**.

   The *"Mission tab: Document tab"* is displayed:
3. Enter and format the mission statement. You can apply such formatting options such as bold, italic, underlining, indents, justification, and font size changes.
4. Click the *"Mission tab: Document tab"*.
5. Assign the business owner and specify related documents, as appropriate. See *"Related Documents area"*.
6. Click Save to display the *"Save As dialog"*. In the Save As dialog, you can rename the mission statement rather than use the default name.

Perspectives

Perspectives are categories in your organization with which to associate initiatives, objectives, and KPIs. A perspective can represent a key stakeholder (such as a candidate, employee, or manager) or a key competency area (such as time, cost, or quality).

You associate an initiative and objective with a perspective when you create or edit it. See *"Creating an Initiative"* and *"Creating an Objective "*. You associated a KPI with a perspective when you edit the details of the KPI. See *"Working with KPI Details"*.

For example, when you create an objective called Improved Candidate Response Time you might associate it with a Candidate perspective as the objective sustains and supports customer-related operations.

You can create custom perspectives for your scorecard. For information on creating custom perspectives, see *"Creating a Custom Perspective"*.

Creating a Custom Perspective

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard for which you want to create a custom perspective. For information, see *"Opening or Editing a Scorecard"*.
2. In the *"Perspectives pane"*, click the **New Perspective** toolbar button.

   The *"Scorecard editor: Perspective tab"* is displayed.
3. In the **Perspective Name** field, enter the name of the perspective.
4. (optional) In the Description field, enter a description of the perspective.
5. Click the **Set User** button to display the *"Select Business Owner dialog"*, where you select the business owner. (By default, the business owner is the creator of the scorecard.)
6. In the Focus area, specify whether the focus of the perspective is financial or internal facing.
7. Add related documents, as appropriate. See *"Related Documents area"*.
8. Click **Save**.

   The perspective displays in the *"Perspectives pane"*.

You can now associate initiatives, objectives, and KPIs with this custom perspective. You associate an initiative and objective with a perspective when you create or edit the initiative or objective. See *"Creating an Initiative"* and *"Creating an Objective"*. You associated a KPI with a perspective when you edit the details of the KPI. See *"Working with KPI Details"*.

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Key Performance Indicators (KPIs)

A KPI represents the result of a business measure (for example, Product Sales or Operational Costs) evaluated against a target for that measure. You can use KPIs to assess the progress of the objectives and initiatives that form levels of organizational strategy.

You can create KPIs that you need:

- Within a scorecard. This enables you to create the KPIs as you are creating or editing the scorecard.
- Outside a scorecard. This enables you to create the KPIs in advance of creating or editing a scorecard.

For information on KPIs and how to create them, see , *"KPIs and KPI Watchlists."*

Objectives

Objectives are the required or desired outcomes that form your corporate strategy. You can create an objective for:

- An entire organization, for example, Oracle Corporation
- A department, for example, Talent Development

When you create an objective, you assign it one or more KPIs that are to be used to measure its progress and performance. For example, you can measure the progress and performance of an objective named Improved Offer Acceptance by assigning it the following KPIs:

- Average Accepted Offers
- Average Declined Offers

For more information on KPIs, see , *"KPIs and KPI Watchlists."*

Within a scorecard, you also create the initiatives that are required to meet the objectives. For more information on initiatives, see *"Initatives"*.

Objectives that you create are displayed hierarchically in the *"Strategy pane"*. The root objective represents the entity that you are scorecarding, that is the entire organization or a department. The KPIs that are assigned to assess the performance of objectives are displayed below the objectives in the Strategy pane.

The Strategy pane also shows the statuses of objectives and KPIs using the appropriate colors and icons that you specified for assessment mappings. For more information on assessment mappings, see *"Defining Assessment Mappings for a Scorecard"*.

For information on creating objectives, see Creating Objectives.

Creating an Objective

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard for which you want to create an objective. For information, see *"Opening or Editing a Scorecard"*.

2. In the *"Strategy pane"*:

   o If the objective that you want to create can be independently achieved, then select the root objective.

   o If the objective that you want to create is required to meet a higher-level objective, then select the higher-level objective.

3. Click the **Create Objective** toolbar button or right-click and select **Create Objective**.

   The *"Scorecard editor: Objective Details tab"* is displayed.

4. Highlight the default objective name in the top left corner and enter a new name for the objective.

5. In the **Description** field, enter a description of the objective.

6. Specify the analytic information (including the KPIs to be used to measure the progress and performance of the objective) by completing the *"Analytics pane"*. For information, see *"Completing the Analytics Pane for an Objective or Initiative"*.

7. Specify the collaboration information by completing the *"Collaboration pane"* as follows:

   a. (optional) Add comments by clicking the **Add Comment** button to display the *"Add Comment dialog"*. See *"Comments"*.

   b. Specify the business owner that users can contact by clicking the **Set User** button to display the *"Select Business Owner dialog"*. (By default, the business owner is the creator of the scorecard.)

   c. (optional) Add related documents by clicking the **New Row** button to display the *"New Related Document dialog"*. Also see *"Related Documents area"*.

8. Add related items by completing the *"Related Items pane"* as follows:

   a. Add one or more objectives that impact or support (that is, help achieve or hinder progress on) this objective. To do so, drag the objective from the Strategy pane and drop it in the **Causes** table.

      The *"Causal Linkage dialog"* is displayed, where you specify how closely the objectives are related and whether changes to the values in this causal objective have a direct or inverse impact on this objective.

      For example, for an Increased Offer Acceptance objective, you might drag and drop the following objectives that could cause (or help or hinder) it: Decreased Time to Offere and Increase Offer Salary.

   b. Add one or more initiatives (that is, the tasks that are required to meet the objective). To add an initiative, drag it from the "Initiatives pane" and drop it in the **Initiatives Driving This Objective** table.

      The *"Initiative Linkage dialog"*, where you specify how closely the initiative and the objective are related and whether changes to the values in this initiative have a direct or inverse impact on this objective.

   c. Add one or more objectives that this objective impacts or supports. To do so, drag the objective from the Strategy pane and drop it in the **Effects** table.

      The *"Causal Linkage dialog"* is displayed, where you specify how closely the objectives are related and whether changes to the values in this causal objective have a direct or inverse impact on this objective.

9. Click **Save**.

Completing the Analytics Pane for an Objective or Initiative

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. In the **Perspective** box, select the perspective with which the objective or initiative is to be aligned.

2. In the **Assessment Rule** box, select the rule to be used to assess the overall performance of the initiative or objective. For example, select **Worst case** to specify that the status of the worst performing child KPI or objective is to be used.

3. (for an objective only) In the **Leading/Lagging** box, indicate whether the performance of the objective drives other objectives, or is affected by the performance of other objectives or other data or processes.

4. (for an initiative only) In the **Priority** box, select the priority that indicates the importance and urgency of an initiative.

5. (for an initiative only) Specify the start date, due date, and completion date.

6. In the **Action Link** area, add any action links that you want to provide to users to let them take actions that are relevant for the status of the objective or initiative. For information, see *"Adding Actions to Initiatives and Objectives in a Scorecard"*. Also see *"Actions"*.

7. In the **Objectives & KPIs** or **Initiatives & KPIs** watchlist, add the KPIs to be used to measure the progress and performance of the objective or initiative. (For more information on watchlists, see *"Watchlists"*.) To add a KPI

   a. Click **Objects** in the **Objectives & KPIs** or **Initiatives & KPIs** watchlist and then select **Add KPI**.

      Alternatively, you can drag the KPI from the "Catalog pane for Scorecard" or from the *"Scorecard Documents pane"* (if the KPI has been saved to the current scorecard folder) and drop it in the watchlist.

      The *"Add KPI dialog"* is displayed.

   b. If the KPI is dimensioned, then for each dimension, specify a value, select **Use Variable** and specify the variable, or select **Use Point-of-View** to use the value selected in the point of view area. For more information on the point of view area, see *"Point of View Area"*.

   c. In the **Label** field, enter the name to be displayed for the KPI in the *"Strategy pane"*.

   d. Click OK.

      > **Note:** A KPI that you have added to the Strategy pane or Initiatives pane obtains many of its properties from the base KPI as it was originally defined in the KPI editor. You can override some of the base KPI's properties to customize them for use within Scorecard. The KPI properties that you can override are the label, description, business owner, and dimension pinnings. You also can assign a perspective and an indicator type. For information on overriding KPI properties, see *"Working with KPI Details"*.

      > **Note:** If no KPIs have been defined, or you want to define another KPI to meet your needs, then you can create the KPI from within the Scorecard editor. For information, see *"Creating a KPI"*.

   Tip: You can modify the columns that are displayed in the **Objectives & KPIs** or **Initiatives & KPIs** watchlist. To do so, select **View**, then **Show More Columns** to display the *"Show More Columns dialog"*, where you can add or remove columns.

Initiatives

Initiatives are time-specific tasks or projects that are necessary to achieve objectives. As such, you can use initiatives that support objectives as milestones as they reflect progress toward strategy targets. For example to implement an objective called Improve Offer Acceptance, you might create these initiatives:

- Record candidate desired pay rate
- Record reasons for declined offers

Generally, an initiative supports multiple objectives.

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When you create an initiative, you assign it KPIs that are to be used to measure its progress. For more information on KPIs, see *"KPIs and KPI Watchlists"*.

Initiatives that you create are displayed hierarchically in the *Initiatives pane*"". The root initiative represents all the initiatives that you implement to achieve objectives and goals. The KPIs that are assigned to an initiative are displayed below the initiative in the Initiatives pane.

The Initiatives pane also shows the statuses of initiatives and KPIs using the appropriate colors and icons that you specified for assessment mappings. For more information on assessment mappings, see *"Defining Assessment Mappings for a Scorecard"*.

For information on creating initiatives, see Creating an Initiative.

Creating an Initiative

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard for which you want to create an initiative. For information, see *"Opening or Editing a Scorecard"*.
2. In the *"Initiatives pane"*:
   - If the initiative that you want to create can be independently implemented, then select the root initiative.
   - If the initiative that you want to create is required to meet a higher-level initiative, then select the higher-level initiative.
3. Click the **Create Initiative** toolbar button or right-click and select **Create Initiative**.

   The *"Scorecard editor: Initiative Details tab"* is displayed.
4. Highlight the default initiative name in the top left corner of the tab and enter a new name for the initiative.
5. In the **Description** field, enter a description of the initiative.
6. Specify the analytic information (including the KPIs to be used to measure the progress of the initiative) by completing the *"Analytics pane"*. For information, see *"Completing the Analytics Pane for an Objective or Initiative"*.
7. Specify the collaboration information by completing the *"Collaboration pane"* as follows:
   a. (optional) Add comments by clicking the **Add Comment** button to display the *"Add Comment dialog"*. See *"Comments"*.
   b. Specify the business owner that users can contact by clicking the **Set User** button to display the *"Select Business Owner dialog"*. (By default, the business owner is the creator of the scorecard.)
   c. (optional) Add related documents by clicking the **New Row** button in the Related Documents toolbar to display the *"New Related Document dialog"*. Also see *"Related Documents area"*.
   d. (optional) Add the key resources by clicking the **New Row** button in the Key Resources toolbar to display the *"Key Resource dialog"*.
8. In the *"Related Items pane"*, add one or more objectives that require this initiative in order to succeed. To add an objective, drag the objective from the *"Strategy pane"* and drop it in the **Objectives for this Initiative** table.

   The *"Initiative Linkage dialog"* is displayed, where you specify how closely the initiative and the objective are related and whether changes to the values in this initiative have a direct or inverse impact on this objective.
9. Click **Save**.

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Understanding Initiative or Objective Performance Assessment

Oracle Business Intelligence assesses the performance of an initiative or objective by aggregating the assessments of its children. In the process, it uses:

- Scorecard assessment mappings that you define. See *"About Assessment Mappings"*.

- Assessment formulas (such as Weighted or Best Case) assigned to all objectives and initiatives. The assessment formulas include:

  - Worst case — Specifies that the status of the worst performing child KPI or objective is to be used.

  - Best case — Specifies that the status of the best performing child KPI or objective is to be used.

  - Most Frequent (Worst Case) — Specifies that, if half the child KPIs and objectives have high performance and half have low performance, then use the status of the worst performing child KPI or objective.

  - Most Frequent (Best Case) — Specifies that, if half the child KPIs and objectives have high performance and half have low performance, then use the status of the best performing child KPI or objective.

  - Weighted — Specifies to use a weighted average based on the weights you have assigned to the child KPIs and objectives. See *"Assigning Weights to Child Objectives, Initiatives and KPIs"*.

  You assign assessment formulas when you create an objective or initiative. For how to create an objective or initiative, see *"Creating an Objective"* or *"Creating an Initiative"*.

- Weights that you assign to child initiatives, objectives, and KPIs (but only if the parent's assessment rule is set to Weighted) to identify the extent to which each child contributes to the overall performance of the parent. See *"Assigning Weights to Child Objectives, Initiatives and KPIs"*.

Assessment Mappings

Assessment mappings are the score thresholds and assessment ranges that Oracle Business Intelligence uses to assess the performance of objectives and initiatives.

Oracle Business Intelligence uses these score thresholds and assessment ranges to:

- Determine the status and score of an objective or initiative based on the aggregation of the assessments of its children.

  > ✎ **Note:** If the assessment formula of an objective or initiative is Best Case, Worst Case, Most Frequent (Worst Case), or Most Frequent (Best Case), the score will be one of the defined score thresholds, for example, 0, 33, or 66. If the assessment formula is Weighted, the score is computed based on the weights assigned to the children.

- Map the KPI scores of KPIs that are used to measure the progress of initiatives and objectives to scorecard scores so that they can be used to measure the performance of the objectives or initiatives.

For more information on initiative and objective performance assessment, see *"Understanding Initiative or Objective Performance Assessment"*.

For how to define assessment mappings, see *"Defining Assessment Mappings for a Scorecard"*.

Defining Assessment Mappings for a Scorecard

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard for which you want to define assessment mappings. For information, see *"Opening or Editing a Scorecard"*.
2. Click the **Scorecard Settings** toolbar button in the Scorecard editor.

    The *"Settings dialog: Assessment Mappings tab"* is displayed.
3. In the Score Threshold fields, enter the numeric values that set the boundaries for the assessment ranges.

    For example, you might enter 33 and 66 to set the boundaries for three assessment ranges — Critical, Warning, and OK. Any KPI score from 0 to 33 would fall in the Critical assessment range, any KPI score from 34 to 66 would fall in the Warning assessment range, and any KPI score from 66 to 100 would fall in the OK assessment range.
4. In the **Assessment Range** boxes, specify the name of each assessment range (for example, Critical) and, for each range, specify the icon and the color to be used to represent the range.
5. Click **OK**.

Assigning Weights to Child Objectives, Initiatives, and KPIs

You assign weights to the child objectives, initiatives, and KPIs of an objective or initiative to indicate how much it affects the performance of its parent objective.

To assign weights to child objectives, initiatives, and KPIs, the Assessment Rule for the parent objective or initiative must be set to Weighted.

For more information on objective and initiative performance assessment, see *"Understanding Initiative or Objective Performance Assessment"*.

Assigning Weights to Child Objectives, Initiatives, and KPIs

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard that contains the parent objective or initiative of the objectives, initiatives, and KPIs to which you want to assign weights. For information, see *"Opening or Editing a Scorecard"*.
2. Open the parent objective or initiative. To do so, double-click the objective in the in the *"Strategy pane"* or the initiative in the *"Initiatives pane"*.
3. In the Objectives & KPIs or Initiatives and KPIs watchlist of the *"Analytics pane"*, enter a weight for each child objective, initiative, or KPI.
4. Click **Save**.

Point of View Area

The point of view area of the *"Scorecard editor"* displays controls for the dimensions of KPIs that are used in the Scorecard to measure the progress and performance of initiatives and objectives. For more information on KPI dimensions, see *"Dimensions and Pinned Dimension Values"*.

Controls are displayed for each KPI dimension that is referenced in a scorecard with the exception of those that you explicitly prevent from being displayed. If the same dimension is referenced in more than one KPI, then a control can be shared by the KPIs. (For more information on how to set up the controls in the point of view area, see *"Setting Up the Point of View Controls"*.)

Each control includes a label and a down-arrow button that displays a list of the dimension values from which you can select. The label is either the database name for the dimension (by default), a user-friendly label, if specified for the control, or a specific value, if the dimension is pinned to a value.

You use this area to temporarily pin (that is, set values) for the dimensions. When you pin a dimension, the data in the scorecard is filtered to give you a new point of view (that is, a new view of the data). This enables you to focus on specific data of interest to you, such as the area of business for which you are responsible.

The point of view area settings are temporary and are not persisted when the scorecard is saved. To persist pinnings, you can use the:

- *"Settings dialog: Dimension Settings tab"* to affect all KPI usages within a scorecard.
- **Dimensionality** area in the *"Analytics pane"* of the *"Scorecard editor: KPI Details tab"* to pin the values for a particular KPI usage.
- *"Add KPI dialog"* (also displayed as the Edit Watchlist Entry dialog) in the "KPI Watchlist editor" to pin values for individual KPIs.
- "Dimension Pinnings dialog" to pin values in a view that has been added to a dashboard.
- *"KPI editor: Dimensionality page"* (also displayed as the Scorecard editor: KPI tab) to pin values in a KPIs definition. This approach is less flexible than when you let a KPI's definition be reusable in different contexts and pin only within views that reference the KPI.

The Scorecard editor also contains the **Back** and **Forward** buttons that enable you to move forward or backward through your point of view history to select a previous point of view or the point of view with which you started.

To temporarily pin a dimension:

1. Click the down-arrow button to the right of the dimension and select a value. The data is filtered and a new point of view is displayed.

Setting Up the Point of View Controls

You use the *"Settings dialog: Dimension Settings tab"* to set up the controls for dimensions in the point of view area of a scorecard.

Specifically, you can specify:

- A default value for the dimension

- Whether a control for the dimension is to be displayed in the point of view area

- The label to be displayed in the point of view area for the dimension

For more information on the point of view, see *"Point of View Area"*.

Setting up a Point of View Control

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard for which you want to set up the point of view controls. For information, see *"Opening or Editing a Scorecard"*.
2. Click the **Scorecard Settings** toolbar button in the Scorecard editor.

   The *"Settings dialog: Assessment Mappings tab"* is displayed.
3. Click the Dimension Settings tab.
4. Set up the controls for each dimension as desired. To set up the control for a dimension:
   a. Select the dimension and then click the **Edit Row** button to display the "Edit Dimension Settings dialog".
   b. Specify the settings that you want.
   c. Click **OK**.
5. Click **OK**.

Strategy Trees

A strategy tree shows an objective and its supporting child objectives and KPIs hierarchically. It also provides supporting information for the objective, such as business owner and related documents.

A strategy tree lets you easily explore and navigate:

- The strategy for an entire scorecard (that is, the root objective) for example, ABC Corporation

- The strategy for an individual objective, for example, Decrease Support Turnaround.

There are two types of diagrams for a strategy tree:

- Strategy tree diagram. See *"Strategy Tree Diagram"*.

- Contribution wheel diagram. See *"Contribution Wheel Diagram"*.

For information on creating a strategy tree, see *"Creating Strategy Trees"*.

Strategy Tree Diagram

You use a strategy tree diagram to view an objective and its supporting child objectives and KPIs hierarchically in a tree diagram. It contains the following components:

- The tree diagram — Consists of nodes that represent an objective and its supporting objectives and KPIs. Each node shows the status of the objective or KPI by displaying the icon and color that represents the assessment range. A KPI node also displays the actual value of the KPI and the percent variance from the target.

- The bird's eye view — Provides an overhead view of the tree diagram.

Contribution Wheel Diagram

You use a contribution wheel diagram to view an objective and its supporting child objectives and KPIs hierarchically in a circular diagram called a contribution wheel diagram. The contribution wheel diagram makes it easy to see the contribution (or impact) a specific objective or KPI has on a parent objective. It contains the following components:

- The contribution wheel — Consists of a center circle (or focus node) that represents the starting objective of the diagram. It is surrounded by concentric circles that are divided into sectors. Each sector is a node that represents a child objective or KPI.

  The size of a sector is determined by the weight assigned to the represented objective or KPI in its parent's weighted assessment rule. For more information on assigning weights, see *"Assigning Weights to Child Objectives, Initiatives and KPIs"*. If the parent has no weighted assessment rule, then the child sectors of a parent are all the same size.

- The Information pane — Displays the following information about the current node:
  - The status icon and either the score (for an objective) or the actual values and variance percentage (for a KPI)
  - The status of its children
  - The weight assigned to it in its parent's weighted assessment rule

- Breadcrumbs — Consists of a group of small circles that represent the node in the center of the contribution wheel and any of its ancestors that are included in the diagram. Each circle displays the status color of its corresponding node.

Creating Strategy Trees

You can create a strategy tree for the entire scorecard or for a specific objective as follows:

- In Edit mode, you can create and save a strategy tree for an entire scorecard and for specific objectives.
- In View mode, you can create a temporary, read-only strategy tree only for specific objectives. You cannot save the strategy tree.

For more information about the Edit and View modes, see *"Scorecard Editor Edit and View Modes"*.

Creating a Strategy Tree

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. If you want to:
   - Create and save a strategy tree for an entire scorecard or for a specific objective, edit the scorecard in which you want to create the strategy tree. For information, see *"Opening or Editing a Scorecard"*
   - Create but not save a temporary, read-only strategy tree only for a specific objective, open the scorecard. For information, see *"Opening or Editing a Scorecard"*
2. To create a strategy tree for:
   - The entire scorecard (the root objective), in the *"Scorecard Documents pane"*, click the **New Object** toolbar button and select **Create Strategy Tree**

    o For a specific objective, in the *"Strategy pane"*, right-click the objective and then select **View Strategy Tree**

The *"Strategy Tree tab: Diagram tab"* is displayed, showing the objective and its supporting child objectives and KPIs hierarchically in a diagram.

3. In a strategy tree diagram, to:

    o Display options that enable you to work with a node, click the Options button (on the right side of the node) to display the *"Node Options Menu"*

    o Display additional performance data for a KPI, such as target value or variance, click the down arrow at the bottom center of the node. To collapse this data, click the up arrow.

    o Expand or collapse a node

    o Zoom in and out of the diagram, use the toolbar buttons on the *"Scorecard editor: Strategy Tree tab"*

    o Work with comments:

        - Hover the mouse pointer over the Comment button in the upper-right corner of a node to display the *"Status window"*, where you can read the comments that were previously added, add another comment, or reply to a comment.

        - Click the Options button on the right side of the node to which you want to add a comment and select Add Comment from the *"Node Options Menu"*. The *"New Comment dialog"* is displayed, where you can add a comment or read any comments that were previously added.

        See *"Comments"*.

    o Work with status overrides on nodes for which you are the business owner:

        - Hover the mouse over the red asterisk (if available) in a node to display the *"Status window"*, where you can view the overrides that were previously applied or apply another override.

        - Click the Options button on the right side of the node to which you want to apply the status override and select Override Status from the *"Node Options Menu"*. The *"Status Override dialog"* is displayed, where you apply another override or view any overrides that were previously applied.

        See *"Status Overrides"* and *"Status Overrides"*.

    o Change the type of diagram to a contribution wheel diagram, right-click in the background outside the tree and select **View as Wheel Diagram** or click the **Wheel Diagram Type** toolbar button in the *"Scorecard editor: Strategy Tree tab"*

4. In a contribution wheel diagram, to:

    o Display information specific to a node (such as the weight assigned to it in its parent's assessment rule), hover the mouse over the node.

    o Display options that allow you to work with a node, right-click the node to display the *"Node Options Menu"*. For example, you can change the focus of the wheel using the **Focus on** Node and Focus up to Node options.

    o Change the focus of the wheel down to a descendant, double-click the descendant node.

    o Zoom in and out of the diagram or set properties for the strategy tree, use the toolbar buttons on the *"Scorecard editor: Strategy Tree tab"*

    o Drill to the next level or collapse a level, hover the mouse over the concentric rings on the outer border of the wheel and click the **Drill to next level** or **Collapse Level** triangle.

    o Expand or collapse a node or group of nodes that appear as slivers (that is, appear very thin) in the diagram, click the Expand Section triangle or the **Collapse Section** triangle that displays when you hover over it. You can expand only slivers in the second concentric circle around the center and farther out.

    o Work with comments (if any), click the **Comment** button in a node to display the *"Status window"*, where you can read the comments that previously have been added, add another comment, or reply to a comment. See *"Comments"*

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o   Work with status overrides (if any), click the white dashed line around the border of a node to display the *"Status window"*, where you can view the overrides that previously have been applied or apply another override. See *"Status Overrides"*

o   Change the type of diagram to a strategy tree diagram, right-click in the background outside the wheel and select **View as Tree Diagram** or click the **Tree Diagram Type** toolbar button in the *"Scorecard editor: Strategy Tree tab"*

5.   To set properties that control the appearance of the diagrams, click the **Properties** toolbar button on the Scorecard editor: Strategy Tree tab.

   The Strategy Tree View Properties dialog is displayed.

6.   Specify the property settings to achieve the desired appearance, and then click **OK**.

7.   Click the *"Strategy Tree tab: Details tab"*.

8.   Specify a description, assign the business owner, and specify related documents, as appropriate. (By default, the business owner is the creator of the scorecard.)

9.   Click **Save** to display the *"Save As dialog"*. In the Save As dialog, you can rename the strategy tree rather than use the default name.

Strategy Maps

A strategy map shows how the objectives that have been defined for a scorecard and the KPIs that measure their progress are aligned by perspectives. It also indicates cause and effect relationships between objectives and other objectives or KPIs with connecting lines. You create cause and effect relationships when you create (or edit) an objective (see *"Creating an Objective"*) or work with KPI details (see *"Working with KPI Details"*). You also can create cause and effect relationships in a strategy map.

You can create multiple strategy maps to represent the strategy of different areas of your organization.

You can create strategy maps in Edit mode only. For more information about the Edit and View modes, see *"Scorecard Editor Edit and View Modes*.

For information on creating strategy maps, see *"Creating a Strategy Map"*.

Creating a Strategy Map

You must have one of the following user type permissions:

   • BI Author Developer

   • BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1.   Edit the scorecard in which you want to create the strategy map. For information, see *"Opening or Editing a Scorecard"*.

2.   In the *"Scorecard Documents pane"*, click the **New Object** toolbar button and select **Create Strategy Map**.

   The Strategy Map tab: Diagram tab is displayed.

3.   Build the map as follows:

   o   Add objectives and KPIs that measure their progress by dragging them from the *"Strategy pane"* and dropping them in the diagram as follows:

      -   If the objective or KPI is aligned with a specific perspective, then drop it anywhere in the diagram. It is displayed automatically in the section for the perspective to which the objective or KPI is associated. You align an objective or KPI with a perspective when you create (or edit) the objective or KPI. See *"Creating an Objective"*. For more information on perspectives, see *Perspectives*

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- If the objective or KPI is not associated with a perspective, then you drop it in the section for the perspective to which the objective or KPI is to be associated. Note that this does not permanently assign the perspective to this objective or KPI.

   o (optional) Add the direct cause and effect objects for the selected node (that is, the representation of an objective or KPI) to the diagram by right-clicking and selecting **Add Related Strategy Nodes**

   o Add cause and effect relationships, as needed.

   To add a cause and effect relationship, click the **Draw A Casual Linkage Between Two Objectives** button on the Scorecard editor: Strategy Map tab toolbar, select one of the nodes, and then select the second node. A line connecting the nodes is displayed.

   If you want to delete a node from the map, then right-click the node and select **Remove From Diagram**.

4. To:

   o Display options that enable you to work with a node, click the Options button (on the right side of the node) to display the *"Node Options Menu"*

   o Edit a causal linkage, right-click the linkage line and select Edit Causal Linkage. The *"Causal Linkage dialog"* is displayed.

   o Delete a causal linkage, right-click the linkage line and select Delete Causal Linkage.

   o Display additional performance data for the KPI, such as target value or variance, click the down arrow at the bottom center of the representation. To collapse this data, click the up arrow.

   o Zoom in and out of the diagram, use the toolbar buttons on the *"Scorecard editor: Strategy Map tab"*

   o Work with comments:

      - Hover the mouse pointer over the Comment button in the upper-right corner of a node to display the *"Status window"*, where you can read the comments that were previously added, add another comment, or reply to a comment.
      - Click the Options button on the right side of the node to which you want to add a comment and select Add Comment from the *"Node Options Menu"*. The *"New Comment dialog"* is displayed, where you can add a comment or read any comments that were previously added.

      See "About Comments" and *"Comments"*.

   o Work with status overrides on nodes for which you are the business owner:

      - Hover the mouse over the red asterisk (if available) in a node to display the *"Status window"*, where you can view the overrides that were previously applied or apply another override.
      - Click the Options button on the right side of the node to which you want to apply the status override and select Override Status from the *"Node Options Menu"*. The *"Status Override dialog"* is displayed, where you apply another override or view any overrides that were previously applied.

      See *"Status Overrides"* and *"Status Overrides"*

5. Click the *"Strategy Map tab: Details tab"*.
6. Specify a description, assign the business owner, and specify related documents, as appropriate. (By default, the business owner is the creator of the scorecard.)
7. Click Save to display the *"Save As dialog"*. In the Save As dialog, you can rename the strategy map rather than use the default name.

Cause & Effect Maps

A cause & effect map lets you illustrate the cause and effect relationships of an objective or KPI that is listed in the *"Strategy pane"*.

You create cause and effect relationships for:

- An objective when you create or edit the objective and identify:
    - Other objectives or KPIs that impact or support the objective (causes)
    - Other objectives or KPIs that this objective impacts or supports (effects)

- A KPI when you work with KPI details.
    - Other objectives or KPIs that impact or support the KPI (causes)
    - Other objectives or KPIs that this KPI impacts or supports (effects)

    For more information, see *"Working with KPI Details"*.

A cause and effect map also indicates the proportionality (that is, whether changes in performance or value in the cause and effect relationship are directly proportional (direct) or inversely proportional (inverse) and strength (strong, moderate, or weak) of cause & effect relationships using symbols.

A cause & effect map helps you to better understand the implications of future strategic changes.

You can create a cause & effect map in either Edit or View mode:

- In Edit mode, you can create and save a cause & effect map.
- In View mode, you can create a temporary, read-only cause & effect map. You cannot save it.
  For more information about the Edit and View modes, see *"Scorecard Editor Edit and View Modes"*.

For information on creating cause & effect maps, see *"Creating a Cause & Effect Map"*.

Creating a Cause & Effect Map

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. If you want to:
    - Create and save a cause & effect map, edit the scorecard in which you want to create the cause & effect map. For information, see *"Opening or Editing a Scorecard"*.
    - Create but not save a temporary, read-only cause & effect map, open the scorecard in which you want to create the cause & effect map. For information, see *"Opening or Editing a Scorecard"*.
2. In the *"Strategy pane"*, right-click the objective or KPI and then select **View Cause & Effect Map**

The *"Cause & Effect Map tab: Diagram tab"* is displayed.

3. To:

    ○ Display options that enable you to work with a node, right-click the node or click the **Options** button (on the right side of the node) to display the *"Node Options Menu"*

    ○ Display additional performance data for a KPI, such as target value or variance, click the down arrow at the bottom center of the node. To collapse this data, click the up arrow.

    ○ Edit a causal linkage, right-click the linkage line and select **Edit Causal Linkage**. The *"Causal Linkage dialog"* is displayed.

    ○ Delete a causal linkage, right-click the linkage line and select **Delete Causal Linkage**.

    ○ Zoom in and out of the diagram or to set preferences, use the toolbar buttons on the *"Scorecard editor: Cause & Effect Map tab"*

    ○ Work with comments:

        - Hover the mouse pointer over the **Comment** button in the upper-right corner of a node to display the *"Status window"*, where you can read the comments that were previously added, add another comment, or reply to a comment.

        - Click the Options button on the right side of the node to which you want to add a comment and select **Add Comment** from the *"Node Options Menu"*. The *"New Comment dialog"* is displayed, where you can add a comment or read any comments that were previously added.

    See *"Comments"*.

    ○ Work with status overrides on nodes for which you are the business owner:

        - Hover the mouse over the red asterisk (if available) in a node to display the *"Status window"*, where you can view the overrides that were previously applied or apply another override.

        - Click the **Options** button on the right side of the node to which you want to apply the status override and select Override Status from the *"Node Options Menu"*. The *"Status Override dialog"* is displayed, where you apply another override or view any overrides that were previously applied.

    See *"Status Overrides"* and *"Status Overrides"*

4. To specify how cause and effect relationships are to be displayed on the cause & effect map, click the **Cause & Effect Map Preferences** toolbar button on the *"Scorecard editor: Cause & Effect Map tab"*

    The *"Cause & Effect Map Preferences dialog: General tab"* is displayed.

5. Specify how you want cause and effect relationships displayed and then click **OK**

6. Click the *"Cause & Effect Map tab: Details tab"*.

7. Specify a description, assign the business owner, and specify related documents, as appropriate. (By default, the business owner is the creator of the scorecard.)

8. Click **Save** to display the *"Save As dialog"*. In the Save As dialog, you can rename the cause & effect map rather than use the default name.

Custom Views

A custom view lets you show a customized view of your business and strategy data. For example, you might present information about objectives and KPIs on a background image of your choice, such as your company logo.

You can create custom views in Edit mode only. For more information about the Edit and View modes, see *"Scorecard Editor Edit and View Modes"*.

For information on creating custom views, see *"Creating a Custom View"*.

Creating a Custom View

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard in which you want to create the custom view. For information, see *"Opening or Editing a Scorecard"*
2. In the *"Scorecard Documents pane"*, click the **New Object** toolbar button and select **Create Custom View**

    The *"Custom View tab: Diagram tab"* is displayed.
3. Drag objectives and KPIs from the *"Strategy pane"* and drop them on the diagram.
4. Specify how you want each objective or KPI to be displayed on the diagram. For each objective or KPI, select it on the diagram and specify whether you want it displayed as:

    - Its full version. To do so, click the **Full** toolbar button.
    - Its simple version. To do so, click the **Simple** toolbar button.
    - One of its properties. To do so, click the **Property** toolbar button and select the property.
5. (optional) Specify a background image, a background color, or both by clicking the **Properties** toolbar button to display the *"Custom View Properties dialog"*.
6. To:

    - Display options that enable you to work with a node, click the Options button (on the right side of the node) to display the *"Node Options Menu"*
    - Display additional performance data for the KPI, such as target value or variance, click the down arrow at the bottom center of the node. To collapse this data, click the up arrow.
    - Zoom in and zoom out of the diagram, use the toolbar buttons on the *"Scorecard editor: Custom View tab"*
    - Work with comments:
        - Hover the mouse pointer over the **Comment** button in the upper-right corner of a node to display the *"Status window"*, where you can read the comments that were previously added, add another comment, or reply to a comment.
        - Click the **Options** button on the right side of the node to which you want to add a comment and select **Add Comment** from the *"Node Options Menu"*. The *"New Comment dialog"* is displayed, where you can add a comment or read any comments that were previously added.

        See *"Comments"*.
    - Work with status overrides on nodes for which you are the business owner:
        - Hover the mouse over the red asterisk (if available) in a node to display the *"Status window"*, where you can view the overrides that were previously applied or apply another override.
        - Click the Options button on the right side of the node to which you want to apply the status override and select Override Status from the *"Node Options Menu"*. The *"Status Override dialog"* is displayed, where you apply another override or view any overrides that were previously applied.

        See *"Status Overrides"* and *"Status Overrides"*.
7. Click the Custom View tab: Details tab.
8. Specify a description, assign the business owner, and specify related documents, as appropriate. (By default, the business owner is the creator of the scorecard.)
9. Click Save to display the *"Save As dialog"*. In the Save As dialog, you can rename the cause & effect map rather than use the default name.

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Watchlists

Watchlists are tables that list scorecard objects (that is, initiatives, objectives, and KPIs) that are related to a particular aspect of a scorecard or that are grouped together for a particular purpose.

Some watchlists are components of scorecard objects. These include the following watchlists:

- Initiatives & KPIs watchlist — Lists the child initiatives and the KPIs that are used to evaluate the performance of an initiative.

  This watchlist is displayed in the *"Analytics pane"* of the *"Scorecard editor: Initiative Details tab"*.

  Objectives & KPIs watchlist — Lists the child objectives and the KPIs that are used to evaluate the performance of an objective or that are displayed in a view (that is, cause & effect map, custom view, strategy tree, or strategy map).

  This watchlist is displayed in the following tabs:

  - *"Analytics pane"* of the *"Scorecard editor: Objective Details tab"*
  - *"Cause & Effect Map tab: Details tab"*
  - *"Custom View tab: Details tab"*
  - *"Strategy Map tab: Details tab"*
  - *"Strategy Tree tab: Details tab"*

- Objectives, Initiatives & KPIs watchlist — Lists the initiatives, objectives, and KPIs that are associated with a perspective.
- This watchlist is displayed in the *"Scorecard editor: Perspective tab"*.

Other watchlists you create to serve a particular purpose. These include the following watchlists:

- KPI watchlist — Lists the KPIs whose performance you want to monitor.

  This watchlist is displayed in the *"KPI Watchlist editor: Performance tab"*.

  For more information on KPI watchlists, see *"KPI Watchlists"*

- Smart watchlist — Lists the initiatives, objectives, and KPIs within a scorecard that meet criteria that you specify.

  This watchlist is displayed in the *"Scorecard editor: Smart Watchlist tab"*.

  For more information on smart watchlists, see *"Smart Watchlists"*

- Breakdown watchlist — Lists the child or descendant initiatives or objectives and KPIs that are used to evaluate the performance of an initiative or objective.

  This watchlist is displayed in the *"Scorecard editor: Breakdown tab"*.

A watchlist includes columns that describe the scorecard objects (such as Status, % Variance, and so on) and components (such as **View** or **Summary**) that allow you to view and manage these objects.

Smart Watchlists

A smart watchlist is a view into a particular scorecard based on criteria that you specify. For example, a smart watchlist might show the top ten KPIs in a scorecard based on best performance or all the objectives, initiatives, and KPIs in a scorecard that are owned by a specific business owner.

A smart watchlist consists of the following components:

- Filter pane — This pane is displayed as a control panel, as a text summary, or is hidden, depending on the setting of the **Filter Criteria Display** component in the *"Smart Watchlist Properties dialog"*. If displayed as a:
    - Control panel, it contains tabs that let you specify the criteria to be used to filter the smart watchlist. You can filter by object relationships, by object types, by perspective associations, by performance, and by business owner assignments.
    - Text summary, it displays a read-only text summary of the current filter criteria.

- Smart watchlist — Lists the objectives, initiatives, and KPIs in a scorecard that meet the criteria specified in the Filter pane.

- Smart watchlist toolbar — Contains buttons that allow you to save the smart watchlist and to specify smart watchlist properties, such as how the Filter pane is to be displayed (that is, as a control panel, a read-only text summary, or hidden).

You can create smart watchlists in Edit mode only.

In View mode, you can view a smart watchlist and, if the smart watchlist was saved with the Filter pane displayed as a control panel, you can specify filter criteria to dynamically change what is shown in the smart watchlist.

For more information about the Edit and View modes, see *"Scorecard Editor Edit and View Modes"*.

You can also add smart watchlists to dashboards. If the smart watchlist was saved with the Filter pane displayed as a control panel, end users will be able to specify filter criteria to dynamically change what is shown in the smart watchlist. For information on creating smart watchlists, see *"Creating a Smart Watchlist"*.

Creating a Smart Watchlist

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard in which you want to create the smart watchlist. For information, see *"Opening or Editing a Scorecard"*.
2. In the *"Scorecard Documents pane"*, click the New Object toolbar button and select Create Smart Watchlist.

   The Scorecard editor: Smart Watchlist tab is displayed.
3. In the Filter pane, specify the filter criteria as follows:
    a. In the *"Filter pane: Relationship tab"*, specify the object relationships by which the scorecard objects are to be filtered.
    b. In the *"Filter pane: Type tab"*, specify the object types by which the scorecard objects are to be filtered.
    c. In the *"Filter pane: Perspective tab"*, specify the perspective associations by which the scorecard objects are to be filtered.
    d. In the *"Filter pane: Performance tab"*, specify the performance criteria (status, score, or ranking) by which the scorecard objects are to be filtered.

e. In the "*Filter pane: Ownership tab*", specify the business owner assignments by which the scorecard objects are to be filtered.

4. Set smart watchlist properties. To do so, click the **Properties** toolbar button to display the "*Smart Watchlist Properties dialog*".

5. Manage the smart watchlist, as appropriate. For more information on managing a watchlist, see "*Watchlists*".

6. Click **Save** to display the "*Save As dialog*". In the Save As dialog, you can rename the smart watchlist rather than use the default name.

KPI Watchlists

A KPI watchlist is a collection of KPIs whose performance you want to monitor.

You can create KPI watchlists:

- Within a scorecard. You create a KPI watchlist within a scorecard to help you view and investigate the progress of the objectives and initiatives. KPI watchlists that you create within a scorecard are saved as part of the scorecard.

- Outside a scorecard. This enables you to create a KPI watchlist in advance of creating or editing a scorecard. KPI watchlists that you create outside a scorecard are saved as standalone objects in the Oracle BI Presentation Catalog.

For information on KPI watchlists and how to create them, see *KPIs and KPI Watchlists* on page "KPIs and KPI Watchlists."

Working with KPI Details

When you create initiatives and objectives, you can assign KPIs to them to measure their progress and performance. You can work with these KPIs within a Scorecard using the "*Scorecard editor: KPI Details tab*".

Specifically, you can:

- View basic KPI settings as well as a graph that presents actual values and target values.

- Override the label, description, and business owner that are defined for the KPI.

- Pin dimensions. For more information on KPI dimensions and dimension pinning, see "*Dimensions and Pinned Dimension Values*"

- View documents that provide supporting information to the KPI.

- Run actions that are associated with the KPI.

- Associate the KPI with a perspective.

- Specify an indicator type (for example, Leading) to indicate whether the performance of the KPI drives other KPIs, or is affected by the performance of other KPIs, or other data or processes.

- View, add, or reply to comments.

- Identify initiatives and KPIs (for a KPI listed in the "*Initiatives pane*") or objectives and KPIs (for a KPI listed in the "*Strategy pane*") that cause or effect the KPI.

Working with the Details of a KPI

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Edit the scorecard that contains the KPI. For information, see *"Opening or Editing a Scorecard"*.

2. If the KPI is assigned to an:

   o Initiative, double-click the KPI in the *"Initiatives pane"*

   o Objective, double-click the KPI in the *"Strategy pane"*

   The Scorecard editor: KPI Details tab is displayed.

3. Perform any of the following tasks:

   o Override one of the following items:

      - Label, using the **Label** field
      - Description, using the **Description** field
      - Business Owner, using the **Business Owner** field in the *"Collaboration pane"*

   o Pin dimensions using the **Dimensionality** area in the *"Analytics pane"*

   o Run actions that are associated with the KPI, using the action links in the **Actions** area of the Analytics pane.

   o Associate the KPI with a perspective, using the **Perspective** field in the Analytics pane.

   o Specify the indicator type, using the **Indicator Type** field in the Analytics pane.

   o View, add, or reply to comments, using the Collaboration pane. For more information on comments, see *"Comments"*

   o View documents that provide supporting information to the KPI, using the **Related Documents** area in the Collaboration pane.

   o Identify objectives that cause or effect the KPI, using the *"Related Items pane"*
   .

4. If you made any changes, then click **Save**.

Opening Scorecard Objects

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Open or edit the scorecard that contains the object. For information, see *"Opening or Editing a Scorecard"*.

2. To open:

   o An objective, double-click it in the in the *"Strategy pane"*. *"Scorecard editor: Objective Details tab"* is displayed.

   o An initiative, double-click it in the *"Initiatives pane"*. The *"Scorecard editor: Initiative Details tab"* is displayed.

   o A view (for example, a Strategy Map), a mission, a vision, a KPI watchlist, or a smart watchlist, double-click it in the *"Scorecard Documents pane"*. Depending on the object you double-clicked, one of the following tabs is displayed:

      - *"Scorecard editor: Cause & Effect Map tab"*
      - *"Scorecard editor: Custom View tab"*
      - *"Scorecard editor: Strategy Map tab"*

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- *"Scorecard editor: Strategy Tree tab"*
- *"Scorecard editor: KPI Watchlist tab"*
- *"Scorecard editor: Smart Watchlist tab"*
- *"Scorecard editor: Mission tab"*
- *"Scorecard editor: Vision tab"*

- o A perspective, double-click it in the *"Perspectives pane"*. The *"Scorecard editor: Perspective tab"* is displayed.
- o A KPI, double-click it in the:
  - *"Strategy pane"* or the *"Initiatives pane"*. The *"Scorecard editor: KPI Details tab"* is displayed.
  - *Catalog pane for Scorecard* *"Catalog pane for Scorecard"*. The *"Scorecard editor: KPI tab"* is displayed.

Alternatively, you can select the object and click the **Open** button on the tab toolbar or right-click the initiative or objective and select the **Open** option.

Viewing Overview Information

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Open or edit the scorecard. For information, see *"Opening or Editing a Scorecard"*.

    The *"Scorecard editor: Overview tab"* is displayed. It shows summary information for the root objective, which represents the entity that you are scorecarding, that is, the entire organization or a department.
2. To show summary information for:
    - o A KPI, in the *"Initiatives pane"* or in the *"Strategy pane"*, click the KPI.
    - o An initiative, in the *"Initiatives pane"*, click the initiative.
    - o An objective, in the *"Strategy pane"*, click the objective.

Editing a Scorecard Object

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Edit the scorecard that contains the scorecard object that you want to edit. For information, see *"Opening or Editing a Scorecard"*.

    You also can edit scorecard objects from the *"Catalog page"*. For information, see *"Managing Objects in the Oracle BI Presentation Catalog"*.

2. Double-click the object. For example, to edit an objective, double-click it in the *"Strategy pane"*, or, to edit a strategy map, double-click it in the Scorecard Documents pane.

Note, for a strategy tree, you can edit only the details of a strategy tree, not the diagram.

3. Make your changes.

4. Click Save.

Deleting Scorecard Objects

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

> ✏ **Note:** Before deleting an initiative, ensure that it has been completed or is no longer required to achieve an objective. Before deleting an objective, examine any child objectives or other objectives with which it is linked to ensure that its removal does not negatively impact these objectives.

1. Edit the scorecard that contains the scorecard object that you want to delete. For information, see *"Opening or Editing a Scorecard"*.

   You also can delete scorecard objects from the *"Catalog page"*. For information, see *"Managing Objects in the Oracle BI Presentation Catalog"*

2. Right-click the object and select **Delete**. For example, to delete a Strategy Map, right-click it in the *"Scorecard Documents pane"* and select **Delete**.

3. In the confirmation dialog, confirm that you want to delete the object.

Adding Scorecard Objects to Dashboards

You can add the following scorecard objects to dashboards:

- Cause & effect maps. See *"Cause & Effect Maps"*

- Custom views. See *"Custom Views"*

- Strategy maps. See *"Strategy Maps"*

- Strategy trees. See *"Strategy Trees"*

- KPI watchlists. See *"KPI Watchlists"*

- Smart watchlists. See *"Smart Watchlists"*

For information on adding a scorecard object to a dashboard, see *"Dashboard Content".*

Status Overrides

You can override the statuses of initiatives, objectives, or KPIs that measure the performance of initiatives and objectives. To override a status, you must be the business owner of the initiative, objective, or KPI. You can also cancel an override.

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You can work with status overrides in many places in a scorecard. For example, you can apply a status override to an objective in the *"Scorecard editor: Objective Details tab"*. You can also apply a status override to an objective in the Diagram tab of a view, a smart watchlist, and a perspective in which its referenced.

A status override is associated with:

- An initiative, objective, or KPI that measures the progress of an initiative and objective.

  When an initiative, objective, or KPI that has a status override associated with it is referenced elsewhere in a scorecard, and the point of view being displayed matches that of the status override, a status override indicator — a red asterisk (*) — is displayed as follows:

  - In a watchlist, it is displayed to the right of the status symbol in the row containing the initiative, objective, or KPI. (For more information on watchlists, see *"Watchlists"*.
  - In a node in the Diagram tab of a view, it is displayed to the right of the status symbol in the lower-left corner of the node.

- The status column of an objective, initiative, or KPI.

- A specific point of view.

  Status overrides are filtered by the values in the point of view area in the *"Scorecard editor"* that are currently in effect for the object being viewed. As a result, the status override for Eastern Region Sales can be different than the status override for Western Region Sales. (For more information on the point of view, see *"Point of View Area"*.)

- Any dimension pinnings on the KPI.

  Status overrides are filtered by any other dimension pinnings which are in effect (on a KPI, scorecard, scorecard diagram, dashboard prompt, or KPI watchlist).

For how to work with status overrides, see *"Status Overrides"*.

Working with Status Overrides

You can work with status overrides in many places in a scorecard, including in:

- Watchlists

  See *"Working with Status Overrides in a Watchlist"*.

- The Diagram tab of a view.

  See *"Working with Status Overrides in the Diagram Tab of a View"*.

As you work with status overrides, remember that a status override is associated with a specific point of view. For more information on the point of view, see *"Point of View Area"*.

For more information about status overrides, see *"Status Overrides"*.

Working with Status Overrides in a Watchlist

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

. **Home** > **Oracle Business Intelligence** > **Catalog**

1. Open or edit the scorecard. See *"Opening or Editing a Scorecard"*.
2. Open the object in which you want to work with status overrides and navigate to the appropriate pane or tab. For how to open an object, see *"Opening Scorecard Objects"*.
3. Ensure that the values that are displayed in the point of view area reflect the desired context for the status override. (For example, you might want to override the status of a KPI for the Eastern region.)
4. To override a status or to cancel an override:
    a. In the watchlist, right-click the **Status** cell in which you want to override the status or cancel an override and select **Override Status**. The *"Status Override dialog"* is displayed.
    b. Complete the Status Override dialog and click **OK**.
5. To view status overrides or override cancellations that were previously applied to an object, hover the mouse pointer over the red asterisk to the right of the status symbol.

    The *"Status window"* is displayed. From this window, you can:

    ○ View status overrides or override cancellations that were previously applied.

    ○ Display the Status Override dialog to apply a new override or to cancel an override by clicking **New Override**.

    ○ Pin the window so that it stays open by clicking the **Pin** button.

Working with Status Overrides in the Diagram Tab of a View

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

. **Home** > **Oracle Business Intelligence** > **Catalog**

1. Open or edit the scorecard. See *"Opening or Editing a Scorecard"*.
2. Open the view in which you want to work with status overrides and navigate to the Diagram tab. For how to open an object, see " *Opening Scorecard Objects*".
3. Ensure that the values that are displayed in the point of view area reflect the desired context for the status override. (For example, you might want to override the status of a KPI for the Eastern region.)
4. To apply a new status override:
    a. Click the **Options** button on the right side of the node to which you want to apply the status override and select **Override Status** from the *"Node Options Menu"*. The *"Status Override dialog"* is displayed.
    b. Complete the Status Override dialog and click **OK**.
5. To view status overrides that were previously applied to an object, hover the mouse pointer over the red asterisk to the right of the status symbol.

    The *"Status window"* is displayed. From this window, you can:

    ○ View status overrides that were previously applied.

    ○ Display the Status Override dialog to apply a new override by clicking New Override.

    ○ Pin the window so that it stays open by clicking the Pin button.

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Scorecard Object Business Owner Contact

You can send a message to the business owner of a scorecard object. The business owner is the person who is responsible for managing and improving the business value and performance of a scorecard object. (The business owner might or might not be the same as the person who creates the scorecard or creates the KPI.) You specify the business owner of an object when you create it.

You use the Contact Owner button or menu option to contact the business owner. This button is available in many places in a scorecard, for example, on the toolbar of most tabs, such as the *"Scorecard editor: Objective Details tab"*.

Oracle BI uses an agent and the delivery devices and profiles that the business owner specified in the *"My Account dialog: Delivery Options tab"* to determine where to deliver the message (for example, email, phone, or pager).

Contacting a Scorecard Object Business Owner

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Open or edit the scorecard.
2. Click the Contact Owner button or menu option. The *"Contact Owner dialog"* is displayed.
3. In the Subject field, enter a the subject of the message.
4. In the Priority field, select the priority of the message.
5. In the Message field, enter the message that you want to send to the business owner.
6. Click Send.

Comments

Comments (also known as annotations) enable you to discuss changes in performance and progress for an initiative, objective, or KPI for a specific set of dimension values (that is, for a specific point of view).

You can add, view, and reply to comments in many places in a scorecard. For example, you can add a comment directly to an objective in the *"Scorecard editor: Objective Details tab"*. You can also add a comment to an objective in the Diagram tab of a view, a smart watchlist, and a perspective in which its referenced.

A comment is associated with:

- An initiative, objective, or KPI that measures the progress of an initiative and objective.

  When an initiative, objective, or KPI that has a comment associated with it is referenced elsewhere in a scorecard and the point of view being displayed matches that of the comment, a comment indicator is displayed as follows:

  - In a watchlist, a blue triangle is displayed in the row containing the initiative, objective, or KPI. For more information on watchlists, see *"Watchlists"*.
  - In a node in the Diagram tab of a view, the Comment button is displayed in the upper-right corner of the node.

- A certain column. A comment is normally associated with the Status column of an objective, initiative, or KPI, unless (for KPIs only) the comment is added to another column such as Trend or Variance.

- A specific point of view. Comments are filtered by the values in the point of view area in the *"Scorecard editor"* that are currently in effect for the object being viewed. As a result, the comment for Eastern Region Sales can be different than the comment for Western Region Sales. (For more information on the point of view, see *"Point of View Area"*.)

- Any dimension pinnings on the KPI. Comments are filtered by any other dimension pinnings that are in effect (on a KPI, scorecard, scorecard diagram, dashboard prompt, or KPI watchlist).

> 🖉 **Note:** As you work with comments, remember that a comment is associated with a specific point of view. For more information on the point of view, see *"Point of View Area"*.

Working with Comments in the Collaboration Pane

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Open or edit the scorecard. See *"Opening or Editing a Scorecard"*.
2. Open the initiative, objective, or KPI and navigate to the Collaboration pane. For how to open an object, see *"Opening Scorecard Objects"*.
3. Ensure that the values that are displayed in the point of view area reflect the desired context for the comment. (For example, you might want to comment on a KPI status for the Eastern region.)
4. Do one of the following:
   - To add a new comment, click the **New Comment** button. The *"New Comment dialog"* is displayed.

     Comments added by clicking the **New Comment** button are associated with the status (that is, the Status column) of the objective, initiative, or KPI.

     For KPIs only, you can also associate a comment with other columns such as Trend, Target, or Variance. To do so, edit the parent object, right-click on the relevant cell in the *"Watchlists"* and select **Add Comment**.
   - To reply to a comment, locate the comment to which you want to reply and click the **Reply** link. The *"Reply dialog"* is displayed.
5. Enter the subject of your comment (for a new comment only) and the text of your comment.
6. Click **OK**.

Working with Comments in a Watchlist

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**
1. Open or edit the scorecard. See *"Opening or Editing a Scorecard"*.

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2. Open the object in which you want to work with comments and navigate to the appropriate pane or tab. For how to open an object, see *"Opening Scorecard Objects"*.

3. Ensure that the values that are displayed in the point of view area reflect the desired context for the comment. (For example, you might want to comment on a KPI status for the Eastern region.)

4. To add a new comment:

   a. In the watchlist, right-click the Status cell to which you want to add the comment and select **Add Comment**. The *"Add Comment dialog"* is displayed.

   b. Complete the Add Comment dialog and click **OK**.

5. To work with the comments that were previously added to an object, hover the mouse pointer over the Blue triangle in the upper-right corner of the cell in the Status column or, for a KPI, one of its columns.

   The *"Status window"* is displayed. From this window, you can:

   o Read the comments that were previously added.

   o Display the *"New Comment dialog"* to add a new comment by clicking New Comment.

   o Display the *"Reply dialog"* to reply to a comment by clicking the Reply link.

   o Pin the window so that it stays open by clicking the Pin button.

Working with Comments in the Diagram Tab of a View

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1.
   > 📝 **Note:** You can also work with comments in this same way when a view is rendered as a diagram in a dashboard.

   Open or edit the scorecard. See *"Opening or Editing a Scorecard"*.

2. Open the view in which you want to work with comments and navigate to the Diagram tab. For how to open an object, see *"Opening Scorecard Objects"*.

3. Ensure that the values that are displayed in the point of view area reflect the desired context for the comment. (For example, you might want to comment on a KPI status for the Eastern region.)

4. To add a new comment:

   a. Click the **Options** button on the right side of the node to which you want to add the comment and select **Add Comment** from the *"Node Options Menu"*. The *"New Comment dialog"* is displayed.

   b. Complete the Add Comment dialog and click OK.

5. To work with the comments that were previously added to an object, hover the mouse pointer over the **Comment** button in the upper-right corner of the node.

   The *"Status window"* is displayed with all the comments that are attached to the initiative, objective, or KPI. From this window, you can:

   o Read the comments that were previously added.

   o Display the *"New Comment dialog"* to add a new comment by clicking New Comment.

   o Display the *"Reply dialog"* to reply to a comment by clicking the Reply link.

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o Pin the window so that it stays open by clicking the Pin button.

15 Managing Objects in the OBI Presentation Catalog

Oracle Business Intelligence Presentation Catalog

Presentation Catalog

The Oracle BI Presentation Catalog (the catalog) stores business intelligence objects and provides an interface where users create, access, and manage objects, and perform specific object-based tasks (for example, export, print, and edit). The catalog is organized into folders that are either shared or personal.

Catalog Users

Within Oracle BI, there are three primary users: content consumers, content designers, and catalog administrators. Each user performs different tasks within the catalog, and, therefore, each user sees a different version of the catalog interface. Functionality that is available for one user might not be available for another. Furthermore, the catalog functionality and objects that are available to a user depend upon the privileges that are specified by the Presentation Services Administrator and the object's individual permissions, which are usually set by the content designer.

Content consumers can use the Catalog page to view the business intelligence objects that are necessary to perform their day-to-day tasks. For example, a sales manager must access an analysis that monitors the weekly sales of a specific brand of beverage in the Central and Eastern regions. The permissions that are set by the content designer and catalog administrator determine what tasks the content consumers can perform both on an individual piece of content and within the catalog. For example, content consumers at Company A can search for, view, and interact with only those objects that have been assigned to them, but content consumers at Company B can search for and interact with content as well as create content and store it to their personal folders.

Content designers are the individuals who create the content for the content consumers. Content designers need broader access to the catalog to efficiently create, edit, test, and troubleshoot objects. Their access to the catalog's functionality is more comprehensive than that of the content consumers. However, like the content consumer, the content designer's permissions are set by the administrator. For example, a content designer must store content in and retrieve content from the public folders for the Sales functional area, but not the Operations functional area. Or a content designer must be assigned to several groups so that the content designer can sign in to Presentation Services as different users to test the new or revised content.

Administrators need the most comprehensive access to the catalog; however, their access is still determined by the privileges that are assigned to their role by the Presentation Services administrator. In general, the catalog tasks that the administrator performs include setting permissions on catalog objects and folders, archiving the catalog, creating and managing directory structures, and managing system and user data.

Saving a Business Intelligence Object

1. Create or edit a business intelligence object and click Save or Save As from the editor's toolbar. The Save As dialog is displayed.

2. Select the catalog location to which you want to save the object. Note the following items:
     ○ You can create sub-folders for storage within your My Folders folder or within the system folder for which you have the permissions to modify.
     ○ Oracle BI enables you to save any type of business intelligence object to any location within the catalog. However, for some object types, Oracle BI's Save As dialog suggests the best catalog location. For example, if you are creating a named filter, then it should be saved to a subject area folder (/My Folders/Subject Area Contents/Paint) so that it is available when you create an analysis using the same subject area and to which you want to add the saved filter.
     ○ You can save the following objects to any location within the catalog: actions, agents, analyses, BI Publisher objects, briefing books, conditions, KPIs, and prompts.
     ○ Oracle recommends that you save the following objects to the subject area folder: calculated items, custom groups, and filters. If a subject area folder does not exist in your /My Folders folder or within the /Shared Folders folder, then Oracle BI EE creates a subject area folder and the Save As dialog defaults a save path to /My Folders/Subject Area Contents/<subject area>. Saving these objects to the subject area folders ensures that they are available when you build an analysis for the same subject area.
     ○ Dashboards can be saved to any catalog location. However, if you want the dashboard to display in the global header's Dashboards menu, then you must save the dashboard to a first level dashboard folder. For example, save the dashboard to the following location to include the dashboard in the Dashboard menu: /Shared Folders/Sales Projections/Dashboards. Save the dashboard to the following location to exclude the dashboard from the Dashboard menu: /Shared Folders/Sales Projections/Dashboards/Design Time. For more information about saving dashboards, see *"Saving Dashboards By Other Names and In Other Locations"*
3. Click **OK**.

Creating a Folder or Sub-folder

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. On the *"Catalog page"*, go to the desired location in the *"Folders pane"*.
2. In the catalog toolbar, click **New** and select **Folder**. The New Folder dialog is displayed.
3. Enter the folder name and click **OK**.

Object-Specific Tasks

The tasks that you can perform for an object that you select from the *"Catalog pane"* are determined by both the selected object's type (for example, a dashboard or KPI) and the permissions that were set for the object. The list of available tasks is displayed in the *"Tasks pane"*, which is located within the *"Catalog page"* or from the object's More link.

In most cases, you can open or copy an object. However, if you selected an analysis, then you can create an agent for the analysis or export the analysis. If you selected a dashboard, then you can publish the dashboard or archive it, depending upon the permissions that were assigned to the object.

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Favorites

The favorites functionality allows you to bookmark as favorites the catalog objects that you view regularly or want to view again at another time. After you flag objects as favorites, you can use the *"Manage Favorites dialog"* to organize your favorites by creating categories and rearrange your favorites into the order that you find most intuitive. You can access a list of the objects that you marked as favorites and any categories that you created by clicking Favorites in the global header.

Adding an Object to Favorites List from Home Page or Catalog Page

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. Go to the *"Home page"* or *"Catalog page"* and browse for the object that you want to add to your favorites list.
2. Click the **More** link, and then click **Add to Favorites**. The object is added to your favorites list.

Adding an Object to Favorites List while Viewing or Editing the Object

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. Open the object in its designated viewer or editor.
2. In the global header, hover over **Favorites** and click **Add to Favorites**. The object is added to your favorites list.

Accessing Your Favorites List

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, hover over the **Favorites** menu. The list of the objects that you marked as favorites displays.
2. Scroll through the list of objects and categories to find a specific object. Click the object to select it.

   Oracle BI EE displays the selected object based on your permissions. For example, if you open an analysis to which you have write permission, then Oracle BI EE opens the object in the *"Analysis editor"*.

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Organizing your Favorites List

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, hover over the **Favorites** menu. The list of the objects that you marked as favorites displays.
2. Click **Manage Favorites**. The "*Manage Favorites dialog*" displays.
3. In the Category Tree area, browse to the location where you want to add a new category. When you select a category in the Category Tree, any subcategories or favorite objects nested in that category display in the Selected Category area.
4. On the toolbar, click **New Category**. The "*New Category dialog*" displays.
5. Enter a unique name for the category. Click **OK**.
6. The new category displays in the Category Tree.

Rearranging your Favorite Objects

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, hover over the **Favorites** menu. The list of the objects that you marked as favorites displays.
2. Click **Manage Favorites**. The "*Manage Favorites dialog*" displays.
3. In the Category Tree area, browse to the location of the categories or objects that you want to rearrange. When you select a category in the Category Tree, any subcategories or favorite objects nested in that category display in the Selected Category area. You can perform any of the following actions to rearrange your favorites.
    - Select an object or category and click the move buttons to move the object up or down in your favorites list.
    - Drag and drop objects into categories. Drag and drop categories into other categories to nest them. Note that depending on how you want to nest categories, you can drag and drop categories within the Category Tree or the Selected Category area.
    - Copy objects or categories from one location and paste them into another location.
    - Rename categories.
    - Sort the selected categories or objects within a category by ascending or descending alphabetic order.

    For more information, see the "*Manage Favorites dialog*".
4. Click **OK**. Your rearranged objects and categories are saved and display in your favorites list.

Removing an Object from your Favorites List using the Home Page or Catalog Page

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. Go to the *"Home page"* or *"Catalog page"* and browse for the object that you want to remove from your favorites list.
2. Click the **More** link, and then click **Remove from Favorites**. The object is removed from your favorites list.

Removing an Object from your Favorites List while Viewing or Editing the Object

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. Open the object in its designated viewer or editor.
2. In the global header, hover over the **Favorites** menu. The list of the objects that you marked as favorites displays.
3. Click **Remove from Favorites**. The object is removed from your favorites list.

Removing an Object from your Favorites List by Using Manage Favorites Dialog

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, hover over the **Favorites** menu. The list of the objects that you marked as favorites displays.
2. Click **Manage Favorites**. The *"Manage Favorites dialog"* displays.
3. Browse for and select the object that you want to remove.
4. Click **Delete**.
5. Click **OK**. The object is removed from the list.

Exporting a KPI or Analysis Prompt Data

You must have one of the following user type permissions:

- BI Consumer

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, click Catalog. The *"Catalog page"* is displayed.

2. Search for the object to export. For more information about searching, see "Searching with the Basic Search or Fully Integrated Full-Text Search".

3. In the "*Folders pane*", select the object to export.

4. Select the object and perform a task:

   o Below the document, select **More** and then **Export**

   o Select the **Export** button in the "Tasks pane".

5. Select the format. Note that the **Data** list contains the **CSV Format**, **Tab delimited Format**, and **XML Format** options.

Accessing Properties

Administrative users can access the properties of any object or folder to perform tasks such as view system information or change access levels. Users can access and modify the properties of the objects that they create or own.

Home > **Oracle Business Intelligence**

1. In the global header, click Catalog. The "*Catalog page*" is displayed.

2. Search for the object to which you want to assign properties.

3. In the "*Folders pane*", select an object or folder.

4. Perform a task:

   o Below the document, select More and then Properties

   o Click the Properties button in the "*Tasks pane*"

5. Review or change the settings displayed in the "*Properties dialog*".

Levels of Oracle BI Security

Oracle BI EE supports security mechanisms that allow users to access only the data for which they are authorized. The following types of security are typical:

- Subject Area security. This security mechanism controls access to objects, such as subject areas, folders, and columns. For example, content designers in a particular department can view only the subject areas that belong to their department when using the Analysis editor.

- Catalog object security. This security mechanism provides security for objects that are stored in the Oracle BI Presentation Catalog, such as dashboards, dashboard pages, folders, and analyses. Users can view only the objects for which they are authorized. For example, a mid-level manager might not be granted access to a dashboard that contains summary information for an entire department. For more information about catalog object security, see "What Are Permissions?"

- Data level security. This security mechanism controls the type and amount of data that is available in analyses. When multiple users run the same analysis, the results that are returned to each user depend on their access rights and roles in the company. For example, a sales vice president sees results for all regions, while a sales representative for a particular region sees only data for that region.

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Archiving

Archiving enables you to bundle specific folders, or multi-component objects (for example, scorecards) as a .catalog file and upload the .catalog file to unarchive the data to another location in the catalog. This process enables you to transfer specific data across environments. For example, you can use this feature to transfer data from a staging environment to a production environment.

If you have the necessary privileges, then you can use the Oracle BI Catalog Manager to archive and unarchive catalog objects and perform other Catalog maintenance tasks.

Archiving Objects

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**
1. In the global header, click **Catalog**. The *"Catalog page"* is displayed.
2. Search for the objects to archive.
3. Go to the *"Folders pane"* to select the object.
4. Select **More**, then **Archive** below the object. The *"Archive dialog"* is displayed.
5. Specify to maintain or omit the permissions and timestamps for the folder or object. For more information, see the *"Archive dialog"*.
6. Click **OK**.

Unarchiving Objects

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

You cannot save objects from a catalog file if you cannot create the object.

> ✎ **Note:** When archiving and unarchiving, the integrity of the folder structure is important. If child objects have moved parent objects may need to be reconfigured to find child objects and work properly.

Home > **Oracle Business Intelligence**
1. Locate the archive file to upload. The archive file contains the.catalog extension (for example, _portal.catalog).
2. Go to the *"Folders pane"* and select the location where you want to upload the archive file.
3. Go to the Tasks pane and click **Unarchive**. The *"Unarchive dialog"* is displayed.
4. Enter the name of the archive file or browse for the archive file. Select the archive file.
5. Click **OK**.

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16 **BI Composer**

BI Composer

BI Composer

BI Composer is a simple-to-use wizard that allows you to quickly and easily create, edit, or view analyses without the complexities of the *"Analysis editor"*.

The main components of the *"BI Composer"* are as follows:

- At the top of the wizard is the BI Composer train, which contains buttons for each step in the wizard. For more information, see *"Steps for Creating or Editing an Analysis in BI Composer"*.

- The panel area, where the components for each step are displayed.

- To the far right are the **Back, Next, Finish,** and **Cancel** buttons.

BI Composer Modes

There are two modes in which BI Composer is available in an application (such as Oracle BI) — regular mode and accessibility mode. Accessibility mode has the same functionality as regular mode but is optimized for use with screen reader applications such as JAWS. It makes it easier for users with visual impairments to create, edit, and view analyses.

BI Composer Availability

When users work with analyses in Oracle BI, BI Composer may be displayed in place of the *"Analysis editor"*, depending on the preferences users make as follows:

- BI Composer is displayed in regular mode in place of the Analysis editor, when users have specified that they want to use the BI Composer wizard as the analysis editor and have turned off accessibility mode in Oracle BI.

- BI Composer is displayed in accessibility mode in place of the Analysis editor, when users have turned on accessibility mode in Oracle BI EE.

Users specify that they want to use the BI Composer wizard as the analysis editor by selecting the **Wizard (limited functionality)** option for the **Analysis Editor** component in the *"My Account dialog: Preferences tab"*.

Steps for Creating or Editing an Analysis in BI Composer

The steps for creating or editing an analysis in BI Composer are as follows:

- Select Columns — In this step you select the columns that are to be included in the analysis. You can also:
  - ○ Specify column interactions
  - ○ Specify a column formula
  - ○ Rename a column

   o Hide a column

- Select Views — In this step you select the views that are to be included in the analysis, such as a title, table, pivot table, bar graph, and so on. (Note that not all views available in Oracle BI Enterprise Edition are supported in BI Composer.) You can also preview the results.

- Edit Table — In this step you edit the layout of the tabular view (if you have included a tabular view). For example, you can create prompts, use a column to section the analysis, and exclude certain columns from the tabular view. You can also preview the results.

- Edit Graph — In this step you edit the properties and layout of the graph (if you have included a graph view). For example, you can create prompts, use a column to section the analysis, and exclude certain columns from the graph. You can also preview the results.

- Sort and Filter — In this step you apply sorting and filters to the views. You can also preview the results.

- Highlight — In this step you apply conditional formatting to the tabular view (if you have included a tabular view). You can also preview the results.

- Save — In this step you save the analysis with the same name or with a different name. You can also:
   o Create new folders in which to save the analyses
   o Rename folders and analyses
   o Delete folders and analyses
   o Expand and collapse folders

Creating an Analysis Using BI Composer

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

. **Home** > **Oracle Business Intelligence** > **Catalog**

1. In Oracle BI:
   a. In the global header, click **New**, then **Analysis**.
   b. Select a subject area. The "*BI Composer*" is displayed in a new window.
2. Use the Select Columns panel to select the columns to include in the analysis. For each column that you want to add:
   a. Select the column in the Subject Area list.
   b. Click **Add** to move it to the Selected Columns list.

If you want to add or remove subject areas from which to select columns, click the **Add** button in the Subject Area: Subject_Area_Name area to display the "Add/Remove Subject Areas dialog".

For a column in the Selected Columns list, if you want to:
   o Change the column name or specify a formula for the column, select the column and click **Column Properties** to display the "Column Properties dialog for BI Composer".
   o Specify what happens when you click either the column heading or a value in the column or hierarchy level, select one of options in the **Interaction** list for the column.
   o Hide the column in the view, select the **Hidden** box for the column.

      o Remove the column from the list, select the column and click **Remove**.

      o Remove all columns from the list, click **Remove All**.

3. Click the **Select Views** button in the BI Composer train at the top of the wizard. The *"BI Composer wizard -- Create Analysis: Select Views panel"* is displayed.

4. Use the Select Views panel to specify the views to include.

5. (optional) If you included a tabular view in the analysis, click the **Edit Table** button in the BI Composer train. The *"BI Composer wizard -- Create Analysis: Edit Table panel"* is displayed.

6. (optional) Use the Edit Table panel to edit the layout of the tabular view.

7. (optional) If you included a graph view in the analysis, click the **Edit Graph** button in the BI Composer train. The *"BI Composer wizard -- Create Analysis: Edit Graph panel"* is displayed.

8. (optional) Use the Edit Graph panel to edit the properties and layout of the graph.

9. (optional) Click the **Sort and Filter** button in the BI Composer train. The *"BI Composer wizard -- Create Analysis: Sort and Filter panel"* is displayed.

10. (optional) Use the Sort and Filter panel to apply sorting and filters to the views.

11. (optional) If you included a tabular view in the analysis, click the **Highlight** button in the BI Composer train. The *"BI Composer wizard -- Create Analysis: Highlight panel"* is displayed.

12. (optional) Use the Highlight panel to apply conditional formatting to the tabular view.

13. Click the **Save** button in the BI Composer train. The *"BI Composer wizard -- Create Analysis: Save panel"* is displayed.

14. Use the Save panel to save the analysis with the same name or with a different name by specifying the save criteria and then clicking **Submit**.

Editing an Analysis Using BI Compser

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

. **Home** > **Oracle Business Intelligence** > **Catalog**

1. Edit the analysis in one of the following ways:
   o From the Catalog or Home page in Oracle BI, navigate to the analysis and click **Edit**. The BI Composer wizard is displayed.
   o From the BI Composer wizard, click the Catalog tab, select the analysis, and click **Edit**.

2. Make the changes to the analysis by navigating the steps of the wizard using the buttons in the BI Composer train at the top of the wizard.

3. Click the **Save** button in the BI Composer train. The *"BI Composer wizard -- Create Analysis: Save panel"* is displayed.

4. Use the **Save** panel to save the edited analysis with the same name or with a different name by specifying the save criteria and then clicking Submit.

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Viewing an Analysis in BI Composer

You must have one of the following user type permissions:

- BI Consumer
- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence** > **Catalog**

1. Click the Catalog tab.
2. Select the analysis.
3. Click **View**. The analysis is displayed for viewing to the right of the Catalog tab.

17 **Actions**

Actions

Actions

Actions provide functionality to:

- Navigate to related content

You can include actions in analyses, dashboard pages, agents, scorecard objectives, scorecard initiatives, and KPIs. Invoke Actions are not permitted with Taleo.

Actions can be executed:

- Explicitly by end users who click action links that are embedded within:
    - Analyses on column headings, column values, and hierarchy level values and in certain views, such as graphs
    - Dashboard pages
    - Content delivered by agents
    - Scorecards in Cause, Effect Maps, Custom Views, Strategy Tree Views, Strategy Maps, KPIs, and KPI watchlists.
    - KPI analyses

- Automatically, as the final step of an agent
- Directly from the *"Home page"* or from the *"Catalog page"*

Action Links and Action Menus

An action link is a link to an action that you have embedded in an analysis, dashboard page, scorecard objective, scorecard initiative, or KPI that, when clicked, runs an associated action.

On a dashboard page, you can add action links as standalone links or you can group multiple action links together on action link menus. An action link menu lets users select, from a list of action links, the appropriate action to be executed based on the business insight that they gained from the data.

Additionally, you can conditionally show each action link, depending on the data. This powerful functionality enables you to set up context-sensitive menus that present users with the appropriate next steps based on the data that is displayed. For more information on conditionally showing action links, see *"Conditionally Enabled Actions".*

Action links that you add to analyses are displayed to users in the following views:

- Tables
- Pivot tables
- Graphs

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- Funnel graphs

- Gauges

For information about views see "Adding Views for Display in Dashboards."

Action links that you add to scorecard objectives and initiatives are displayed to users in the following scorecard views:

- Cause & effect maps

- Custom views

- Strategy trees

- Strategy maps

- KPI watchlists

Action links that you add to KPIs are displayed to users in KPI analyses.

Actions that Navigate to Related Content

The following list identifies and describes the types of actions that navigate to related content:

- Navigate to BI Content — Navigates to an analysis, a specific dashboard page, or dashboard.

- Navigate to a Web Page — Navigates to a specified URL.

These actions cannot be added to agents.

Named Actions

A named action is an action that you define and then save by name in the Oracle BI Presentation Catalog so that you can reuse it. You can also reuse a named action as a template to create another named action.

For example, suppose that you frequently want to include navigation to your organization's Web site in analyses and dashboard pages that you are designing. You can create an action that navigates to the URL and save it to the catalog. Then as you create analyses and dashboard pages, you can add this named action to them.

You create a named action when you create a new action from the:

- **New** menu on the global toolbar by clicking **Action** and then selecting one of the action types (for example, **Navigate to a Web Page**).

- Home page by clicking **Action** in the Create area and then selecting one of the action types (for example, **Navigate to BI Content**).

You can also create a new named action from a dashboard, an analysis, or a KPI. You do so by creating an inline action and then, to keep it, saving it to the catalog. For information on inline actions, see *Inline Actions* on page 367 "Inline Actions".

Inline Actions

An inline action is an action that you define at the point of use and do not save by name in the catalog. Instead, it is saved as part of the analysis, dashboard page, agent, scorecard objective, scorecard initiative, or KPI.

scorecard objective, scorecard initiative, or KPI that contains it is deleted. This simplifies catalog management for actions that make sense only within particular BI content.

For example, suppose that you are designing a dashboard page and want to invoke an action that you plan to use only once. You can create an action at that point and then add it to the page. When you save the dashboard, the action is saved with it.

You create an inline action when you:

- Create or edit an agent and add a new action to run when the agents finishes.

  For information, see *"Adding Actions to an Agent"*.

- Edit a dashboard page and add a new action to the page using an action link or an action link menu.

  For information see *"Actions in Dashboard Pages"*.

- Create or edit an analysis and add a new action to a column heading, column value, or hierarchy level value using an action link.

  For information, see *"Adding Actions to an Analysis"*.

- Create or edit a KPI and add a new action to the KPI using an action link.

  For information, see *"Adding Actions to a KPI"*.

- Create or edit an initiative or objective in a scorecard and add a new action to the initiative or objective using an action link.

  For information, see *"Adding Actions to Initiatives and Objectives in a Scorecard"*.

Conditionally Enabled Actions

You can conditionally enable actions that are added to:

- Analyses
- Dashboard pages
- Agents

Actions that are added to KPIs are associated with KPI ranges so they are enabled conditionally because of their definitions. Likewise for actions that are added to scorecards, because they are associated with states of initiatives and objectives.

Conditionally Enabled Actions Added to Analyses

When you add an action to an analysis, you can specify that its associated action link is to be displayed only when one or more conditions are met. You do this by selecting one or more columns in the analysis to use and specifying the condition to meet. (The steps to specify a condition are very similar to those used for conditional formatting.)

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Conditionally Enabled Actions Added to Dashboard Pages

When you add an action to a dashboard page, you can specify that its associated action link is to be displayed only when a certain condition is satisfied. You do this by specifying a condition (either a named or inline) that is to be satisfied.

For more information on action links, see *"Action Links and Action Link Menus"*. For more information on conditions, see *"Working with Conditions."*

Conditionally Enabled Actions Added to Agents

While you primarily use an agent's condition to determine whether the agent delivers its content or not, you can also use it to determine if the agent executes its actions.

When you add an action to an agent, you can specify that the action is to be executed only when a certain condition is satisfied. You do this by adding a condition (either inline or named) to the agent, and then specifying whether you want the action to be executed:

- Only if the agent condition evaluates to true
- Only if the agent condition evaluates to false

For some actions, you can also specify whether to execute the action for each row that is returned by the condition.

For more information on conditions, see *"Working with Conditions."*

Customized Information Displayed to Users on Action Execution

You can customize information to display to users when they run actions. Specifically, you can:

- Specify whether to display a confirmation prompt to users when they execute the action.
- Customize a dialog that is displayed to users when they need to supply action parameter values before the action is executed.

You use the *User Interface Reference*"Action Options dialog" to customize this information when you create or edit an action.

Creating a Named Action

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. In the global header, click **New**, select **Action** under **Actionable Intelligence**, and then select the type of action to create.

   The *"Create New Action dialog"* is displayed.
2. Complete the New Action dialog. For information, see *"Specifying the Settings for a New Action"*.

Specifying the Settings for a New Action

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Click the **Create New Action** button (displayed as the **Add New Action** button in an agent or **New Action** button in a dashboard) and then select the type of action to create.

   The Create New Action dialog is displayed.
2. In the **URL** field, enter the URL of the Web page.
3. To define parameters for the action, then click Define Parameters to display the Define Parameters list.
4. Define the parameters as appropriate:
   - To add a parameter, click the **Add Parameter** button. A new parameter row is added to the **Define Parameters** list. (Note that the **Add Parameter** button is not available for all action types.)
   - Specify the column values for each parameter:

     - In the **Name** column, if you are creating a new parameter, then enter the name of the parameter. Use a name that is unique within the action.

       This column is not available for all action types.
     - In the **Prompt** column, if you want the user to provide the parameter value, then enter the prompt to display to the user.
     - In the **Value** column, to provide a parameter value, then enter or select the value. If you want the user to specify the value, then leave this field as is.
     - In the **Fixed** column, specify whether to allow users to see but not set the parameter.

       This column is not available for all action types.
     - In the **Hidden** column, specify whether to hide the parameter from users.

       This column is not available for all action types.
     - In the **Optional** column, specify whether the parameter requires a value before the action can be executed.
5. (optional) Customize information displayed to the user when the action runs:
   a. Click **Options** to display the "*Action Options dialog*".
   b. Specify the customization that you want.
   c. Click **OK**.

   This functionality is available only for actions where it is appropriate to display information to users.

6. Click **OK**.

   If you are creating a named action, then a dialog is displayed where you specify the information for saving the action.

Actions in Analyses

You can add one or more actions to a column heading, column value, or hierarchy level value in an analysis. When you add an action to a column heading, column value, or hierarchy level value, you add the action by using an action link.

When an analysis that contains one or more action links is presented to users in a pivot table, table, **map,** graph, trellis, or gauge, users can click a link to run the associated action.

For more information on action links, see *Action Links and Action Link Menus*.

Adding Actions to an Analysis

You must have one of the following user type permissions:

- BI Author Limited
- BI Author Developer
- BI Tenant Administrator

✎ **Note:** BI Author limited can add named actions to an analysis, but they cannot create new actions.

Home > **Oracle Business Intelligence**
1. Edit the analysis to which you want to add one or more actions.
2. Move the mouse pointer over the **Options** button for the column or hierarchy level to which you want to add one or more actions and select **Column Properties** or **Hierarchy Level Properties**.

    ✎ **Note:** For trellis graphs, you can add actions to columns, but not to hierarchy levels.

    The *"Column Properties dialog"* is displayed.
3. Click the *"Column Properties dialog: Interaction tab"*.
4. In the **Primary Interaction** box in the **Column Heading** area (to add one or more actions to a column heading) or the Value area (to add one or more actions to a column value or hierarchy level value), select **Action Links** to display the **Action Links** area.
5. Click the **Add Action Link** button.

    The *"New Action Link dialog"* is displayed.

6. In the **Link Text** field, enter the text to display as the link to execute the associated action.
7. To create a new action (that is, an inline action), then click the **Create New Action** button and specify the settings for the new action. For information, see *"Specifying the Settings for a New Action"*.
8. To add an existing action (that is, a named action):
    a. Click the **Select existing action** button.

        The *"Open dialog"* is displayed.
    b. Complete the Open dialog.

        If there are parameters associated with the action, then the *"Edit Parameter Mapping dialog"* is displayed.

    c. Complete the Edit Parameter Mapping dialog (if displayed).
9. If you are adding the action link to a value, then in the **Show Link** component in the New Action Link dialog, select one of the following options:
    o **Always** — Specifies that the action link is always to be enabled.

    ○ **Conditionally** — Specifies that the action link is to be enabled only under certain conditions.

        Selecting this option displays the **Conditions** area.

        For more information, see *"Conditionally Enabled Actions"*.

    If you are adding the action link to a column heading, then the **Conditionally** option is not available.

10. If you selected Conditionally, then add one or more conditions to be used to enable the action link. For each condition to add:

    a. Click the **New Condition** button and select the column to use. The *"New Condition dialog"* is displayed.

    b. Complete the New Condition dialog.

11. In the New Action Link dialog, click OK to add the action link to the Action Links area on the Interaction tab.

12. For each additional action link to add, repeat steps 5+.

13. To specify that, when only one action link is available at runtime, the action link is to be executed immediately rather than be displayed in a menu for selection, select the **Do not display in a popup if only one action link is available at runtime** box.

14. Click **OK** to close the Column Properties dialog.

15. Click the **Save Analysis** toolbar button on the Analysis editor to save the analysis.

Actions in Dashboard Pages

You can add actions to dashboard pages in one of two ways:

- By adding to a section on the dashboard page an Action Link object to which you add an action.

  When a dashboard page that contains one or more action links is presented to users, users can click a link to run the associated action.

- By adding to a section on the dashboard page an Action Link Menu object to which you add action links.

  When a dashboard page that contains an action link menu is presented to users, users can select a link from the action link menu to run the associated actions.

For more information on action links and action link menus, see *Action Links and Action Link Menus."*

Adding Actions to a Dashboard Page Using Action Links

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Edit the dashboard page to which you want to add an action.

2. From the Dashboard Object pane, drag and drop an Action Link object on the dashboard page.

3. Click the **Properties** button for the Action Link object to display the *"Action Link Properties dialog"*.

4. Complete the Action Link Properties dialog. For information, see *"Completing the Action Link Properties Dialog"*.

5. Click the **Save** toolbar button on the Dashboard builder to save the dashboard page.

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Completing the Action Link Properties Dialog

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. In the **Link Text** box, enter the text to display as the link to execute the associated action.

2. If you are creating an action link that will not be displayed on an action link menu, then in the **Caption** box, enter a caption to display above the link text.

3. To create a new action (that is, an inline action), then click the **New Action** button and specify the settings for the new action. For information, see *"Specifying the Settings for a New Action"*.

4. To add an existing action (that is, a named action):

    a. Click the **Select existing action** button.

      The *"Open dialog"* is displayed.

    b. Complete the Open dialog.

      If there are parameters associated with the action, then the "Edit Parameter Mapping dialog" is displayed.

    c. Complete the Edit Parameter Mapping dialog (if displayed).

5. (for an action link that navigates to a URL or to other BI content only) Use the **Open Link in New Window** box in the Action Link Properties dialog to specify whether to open the link in a new browser window or tab.

6. (for Navigate to BI Content actions only) Use the **Add to Briefing Book** box to specify whether the action that is associated with the action link can be executed in a briefing book, but only if the number of briefing book navigation links to be followed is greater than 0.

    For information about briefing books, see *"Briefing Book"*.

7. In the **Show Link** component, select one of the following options:

    ○ **Always** — Specifies that the action link is always to be enabled.

    ○ **Conditionally** — Specifies that the action link is to be enabled only if the associated condition is satisfied.

      The Condition area is displayed.

8. The Condition area is displayed.

    a. To create a new condition, click the **New Condition** button to display the *"New Condition dialog"* and then complete the dialog.

      For information on completing the dialog, see *"Specifying the Settings for a Condition"*.

    b. To select an existing condition, click Select Condition to display the *"Select Condition dialog"* and then complete the dialog.

9. Click **OK** in the Action Link Properties dialog.

Adding Actions to a Dashboard Page Using an Action Link Menu

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Edit the dashboard page to which you want to add one or more actions.

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2. From the Dashboard Object pane, drag and drop an Action Link Menu object on the dashboard page.

3. Click the **Properties** button for the Action Link Menu object to display the "*Action Link Menu Properties dialog*".

4. In the **Menu Label** box, enter the name to display for the menu.

5. In the **Caption** box, enter a caption to display above the action link menu text.

6. Add the action links to the menu as follows:

   o To add an action link that already exists on the page, drag and drop the existing Action Link object onto the Action Link Menu object.

   o To add a new action link, click the **Add** button to display the "*Action Link Properties dialog*" and then complete the dialog. For information, see "*Completing the Action Link Properties Dialog*".

   > ✎ **Note:** You also can drag an Action Link object from an Action Link Menu object to create a standalone action link.

7. Click **OK** in the Action Link Menu Properties dialog.

8. Click the **Save** toolbar button on the Dashboard builder to save the dashboard page.

Adding Actions to an Agent

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Edit the agent to which you want to add an action.

2. Click the "*Agent editor: Actions tab*".

3. Determine whether to add the action to the **Agent Condition True** or **No Condition Exists** area or the **Agent Condition is False** area as follows:

   o If there is no condition associated with the agent, or if there is a condition associated with the agent and you want the action to execute only if the condition evaluates to true, then use the **Agent Condition True or No Condition Exists** area

   o If there is a condition associated with the agent and you want the action to execute only if the condition evaluates to false, then use the **Agent Condition is False** area.

4. To create a new action (that is, an inline action), then click the **Add New Action** button and specify the settings for the new action. For information, see "*Specifying the Settings for a New Action*".

5. To add an existing action (that is, a named action):

   a. Click the **Add Existing Action** button.

      The "*Select Existing Action dialog*" is displayed.

   b. Complete the Select Existing Action dialog.

      > ✎ **Note:** You cannot add an existing action that navigates to related content (such as Navigate to BI Content).

      If there are parameters associated with the action, then the "*Add Existing Action dialog*" is displayed.

   c. Specify any required parameter values in the Add Existing Action dialog.

   d. Click **OK**.

6. Click the **Save this Agent** toolbar button in the Agent editor to save the agent.

Adding Actions to a KPI

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Edit the KPI to which you want to add one or more actions.
2. Click the *"KPI editor: States page"*.
3. Click the **Define action links for this status** button to display the *"Action Links dialog"*.
4. To add an action that has been added to another range of the KPI, click the **Add Action Link** button and select the action.
5. To add a new action:
    - If one or more actions have been added to another range of the KPI, click the **Add Action Link** button and select **New Action Link**.
    - If no actions have been added to other ranges of the KPI, then click the **Add Action Link** button.

    The *"New Action Link dialog"* is displayed.
6. In the **Link Text** field, enter the text to display as the link to execute the associated action.
7. To create a new action (that is, an inline action), then click the **Create New Action** button and specify the settings for the new action. For information, see *"Specifying the Settings for a New Action"*.
8. To add an existing action (that is, a named action):
    a. Click the **Select existing action** button.

        The *"Open dialog"* is displayed.
    b. Complete the Open dialog.

        If there are parameters associated with the action, then the *"Edit Parameter Mapping dialog"* is displayed.

    c. Complete the Edit Parameter Mapping dialog (if displayed).
    d. Click **OK** in the New Action Link dialog.
9. For each additional action link to add, repeat steps 5+.
10. Click **OK** to close the Action Links dialog.
11. Click the **Save KPI As** toolbar button on the KPI Builder to save the KPI.

Adding Actions to Initiatives and Objectives in a Scorecard

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Edit the scorecard that contains the initiative or objective.
2. Navigate to the initiative or objective to which you want to add an action as follows:
    - If you are adding the action to an initiative, then in the *"Initiatives pane"*, double-click the initiative.

     o If you are adding the action to an objective, then in the "Strategy pane", double-click the objective.

3. In the Action Link area in the *"Analytics pane"*, click the **New Row** button.

   The *"Action Link dialog"* is displayed.

4. In the **State Equals** box, select the state of the initiative or objective under which the action link is to be enabled.

5. To create a new action (that is, an inline action), then click the Create New Action button and specify the settings for the new action. For information, see *"Specifying the Settings for a New Action"*.

6. To add an existing action (that is, a named action):

    a. Click the **Select Existing Action** button.

       The *"Open dialog"* is displayed.

    b. Click **OK**.

7. In the **Link Text** field, enter the text to display as the link to execute the associated action.

8. Click **OK** in the Action Link dialog.

   The action link is added to the Action Link area.

9. Save the objective or initiative.

Creating a New Action Based on an Existing Named Action

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Edit the existing named action on which you want to base a new action. The *"Edit Action dialog"* is displayed.

2. Specify any changes that you want.

3. Click **Save As** and specify the save as criteria in the dialog.

Editing a Named Action

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Navigate to the action in the catalog.

2. Click the Edit link to display the *"Edit Action dialog"*.

3. Edit the action and click **OK**.

4. Click **Save Action**.

Editing an Action or Action Link Added to an Analysis

You must have one of the following user type permissions:

- BI Author Developer

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- BI Tenant Administrator

Home > **Oracle Business Intelligence**

1. Edit the analysis to which the action and action link has been added.
2. Move the mouse pointer over the **Options** menu for the column or hierarchy level to which the action has been added and select **Column Properties** or **Hierarchy Level Properties**.

   The *"Column Properties dialog"* is displayed.
3. Click the *"Column Properties dialog: Interaction tab"*.
4. In the Action Links area, select the action to edit and click the **Edit Action Link** button to display the *"Edit Action Link dialog"*.
5. Make the appropriate changes to the action link.
6. Click the **More** button and select **Edit Action**. The *"Edit Action dialog"* is displayed.
7. Edit the action and click **OK**.
8. Click **OK** in the Edit Action Link dialog.
9. Click **OK** in the Column Properties dialog.
10. Click **Save Analysis**.

Editing an Action, Action Link, or Action Link Menu Added to a Dashboard Page

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

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1. Edit the dashboard page.
2. If the action and action link are associated with an action link menu:
   a. Click the **Properties** button for the Action Link Menu object. The *"Action Link Menu Properties dialog"* is displayed.
   b. Make the appropriate changes to the menu label and caption.
   c. In the Action Links area, select the action to edit and click the **Edit** button.

      The" *Action Link Properties dialog*" is displayed.
3. If the action and action link are standalone, click the **Properties** button for the Action Link object to which the action is associated. The " *Action Link Properties dialog*" is displayed.
4. Make the appropriate changes to the action link.
5. Click the **More** button and select **Edit Action**. The " *Edit Action dialog*" is displayed.
6. Edit the action and click **OK**.
7. Click **OK** in the Action Link Properties dialog, and then in the Action Link Menu Properties dialog (if displayed).
8. Click **Save** to save the dashboard.

Editing Actions Added to an Agent

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

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1. Open the agent.
2. Click the *"Agent editor: Actions tab"*.
3. Select the action and click the **Edit Parameters** button. The *"Edit Action dialog"* is displayed.
4. Edit the action and click **OK**.

Editing Actions or Action Links Added to a KPI

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

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1. Edit the KPI to which the action and action link has been added.
2. Click the *"KPI editor: States page"*.
3. Click the **Define action links for this status** button to display the *"Action Links dialog"*.
4. In the Action Links area, select the action to edit and click the **Edit Action Link** button to display the *"Edit Action Link dialog"*.
5. Make the appropriate changes to the action link.
6. Click the **More** button and select **Edit Action**. The *"Edit Action dialog"* is displayed.
7. Edit the action and click **OK**.
8. Click **OK** in the Edit Action Link dialog.
9. Click **OK** in the Action Links dialog.
10. Click **Save KPI As**.

Editing Actions and Action Links Added to an Initiative or Objective in a Scorecard

You must have one of the following user type permissions:

- BI Author Developer

- BI Tenant Administrator

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1. Edit the scorecard that contains the initiative or objective.
2. Navigate to the initiative or objective as follows:
   - For an initiative, in the *"Initiatives pane"*, double-click the initiative.
   - For an objective, in the *"Strategy pane"*, double-click the objective.
3. In the **Action Link** area in the *"Analytics pane"*, click the Edit Row button.

   The "Action Link dialog" is displayed.
4. Make the changes that you want and click **OK** in the Action Link dialog.

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5. Save the objective or initiative.

Saving an Inline Action in an Analysis to the Catalog

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

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1. Edit the analysis to which the action has been added.
2. Move the mouse pointer over the **Options** menu for the column or hierarchy level to which the action has been added and select **Column Properties** or **Hierarchy Level Properties**.

   The *"Column Properties dialog"* is displayed.
3. Click the *"Column Properties dialog: Interaction tab"*.
4. In the Action Links area, select the action to save and click the **Edit Action Link** button. The *"Edit Action Link dialog"* is displayed.
5. Click the More button and select Save Action As to display the *"Save As dialog"* to specify the save criteria.
6. Specify the save criteria and click OK.

   Tip: To replace the reference to the current action with the saved action, then select the **Replace current action with a reference to the saved action** box.
7. Click **OK** in the Edit Action Link dialog.
8. Click **OK** in the Column Properties dialog.

Saving an Inline Action in a Dashboard to the Catalog

You must have one of the following user type permissions:

- BI Author Developer
- BI Tenant Administrator

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1. Edit the dashboard page.
2. If the action and action link are associated with and action link menu:
   a. Click the **Properties** button for the Action Link Menu object. The *"Action Link Menu Properties dialog"* is displayed.
   b. Make the appropriate changes to the menu label and caption.
   c. In the Action Links area, select the action to edit and click the **Edit** button.

      The *"Action Link Properties dialog"* is displayed.
3. If the action and action link are standalone, then click the **Properties** button for the Action Link object to which the action is associated. The *"Action Link Properties dialog"* is displayed.
4. Click the **More** button and select **Save Action As**. The *"Save As dialog"* is displayed.
5. Edit the action and click **OK**.
6. Click **OK** in the Action Link Properties dialog, and then in the Action Link Menu Properties dialog (if displayed).
7. Click **Save** to save the dashboard.

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8. Click the More button and select Save Action As to display the dialog to specify the save criteria.

9. Specify the save criteria and click OK.

    Tip: To replace the reference to the current action with the saved action, then select the **Replace current action with a reference to the saved action** box.

10. Click **OK** in the Action Link Properties dialog, and then in the Action Link Menu Properties dialog (if displayed).

11. Click **Save** to save the dashboard.

Executing a Named Action to Test It

You must have one of the following user type permissions:

- BI Author Limited

- BI Author Developer

- BI Tenant Administrator

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1. Navigate to the named action in the catalog.

2. Click the Execute link.

3. Respond to any request for more information or any confirmation prompt that is displayed.

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18 **Appendix**

Subject Areas

The standard content was delivered using the Recruiting subject area.

For a complete filterable list of fields, refer to the Oracle Taleo Reporting with OBI — Data Dictionary — Recruiting Subject Area for the Recruiting and Administration subject areas.

Administration Subject Area Additional Information

When developing reports and analyses against the Administration subject area, it is important to understand that every top level folder is independent, meaning that reports cannot be directly created across various folders. For example, it is not possible to mix elements from "OLF" and "System Users" in the same query.

Recruiting (Legacy) Subject Area Additional Information

Net new reports should be developed using the contemporary Recruiting subject area, unless the contemporary Recruiting subject area has functional gaps preventing the new report's functional scope to be met.

When a report developer needs to develop a report on requisitions that do not have any job submissions, it is necessary to add the following element in the results of the report:

- Context / Requisitions with/without applications

Recruiting Subject Area

Folder Path	Column	Description	Data Type
Candidate > Candidate Basic Profile & Preferences	Advance Notice	Returns the candidate's preferred advance notice.	Varchar
Candidate > Candidate Basic Profile & Preferences	Candidate Education Level	Returns the candidate's education level.	Varchar
Candidate > Candidate Basic Profile & Preferences	Candidate Employee Status	Returns the candidate's preferred employee status.	Varchar
Candidate > Candidate Basic Profile & Preferences	Candidate Job Level	Returns the candidate's job level.	Varchar
Candidate > Candidate Basic Profile & Preferences	Candidate Job Schedule	Returns the candidate's preferred job schedule.	Varchar
Candidate > Candidate Basic Profile & Preferences	Candidate Job Shift	Returns the candidate's preferred job shift.	Varchar
Candidate > Candidate Basic Profile & Preferences	Candidate Job Type	Returns the candidate's preferred job type.	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Job Field Level1 Name	Desired Job Field Level1 Name	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Basic Profile & Preferences	Desired Job Field Level2 Name	Desired Job Field Level2 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Job Field Level3 Name	Desired Job Field Level3 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Job Field Level4 Name	Desired Job Field Level4 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Location Level1 Name	Desired Location Level1 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Location Level2 Name	Desired Location Level2 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Location Level3 Name	Desired Location Level3 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Location Level4 Name	Desired Location Level4 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Location Level5 Name	Desired Location Level5 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level1 Name	Desired Organization Level1 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level10 Name	Desired Organization Level10 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level11 Name	Desired Organization Level11 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level12 Name	Desired Organization Level12 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level13 Name	Desired Organization Level13 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level14 Name	Desired Organization Level14 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level15 Name	Desired Organization Level15 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level16 Name	Desired Organization Level16 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level17 Name	Desired Organization Level17 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level18 Name	Desired Organization Level18 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level19 Name	Desired Organization Level19 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level2 Name	Desired Organization Level2 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level20 Name	Desired Organization Level20 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level3 Name	Desired Organization Level3 Name	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level4 Name	Desired Organization Level4 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level5 Name	Desired Organization Level5 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level6 Name	Desired Organization Level6 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level7 Name	Desired Organization Level7 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level8 Name	Desired Organization Level8 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Desired Organization Level9 Name	Desired Organization Level9 Name	Varchar
Candidate > Candidate Basic Profile & Preferences	Email Invitations	Returns whether or not the candidate wants to receive email invitations.	Char
Candidate > Candidate Basic Profile & Preferences	Hours Per Week - Preference	Returns the candidate's preference of work hours per week.	Varchar
Candidate > Candidate Basic Profile & Preferences	Hours Per Week - Willingness	Returns the candidate's threhold of work hours per week.	Varchar
Candidate > Candidate Basic Profile & Preferences	Min. Ann. Salary	Returns the candidate's preferred min. annual salary.	Double
Candidate > Candidate Basic Profile & Preferences	Travel	Returns the candidate's perferred travel.	Varchar
Candidate > Candidate Basic Profile & Preferences	Willing To Work On Holidays	Returns the candidate's willingess to work on holidays.	Char
Candidate > Candidate Basic Profile & Preferences	Willing To Work On Weekends	Returns the candidate's willingess to work on weekends.	Char
Candidate > Candidate Dates	Availability Date	Returns the candidate availability date	Datetime
Candidate > Candidate Dates	Candidate Creation Date	Returns the candidate creation date	Timestamp
Candidate > Candidate Dates	Candidate Last Modified Date	Returns the date when the candidate record was last modified	Timestamp
Candidate > Candidate Dates	Candidate Last Modified Date (Including CSW)	Returns the date when the candidate record was last modified, including CSW status changes	Timestamp
Candidate > Candidate Dates	Most Recent CSW Move Date	Returns the most recent date when the candidate was moved in the CSW	Timestamp
Candidate > Candidate Dates	Reference Date	Returns the candidate reference date	Timestamp
Candidate > Candidate Dates	Reference End Date	Returns the referral end date.	Datetime
Candidate > Candidate General Profile > Profile Certification	Profile Certification Display Sequence	Returns the certification display sequence	Int

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Certification	Profile Certification Expiration Date	Returns the certification expiration date	Date
Candidate > Candidate General Profile > Profile Certification	Profile Certification Issue Date	Returns the certification issue date	Date
Candidate > Candidate General Profile > Profile Certification	Profile Certification Issuing Organization	Returns the certification issuing organization	Varchar
Candidate > Candidate General Profile > Profile Certification	Profile Certification Name	Returns the certification name as it was selected from the list.	Varchar
Candidate > Candidate General Profile > Profile Certification	Profile Certification Name (Other)	Returns the certification name as it was entered in free text	Varchar
Candidate > Candidate General Profile > Profile Certification	Profile Certification Number/ ID	Returns the certification identifier	Varchar
Candidate > Candidate General Profile > Profile Dates	Profile Completed Date	Returns the date/time when the general profile was completed	Timestamp
Candidate > Candidate General Profile > Profile Dates	Profile Created Date	Returns the date/time when the general profile was created	Timestamp
Candidate > Candidate General Profile > Profile Education History	Profile Education Degree Type	Returns the educational degree type achieved	Varchar
Candidate > Candidate General Profile > Profile Education History	Profile Education Display Sequence	Returns the education display sequence	Int
Candidate > Candidate General Profile > Profile Education History	Profile Education GPA	Returns the profile education GPA	Double
Candidate > Candidate General Profile > Profile Education History	Profile Education GPA (Out Of)	Returns the profile education GPA range	Double
Candidate > Candidate General Profile > Profile Education History	Profile Education Graduation Date	Returns the educational program graduation date	Datetime
Candidate > Candidate General Profile > Profile Education History	Profile Education Graduation Date Is Projected	Returns whether or not the education program graduation date is projected	Char
Candidate > Candidate General Profile > Profile Education History	Profile Education Institution Country	Returns the country of the educational institution	Varchar
Candidate > Candidate General Profile > Profile Education History	Profile Education Institution Name	Returns the educational institution as it was selected from the list.	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Education History	Profile Education Institution Name (Other)	Returns the educational institution as it was entered in free text.	Varchar
Candidate > Candidate General Profile > Profile Education History	Profile Education Institution State/Province	Returns the state/province of the educational institution	Varchar
Candidate > Candidate General Profile > Profile Education History	Profile Education Is Most Recent Based On Graduation Date	Filters so that only the most recent education is shown, based on the graduation date.	Char
Candidate > Candidate General Profile > Profile Education History	Profile Education Program Name	Returns the educational program as it was selected from the list.	Varchar
Candidate > Candidate General Profile > Profile Education History	Profile Education Program Name (Other)	Returns the educational program as it was entered in free text.	Varchar
Candidate > Candidate General Profile > Profile Education History	Profile Education Start Date	Returns the educational program start date	Datetime
Candidate > Candidate General Profile > Profile General Info	Profile Is Completed	Returns whether or not the general profile is complete	Char
Candidate > Candidate General Profile > Profile General Info	Profile Is Internal	Returns whether or not the candidate was internal as of when he/she created the general profile	Char
Candidate > Candidate General Profile > Profile General Info	Profile Locale	Returns the locale of the general profile	Varchar
Candidate > Candidate General Profile > Profile General Info	Profile Medium	Returns the general profile medium	Varchar
Candidate > Candidate General Profile > Profile General Info	Profile Originator	Returns the general profile originator type i.e. "Agent", "Candidate", "Recruiter", "Referrer"	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 1	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 10	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 2	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 3	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 4	Returns the code of the passport service request's input parameter	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 5	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 6	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 7	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 8	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Code 9	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 1	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 10	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 2	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 3	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 4	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 5	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 6	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 7	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 8	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Input Parameter - Value 9	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 1	Returns the code of the passport service results	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 10	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 11	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 12	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 13	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 14	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 15	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 16	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 17	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 18	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 19	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 2	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 20	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 21	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 22	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 23	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 24	Returns the code of the passport service results	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 25	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 26	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 27	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 28	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 29	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 3	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 30	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 4	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 5	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 6	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 7	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 8	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Code 9	Returns the code of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 1	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 10	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 11	Returns the value of the passport service results	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 12	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 13	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 14	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 15	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 16	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 17	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 18	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 19	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 2	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 20	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 21	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 22	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 23	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 24	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 25	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 26	Returns the value of the passport service results	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 27	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 28	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 29	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 3	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 30	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 4	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 5	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 6	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 7	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 8	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Passport Result - Value 9	Returns the value of the passport service results	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Request Is Most Recent Request Per Provider/Alias	Filters so that only the most recent passport service request is displayed. This is calculated for each provider+alias combination.	Char
Candidate > Candidate General Profile > Profile Passport	Profile Service Alias	Returns the passport service alias	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Service External Reference Number	Returns the passport service request's external reference number	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Service Internal Reference Number	Returns the passport service request's internal reference number	Double
Candidate > Candidate General Profile > Profile Passport	Profile Service Name	Returns the passport service name	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Passport	Profile Service Provider	Returns the passport service provider	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Service Request Date	Returns the date/time when the passport service was requested	Timestamp
Candidate > Candidate General Profile > Profile Passport	Profile Service Request Status	Returns the current status of the passport service request	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Service Requester	Returns the requester of the passport service	Varchar
Candidate > Candidate General Profile > Profile Passport	Profile Service Status Log Date	Returns the date/time the passport service request was changed to its current status	Timestamp
Candidate > Candidate General Profile > Profile Passport	Profile Service Type	Returns the passport service type	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source (BL)	Returns the profile source, in its base locale	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source (ML)	Returns the profile source. Use the element "Source Locale" to filter on the appropriate locale.	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source Event Identifier	Returns the general profile source event identifier	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source Event Name	Returns the profile source event name	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source Explanation	Returns the profile source explanation	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source Identifier	Returns the source identifier as seen in the source configuration page	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source Is Available	Returns whether or not the source is currently available.	Char
Candidate > Candidate General Profile > Profile Source	Profile Source Locale	Returns the locale of the profile source.	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source Type	Returns the recruitment source type, based on its default display label.	Varchar
Candidate > Candidate General Profile > Profile Source	Profile Source Type(Display As)	Returns the recruitment source type, as displayed in the recruiting administration application, under the "display as" column.	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Source	Profile Source Was Automatically Entered	Returns whether or not the source was automatically populated into the candidate file	Char
Candidate > Candidate General Profile > Profile Source	Source (Agency)	Returns the name of the agency when the source is an agency.	Varchar
Candidate > Candidate General Profile > Profile Source	Source (Agent)	Returns the full name of the agent when the source is an agency.	Varchar
Candidate > Candidate General Profile > Profile Source	Source (BL) Agent	Returns the description of the agency or 'Not Specified' if no description has been entered for an agency source.	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Next Step Code	Returns the profile transitions next step code.	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Next Step Name (BL)	Returns the profile transitions next step name in its base locale.	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Code	Returns the profile transitions process code	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Current Status	Returns the profile transitions process current status	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Days Since Creation	If the profile transitions process is in progress, the time in days between the profile transitions process start date and the current date is returned.	Int
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Days To Complete	If the profile transitions process is complete, the time in days between the profile transitions process start date and the profile transitions latest status change date.	Int
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process End Date	Returns the transitions process end date	Timestamp
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Is Latest (By Type)	Returns whether or not the profile transitions process is latest (By Type)	Char
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Is Visible	Returns whether or not the profile transitions process is sisible	Char
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Latest Status Change Date	Returns the profile transitions process latest status change date	Timestamp
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Name (BL)	Returns the process name in its base locale	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Owner Email	Returns the profile transitions process owner email	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Owner Full Name	Returns the profile transitions process wwner full name	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Percent Complete	Returns the percent of the profile transitions process that has beeen completed.	Double
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Progression Health Is Red	Returns yes if a step or task in the profile transitions process is overdue.	Char
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Start Date	Returns the profile transitions process start date	Timestamp
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Supervisor Email	Returns the profile transitions process supervisor email	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Supervisor Full Name	Returns the profile transitions process supervisor full name	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Process Type	Returns the profile transitions process type	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Code	Returns the profile transitions step code	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Current Status	Returns the profile transitions step current status	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Days In Progress	If the profile transitions process is in progress, the time in days between the profile transitions process start date and the current date is returned.	Int
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Days To Complete	If the profile transitions step is complete, the time in days between the profile transitions step start date and the profile transitions step latest status change date is returned.	Int
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Due Date	Returns the profile transitions step due date	Datetime
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step End Date	Returns the transitions step end date	Timestamp
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Expected Duration	Returns the profile transitions step expected duration	Double
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Is Overdue	Returns whether or not the profile transitions step ss currently overdue	Char
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Latest Status Change Date	Returns the profile transitions step latest status change date	Timestamp

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Name (BL)	Returns the profile transisions step name in its base locale	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Overdue Days	If the profile transitions step is in progress, the time in days between the profile transitions step due date and the current date is returned.	Int
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Start Date	Returns the profile transitions step start date	Timestamp
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Sub Process Code	Returns the profile transitions step sub process code	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Sub Process Name (BL)	Returns the step sub-process name in its base locale	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Step Type Code	Returns the profile transitions step type code	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Action	Returns the profile transitions task action	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Assignee Department	Returns the profile transitions task assignee department	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Assignee Email	Returns the profile transitions task assignee email	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Assignee Name	Returns the profile transitions task assignee name	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Assignment Date	Returns the profile transitions task assignment date	Datetime
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Code	Returns the profile transitions task code	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Comments	Returns the profile transitions task comments	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Creation Date	Returns the profile transitions task creation date	Timestamp
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Current Status	Returns the profile transitions task current status	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Days Since Creation	If the profile transitions task is in progress, the time in days between the profile transitions task creation date and the current date.	Int

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Due Date	Returns the profile transitions task due date	Timestamp
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Is Overdue	Returns whether or not the profile transitions task is overdue	Char
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Name (BL)	Returns the name of task in its base locale	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Overdue Days	If the profile transitions task is in progress and the task is overdue, the time in days between the profile transitions task due date and the current date.	Int
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Owner Email	Returns the profile transitions task owner email	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Owner Name	Returns the profile transitions task owner name	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Related Source (BL)	Returns the task related source in its base locale	Varchar
Candidate > Candidate General Profile > Profile Transition Process	Profile Transitions Task Type	Returns the profile transitions task type	Varchar
Candidate > Candidate General Profile > Profile Transitions E-Signature	Profile Transitions E-Signature Date	Returns the profile transitions e-signature date	Datetime
Candidate > Candidate General Profile > Profile Transitions E-Signature	Profile Transitions E-Signature Definition Name	Returns the profile transitions e-signature definition name	Varchar
Candidate > Candidate General Profile > Profile Transitions E-Signature	Profile Transitions E-Signature First & Last Name	Returns the profile transitions e-signature first & last Name. In transitions, this field is titled FullName	Varchar
Candidate > Candidate General Profile > Profile Transitions E-Signature	Profile Transitions E-Signature IP Address	Returns the profile transitions e-signature IP address	Varchar
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience Display Sequence	Returns the work experience display sequence	Int
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience Employer Name	Returns the work experience employer as it was selected from the list.	Varchar
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience Employer Name (Other)	Returns the work experience employer as it was entered in free text.	Varchar
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience End Date	Returns the work experience end date	Datetime

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Folder Path	Column	Description	Data Type
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience Is Current Job	Returns whether or not the candidate is currently working for this employer	Char
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience Is Most Recent Based On Start Date	Filters so that only the most recent experience is shown, based on the work start date.	Char
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience Job Title	Returns the work experience job title as it was selected from the list.	Varchar
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience Job Title (Other)	Returns the work experience job title as it was entered in free text.	Varchar
Candidate > Candidate General Profile > Profile Work Experience History	Profile Experience Start Date	Returns the work experience start date	Datetime
Candidate > Candidate Identification	Address of Residence (Line 1)	Returns the candidate address of residence	Varchar
Candidate > Candidate Identification	Address of Residence (Line 2)	Returns the candidate address of residence	Varchar
Candidate > Candidate Identification	Age (Years)	Returns the time (in years) between now and the candidate's date of birth.	Double
Candidate > Candidate Identification	Candidate Identifier	Returns Candidate ID	Double
Candidate > Candidate Identification	Candidate Is Internal	Returns whether or not the candidate is internal	Char
Candidate > Candidate Identification	City of Residence	Returns the candidate city of residence	Varchar
Candidate > Candidate Identification	Country of Residence	Returns the candidate country of residence	Varchar
Candidate > Candidate Identification	Date of Birth	Returns the candidate date of birth	Datetime
Candidate > Candidate Identification	Email	Returns the candidate email	Varchar
Candidate > Candidate Identification	Employee Number	Returns the candidate employee number	Varchar
Candidate > Candidate Identification	Has Submission	Returns whether or not the candidate has a Submission.	Char
Candidate > Candidate Identification	Home Phone	Returns the candidate home phone number	Varchar
Candidate > Candidate Identification	Is Anonymous	Returns whether the candidate elected to be anonymous	Char
Candidate > Candidate Identification	Is Missing Identification	Returns whether or not the candidate is missing identification information.	Varchar
Candidate > Candidate Identification	Mobile Phone	Returns the candidate mobile phone number	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Identification	Name	Returns the candidate name	Varchar
Candidate > Candidate Identification	Prefix	Returns the candidate prefix	Varchar
Candidate > Candidate Identification	Primary Phone Designation	Returns the candidate primary phone designation	Varchar
Candidate > Candidate Identification	Record Status	Returns the status of the candidate record	Varchar
Candidate > Candidate Identification	Region of Residence	Returns the candidate region of residence	Varchar
Candidate > Candidate Identification	SSN	Returns the candidate social security number	Varchar
Candidate > Candidate Identification	State/Prov of Residence	Returns the state/province of residence	Varchar
Candidate > Candidate Identification	Suffix	Returns the candidate suffix	Varchar
Candidate > Candidate Identification	Work Phone	Returns the candidate work phone number	Varchar
Candidate > Candidate Identification	Zip Code of Residence	Returns the candidate zip code of residence	Varchar
Candidate > Candidate Most Advanced Job Application	Most Advanced Reference Status	Returns the candidate's most advanced job application reference status	Varchar
Candidate > Candidate Most Advanced Job Application	Most Advanced Requisition Identifier	Returns the requisition identifier associated with the candidate's most advanced job application	Varchar
Candidate > Candidate Q&A	Answer (Choice) (BL)	Returns the answer to the question in the question's base locale	Varchar
Candidate > Candidate Q&A	Answer (Text)	Returns the free text answer to the question	Varchar
Candidate > Candidate Q&A	Is Candidate Question On Req. List	Returns whether or not the candidate question is on the requisition question list.	Char
Candidate > Candidate Q&A	Question Code	Returns the question code	Varchar
Candidate > Candidate Q&A	Question Description (BL)	Returns the description of the question in its base locale	Varchar
Candidate > Candidate Referral	Current Referral Status	Returns the current status of the referral	Varchar
Candidate > Candidate Referral	Is Currently Referred	Returns whether or not the candidate is currently bound to an active referral	Char
Candidate > Candidate Referral	Is Currently Referred By Agent	Returns whether or not the candidate is currently bound to an agent referral	Char
Candidate > Candidate Referral	Referral Is Most Recent	Returns whether or not the referral is the most recent for the candidate	Char
Candidate > Candidate Referral	Referrer Email	Returns the email of the referrer	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Referral	Referrer Is Employee	Returns whether or not the referrer is an employee	Char
Candidate > Candidate Referral	Referrer Name	Returns the name of the referrer	Varchar
Candidate > Candidate Referral	Referring Agency Name (BL)	Returns the referring agent's agency, in its base locale	Varchar
Candidate > Candidate Referral	Referring Agent Email	Returns the email of the agent	Varchar
Candidate > Candidate Referral	Referring Agent Name	Returns the name of the agent	Varchar
Candidate > Candidate Regulations	Aboriginal	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Armed Forces Medal Veteran Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Armed Forces Medal Vetran	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Disabled	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Disabled Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Disabled Veteran	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Disabled Veteran Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Ethnicity	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Ethnicity Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Family Status	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Gender	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Gender Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Is Max Standard USA EEO Form With Answer	Returns whether or not this is the most recent EEO form with at least one candidate answer, as it pertains to the standard EEO-USA forms with versions i.e. EEO1, EEO2A and EEO2b.	Char
Candidate > Candidate Regulations	Marital Status	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Military Status	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Other Protected Veteran	Returns the answer to the regulation question	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Regulations	Other Protected Veteran Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Political Affiliation	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Race	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Race Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Recently Separated Veteran	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Recently Separated Veteran Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Form Code	Returns the code associated to the global regulation data collection form.	Varchar
Candidate > Candidate Regulations	Regulation Question 1	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 10	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 11	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 12	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 13	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 14	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 15	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 16	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 17	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 18	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 19	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 2	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 20	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 21	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 22	Returns the answer to the regulation question	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Regulations	Regulation Question 23	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 24	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 25	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 3	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 4	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 5	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 6	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 7	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 8	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Regulation Question 9	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Religion	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Sexual Orientation	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Special Disabled Veteran	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Special Disabled Veteran Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Veteran	Returns the answer to the regulation question	Varchar
Candidate > Candidate Regulations	Veteran Question Code	Returns the code of the regulation question	Varchar
Candidate > Candidate Regulations	Visible Minority	Returns the answer to the regulation question	Varchar
Candidate > Candidate Transitions Direct Deposit	Direct Deposit Folio	Returns the direct deposit folio.	Varchar
Candidate > Candidate Transitions Direct Deposit	Direct Deposit Institution Name	Returns the direct deposit institution name.	Varchar
Candidate > Candidate Transitions Direct Deposit	Direct Deposit Institution Transit Number	Returns the direct deposit institution transit number.	Varchar
Candidate > Candidate Transitions Direct Deposit	Direct Deposit Pay Distribution	Returns the direct deposit pay distribution.	Double
Candidate > Candidate Transitions I9	I9 1 Document Expiration Date	Returns the I9 1 document expiration date	Datetime

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Folder Path	Column	Description	Data Type
Candidate > Candidate Transitions I9	I9 1 Document Issuing Authority	Returns the I9 1 document issuing authority	Varchar
Candidate > Candidate Transitions I9	I9 1 Document Number	Returns the I9 1 document number	Varchar
Candidate > Candidate Transitions I9	I9 1 Document Title	Returns the I9 1 document title	Varchar
Candidate > Candidate Transitions I9	I9 1B Document Expiration Date	Returns the I9 1B document expiration date	Datetime
Candidate > Candidate Transitions I9	I9 1B Document Issuing Authority	Returns the I9 1B document issuing authority	Varchar
Candidate > Candidate Transitions I9	I9 1B Document Number	Returns the I9 1B document number	Varchar
Candidate > Candidate Transitions I9	I9 1B Document Title	Returns the I9 1B document title	Varchar
Candidate > Candidate Transitions I9	I9 1C Document Expiration Date	Returns the I9 1C document expiration date	Datetime
Candidate > Candidate Transitions I9	I9 1C Document Issuing Authority	Returns the I9 1C document issuing authority	Varchar
Candidate > Candidate Transitions I9	I9 1C Document Number	Returns the I9 1C document number	Varchar
Candidate > Candidate Transitions I9	I9 1C Document Title	Returns the I9 1C document title	Varchar
Candidate > Candidate Transitions I9	I9 2 Document Expiration Date	Returns the I9 2 document expiration date	Datetime
Candidate > Candidate Transitions I9	I9 2 Document Issuing Authority	Returns the I9 2 document issuing authority	Varchar
Candidate > Candidate Transitions I9	I9 2 Document Number	Returns the I9 2 document number	Varchar
Candidate > Candidate Transitions I9	I9 2 Document Title	Returns the I9 2 document title	Varchar
Candidate > Candidate Transitions I9	I9 3 Document Expiration Date	Returns the I9 3 document expiration date	Datetime
Candidate > Candidate Transitions I9	I9 3 Document Issuing Authority	Returns the I9 3 document issuing authority	Varchar
Candidate > Candidate Transitions I9	I9 3 Document Number	Returns the I9 3 document number	Varchar
Candidate > Candidate Transitions I9	I9 3 Document Title	Returns the I9 3 document title	Varchar
Candidate > Candidate Transitions I9	I9 Employee Alien Number	Returns the I9 employee alien number	Varchar
Candidate > Candidate Transitions I9	I9 Employee Alien Number (2)	Returns the I9 employee alien number (2)	Varchar
Candidate > Candidate Transitions I9	I9 Employee Apartment	Returns the I9 employee apartment	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Transitions I9	I9 Employee Citizenship	Returns the I9 employee citizenship	Varchar
Candidate > Candidate Transitions I9	I9 Employee Foreign Passport Country	Returns the I9 employee foreign passport country	Varchar
Candidate > Candidate Transitions I9	I9 Employee Foreign Passport Number	Returns the I9 employee foreign passport number	Varchar
Candidate > Candidate Transitions I9	I9 Employee Other Names	Returns the I9 employee other names	Varchar
Candidate > Candidate Transitions I9	I9 Employee Signature Date	Returns the I9 employee signature date	Datetime
Candidate > Candidate Transitions I9	I9 Employee Signature First & Last Name	Returns the I9 employee signature first & last Name. In transitions, this field is titled FullName	Varchar
Candidate > Candidate Transitions I9	I9 Employee Signature IP Address	Returns the I9 employee signature IP address	Varchar
Candidate > Candidate Transitions I9	I9 Employee Work Until Date	Returns the I9 employee work until date	Datetime
Candidate > Candidate Transitions I9	I9 Employer Business Address	Returns the I9 employer business address	Varchar
Candidate > Candidate Transitions I9	I9 Employer Business City	Returns the I9 employer business city	Varchar
Candidate > Candidate Transitions I9	I9 Employer Business Name	Returns the I9 employer business name	Varchar
Candidate > Candidate Transitions I9	I9 Employer Business State	Returns the I9 employer business state	Varchar
Candidate > Candidate Transitions I9	I9 Employer Business Street Address	Returns the I9 employer business street address	Varchar
Candidate > Candidate Transitions I9	I9 Employer Business Zip Code	Returns the I9 employer business zip code	Varchar
Candidate > Candidate Transitions I9	I9 Employer Rep First Name	Returns the I9 employer rep first name	Varchar
Candidate > Candidate Transitions I9	I9 Employer Rep Last Name	Returns the I9 employer rep last name	Varchar
Candidate > Candidate Transitions I9	I9 Employer Rep Signature Date	Returns the I9 employer rep signature date	Datetime
Candidate > Candidate Transitions I9	I9 Employer Rep Signature First & Last Name	Returns the I9 employer rep signature first & last name. In transitions, this field is titled FullName	Varchar
Candidate > Candidate Transitions I9	I9 Employer Rep Signature IP Address	Returns the I9 employer rep signature IP address	Varchar
Candidate > Candidate Transitions I9	I9 Employer Rep Title	Returns the I9 employer rep title	Varchar
Candidate > Candidate Transitions I9	I9 Preparer Address	Returns the I9 preparer address	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Transitions I9	I9 Preparer City	Returns the I9 preparer city	Varchar
Candidate > Candidate Transitions I9	I9 Preparer First Name	Returns the I9 preparer first name	Varchar
Candidate > Candidate Transitions I9	I9 Preparer Last Name	Returns the I9 preparer last name	Varchar
Candidate > Candidate Transitions I9	I9 Preparer Print Name	Returns the I9 preparer print name	Varchar
Candidate > Candidate Transitions I9	I9 Preparer Signature Date	Returns the I9 preparer signature date	Datetime
Candidate > Candidate Transitions I9	I9 Preparer Signature First & Last Name	Returns the I9 preparer signature first & last name. In transitions, this field is titled FullName	Varchar
Candidate > Candidate Transitions I9	I9 Preparer Signature IP Address	Returns the I9 preparer Signature IP Address	Varchar
Candidate > Candidate Transitions I9	I9 Preparer State	Returns the I9 preparer state	Varchar
Candidate > Candidate Transitions I9	I9 Preparer Street Address	Returns the I9 preparer street address	Varchar
Candidate > Candidate Transitions I9	I9 Preparer Zip Code	Returns the I9 preparer zip code	Varchar
Candidate > Candidate Transitions Passport	Transitions Passport Input Parameter - Code *	Returns the code of the passport service request's input parameter	Varchar
Candidate > Candidate Transitions Passport	Transitions Passport Input Parameter - Value *	Returns the value of the passport service request's input parameter	Varchar
Candidate > Candidate Transitions Passport	Transitions Passport Result - Code *	Returns the code of the passport service results	Varchar
Candidate > Candidate Transitions Passport	Transitions Passport Result - Value *	Returns the value of the passport service results	Varchar
Candidate > Candidate Transitions Passport	Transitions Request Is Most Recent Per Provider/Alias	Filters so that only the most recent passport service request is displayed. This is calculated for each provider+alias combination.	Double
Candidate > Candidate Transitions Passport	Transitions Service Alias	Returns the passport service alias	Varchar
Candidate > Candidate Transitions Passport	Transitions Service External Reference Number	Returns the passport service request's external reference number	Varchar
Candidate > Candidate Transitions Passport	Transitions Service Internal Reference Number	Returns the passport service request's internal reference number	Double
Candidate > Candidate Transitions Passport	Transitions Service Name	Returns the passport service name	Varchar
Candidate > Candidate Transitions Passport	Transitions Service Provider	Returns the passport service provider	Varchar
Candidate > Candidate Transitions Passport	Transitions Service Provider Request Status	Returns the current provider status of the passport service request	Varchar

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Folder Path	Column	Description	Data Type
Candidate > Candidate Transitions Passport	Transitions Service Request Date	Returns the date/time when the passport service was requested	Timestamp
Candidate > Candidate Transitions Passport	Transitions Service Request Status	Returns the current status of the passport service request	Double
Candidate > Candidate Transitions Passport	Transitions Service Requester	Returns the requester of the passport service	Varchar
Candidate > Candidate Transitions Passport	Transitions Service Status Log Date	Returns the date/time the passport service request was changed to its current status	Timestamp
Candidate > Candidate Transitions Passport	Transitions Service Type	Returns the passport service type	Varchar
Candidate > Candidate Transitions Subject Info	Subject Corporate Email	Returns the subject corporate email	Varchar
Candidate > Candidate Transitions Subject Info	Subject Correspondence Email	Returns the subject correspondence email	Varchar
Candidate > Candidate Transitions Subject Info	Subject Department Name	Returns the subject department name	Varchar
Candidate > Candidate Transitions Subject Info	Subject Fax Number	Returns the subject fax number	Varchar
Candidate > Candidate Transitions Subject Info	Subject Home Phone Number	Returns the subject home phone number	Varchar
Candidate > Candidate Transitions Subject Info	Subject Mobile Phone Number	Returns the subject mobile phone number	Varchar
Candidate > Candidate Transitions Subject Info	Subject Pager Number	Returns the subject pager number	Varchar
Candidate > Candidate Transitions Subject Info	Subject Work Phone Number	Returns the subject work phone number	Varchar
Candidate > Candidate Transitions Subject Info	Subject Work Phone Number Extension	Returns the subject work phone number extension	Varchar
Candidate Facts > Candidate Counts	# Candidates	Returns the number of distinct candidates	Int
Candidate Facts > Candidate Counts	# Candidates Currently Referred	Returns the number of distinct candidates whose referral status is active	Int
Candidate Facts > Candidate Counts	# Candidates Currently Referred By Agent	Returns the number of distinct candidates who are referred by an agent.	Int
Candidate Facts > Candidate Counts	# General Profiles	Returns the number of distinct of general profiles.	Int
Candidate Facts > Candidate Counts	# Submissions	Returns the number of distinct job submissions.	Int
Candidate Facts > Candidate Counts	# Submissions Ace	Returns the number of distinct job submissions where the candidate is considered to be ACE.	Int
Candidate Facts > Candidate Counts	# Submissions By Candidate	Returns the number of distinct submissions divided by the number of distinct candidates.	Double

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Folder Path	Column	Description	Data Type
Candidate Facts > Candidate Counts	# Submissions By Recruiter	Returns the number of submissions divided by the number of recruiters.	Double
Candidate Facts > Candidate Counts	# Submissions By Requisition	Returns the number of submissions divided by the number of requisitions.	Double
Candidate Facts > Candidate Counts	# Submissions Complete	Returns the number of distinct job submissions that are completed.	Int
Candidate Facts > Candidate Counts	# Submissions Currently Declined	Returns the number of distinct submissions currently in the "Declined" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently Hired	Returns the number of distinct submissions currently in the "Hired" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently In 1st Intv.	Returns the number of distinct submissions currently in the "1st Interview" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently In 2nd Intv.	Returns the number of distinct submissions currently in the "2nd Interview" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently In 3rd Intv.	Returns the number of distinct submissions currently in the "3rd Interview" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently In Offer	Returns the number of distinct submissions currently in the "Offer" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently In Pipeline	Returns the number of distinct submissions currently in the "Pipeline" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently in Review	Returns the number of distinct submissions currently in the "Review" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently In Testing	Returns the number of distinct submissions currently in the "Testing" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently Inactive	Returns the number of distinct submissions currently in the "Inactive" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently New	Returns the number of distinct submissions currently in the "New" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions Currently Referred	Returns a distincct count of submissions currently referred.	Double
Candidate Facts > Candidate Counts	# Submissions Currently Referred By Agent	Returns a distinct count of submissions current referred by an agent.	Double
Candidate Facts > Candidate Counts	# Submissions Currently Rejected	Returns the number of distinct submissions currently in the "Rejected" reference model status	Int
Candidate Facts > Candidate Counts	# Submissions External	Returns the number of distinct job submissions that are external	Int

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Folder Path	Column	Description	Data Type
Candidate Facts > Candidate Counts	# Submissions Incomplete	Returns the number of distinct job submissions that are not completed.	Int
Candidate Facts > Candidate Counts	# Submissions Internal	Returns the number of distinct submissions that are internal	Int
Candidate Facts > Candidate Counts	# Submissions Min. Requirements Met	Returns the number of distinct job submissions where the candidate as met all the requisition minimum requirements.	Int
Candidate Facts > Candidate Counts	# Submissions Min. Requirements Unmet	Returns the number of distinct job submissions where the candidate as not met all the requisition minimum requirements.	Int
Candidate Facts > Candidate Counts	# Submissions Non-Ace	Returns the number of distinct job submissions where the candidate is not considered to be ACE.	Int
Candidate Facts > Candidate Counts	# Submissions Offer Accepted	Returns the number of distinct submissions where the offer status is accepted	Int
Candidate Facts > Candidate Counts	# Submissions Offer Refused	Returns the number of distinct submissions where the offer status is refused	Int
Candidate Facts > Candidate Counts	# Submissions Reached 1st Intv.	Returns the number of distinct submissions that were historically moved to the reference status 1st Interview	Int
Candidate Facts > Candidate Counts	# Submissions Reached 2nd Intv.	Returns the number of distinct submissions that were historically moved to the reference status 2nd Interview	Int
Candidate Facts > Candidate Counts	# Submissions Reached 3rd Intv.	Returns the number of distinct submissions that were historically moved to the reference status 3rd Interview	Int
Candidate Facts > Candidate Counts	# Submissions Reached Offer	Returns the number of distinct submissions that were historically moved to the reference status Offer	Int
Candidate Facts > Candidate Counts	# Submissions Reached Reviewed	Returns the number of distinct submissions that were historically moved to the reference status review	Int
Candidate Facts > Candidate Counts	# Submissions Reached Testing	Returns the number of distinct submissions that were historically moved to the reference status Testing	Int
Candidate Facts > Candidate Cycle Time	Average Submission Cycle Time	Returns the number of days between the submission completed date and the hired date.	Double
Candidate Facts > Candidate Cycle Time	Average Time To Complete Submission	Returns the number of days between the submission created date and the submission completed date.	Double
Candidate Facts > Candidate Cycle Time	Average Time to Hire	Returns the number of days between the first fully approved date and the hired date.	Double
Candidate Facts > Candidate Cycle Time	Average Time to Start	Returns the number of days between the first fully approved date and the hire start date (offer actual start date, if hire start date is null).	Double

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Folder Path	Column	Description	Data Type
Candidate Facts > Candidate Cycle Time	Submission Cycle Time	Returns the average number of days between the submission completed date and hired date.	Int
Candidate Facts > Candidate Cycle Time	Time to Complete Submission	Returns the average number of days between the submission created date and the submission completed date.	Double
Candidate Facts > Candidate Cycle Time	Time to Hire	Returns the average number of days between the first fully approved date and the hired date.	Double
Candidate Facts > Candidate Cycle Time	Time to Start	Returns the average number of days between the the first fully approved date and the hire start date (offer actual start date, if hire start date is null).	Double
Candidate Facts > Candidate Demographics	# Candidates Age < 40 Years	Returns the number of candidates whose age is under 40	Int
Candidate Facts > Candidate Demographics	# Candidates Age >= 40 Years	Returns the number of candidates whose age is 40 or older.	Int
Candidate Facts > Candidate Demographics	# Candidates Asian	Returns the number of candidates whose race is asian	Int
Candidate Facts > Candidate Demographics	# Candidates Black	Returns the number of candidates whose race is black	Int
Candidate Facts > Candidate Demographics	# Candidates Ethnicity N/S	Returns the number of candidates whose ethnicity is not specified or undisclosed.	Int
Candidate Facts > Candidate Demographics	# Candidates Female	Returns the number of candidates whose gender is female.	Int
Candidate Facts > Candidate Demographics	# Candidates Gender N/S	Returns the number of candidates whose gender is not specified or undisclosed.	Int
Candidate Facts > Candidate Demographics	# Candidates Hispanic	Returns the number of candidates whose ethnicity is hispanic	Int
Candidate Facts > Candidate Demographics	# Candidates Indian Native	Returns the number of candidates whose race is indian native	Int
Candidate Facts > Candidate Demographics	# Candidates Male	Returns the number of candidates whose gender is male.	Int
Candidate Facts > Candidate Demographics	# Candidates Not Hispanic	Returns the number of candidates whose ethnicity is not hispanic	Int
Candidate Facts > Candidate Demographics	# Candidates Pacific Native	Returns the number of candidates whose race is pacific native	Int
Candidate Facts > Candidate Demographics	# Candidates Race >1 Choice	Returns the number of candidates who responded that they have 2 or more races.	Int
Candidate Facts > Candidate Demographics	# Candidates Race N/S	Returns the number of candidates whose race is not specified or undisclosed.	Int
Candidate Facts > Candidate Demographics	# Candidates White	Returns the number of candidates whose race is white	Int
Candidate Facts > Candidate Demographics	Average Age (Years)	Returns the average time (in years) between now and the candidate's date of birth.	Double

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Folder Path	Column	Description	Data Type
Candidate Facts > Candidate Evaluation Questionnaires	# Evaluation Event	Returns a distinct count of scheduled events. Events can be of type feedback or interview.	Integer
Candidate Facts > Candidate Evaluation Questionnaires	# Evaluation Interviews	Returns a distinct count of interviews.	Integer
Candidate Facts > Candidate Evaluation Questionnaires	# Evaluation Question Responses	Returns the distinct count of answers to individual questions.	Integer
Candidate Facts > Candidate Evaluation Questionnaires	# Evaluation Requests	Returns the distinct count of evaluation requests.	Integer
Candidate Facts > Candidate Evaluation Questionnaires	# Evaluation Requests Currently Completed	Returns the distinct count of evaluation requests currently in the status of completed.	Integer
Candidate Facts > Candidate Evaluation Questionnaires	# Evaluation Requests Currently Requested	Returns the distinct count of evaluation requests currently in the status of requested.	Integer
Candidate Facts > Candidate Evaluation Questionnaires	# Evaluation Skill Responses	Returns the distinct count of answers to individual skills.	Integer
Candidate Facts > Candidate Evaluation Questionnaires	Average Evaluation Answer Total Score By Question	Returns the average total score by question.	Double
Candidate Facts > Candidate Evaluation Questionnaires	Average Evaluation Answer Total Weight By Question	Returns the average total weight by question.	Double
Candidate Facts > Candidate Evaluation Questionnaires	Average Evaluation Answer Weight	Returns the average individual answer score.	Double
Candidate Facts > Candidate Evaluation Questionnaires	Average Evaluation Questions Total Percent Score	Returns the average question summary percent score.	Double
Candidate Facts > Candidate Evaluation Questionnaires	Average Evaluation Questions Total Score	Returns the average question summary score.	Double
Candidate Facts > Candidate Evaluation Questionnaires	Average Evaluation Skill Rating Value	Returns the average individual skill rating.	Double
Candidate Facts > Candidate Evaluation Questionnaires	Average Evaluation Skills Total Percent Score	Returns the average skill summary percent score.	Double
Candidate Facts > Candidate Evaluation Questionnaires	Average Evaluation Skills Total Score	Returns the average skill summary score.	Double
Candidate Facts > Candidate Source Types	# Submissions From Agency	Returns the number of submissions where the source type is Agency	Int
Candidate Facts > Candidate Source Types	# Submissions From Billboards	Returns the number of submissions where the source type is Billboards	Int

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Folder Path	Column	Description	Data Type
Candidate Facts > Candidate Source Types	# Submissions From Broadcast	Returns the number of submissions where the source type is Broadcast	Int
Candidate Facts > Candidate Source Types	# Submissions From Career Fair	Returns the number of submissions where the source type is Career Fair	Int
Candidate Facts > Candidate Source Types	# Submissions From Direct Mail	Returns the number of submissions where the source type is Direct Mail	Int
Candidate Facts > Candidate Source Types	# Submissions From Direct Sourcing	Returns the number of submissions where the source type is Direct Sourcing	Int
Candidate Facts > Candidate Source Types	# Submissions From Job Board	Returns the number of submissions where the source type is Job Board	Int
Candidate Facts > Candidate Source Types	# Submissions From Magazines and Trade Publications	Returns the number of submissions where the source type is Magazines and Trade Publications	Int
Candidate Facts > Candidate Source Types	# Submissions From Mailing List	Returns the number of submissions where the source type is Mailing List	Int
Candidate Facts > Candidate Source Types	# Submissions From News Group	Returns the number of submissions where the source type is News Group	Int
Candidate Facts > Candidate Source Types	# Submissions From Newspapers	Returns the number of submissions where the source type is Newspapers	Int
Candidate Facts > Candidate Source Types	# Submissions From Other	Returns the number of submissions where the source type is Other	Int
Candidate Facts > Candidate Source Types	# Submissions From Our Web Site	Returns the number of submissions where the source type is Our Web Site	Int
Candidate Facts > Candidate Source Types	# Submissions From Professional Associations	Returns the number of submissions where the source type is Professional Associations	Int
Candidate Facts > Candidate Source Types	# Submissions From Referral	Returns the number of submissions where the source type is Referral	Int
Candidate Facts > Candidate Source Types	# Submissions From Social Network	Returns the number of submissions where the source type is Social Network	Int
Candidate Facts > Candidate Source Types	# Submissions From Talent Exchange	Returns the number of submissions where the source type is Talent Exchange	Int
Candidate Facts > Candidate Source Types	# Submissions From Taleo Performance	Returns the number of submissions where the source type is Taleo Performance	Int
Candidate Facts > Candidate Source Types	# Submissions From University Recruiting	Returns the number of submissions where the source type is University Recruiting	Int
Candidate Facts > Candidate Source Types	# Submissions From Unsolicited	Returns the number of submissions where the source type is Unsolicited	Int
Candidate Facts > Profile Transitions Process Counts	# Profile Transitions Processes	Returns the number of profile transitions processes.	Int
Candidate Facts > Profile Transitions Process Counts	# Profile Transitions Processes Completed	Returns the number of profile transitions process with a completed status.	Int
Candidate Facts > Profile Transitions Process Counts	# Profile Transitions Processes Health Status Red	Returns the number of profile transitions processes where a step or task is overdue.	Int

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Folder Path	Column	Description	Data Type
Candidate Facts > Profile Transitions Process Counts	# Profile Transitions Steps	Returns the number of steps that are associated with a profile transitions process.	Int
Candidate Facts > Profile Transitions Process Counts	# Profile Transitions Steps Overdue	Returns the number of steps, that are associated with a profile transitions process, that are overdue.	Int
Candidate Facts > Profile Transitions Process Counts	# Profile Transitions Tasks	Returns the number of tasks that are associated with a profile transitions process.	Int
Candidate Facts > Profile Transitions Process Counts	# Profile Transitions Tasks Overdue	Returns the number of tasks, that are associated with a profile transitions process, that are overdue.	Int
Candidate Facts > Profile Transitions Process Time	Average Profile Transitions Process Days In Progress	If the transitions process is in progress, the average time in days between the profile transitions process start date and the current date is returned.	Double
Candidate Facts > Profile Transitions Process Time	Average Profile Transitions Process Days To Complete	If the transitions process is complete, the average time in days between the profile transitions process start date and the profile transitions latest status change date	Double
Candidate Facts > Profile Transitions Process Time	Average Profile Transitions Step Days In Progress	If the profile transitions step is in progress, the average time in days between the profile transitions step start date and the current date is returned.	Double
Candidate Facts > Profile Transitions Process Time	Average Profile Transitions Step Days To Complete	If the profile transitions step is complete, the average time in days between the profile transitions step start date and the profile transitions step latest status change date is returned.	Double
Candidate Facts > Profile Transitions Process Time	Average Profile Transitions Step Overdue Days	If the profile transitions step is in progress, the average time in days between the profile transitions step due date and the current date is returned.	Double
Candidate Facts > Profile Transitions Process Time	Average Profile Transitions Task Days Since Creation	If the profile transitions task is in progress, the average time in days between the profile transitions task creation date and the current date.	Double
Candidate Facts > Profile Transitions Process Time	Average Profile Transitions Task Overdue Days	If the profile transitions task is in progress and the task is overdue, the average time in days between the profile transitions task due date and the current date.	Double
Candidate Facts > Submission Aging	Average Time Since Last CSW Status Change	Returns the time (in days) between now and the most recent candidate selection workflow status change.	Double
Candidate Facts > Submission Aging	Average Time Since Submission Completion	Returns the time (in days) between now and the candidate submission completion date.	Double
Candidate Facts > Submission Aging	Time On Hold Since Last CSW Status Change	Returns the average time (in days) between now and the most recent candidate selection workflow status change.	Double
Candidate Facts > Submission Aging	Time On Hold Since Submission Completion	Returns average the time (in days) between now and the candidate submission completion date.	Double

Folder Path	Column	Description	Data Type
Candidate Facts > Submission Aging	Time Since Last CSW Status Change	Returns the time (in days) spent on hold between now and the most recent candidate selection workflow status change.	Double
Candidate Facts > Submission Aging	Time Since Submission Completion	Returns the time (in days) the requisition spent on hold between now and the candidate submission completion date.	Int
Candidate Facts > Submission Transitions Process Counts	# Submission Transitions Processes	Returns the number of submission transitions processes.	Int
Candidate Facts > Submission Transitions Process Counts	# Submission Transitions Processes Completed	Returns the number of submission transitions process with a completed status.	Int
Candidate Facts > Submission Transitions Process Counts	# Submission Transitions Processes Health Status Red	Returns the number of submission transitions process where a step or task is overdue.	Int
Candidate Facts > Submission Transitions Process Counts	# Submission Transitions Steps	Returns the number of steps that are associated with a submission transitions process.	Int
Candidate Facts > Submission Transitions Process Counts	# Submission Transitions Steps Overdue	Returns the number of steps, that are associated with a submission transitions process, that are overdue.	Int
Candidate Facts > Submission Transitions Process Counts	# Submission Transitions Tasks	Returns the number of tasks that are associated with a submission transitions process.	Int
Candidate Facts > Submission Transitions Process Counts	# Submission Transitions Tasks Overdue	Returns the number of tasks, that are associated with a submission transitions process, that are overdue.	Int
Candidate Facts > Submission Transitions Process Time	Average Submission Transitions Process Days In Progress	If the submission transitions process is in progress, the average time in days between the submission transitions process start date and the current date is returned.	Double
Candidate Facts > Submission Transitions Process Time	Average Submission Transitions Process Days To Complete	If the transitions process is complete, the average time in days between the submission transitions process start date and the submission transitions latest status change date	Double
Candidate Facts > Submission Transitions Process Time	Average Submission Transitions Step Days In Progress	If the submission transitions step is in progress, the average time in days between the submission transitions step start date and the current date is returned.	Double
Candidate Facts > Submission Transitions Process Time	Average Submission Transitions Step Days To Complete	If the submission transitions step is complete, the average time in days between the submission transitions step start date and the submission transitions step latest status change date is returned.	Double
Candidate Facts > Submission Transitions Process Time	Average Submission Transitions Step Overdue Days	If the submission transitions step is in progress, the average time in days between the submission transitions step due date and the current date is returned.	Double

Folder Path	Column	Description	Data Type
Candidate Facts > Submission Transitions Process Time	Average Submission Transitions Task Days Since Creation	If the submission transitions task is in progress, the average time in days between the submission transitions task creation date and the current date.	Double
Candidate Facts > Submission Transitions Process Time	Average Submission Transitions Task Overdue Days	If the submission transitions task is in progress and the task is overdue, the average time in days between the submission transitions task due date and the current date.	Double
Felx Fields (UDFs) > Profile Transitions Process Flex Fields	{Transitions Process UDF Label} Code	Returns the code of the transition process flex field (UDF).	Varchar
Felx Fields (UDFs) > Profile Transitions Process Flex Fields	{Transitions Process UDF Label} Value	Returns the value of the transition process flex field (UDF).	Varchar
Felx Fields (UDFs) > Submission Transitions Process Flex Fields	{Transitions Process UDF Label} Code	Returns the code of the transition process flex field (UDF).	Varchar
Felx Fields (UDFs) > Submission Transitions Process Flex Fields	{Transitions Process UDF Label} Value	Returns the value of the transition process flex field (UDF).	Varchar
Felx Fields (UDFs) > Transitions Subject Personal Info Flex Fields	{Transitions Subject Personal Info UDF Label} Code	Returns the code of the transition subject personal info flex field (UDF).	Varchar
Felx Fields (UDFs) > Transitions Subject Personal Info Flex Fields	{Transitions Subject Personal Info UDF Label} Value	Returns the value of the transition subject personal info flex field (UDF).	Varchar
Flex Fields (UDFs) > Candidate Flex Fields	UDF*	Returns a candidate flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Candidate Flex Fields	UDSCODE*	Returns a candidate flex field code. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Department Flex Fields	UDF*	Returns a department flex field code. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Department Flex Fields	UDSCODE*	Returns a department flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Department-Requisition Flex Fields	UDF*	Returns a department-requisition flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar

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Folder Path	Column	Description	Data Type
Flex Fields (UDFs) > Department-Requisition Flex Fields	UDSCODE*	Returns a department-requisition flex field code. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Profile Experience Flex Fields	UDF*	Returns a profile experience flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Profile Experience Flex Fields	UDSCODE*	Returns a profile experience flex field code. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Requisition Compensation Flex Fields	UDF*	Returns a requisition compensation flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Requisition Compensation Flex Fields	UDSCODE*	Returns a requisition compensation flex field code. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Requisition Flex Fields	UDF*	Returns a requisition flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Requisition Flex Fields	UDSCODE*	Returns a requisition flex field code. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Submission Education Flex Fields	UDF*	Returns an education flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Submission Education Flex Fields	UDSCODE*	Returns an education flex field code. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Submission Experience Flex Fields	UDF*	Returns a submission experience flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar

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Folder Path	Column	Description	Data Type
Flex Fields (UDFs) > Submission Experience Flex Fields	UDSCODE*	Returns a submission experience flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Submission Job Offer Flex Fields	UDF*	Returns a submission job offer flex field code. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Flex Fields (UDFs) > Submission Job Offer Flex Fields	UDSCODE*	Returns a submission job offer flex field. The first 100 flex fields assigned in SmartOrg are available for reporting. The name will change dynamically to whatever name the flex field was assigned in SmartOrg.	Varchar
Job Submission > Submission Certifications	Submission Certification Display Sequence	Returns the certification display sequence	Int
Job Submission > Submission Certifications	Submission Certification Expiration Date	Returns the certification expiration date	Date
Job Submission > Submission Certifications	Submission Certification Issue Date	Returns the certification issue date	Date
Job Submission > Submission Certifications	Submission Certification Issuing Organization	Returns the certification issuing organization	Varchar
Job Submission > Submission Certifications	Submission Certification Name	Returns the certification name as it was selected from the list.	Varchar
Job Submission > Submission Certifications	Submission Certification Name (Other)	Returns the certification name as it was entered in free text	Varchar
Job Submission > Submission Certifications	Submission Certification Number/ID	Returns the certification identifier	Varchar
Job Submission > Submission CSW Status - Current	Current Reference Status Name	Returns the current reference status name	Varchar
Job Submission > Submission CSW Status - Current	Current Status Name	Returns the current CSW status name	Varchar
Job Submission > Submission CSW Status - Current	Current Status Start Date	Returns the date when the candidate was moved to the current status.	Timestamp
Job Submission > Submission CSW Status - Current	Current Step Name	Returns the current CSW step name	Varchar
Job Submission > Submission CSW Status - Current	Current Workflow Name	Returns the name of the candidate selection workflow used for this job submission.	Varchar
Job Submission > Submission CSW Status - Historical	Historical Reference Status Name	Returns the unique identifier of the event	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission CSW Status - Historical	Historical Status Change History ID	Returns the step move or status change date. This is the date/time assigned by the user.	Double
Job Submission > Submission CSW Status - Historical	Historical Status Event Date	Returns the motives associated with the transaction	Timestamp
Job Submission > Submission CSW Status - Historical	Historical Status Motives	Returns the historical CSW status name	Varchar
Job Submission > Submission CSW Status - Historical	Historical Status Name	Returns the sequence of the status in its step	Varchar
Job Submission > Submission CSW Status - Historical	Historical Status Sequence	Returns the historical CSW step name	Double
Job Submission > Submission CSW Status - Historical	Historical Step Name	Returns the sequence of the step in its workflow	Varchar
Job Submission > Submission CSW Status - Historical	Historical Step Sequence	Returns who changed the candidate to this status	Double
Job Submission > Submission CSW Status - Historical	Historical Step/Status Changed By User	Returns the historical reference status name	Varchar
Job Submission > Submission CSW Status - Historical	Historical Step/Status Comments	Returns the comments associated with the csw event.	Varchar
Job Submission > Submission CSW Status - Historical	Historical Step/Status Details	Returns the detail text associated with the csw event.	Varchar
Job Submission > Submission CSW Status - Historical	Historical Step/Status Duration	Returns how long the candidate was in this status	Double
Job Submission > Submission CSW Status - Historical	Historical Step/Status Is Latest Offer	Returns whether or not the offer step/status events are associated with the job submission's most recent (max) offer sequence.	Char
Job Submission > Submission CSW Status - Historical	Historical Step/Status Offer ID	Returns the offer id associated with the historical event.	Double
Job Submission > Submission CSW Status - Historical	Historical Step/Status Was Reverted	Returns whether or not the step or status was reverted.	Char
Job Submission > Submission CSW Status - Historical	Historical Workflow Name	Returns the name of the candidate selection workflow used for this job submission.	Varchar
Job Submission > Submission CSW Status - Historical	Is CSW Status Change	Returns whether or not the CSW event is a status change.	Char

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Folder Path	Column	Description	Data Type
Job Submission > Submission CSW Status - Historical	Is CSW Step Move	Returns whether or not the CSW event is a step move.	Char
Job Submission > Submission CSW Status - Historical	Submission Historical Status End Date	Returns the date/time when the status ended	Timestamp
Job Submission > Submission CSW Status - Historical	Submission Historical Status Start Date	Returns the step move or status change date. This is the date/time when the change occurs in the system.	Timestamp
Job Submission > Submission Dates	1st Interviewed Date	Returns the most recent date/time when the candidate was moved to the 1st Interview reference status.	Timestamp
Job Submission > Submission Dates	2nd Interviewed Date	Returns the most recent date/time when the candidate was moved to the 2nd Interview reference status.	Timestamp
Job Submission > Submission Dates	3rd Interviewed Date	Returns the most recent date/time when the candidate was moved to the 3rd Interview reference status.	Timestamp
Job Submission > Submission Dates	Declined Date	Returns the most recent date/time when the candidate was moved to the Declined reference status.	Timestamp
Job Submission > Submission Dates	Expiration Date	Returns the date when the job submission is set to expire	Timestamp
Job Submission > Submission Dates	Hire Start Date	Returns the hire start date/time as entered when the candidate is moved to the Hired reference status	Timestamp
Job Submission > Submission Dates	Hired Date	Returns the most recent date/time when the candidate was moved to the Hired reference status.	Timestamp
Job Submission > Submission Dates	Most Recent Submission Date	Returns the date/time when the most recent candidate submission was created	Timestamp
Job Submission > Submission Dates	Offer Accepted Date	Returns the date/time when the candidate accepted the job offer	Timestamp
Job Submission > Submission Dates	Offer Actual Start Date	Returns the hire start date as entered in the candidate job offer section	Timestamp
Job Submission > Submission Dates	Offer Decision Date	Returns the date/time when the candidate either accepted or refused the job offer	Datetime
Job Submission > Submission Dates	Offer Extended Date	Returns the date/time when the candidate was extended the job offer	Timestamp
Job Submission > Submission Dates	Offer Refused Date	Returns the date/time when the candidate refused the job offer	Timestamp
Job Submission > Submission Dates	Offer Target Start Date	Returns the target start date as entered in the candidate job offer section	Datetime
Job Submission > Submission Dates	Offered Date	Returns the most recent date/time when the candidate was moved to the Offer reference status.	Timestamp

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Folder Path	Column	Description	Data Type
Job Submission > Submission Dates	Rejected Date	Returns the most recent date/time when the candidate was moved to the Rejected reference status.	Timestamp
Job Submission > Submission Dates	Reviewed Date	Returns the most recent date/time when the candidate was moved to the Review reference status.	Timestamp
Job Submission > Submission Dates	Submission Completed Date	Returns the date/time when the submission was completed	Timestamp
Job Submission > Submission Dates	Submission Created Date	Returns the date/time when the submission was created	Timestamp
Job Submission > Submission Dates	Submission Reference Date	Returns the referral date.	Datetime
Job Submission > Submission Dates	Submission Reference End Date	Returns the referral end date.	Datetime
Job Submission > Submission Dates	Tested Date	Returns the most recent date/time when the candidate was moved to the Testing reference status.	Timestamp
Job Submission > Submission Education History	Submission Education Degree Type	Returns the educational degree type achieved	Varchar
Job Submission > Submission Education History	Submission Education Display Sequence	Returns the education display sequence	Int
Job Submission > Submission Education History	Submission Education GPA	Returns the job application education GPA	Double
Job Submission > Submission Education History	Submission Education GPA (Out Of)	Returns the job application education GPA range	Double
Job Submission > Submission Education History	Submission Education Graduation Date	Returns the educational program graduation date	Datetime
Job Submission > Submission Education History	Submission Education Graduation Date Is Projected	Returns whether or not the education program graduation date is projected	Char
Job Submission > Submission Education History	Submission Education Institution Country	Returns the country of the educational institution	Varchar
Job Submission > Submission Education History	Submission Education Institution Name	Returns the educational institution as it was selected from the list.	Varchar
Job Submission > Submission Education History	Submission Education Institution Name (Other)	Returns the educational institution as it was entered in free text.	Varchar
Job Submission > Submission Education History	Submission Education Institution State/Province	Returns the state/province of the educational institution	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Education History	Submission Education Is Most Recent Based On Graduation Date	Filters so that only the most recent education is shown, based on the graduation date.	Char
Job Submission > Submission Education History	Submission Education Program Name	Returns the educational program as it was selected from the list.	Varchar
Job Submission > Submission Education History	Submission Education Program Name (Other)	Returns the educational program as it was entered in free text.	Varchar
Job Submission > Submission Education History	Submission Education Start Date	Returns the educational program start date	Datetime
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Answer Comments	Returns the comments added to the answer.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Answer Description (BL)	Returns the answer description when the answer is selected on a single or multiple select question.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Answer Text/Date	Returns the answer when the question type is either text or date.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Answer Total Score	Returns the best possible weight achievable on the question divided by the total weight rated for the candidate.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Answer Total Weight	Returns the aggregated candidate weight on a per question basis, mostly relevant when the question is multiple choice.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Answer Weight	Returns the weight associated with the candidate answer.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Current Status	Returns the current status of the evaluation.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Days Since Last Modified Date	Returns the days between the request last modified date and the report refresh date.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Desired Skill Score	Returns the desired skill score for the questionnaire.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Evaluator Email	Returns the evaluator email.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Evaluator Name	Returns the evaluator name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Event Type Code	Returns the event type (interview or feedback)	Varchar

Folder Path	Column	Description	Data Type
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Expiry Date	Returns the expiration date of the evaluation.	Timestamp
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Location Notes (BL)	Returns the interview location notes in the base locale.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Name (BL)	Returns the interview name in the base locale.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Participant Notes (BL)	Returns the interview participant notes in the base locale.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Resource Email	Returns the interview resource email.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Resource Name	Returns the interview resource name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Resource Type Name	Returns the interview resource type name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Short Name (BL)	Returns the interview short name in the base locale.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Start Date	Returns the interview date of the evaluation.	Timestamp
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Interview Status	Returns the current interview status.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Max Possible Question Score	Returns the max possible question score for the questionnaire.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Max Possible Skill Score	Returns the max possible skill score for the questionnaire.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Question Category (BL)	Returns the question category.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Question Description (BL)	Returns the question description.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Question Display Sequence	Returns the question display sequence.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Question Display Type	Returns the question display type.	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Question Max Weight	Returns the best possible weight the candidate can achieve on the question. If the question is multiple choice, all answer weights are added. If the question is single choice, the max weight is used.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Question Short Name (BL)	Returns the question short name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Questionnaire Category (BL)	Returns the evaulation questionnaire category.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Questionnaire Name (BL)	Returns the evaluation questionnaire name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Questionnaire Short Name (BL)	Returns the evaluation questionnaire short name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Questions Total Percent Score	Returns the questions total earned percent score.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Questions Total Score	Returns the questions total earned score.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Recommendation Text	Returns the recommendation text associated with the evaluation.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Request Created By Email	Returns the email of the user who created the request.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Request Created By Name	Returns the name of the user who created the request.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Request Created Date	Returns the request creation date.	Timestamp
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Request ID	Returns the evaluation request database identifier.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Request Modified By Email	Returns the email of the user who last modified the request.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Request Modified By Name	Returns the name of the user who last modified the request.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Request Modified Date	Returns the request last modification date.	Timestamp
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Category (BL)	Returns the skill category.	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Desired Rating Value	Returns the skill desired rating value.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Display Sequence	Returns the skill display sequence.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Name (BL)	Returns the skill name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Rating Name (BL)	Returns the selected skill rating name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Rating Scale Value	Returns the skill max possible rating, based on the questionnaire scale.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Rating Short Name (BL)	Returns the selected skill rating short name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Rating Value	Returns the selected skill rating value.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skill Short Name (BL)	Returns the skill short name.	Varchar
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skills Total Percent Score	Returns the skills total earned percent score.	Double
Job Submission > Submission Evaluation Questionnaires	Submission Evaluation Skills Total Score	Returns the skills total earned score.	Double
Job Submission > Submission General Info	Career Site Application Flow Name (BL)	Returns the name of the submission flow of the career site at the time the candidate applied, in its base locale.	Varchar
Job Submission > Submission General Info	Career Site Last Page Reached Name (BL)	Returns the name of the last submission flow page reached at the time the candidate applied, in its base locale.	Varchar
Job Submission > Submission General Info	Career Site Last Page Reached Sequence	Returns the sequence of the last submission flow page reached at the time the candidate applied.	Int
Job Submission > Submission General Info	Career Site Name (BL)	Returns the job application career site at the time the candidate applied, in its base locale.	Varchar
Job Submission > Submission General Info	Consented To Background Check	Returns whether or not the candidate consented to the background check	Char
Job Submission > Submission General Info	Disqualification Results	Returns whether or not the candidate passed the disqualification questions	Varchar
Job Submission > Submission General Info	Disqualification Results Date	Returns the date when the disqualification results were determined	Timestamp

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Folder Path	Column	Description	Data Type
Job Submission > Submission General Info	Is Deleted	Returns whether or not the job submission is deleted	Char
Job Submission > Submission General Info	Matched From - Requisition Number	Returns the requisition identifier corresponding the requisition the candidate was matched from	Varchar
Job Submission > Submission General Info	Recruiter Score	Returns the score the recruiter assigned to the candidate	Double
Job Submission > Submission General Info	Reject/Decline Motives	Returns the candidate rejection/declination motives	Varchar
Job Submission > Submission General Info	Reject/Decline Motives (Auto)	Returns the candidate rejection/declination motives when they are automatically generated by the system	Varchar
Job Submission > Submission General Info	Self-Withdrew From Career Site	Returns whether or not the candidate self-withdrew from the career site.	Char
Job Submission > Submission General Info	Submission Identifier	Returns the submission unique identifier	Double
Job Submission > Submission General Info	Submission Is Completed	Returns whether or not the submission is complete	Char
Job Submission > Submission General Info	Submission Is Internal	Returns whether or not the candidate was internal as of when he/she created the submission	Char
Job Submission > Submission General Info	Submission Locale	Returns the locale of the submission	Varchar
Job Submission > Submission General Info	Submission Medium	Returns the submission medium	Varchar
Job Submission > Submission General Info	Submission Originator	Returns the submission's originator type i.e. "Agent", "Candidate", "Recruiter", "Referrer"	Varchar
Job Submission > Submission Job Offer	Days Per Week	Returns the days per week	Double
Job Submission > Submission Job Offer	Hours Per Day	Returns the hours per day	Double
Job Submission > Submission Job Offer	Is Most Recent	Returns whether or not the job offer is the most recent on the job application record.	Varchar
Job Submission > Submission Job Offer	Refused Offer Comments	Returns the comments associated with the job offer refusal	Varchar
Job Submission > Submission Job Offer	Relocation	Returns the relocation amount	Double
Job Submission > Submission Job Offer	Salary (Annual)	Returns the annual salary	Double
Job Submission > Submission Job Offer	Salary (By Pay Basis)	Returns the salary by pay basis	Double
Job Submission > Submission Job Offer	Sequence	Returns the sequence of the job offer	Int
Job Submission > Submission Job Offer	Sign-On Bonus	Returns the sign-on bonus	Double

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Folder Path	Column	Description	Data Type
Job Submission > Submission Job Offer	Status	Returns the status of the job offer	Varchar
Job Submission > Submission Job Offer	Submission Job Offer Currency	Returns the offer currency	Varchar
Job Submission > Submission Job Offer	Submission Job Offer Pay Basis	Returns the pay basis	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 1	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 10	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 2	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 3	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 4	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 5	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 6	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 7	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 8	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Code 9	Returns the code of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 1	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 10	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 2	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 3	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 4	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 5	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 6	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 7	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 8	Returns the value of the passport service request's input parameter	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Passport	Submission Passport Input Parameter - Value 9	Returns the value of the passport service request's input parameter	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 1	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 10	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 11	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 12	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 13	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 14	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 15	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 16	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 17	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 18	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 19	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 2	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 20	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 21	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 22	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 23	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 24	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 25	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 26	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 27	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 28	Returns the code of the passport service results	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Passport	Submission Passport Result - Code 29	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 3	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 30	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 4	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 5	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 6	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 7	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 8	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Code 9	Returns the code of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 1	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 10	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 11	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 12	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 13	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 14	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 15	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 16	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 17	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 18	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 19	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 2	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 20	Returns the value of the passport service results	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Passport	Submission Passport Result - Value 21	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 22	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 23	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 24	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 25	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 26	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 27	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 28	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 29	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 3	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 30	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 4	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 5	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 6	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 7	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 8	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Passport Result - Value 9	Returns the value of the passport service results	Varchar
Job Submission > Submission Passport	Submission Request Is Most Recent Request Per Provider/Alias	Filters so that only the most recent passport service request is displayed. This is calculated for each provider+alias combination.	Char
Job Submission > Submission Passport	Submission Service Alias	Returns the passport service alias	Varchar
Job Submission > Submission Passport	Submission Service External Reference Number	Returns the passport service request's external reference number	Varchar
Job Submission > Submission Passport	Submission Service Internal Reference Number	Returns the passport service request's internal reference number	Double

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Folder Path	Column	Description	Data Type
Job Submission > Submission Passport	Submission Service Name	Returns the passport service name	Varchar
Job Submission > Submission Passport	Submission Service Provider	Returns the passport service provider	Varchar
Job Submission > Submission Passport	Submission Service Request Date	Returns the date/time when the passport service was requested	Timestamp
Job Submission > Submission Passport	Submission Service Request Status	Returns the current status of the passport service request	Varchar
Job Submission > Submission Passport	Submission Service Requester	Returns the requester of the passport service	Varchar
Job Submission > Submission Passport	Submission Service Status Log Date	Returns the date/time the passport service request was changed to its current status	Timestamp
Job Submission > Submission Passport	Submission Service Type	Returns the passport service type	Varchar
Job Submission > Submission Prescreening Results	Is Ace	Returns yes or no value based on whether the submission was Ace.	Char
Job Submission > Submission Prescreening Results	Minimum Requirements Met	Returns yes or no value based on wheather the submission met minimum requirements.	Char
Job Submission > Submission Prescreening Results	Prescreening Score	Returns the prescreening score from the submission.	Int
Job Submission > Submission Referral	Submission Current Referral Status	Returns the current status of the referral	Varchar
Job Submission > Submission Referral	Submission Is Currently Referred	Returns whether or not the candidate is currently bound to an active referral.	Char
Job Submission > Submission Referral	Submission Is Currently Referred By Agent	Returns whether or not the candidate is currently bound to an active agent referral.	Char
Job Submission > Submission Referral	Submission Referral Is Most Recent	Returns whether or not the referral is the most recent for the job submission.	Char
Job Submission > Submission Referral	Submission Referrer Email	Returns the email of the referrer.	Varchar
Job Submission > Submission Referral	Submission Referrer Is Employee	Returns whether or not the referrer is an employee.	Char
Job Submission > Submission Referral	Submission Referrer Name	Returns the name of the referrer.	Varchar
Job Submission > Submission Referral	Submission Referring Agency Name (BL)	Returns the referring agent's agency, in its base locale.	Varchar
Job Submission > Submission Referral	Submission Referring Agent Email	Returns the email of the agent.	Varchar
Job Submission > Submission Referral	Submission Referring Agent Name	Returns the name of the agent.	Varchar
Job Submission > Submission Source	Submission Source (Agent)	Returns the full name of the agent when the source is an agency.	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Source	Submission Source (BL)	Returns the submission source, in its base locale	Varchar
Job Submission > Submission Source	Submission Source (ML)	Returns the submission source. Use the element "Source Locale" to filter on the appropriate locale.	Varchar
Job Submission > Submission Source	Submission Source Event Identifier	Returns the submission source event identifier	Varchar
Job Submission > Submission Source	Submission Source Event Name	Returns the submission source event name	Varchar
Job Submission > Submission Source	Submission Source Explanation	Returns the submission source explanation	Varchar
Job Submission > Submission Source	Submission Source Identifier	Returns the source identifier as seen in the source configuration page	Varchar
Job Submission > Submission Source	Submission Source Is Available	Returns whether or not the source is currently available.	Char
Job Submission > Submission Source	Submission Source Locale	Returns the locale of the submission source.	Varchar
Job Submission > Submission Source	Submission Source Type	Returns the recruitment source type, based on its default display label.	Varchar
Job Submission > Submission Source	Submission Source Type (Display As)	Returns the recruitment source type, as displayed in the recruiting administration application, under the "display as" column.	Varchar
Job Submission > Submission Source	Submission Source Was Automatically Entered	Returns whether or not the source was automatically populated into the candidate file	Char
Job Submission > Submission Tracking History	Submission History Transaction By User	Returns the user responsible for the transaction	Varchar
Job Submission > Submission Tracking History	Submission History Transaction Date	Returns the date associated with the transaction	Timestamp
Job Submission > Submission Tracking History	Transaction Comments	Returns the comments associated with the transaction.	Varchar
Job Submission > Submission Tracking History	Transaction Details	Returns the detail text associated with the transaction.	Varchar
Job Submission > Submission Tracking History	Transaction Event Date	Returns the date that the user specified when completing the transaction	Timestamp
Job Submission > Submission Tracking History	Transaction Event Name	Returns the name of the event associated with the transaction	Varchar
Job Submission > Submission Tracking History	Transaction Identifier	Returns the identifier of the transaction, as generated automatically from the database	Double
Job Submission > Submission Tracking History	Transaction is Most Recent	Returns whether or not the transaction is the most recent for the candidate submission, based on its sequence of entry.	Char
Job Submission > Submission Transitions Process	Submission Transitions Next Step Code	Returns the submission transitions next step code	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Transitions Process	Submission Transitions Next Step Name (BL)	Returns the submission transitions next step name in its base locale	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Process Code	Returns the submission transitions process code	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Process Current Status	Returns the submission transitions process current status	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Process Days In Progress	If the submission transitions process is in progress, the time in days between the submission transitions process start date and the current date is returned.	Int
Job Submission > Submission Transitions Process	Submission Transitions Process Days To Complete	If the submission transitions process is complete, the time in days between the profile transitions process start date and the profile transitions latest status change date.	Int
Job Submission > Submission Transitions Process	Submission Transitions Process End Date	Returns the submission transitions process end date	Timestamp
Job Submission > Submission Transitions Process	Submission Transitions Process Is Latest (By Type)	Returns whether or not the submission transitions process is latest (by type)	Char
Job Submission > Submission Transitions Process	Submission Transitions Process Is Visible	Returns whether or not the submission transitions process is visible	Char
Job Submission > Submission Transitions Process	Submission Transitions Process Latest Status Change Date	Returns the submission transitions process latest status change date	Timestamp
Job Submission > Submission Transitions Process	Submission Transitions Process Name (BL)	Returns the process name in its base locale	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Process Owner Email	Returns the submission transitions process owner email	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Process Owner Full Name	Returns the submission transitions process owner full name	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Process Percent Complete	Returns the submission transitions process percent complete	Double
Job Submission > Submission Transitions Process	Submission Transitions Process Progression Health Is Red	Returns yes if a step or task in the submission transitions process is overdue.	Char
Job Submission > Submission Transitions Process	Submission Transitions Process Start Date	Returns the submission transitions process start date	Timestamp
Job Submission > Submission Transitions Process	Submission Transitions Process Supervisor Email	Returns the submission transitions process supervisor email	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Transitions Process	Submission Transitions Process Supervisor Full Name	Returns the submission transitions process supervisor full name	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Process Type	Returns the submission transitions process type	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Step Code	Returns the submission transitions step code	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Step Current Status	Returns the submission transitions step current status	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Step Days In Progress	If the submission transitions step is complete, the time in days between the submission transitions step start date and the submission transitions step latest status change date is returned.	Int
Job Submission > Submission Transitions Process	Submission Transitions Step Days To Complete	If the submission transitions step is complete, the time in days between the submission transitions step start date and the submission transitions step latest status change date is returned.	Int
Job Submission > Submission Transitions Process	Submission Transitions Step Due Date	Returns the submission transitions step due date	Datetime
Job Submission > Submission Transitions Process	Submission Transitions Step End Date	Returns the submission transitions step end date	Timestamp
Job Submission > Submission Transitions Process	Submission Transitions Step Expected Duration	Returns the submission transitions step expected duration	Double
Job Submission > Submission Transitions Process	Submission Transitions Step Is Overdue	Returns the submission transitions step is overdue	Char
Job Submission > Submission Transitions Process	Submission Transitions Step Latest Status Change Date	Returns the submission transitions step latest status change date	Timestamp
Job Submission > Submission Transitions Process	Submission Transitions Step Name (BL)	Returns the submission transitions step name in its base locale	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Step Overdue Days	If the submission transitions step is in progress, the time in days between the submission transitions step due date and the current date is returned.	Int
Job Submission > Submission Transitions Process	Submission Transitions Step Start Date	Returns the submission transitions step start date	Timestamp
Job Submission > Submission Transitions Process	Submission Transitions Step Sub Process Code	Returns the submission transitions step sub process code	Varchar

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Folder Path	Column	Description	Data Type
Job Submission > Submission Transitions Process	Submission Transitions Step Sub Process Name (BL)	Returns the step sub-process name in its base locale	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Step Type Code	Returns the submission transitions step type code	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Action	Returns the submission transitions task action	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Assignee Department	Returns the submission transitions task assignee department	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Assignee Email	Returns the submission transitions task assignee email	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Assignee Name	Returns the submission transitions task assignee name	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Assignment Date	Returns the submission transitions task assignment date	Datetime
Job Submission > Submission Transitions Process	Submission Transitions Task Code	Returns the submission transitions task code	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Comments	Returns the submission transitions task comments	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Creation Date	Returns the submission transitions task creation date	Timestamp
Job Submission > Submission Transitions Process	Submission Transitions Task Current Status	Returns the submission transitions task current status	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Days Since Creation	If the submission transitions task is in progress, the time in days between the submission transitions task creation date and the current date.	Int
Job Submission > Submission Transitions Process	Submission Transitions Task Due Date	Returns the submission transitions task due date	Timestamp
Job Submission > Submission Transitions Process	Submission Transitions Task Is Overdue	Returns whether or not the submission transitions task is overdue	Char
Job Submission > Submission Transitions Process	Submission Transitions Task Name (BL)	Returns the name of task in its base locale	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Overdue Days	If the submission transitions task is in progress and the task is overdue, the time in days between the submission transitions task due date and the current date.	Int

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Folder Path	Column	Description	Data Type
Job Submission > Submission Transitions Process	Submission Transitions Task Owner Email	Returns the submission transitions task owner email	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Owner Name	Returns the submission transitions task owner name	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Related Source (BL)	Returns the task related source in its base locale	Varchar
Job Submission > Submission Transitions Process	Submission Transitions Task Type	Returns the submission transitions task type	Varchar
Job Submission > Submission Work Experience History	Submission Experience Display Sequence	Returns the work experience display sequence	Int
Job Submission > Submission Work Experience History	Submission Experience Employer Name	Returns the work experience employer as it was selected from the list.	Varchar
Job Submission > Submission Work Experience History	Submission Experience Employer Name (Other)	Returns the work experience employer as it was entered in free text.	Varchar
Job Submission > Submission Work Experience History	Submission Experience End Date	Returns the work experience end date	Datetime
Job Submission > Submission Work Experience History	Submission Experience Is Current Job	Returns whether or not the candidate is currently working for this employer	Char
Job Submission > Submission Work Experience History	Submission Experience Is Most Recent Based On Start Date	Filters so that only the most recent experience is shown, based on the work start date.	Char
Job Submission > Submission Work Experience History	Submission Experience Job Title	Returns the work experience job title as it was selected from the list.	Varchar
Job Submission > Submission Work Experience History	Submission Experience Job Title (Other)	Returns the work experience job title as it was entered in free text.	Varchar
Job Submission > Submission Work Experience History	Submission Experience Start Date	Returns the work experience start date	Datetime
Requisition Administration > Requisition Admin Other	Additional Information	Returns requisition additional information.	Varchar
Requisition Administration > Requisition Admin Other	Citizenship Status	Returns the required citizenship status for the requisition.	Varchar
Requisition Administration > Requisition Admin Other	Overtime Status	Returns the overtime status of the requisition.	Varchar
Requisition Administration > Requisition Budgeting	Is Employee Referral Enabled	Returns whether or not the requisition is budgeted for employee referrals.	Varchar

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Folder Path	Column	Description	Data Type
Requisition Administration > Requisition Budgeting	Is Public Referral Enabled	Returns whether or not the requisition is budgeted for public referrals.	Varchar
Requisition Administration > Requisition Compensation	High Quartile Salary	Returns the high quartile salary of the requisition	Double
Requisition Administration > Requisition Compensation	Job Grade	Returns the requisition job grade	Varchar
Requisition Administration > Requisition Compensation	Low Quartile Salary	Returns the low quartile salary of the requisition	Double
Requisition Administration > Requisition Compensation	Maximum Salary	Returns the maximum salary of the requisition	Double
Requisition Administration > Requisition Compensation	Midpoint Salary	Returns the midpoint salary of the requisition	Double
Requisition Administration > Requisition Compensation	Minimum Salary	Returns the minimum salary of the requisition	Double
Requisition Administration > Requisition Compensation	Req. Compensation Currency	Returns the requisition compensation currency	Varchar
Requisition Administration > Requisition Compensation	Req. Pay Basis	Returns the pay basis of the requisition	Varchar
Requisition Administration > Requisition CSW	Candidate Selection Workflow Name	Returns the candidate selection workflow associated with the requisition.	Varchar
Requisition Administration > Requisition Regulations	EE Occupational Group	If the position is offered in Canada, this is the employment equity occupational group associated with the requisition. Note: There can be many EE Groups for each requisition.	Varchar
Requisition Administration > Requisition Regulations	EEO Establishment	If the position is offered in the United States, this is the EEO establishment associated with the requisition.	Varchar
Requisition Administration > Requisition Regulations	EEO Job Category	Returns the requisition's EEO job category.	Varchar
Requisition Administration > Requisition Regulations	EEO Job Group	Returns the requisition's EEO job group.	Varchar
Requisition Approval History	Approver 1 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 1 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 1 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 1 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 1 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 10 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 10 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 10 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 10 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 10 Sequence	Returns the sequence of the approver.	Double

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Folder Path	Column	Description	Data Type
Requisition Approval History	Approver 11 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 11 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 11 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 11 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 11 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 12 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 12 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 12 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 12 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 12 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 2 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 2 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 2 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 2 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 2 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 3 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 3 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 3 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 3 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 3 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 4 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 4 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 4 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 4 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 4 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 5 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 5 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 5 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 5 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 5 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 6 Decision	Returns the decision of the approver.	Varchar

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Folder Path	Column	Description	Data Type
Requisition Approval History	Approver 6 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 6 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 6 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 6 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 7 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 7 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 7 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 7 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 7 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 8 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 8 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 8 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 8 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 8 Sequence	Returns the sequence of the approver.	Double
Requisition Approval History	Approver 9 Decision	Returns the decision of the approver.	Varchar
Requisition Approval History	Approver 9 Decision Date	Returns the date/time when the approver made the decision.	Timestamp
Requisition Approval History	Approver 9 Email	Returns the email of the approver.	Varchar
Requisition Approval History	Approver 9 Full Name	Returns the name of the approver.	Varchar
Requisition Approval History	Approver 9 Sequence	Returns the sequence of the approver.	Double
Requisition Dates	External Closing Date	Returns the date/time when the requisition closes externally.	Timestamp
Requisition Dates	External Opening Date	Returns the date/time when the requisition opens externally.	Timestamp
Requisition Dates	First Fully Approved Date	Returns the date/time when the requisition successfully went through the full approval process for the first time.	Timestamp
Requisition Dates	First Sourced After Latest Approved Date	Returns the first time the requisition was put into the sourcing status after the most recent time the requisition the requisition was put into the approved status.	Timestamp
Requisition Dates	First Sourced Date	Returns the date/time when the requisition was sourced for the first time.	Timestamp
Requisition Dates	First To Be Approved Date	Returns the date when the requisition status was changed to "To Be Approved" for the first time.	Timestamp
Requisition Dates	Internal Closing Date	Returns the date/time when the requisition closes internally.	Timestamp

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Folder Path	Column	Description	Data Type
Requisition Dates	Internal Opening Date	Returns the date/time when the requisition opens internally.	Timestamp
Requisition Dates	Last Position Accepted Date	Returns the date/time when the last position was accepted on the requisition.	Timestamp
Requisition Dates	Latest Cancelled Date	Returns the date/time when the requisition was most recently cancelled.	Timestamp
Requisition Dates	Latest Filled Date	Returns the date/time when the requisition was most recently filled.	Timestamp
Requisition Dates	Latest Fully Approved Date	Returns the date/time when the requisition most recently successfully went through the full approval process.	Timestamp
Requisition Dates	Latest On Hold Date	Returns the date/time when the requisition was most recently put into the on hold status.	Timestamp
Requisition Dates	Latest Reactivation Date	Returns the date/time when the requisition was most recently reactivated from the on hold status.	Timestamp
Requisition Dates	Req. Creation Date	Returns the date/time when the requisition was created.	Timestamp
Requisition Dates	Req. Last Modified Date	Returns the date/time when the requisition was last modified.	Timestamp
Requisition Dates	Target Start Date	Returns the requisition's target start date.	Datetime
Requisition Evaluation Questionnaires	Req. Evaluation Questionnaire Category (BL)	Returns the questionnaire category.	Varchar
Requisition Evaluation Questionnaires	Req. Evaluation Questionnaire Evaluator Email	Returns the evaluator email.	Varchar
Requisition Evaluation Questionnaires	Req. Evaluation Questionnaire Evaluator Name	Returns the evaluator name.	Varchar
Requisition Evaluation Questionnaires	Req. Evaluation Questionnaire ID	Returns the questionnaire database identifier.	Double
Requisition Evaluation Questionnaires	Req. Evaluation Questionnaire Name (BL)	Returns the questionnaire name.	Varchar
Requisition Evaluation Questionnaires	Req. Evaluation Questionnaire Short Name (BL)	Returns the questionnaire short name.	Varchar
Requisition Facts > Requisition Aging	Average Time On Hold In Current Hold Period	Returns the time (in days) the requisition has been on hold in its recent on hold cycle. This is only for requisitions currently on hold.	Double
Requisition Facts > Requisition Aging	Average Time Since Creation	Returns the time (in days) the requisition spent on hold between now and the requisition creation date.	Double
Requisition Facts > Requisition Aging	Average Time Since Creation (Minus TOH)	Returns the time (in days) the requisition spent on hold between now and the first occurrence of the requisition being changed to the approved status.	Double

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Folder Path	Column	Description	Data Type
Requisition Facts > Requisition Aging	Average Time Since First Approval	Returns the time (in days) the requisition spent on hold between now and the first occurrence of the requisition being changed to the sourcing status.	Double
Requisition Facts > Requisition Aging	Average Time Since First Approval (Minus TOH)	Returns the time (in days) the requisition spent on hold between now and the most recent occurrence of the requisition being changed to the approved status.	Double
Requisition Facts > Requisition Aging	Average Time Since First Sourcing	Returns the time (in days) the requisition spent on hold between now and the first occurrence of the requisition being changed to the sourcing status after the most recent occurrence of the requisition being changed to the approved status.	Double
Requisition Facts > Requisition Aging	Average Time Since First Sourcing (Minus TOH)	Returns the time (in days) between now and the requisition creation date.	Double
Requisition Facts > Requisition Aging	Average Time Since Most Recent Approval	Returns the time (in days) between now and the first occurrence of the requisition being changed to the approved status.	Double
Requisition Facts > Requisition Aging	Average Time Since Most Recent Approval (Minus TOH)	Returns the time (in days) between now and the first occurrence of the requisition being changed to the sourcing status.	Double
Requisition Facts > Requisition Aging	Average Time Since Most Recent Initial Sourcing (Minus TOH)	Returns the time (in days) between now and the most recent occurrence of the requisition being changed to the approved status.	Double
Requisition Facts > Requisition Aging	Average Time Since Most Recent Reactivation	Returns the time (in days) between now and the first occurrence of the requisition being changed to the sourcing status after the most recent occurrence of the requisition being changed to the approved status.	Double
Requisition Facts > Requisition Aging	AverageTime Since Most Recent Initial Sourcing	Returns the time (in days) between now and the most recent occurrence of the requisition being reactivated from the on hold status.	Double
Requisition Facts > Requisition Aging	Time Closed Since Creation	Returns the average time (in days) the requisition has been on hold in its recent on hold cycle. This is only for requisitions currently on hold.	Double
Requisition Facts > Requisition Aging	Time Closed Since First Approval	Returns the average time (in days) between now and the requisition creation date.	Double
Requisition Facts > Requisition Aging	Time Closed Since First Sourcing	Returns the average time (in days) between now and the requisition creation date, minus the time the requisition spent on hold between those two dates.	Double
Requisition Facts > Requisition Aging	Time Left Until Target Start Date	Returns the average time (in days) between now and the first occurrence of the requisition being changed to the approved status.	Double
Requisition Facts > Requisition Aging	Time On Hold In Current Hold Period	Returns the average time (in days) between now and the first occurrence of the requisition being changed to the approved status, minus the time on hold the requisition spent between the two dates.	Double

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Folder Path	Column	Description	Data Type
Requisition Facts > Requisition Aging	Time On Hold Since Creation	Returns the average time (in days) between now and the first occurrence of the requisition being changed to the sourcing status.	Double
Requisition Facts > Requisition Aging	Time On Hold Since First Approval	Returns the average time (in days) between now and the first occurrence of the requisition being changed to the sourcing status, minus the time on hold the requisition spent between the two dates.	Double
Requisition Facts > Requisition Aging	Time On Hold Since First Sourcing	Returns the average time (in days) between now and the most recent occurrence of the requisition being changed to the approved status.	Double
Requisition Facts > Requisition Aging	Time On Hold Since Most Recent Approval	Returns the average time (in days) between now and the most recent occurrence of the requisition being changed to the approved status, minus the time on hold the requisition spent between the two dates.	Double
Requisition Facts > Requisition Aging	Time On Hold Since Most Recent Initial Sourcing	Returns the average time (in days) between now and the first occurrence of the requisition being changed to the sourcing status after the most recent occurrence of the requisition being changed to the approved status, minus time spent on hold between both dates.	Double
Requisition Facts > Requisition Aging	Time Since Creation	Returns the average time (in days) between now and the most recent occurrence of the requisition being reactivated from the on hold status.	Int
Requisition Facts > Requisition Aging	Time Since First Approval	Returns the average time (in days) between now and the first occurrence of the requisition being changed to the sourcing status after the most recent occurrence of the requisition being changed to the approved status.	Int
Requisition Facts > Requisition Aging	Time Since First Sourcing	Returns the time (in days) the requisition spent closed between now and the requisition creation date.	Int
Requisition Facts > Requisition Aging	Time Since Most Recent Approval	Returns the time (in days) the requisition spent closed between now and the first occurrence of the requisition being changed to the approved status.	Int
Requisition Facts > Requisition Aging	Time Since Most Recent Initial Sourcing	Returns the time (in days) the requisition spent closed between now and the first occurrence of the requisition being changed to the sourcing status.	Int
Requisition Facts > Requisition Aging	Time Since Most Recent Reactivation	Returns the time (in days) between now and the requisition target start date	Int
Requisition Facts > Requisition Counts	# Openings	Returns the number of openings on the requisition(s).	Int
Requisition Facts > Requisition Counts	# Openings Left To Fill (Accepted)	Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates	Int

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Folder Path	Column	Description	Data Type
		with a current standard offer status of Accepted where the candidate does not have a reference status of Declined or Rejected	
Requisition Facts > Requisition Counts	# Openings Left To Fill (Hired)	Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates in the hired reference status.	Int
Requisition Facts > Requisition Counts	# Requisitions	Returns the number of requisitions.	Int
Requisition Facts > Requisition Counts	# Requisitions By Recruiter	Returns the number of requisitions divided by the number of recruiters.	Double
Requisition Facts > Requisition Counts	# Requisitions Currently Approved	Returns the number of requisitions currently in approved status.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently Cancelled	Returns the number of requisitions currently in cancelled status.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently Draft	Returns the number of requisitions currently in draft status.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently Expired	Returns the number of requisitions currently in expired status on at least one career site or internet job board.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently Filled	Returns the number of requisitions currently in filled status.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently On Hold	Returns the number of requisitions currently in on hold status.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently Posted	Returns the number of requisitions currently in posted status on at least one career site or internet job board.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently Sourcing	Returns the number of requisitions currently in sourcing status.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently To Be Approved	Returns the number of requisitions currently in to be approved status.	Int
Requisition Facts > Requisition Counts	# Requisitions Currently Unposted	Returns the number of requisitions currently in unposted status on at least one career site or internet job board.	Int
Requisition Facts > Requisition Cycle Time	Average Cycle Time	Returns the number of days between the req. creation date and the latest filled date.	Double
Requisition Facts > Requisition Cycle Time	Average Time To Approve	Returns the number of days between the first to be approved date and the first fully approved date.	Double
Requisition Facts > Requisition Cycle Time	Average Time To Fill	Returns the number of days between the first fully approved date and the latest filled date.	Double
Requisition Facts > Requisition Cycle Time	Average Time To Last Position Accepted	Returns the number of days between the first fully approved date and the last position accepted date.	Double
Requisition Facts > Requisition Cycle Time	Average Time To Source	Returns the number of days between the req. creation date and the first sourced date.	Double

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Folder Path	Column	Description	Data Type
Requisition Facts > Requisition Cycle Time	Cycle Time	Returns the average number of days between the req. creation date and the latest filled date.	Int
Requisition Facts > Requisition Cycle Time	Time To Approve	Returns the average number of days between the first to be approved date and the first fully approved date.	Int
Requisition Facts > Requisition Cycle Time	Time To Fill	Returns the average number of days between the first fully approved date and the latest filled date.	Int
Requisition Facts > Requisition Cycle Time	Time To Last Position Accepted	Returns the average number of days between the first fully approved date and the last position accepted date.	Int
Requisition Facts > Requisition Cycle Time	Time To Source	Returns the average number of days between the req. creation date and the first sourced date.	Int
Requisition Logistics > Requisition Additional Location(s)	Location Level1 Code	Returns the code of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level1 Name	Returns the name of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level2 Code	Returns the code of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level2 Name	Returns the name of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level3 Code	Returns the code of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level3 Name	Returns the name of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level4 Code	Returns the code of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level4 Name	Returns the name of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level5 Code	Returns the code of the requisition additional location.	Varchar
Requisition Logistics > Requisition Additional Location(s)	Location Level5 Name	Returns the name of the requisition additional location.	Varchar
Requisition Logistics > Requisition Collaborator	Collaborator Department Name	Returns the Collaborator's department	Varchar
Requisition Logistics > Requisition Collaborator	Collaborator Email	Returns the Collaborator's email	Varchar

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Folder Path	Column	Description	Data Type
Requisition Logistics > Requisition Collaborator	Collaborator Employee ID	Returns the Collaborator's employee ID	Varchar
Requisition Logistics > Requisition Collaborator	Collaborator First Name	Returns the Collaborator's first name	Varchar
Requisition Logistics > Requisition Collaborator	Collaborator ID	Returns the Collaborator's database unique identifier	Double
Requisition Logistics > Requisition Collaborator	Collaborator Middle Initial	Returns the Collaborator's middle initial	Varchar
Requisition Logistics > Requisition Collaborator	Collaborator Name	Returns the Collaborator's name	Varchar
Requisition Logistics > Requisition Collaborator	Collaborator User Group	Returns the Collaborator's user group	Varchar
Requisition Logistics > Requisition Collaborator	Collaborator User Type	Returns the Collaborator's user type	Varchar
Requisition Logistics > Requisition Collaborator	Collborator Last Name	Returns the Collaborator's last name	Varchar
Requisition Logistics > Requisition Department	Department Cost Center	Returns the cost center of the department	Varchar
Requisition Logistics > Requisition Department	Department Level 1 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 10 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 11 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 12 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 13 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 14 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 15 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 16 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 17 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 18 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 19 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 2 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 20 Name	Returns the name of the department.	Varchar

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Folder Path	Column	Description	Data Type
Requisition Logistics > Requisition Department	Department Level 3 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 4 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 5 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 6 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 7 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 8 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Level 9 Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Name	Returns the name of the department.	Varchar
Requisition Logistics > Requisition Department	Department Number	Returns the department number	Varchar
Requisition Logistics > Requisition Department	Parent Department Cost Center	Returns the cost center of the department's parent	Varchar
Requisition Logistics > Requisition Department	Parent Department Name	Returns the name of the department's parent.	Varchar
Requisition Logistics > Requisition Department	Parent Department Number	Returns the number of the department's parent	Varchar
Requisition Logistics > Requisition Department (Unstructered)	Department Description (BL)	Returns the requisition department, in its base language. This is the department field that is populated in free text format.	Varchar
Requisition Logistics > Requisition Department (Unstructered)	Department Description (ML)	Returns the requisition department. This is the department field that is populated in free text format.	Varchar
Requisition Logistics > Requisition Department (Unstructered)	Department Description Locale	Returns the requisition department language. Use to filter Departement Description (ML)" to the desired locale.	Varchar
Requisition Logistics > Requisition Hiring Manager	Hiring Manager Department Name	Returns the hiring manager department	Varchar
Requisition Logistics > Requisition Hiring Manager	Hiring Manager Email	Returns the hiring manager email	Varchar
Requisition Logistics > Requisition Hiring Manager	Hiring Manager Employee ID	Returns the hiring manager employee ID	Varchar
Requisition Logistics > Requisition Hiring Manager	Hiring Manager First Name	Returns the hiring manager first name	Varchar
Requisition Logistics > Requisition Hiring Manager	Hiring Manager ID	Returns the hiring manager database unique identifier	Double
Requisition Logistics > Requisition Hiring Manager	Hiring Manager Last Name	Returns the hiring manager last name	Varchar

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Folder Path	Column	Description	Data Type
Requisition Logistics > Requisition Hiring Manager	Hiring Manager Middle Initial	Returns the hiring manager middle initial	Varchar
Requisition Logistics > Requisition Hiring Manager	Hiring Manager Name	Returns the hiring manager name	Varchar
Requisition Logistics > Requisition Hiring Manager	Hiring Manager User Group	Returns the hiring manager user group	Varchar
Requisition Logistics > Requisition Hiring Manager	Hiring Manager User Type	Returns the hiring manager user type	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant Last Name	Returns the hiring manager assistant last name	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant Department Name	Returns the hiring manager assistant department	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant Email	Returns the hiring manager assistant email	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant Employee ID	Returns the hiring manager assistant employee ID	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant First Name	Returns the hiring manager assistant first name	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant ID	Returns the hiring manager database unique identifier	Double
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant Middle Initial	Returns the hiring manager assistant middle initial	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant Name	Returns the hiring manager assistant name	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant User Group	Returns the hiring manager assistant user group	Varchar
Requisition Logistics > Requisition Hiring Manager Assistant	Hiring Manager Assistant User Type	Returns the hiring manager assistant user type	Varchar
Requisition Logistics > Requisition Identification	# Openings	Returns the number of openings on the requisition.	Int
Requisition Logistics > Requisition Identification	# Openings Left To Fill (Accepted)	Returns the number of positions left to fill on the requisition, based on the number of openings minus the number of candidates with a current standard offer status of Accepted where the candidate does not have a reference status of Declined or Rejected	Int
Requisition Logistics > Requisition Identification	# Openings Left To Fill (Hired)	Returns the number of positions left to fill on the requisition, based on the number of	Int

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Folder Path	Column	Description	Data Type
		openings minus the number of candidates in the hired reference status.	
Requisition Logistics > Requisition Identification	Created By User	Returns the user responsible for creating the requisition.	Varchar
Requisition Logistics > Requisition Identification	Has Unlimited Openings	Returns whether or not the requisition has an unlimited amount of openings.	Varchar
Requisition Logistics > Requisition Identification	Justification	Returns the justification of the requisition.	Varchar
Requisition Logistics > Requisition Identification	Req. Identifier	Returns the requisition id, as displayed in the recruiting application.	Varchar
Requisition Logistics > Requisition Identification	Staffing Type	Returns the staffing type associated with the requisition	Varchar
Requisition Logistics > Requisition Identification	Title (BL)	Returns the requisition title, in its base language.	Varchar
Requisition Logistics > Requisition Identification	Title (Manager) (BL)	Returns the requisition's manager title, in the requisition's base locale	Varchar
Requisition Logistics > Requisition Identification	Title (Manager) (ML)	Returns the requisition's manager title.	Varchar
Requisition Logistics > Requisition Identification	Title (Manager) Locale	Returns the locale of the requisition manager title. Use to filter "Title (ML)" to the desired locale.	Varchar
Requisition Logistics > Requisition Identification	Title (ML)	Returns the requisition title.	Varchar
Requisition Logistics > Requisition Identification	Title Locale	Returns the locale of the requisition title. Use to filter "Title (ML)" to the desired locale.	Varchar
Requisition Logistics > Requisition Identification	Validity Period	Returns the validity period of the requisition.	Double
Requisition Logistics > Requisition Job Field	Job Field Level1 Code	Returns the code of the requisition job field.	Varchar
Requisition Logistics > Requisition Job Field	Job Field Level1 Name	Returns the name of the requisition job field.	Varchar
Requisition Logistics > Requisition Job Field	Job Field Level2 Code	Returns the code of the requisition job field.	Varchar
Requisition Logistics > Requisition Job Field	Job Field Level2 Name	Returns the name of the requisition job field.	Varchar
Requisition Logistics > Requisition Job Field	Job Field Level3 Code	Returns the code of the requisition job field.	Varchar
Requisition Logistics > Requisition Job Field	Job Field Level3 Name	Returns the name of the requisition job field.	Varchar
Requisition Logistics > Requisition Job Field	Job Field Level4 Code	Returns the code of the requisition job field.	Varchar
Requisition Logistics > Requisition Job Field	Job Field Level4 Name	Returns the name of the requisition job field.	Varchar
Requisition Logistics > Requisition Job Role	Job Role Code	Returns the requisition job role code	Varchar

Folder Path	Column	Description	Data Type
Requisition Logistics > Requisition Job Role	Job Role Name	Returns the requisition job role name	Varchar
Requisition Logistics > Requisition Organization	Organization Level1 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level1 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level10 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level10 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level11 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level11 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level12 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level12 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level13 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level13 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level14 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level14 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level15 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level15 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level16 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level16 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level17 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level17 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level18 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level18 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level19 Code	Returns the code of the organization	Varchar

Folder Path	Column	Description	Data Type
Requisition Logistics > Requisition Organization	Organization Level19 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level2 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level2 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level20 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level20 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level3 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level3 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level4 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level4 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level5 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level5 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level6 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level6 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level7 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level7 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level8 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level8 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level9 Code	Returns the code of the organization	Varchar
Requisition Logistics > Requisition Organization	Organization Level9 Name	Returns the name of the organization	Varchar
Requisition Logistics > Requisition Position	Position Code	Returns the requisition's associated position code.	Varchar
Requisition Logistics > Requisition Position (Free Text)	Position Description (BL)	Returns the description of the requisition position, in the requisition's base locale.	Varchar

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Folder Path	Column	Description	Data Type
Requisition Logistics > Requisition Position (Free Text)	Position Description (ML)	Returns the description of the requisition position. Use the element "Position Description Locale" to filter on the appropriate locale.	Varchar
Requisition Logistics > Requisition Position (Free Text)	Position Description Locale	Returns the locale of the requisition position title	Varchar
Requisition Logistics > Requisition Primary Location	Location Level1 Code	Returns the code of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level1 Name	Returns the name of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level2 Code	Returns the code of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level2 Name	Returns the name of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level3 Code	Returns the code of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level3 Name	Returns the name of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level4 Code	Returns the code of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level4 Name	Returns the name of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level5 Code	Returns the code of the requisition primary location.	Varchar
Requisition Logistics > Requisition Primary Location	Location Level5 Name	Returns the name of the requisition primary location.	Varchar
Requisition Logistics > Requisition Profile	Education Program	Returns the education program associated with the requisition.	Varchar
Requisition Logistics > Requisition Profile	Req. Education Level	Returns the education level associated with the requisition.	Varchar
Requisition Logistics > Requisition Profile	Req. Employee Status	Returns the employee status associated with the requisition.	Varchar
Requisition Logistics > Requisition Profile	Req. Job Level	Returns the job level associated with the requisition.	Varchar
Requisition Logistics > Requisition Profile	Req. Job Schedule	Returns the job schedule associated with the requisition.	Varchar
Requisition Logistics > Requisition Profile	Req. Job Shift	Returns the job shift associated with the requisition.	Varchar
Requisition Logistics > Requisition Profile	Req. Job Type	Returns the job type associated with the requisition.	Varchar
Requisition Logistics > Requisition Profile	Required Travel	Returns the required travel for the requisition.	Varchar
Requisition Logistics > Requisition Recruiter	Recruiter Department Name	Returns the recruiter department	Varchar

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Folder Path	Column	Description	Data Type
Requisition Logistics > Requisition Recruiter	Recruiter Email	Returns the recruiter email	Varchar
Requisition Logistics > Requisition Recruiter	Recruiter Employee ID	Returns the recruiter employee ID	Varchar
Requisition Logistics > Requisition Recruiter	Recruiter First Name	Returns the recruiter first name	Varchar
Requisition Logistics > Requisition Recruiter	Recruiter ID	Returns the recruiter database unique identifier	Double
Requisition Logistics > Requisition Recruiter	Recruiter Last Name	Returns the recruiter last name	Varchar
Requisition Logistics > Requisition Recruiter	Recruiter Middle Initial	Returns the recruiter middle initial	Varchar
Requisition Logistics > Requisition Recruiter	Recruiter Name	Returns the recruiter name	Varchar
Requisition Logistics > Requisition Recruiter	Recruiter User Group	Returns the recruiter user group	Varchar
Requisition Logistics > Requisition Recruiter	Recruiter User Type	Returns the recruiter user type	Varchar
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant Department Name	Returns the recruiter assistant department	Varchar
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant Email	Returns the recruiter assistant email	Varchar
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant Employee ID	Returns the recruiter assistant employee ID	Varchar
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant First Name	Returns the recruiter assistant first name	Varchar
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant ID	Returns the recruiter assistant database unique identifier	Double
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant Last Name	Returns the recruiter assistant last name	Varchar
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant Middle Initial	Returns the recruiter assistant middle initial	Varchar
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant Name	Returns the recruiter assistant name	Varchar
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant User Group	Returns the recruiter assistant user group	Varchar

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Folder Path	Column	Description	Data Type
Requisition Logistics > Requisition Recruiter Assistant	Recruiter Assistant User Type	Returns the recruiter assistant user type	Varchar
Requisition Logistics > Requisition Template	Template ID	Returns the template identifier	Double
Requisition Logistics > Requisition Template	Template Job Code	Returns the template job code	Varchar
Requisition Logistics > Requisition Template	Template Locale	Returns the locale of the requisition template title	Varchar
Requisition Logistics > Requisition Template	Template Title (BL)	Returns the template title in its base locale.	Varchar
Requisition Logistics > Requisition Template	Template Title (ML)	Returns the template title. Use the element "Template Locale" to filter on the appropriate locale.	Varchar
Requisition Logistics > Requisition User Group	User Group	Returns the user group associated with the requisition.	Varchar
Requisition Logistics > Requisition Work Location	Work Location Code	Returns the code of the requisition work location	Varchar
Requisition Logistics > Requisition Work Location	Work Location Name	Returns the name of the requisition work location	Varchar
Requisition Logistics > Requisition Work Location	Work Location Zip Code	Returns the zip code of the requisition work location	Varchar
Requisition Passport	Req. Input Parameter - Value 1	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 10	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 2	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 3	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 4	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 5	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 6	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 7	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 8	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Input Parameter - Value 9	Returns the value of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 1	Returns the code of the passport service request's input parameter	Varchar

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Folder Path	Column	Description	Data Type
Requisition Passport	Req. Passport Input Parameter - Code 10	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 2	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 3	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 4	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 5	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 6	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 7	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 8	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Passport Input Parameter - Code 9	Returns the code of the passport service request's input parameter	Varchar
Requisition Passport	Req. Service Alias	Returns the passport service alias	Varchar
Requisition Passport	Req. Service Name	Returns the passport service name	Varchar
Requisition Passport	Req. Service Provider	Returns the passport service provider	Varchar
Requisition Passport	Req. Service Type	Returns the passport service type	Varchar
Requisition Posting & Sourcing	Is Urgent Need	Returns whether or not the requisition is posted as an urgent need job.	Varchar
Requisition Posting & Sourcing > Requisition Posting	Is Posted Externally	Returns whether or not the requisition is currently posted to at least one external career site.	Char
Requisition Posting & Sourcing > Requisition Posting	Is Posted Internally	Returns whether or not the requisition is currently posted to at least one internal career site.	Char
Requisition Posting & Sourcing > Requisition Posting	Posting Board Type	Returns the type of board the requisition is posted to i.e. career site, fee-based job board.	Varchar
Requisition Posting & Sourcing > Requisition Posting	Posting Date	Returns the date/time the requisition was posted.	Timestamp
Requisition Posting & Sourcing > Requisition Posting	Posting Enables Online Job Applications	Returns whether or not the posting allows candides to apply online.	Varchar
Requisition Posting & Sourcing > Requisition Posting	Posting Locale	Returns the locale in which the requisition was posted.	Varchar
Requisition Posting & Sourcing > Requisition Posting	Posting Source	Returns the source the requisition is posted to	Varchar

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Folder Path	Column	Description	Data Type
Requisition Posting & Sourcing > Requisition Posting	Posting Status	Returns the current status of the job posting	Varchar
Requisition Posting & Sourcing > Requisition Posting	Unposting Date	Returns the date/time the requisition was unposted.	Timestamp
Requisition Posting & Sourcing > Requisition Sources	Req. Source (BL)	Returns the requisition source, in its base locale	Varchar
Requisition Posting & Sourcing > Requisition Sources	Req. Source (ML)	Returns the requisition source. Use the element "Source Locale" to filter on the appropriate locale.	Varchar
Requisition Posting & Sourcing > Requisition Sources	Req. Source Identifier	Returns the source identifier as seen in the source configuration page	Varchar
Requisition Posting & Sourcing > Requisition Sources	Req. Source Locale	Returns the locale of the requisition source.	Varchar
Requisition Posting & Sourcing > Requisition Sources	Req. Source Type	Returns the recruitment source type. This field displays customized source type labels	Varchar
Requisition Posting & Sourcing > Requisition Sources	Req. Source Type (Admin)	Returns the recruitment source type, as displayed in the recruiting administration application	Varchar
Requisition Status > Requisition Status - Current	Current Posting Status	Returns the posting status as it is displayed in the Recruiting application.	Varchar
Requisition Status > Requisition Status - Current	Current Status	Returns the current status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.	Varchar
Requisition Status > Requisition Status - Historical	Historical Status	Returns the historical status of the requisition. Note that the values "Approved" and "Sourcing" roll up to the "Open" status.	Varchar
Requisition Status > Requisition Status - Historical	Historical Status User	Returns the user responsible for changing the requisition status.	Varchar
Requisition Status > Requisition Status - Historical	Req. Historical Status End Date	Returns the date/time when the requisition was changed from the status. If the end date is null, the status is current.	Timestamp
Requisition Status > Requisition Status - Historical	Req. Historical Status Start Date	Returns the date/time when the requisition was placed into the status.	Timestamp
Requisition Tracking History	Req. History Transaction By User	Returns the user who did the action.	Varchar
Requisition Tracking History	Req. History Transaction Date	Returns the date/time associated with the event.	Datetime
Requisition Tracking History	Transaction Event Type	Returns the code of the event type.	Varchar
Requisition Tracking History	Transaction User Comments	Returns the comments associated with the event.	Varchar

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Accessibility Mode

Changing to Accessibility Mode

Accessibility mode in Oracle BI EE makes the rendering of the user interface more compatible with screen readers while allowing only that functionality that is supported for users with disabilities to be visible. The following list provides information on accessibility mode:

- The "BI Composer wizard" is displayed in place of the "Analysis editor." For more information on BI Composer, see Chapter 14, "Using BI Composer to Work with Analyses."

- The Home page does not contain links for accessing the Administration page or for performing most editing functions, such as for editing dashboards.

- Graphs and map views are not displayed but are instead converted to one or more annotated tables.

- Tables and pivot tables are rendered with appropriate internal annotations to enable screen readers to describe the contents of cells.

  Refer to your assistive-technology documentation for all applicable table navigation shortcuts.

- You cannot use the mouse to modify the layout of a table or pivot table.

- Performance tiles, and treemaps are rendered as pivot tables.

- The collapse icon is included in the upper-left corner of each section on a dashboard page, even if that section is marked as not collapsible in the Dashboard builder. This allows the icon to be the first element that receives focus when using the keyboard to navigate on a dashboard page.

- The Page Options toolbar button on a dashboard page, which displays a menu of page options, is not available.

- If the dashboard page is refreshed, even if you navigate to another page, then the location of the focus is not preserved. You must press Tab to navigate through the focusable items.

- Trellis views, when displayed on dashboards, are converted to pivot table views with the following changes:
  - o Attribute columns of the inner graph are not included in the pivot table views.
  - o Measure values are aggregated to the new grain of the pivot table views.

By default, Oracle BI EE does not use accessibility mode.

Designing for Accessibility

For more information about designing for accessibility see:

- *Designing for Accessibility*
- *Using Objects to Enhance Accessibility*

Enabling Accessibility Mode

1. Press Tab multiple times to navigate through the global header, until the focus is on your user name in the Signed In As area.
2. Press Enter, then Tab to highlight the My Account link.
3. Press Enter to display the "My Account dialog."

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4. Press Tab to select the "My Account dialog: Preferences tab."

5. Press Tab to navigate through the fields on the tab until you reach the Accessibility Mode options.

6. Use the arrow keys to select the On option.

7. Press Enter to save your changes and close the dialog.

8. Refresh the page to see it displayed in accessibility mode.

Keyboard Shortcuts

Oracle BI supports standard keyboard shortcuts that are used in many software applications. In addition, there OBI offers shortcuts to perform specific tasks.

General Keystrokes

Keyboard Shortcut	Result
CTRL+ALT+G	Navigates to the first focusable element in the global header, which is the Skip to Content link. This link enables you to bypass the options that are available in the global header and to move to the features that available in the main part of the Home page.
CTRL+ALT+D	Navigates to the Dashboards popup menu in the global header. You can then press ENTER to display a menu from which you select a dashboard to display.
CTRL+ALT+P	Navigates to the current dashboard page tab, if the tab is displayed. If there is only one page in the dashboard, then the page tab is not displayed.
CTRL+SHIFT+S	Navigates to the first focusable element in the next section. For a dashboard page, the first element is the collapse icon.
CTRL+SHIFT+ U	Navigates to the first focusable element in the previous section. For a dashboard page, the first element is the collapse icon.
TAB	Navigates to the next focusable element.
SHIFT + TAB	Navigates to the previous focusable element.
Down Arrow	Navigates to the next menu option.
Up Arrow	Navigates to the previous menu option.
ENTER	Triggers the activity, when the focus is on a link, an image, or a button with an associated URL or activity.
ESC	Closes the menu that has the focus.

Keyboard Shortcuts for Navigating Dashboards in OBI

> ✎ **Note:** If you use Freedom Scientific JAWS or other screen reader programs, then you must first disable the virtual PC cursor before using the keystroke combinations to navigate the dashboard. You must enable the virtual PC cursor at other times, such as when navigating within table objects on a dashboard.

Keyboard Shortcut	Result
ALT + Up or Down Arrow	Opens drop-down and combo boxes.
CTRL + Up or Down Arrow	Shows the next or previous item in a combo box.

Keyboard Shortcuts for Navigating the BI Composer Wizard

✎ **Note:** The Catalog tree that is displayed in the Catalog tab of the BI Composer wizard is interpreted as a table. To navigate the tree, use the table keystrokes for your screen reader program.

Keyboard Shortcut	Result
ALT + SHIFT + b	Navigates to the Back button.
ALT + SHIFT + c	Navigates to the Cancel button.
ALT + SHIFT + l	Navigates to the Finish button.
ALT + SHIFT + x	Navigates to the Next button.
ALT + CTRL + m	Navigates to the context menu. For example, selecting an item in the Catalog tree and pressing ALT + CTRL + m displays a menu with options to expand and collapse menu items.
ALT + Down Arrow	Reads the messages in a pop-up window, one by one.

Navigating on the Home Page

1. Press CTRL+ALT+G to display the Skip to Content link in the upper-left corner of the Home page.
2. Press one of the following:
   - ENTER on this link to navigate to the default starting location on the Home page, which is the first link in the upper-left corner under the global header.
   - TAB to navigate to the first focusable element in the global header.
3. Continue to press TAB to navigate through the elements on the Home page.

Navigating Dashboards with Keystrokes

1. Navigate to the desired dashboard page as follows:
   a. Press CTRL+ALT+G to display the Skip to Content link.
   b. Press TAB multiple times to navigate through the global header to the tab that corresponds to the first page of the dashboard. If there are no page tabs, then you navigate to the first focusable element on the dashboard page. Press TAB to move through the dashboard pages. After the last page, pressing TAB gives focus to the dashboard page menu.
   c. Press ENTER when the focus is on the appropriate page tab to open that page of the dashboard.
2. Press CTRL+SHIFT+S to navigate to the first focusable element in the next section, which is the collapse icon.
3. Press TAB to navigate to the next focusable element in the current section.
4. Press CTRL+SHIFT+S to navigate to the first focusable element in the next section.
5. While the section collapse and expand icon has focus, press ENTER to collapse the current section.
6. To navigate in a table or pivot table:
   a. Press TAB to select the table.
   b. Press TAB to move through the headers of the table and to select any menus that exist there.
   c. When the table has focus, press the arrow keys to navigate among the columns and body cells of the table.

To access the drop-down menus in the header rows when a body cell has focus, press TAB, then ENTER to display the options for the menu in the first header row. Press TAB and use the arrow keys to highlight the options in the menu and press ENTER to select the desired option.

Logical SQL Reference

Syntax and Usage Notes for the SELECT Statement

The SELECT statement, or query specification, is the way to query a decision support system through the Oracle BI Server. A SELECT statement returns a table to the client that matches the query. It is a table in the sense that the results are in the form of rows and columns.

The SELECT statement is the basis for querying any structured query language (SQL) database. The Oracle BI Server accepts logical requests to query objects in a repository, and users (or query tools) make those logical requests with ordinary SQL SELECT statements. The server then translates the logical requests into physical queries against one or more data sources, combines the results to match the logical request, and returns the answer to the end user.

The SELECT statement in Logical SQL differs from standard SQL in that tables do not need to be joined. Any join conditions supplied in the query are ignored because the join conditions are predefined in the Oracle BI repository.

This section provides the basic syntax for the SELECT statement, as well as definitions for individual clauses. The syntax descriptions cover only basic syntax and features unique to the Oracle BI Server.

Basic Syntax for the SELECT Statement

Syntax for the SELECT statement is as follows:

```
 SELECT [DISTINCT] select_list
FROM from_clause
[WHERE search_condition]
[GROUP BY column {, column}
[HAVING search_condition]]
[ORDER BY column {, column}]
```

Where:

select_list is the list of columns specified in the request. See *"SELECT List Syntax"* for more information.

FROM from_clause is the list of tables in the request. Optionally includes certain join information for the request. See *"FROM Clause Syntax"* for more information.

WHERE search_condition specifies any combination of conditions to form a conditional test. A WHERE clause acts as a filter that lets you constrain a request to obtain results that answer a particular question. Together with the columns you select, filters determine what your results will contain. See *"WHERE Clause Syntax"* for more information.

GROUP BY column {, column} specifies a column (or alias) belonging to a table defined in the data source. See *"GROUP BY Clause Syntax"* for more information.

HAVING search_condition specifies any combination of conditions to form a conditional test. The syntax is identical to that for the WHERE clause. ORDER BY column {, column} specifies the columns to order the results by. See *"ORDER BY Clause Syntax"* for more information.

Usage Notes

The Oracle BI Server treats the **SELECT** statement as a logical request. If aggregated data is requested in the **SELECT** statement, a GROUP BY clause is automatically assumed by the server. Any join conditions supplied in the query are ignored because the join conditions are all predefined in the Oracle BI repository.

The Oracle BI Server accepts the following SQL syntaxes for comments:

- /* */ C-style comments
- // Double slash for single-line comments
- # Number sign for single-line comments

Subquery Support

The Oracle BI Server supports certain subqueries, as well as **UNION**, **UNION ALL**, **INTERSECT**, and **EXCEPT** operations in logical requests. This functionality increases the range of business questions that can be answered, eases the formulation of queries, and provides some ability to query across multiple business models.

The Oracle BI Server supports the following subquery predicates in any conditional expression (for example, within **WHERE**, **HAVING**, or **CASE** statements):

```
IN, NOT IN
Any, >=Any, =Any, <Any, <=Any, <>Any
All, >=All, =All, <All,<=All, <>All
EXISTS, NOT EXISTS
```

In Answers, advanced users and developers can use the Advanced SQL Clauses fields in the Advanced tab of the Analysis editor to specify various SQL clauses, such as GROUP BY, HAVING, and DISTINCT, to include in the SQL queries that are sent to the Oracle BI Server. If an analysis contains hierarchical columns, selections, or groups, then certain Advanced SQL Clauses fields are not available.

SELECT List Syntax

The **select_list** lists the columns in the request. All columns need to be from a single business model. Table names can be included (as Table.Column), but are optional unless column names are not unique within a business model. If column names contain spaces, enclose column names in double quotes. The **DISTINCT** keyword does not need to be included, because the Oracle BI Server always does a distinct query. Columns that are being aggregated do not need to include the aggregation function (such as **SUM**), as aggregation rules are known to the server and aggregation is performed automatically.

Syntax

```
...
* |
(column | expr) [[AS] alias]
{, (column | expr) [[AS] alias] }
...
```

Where:

* Indicates all columns in the resultant table in the **FROM** clause.

column is a column (or alias) belonging to a table defined in the data source.

expr is any valid SQL expression.

> ✎ **Note:** You cannot use * to select all columns from the Advanced tab of the Analysis editor in Answers. Instead, you must specify particular columns.

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FROM Clause Syntax

The Oracle BI Server accepts any valid SQL `FROM` clause syntax. To simplify `FROM` clause creation, you can specify the name of a subject area instead of a list of tables. The Oracle BI Server determines the proper tables and the proper join specifications based on the columns the request asks for and the configuration of the Oracle BI repository.

WHERE Clause Syntax

The Oracle BI Server accepts any valid SQL `WHERE` clause syntax. There is no need to specify any join conditions in the `WHERE` clause, because the joins are all configured within the Oracle BI repository. Any join conditions specified in the `WHERE` clause are ignored.

The Oracle BI Server also supports the following subquery predicates in any conditional expression (`WHERE`, `HAVING` or `CASE` statements):

```
IN, NOT IN
Any, >=Any, =Any, <Any, <=Any, <>Any
All, >=All, =All, <All,<=All, <>All
EXISTS, NOT EXISTS
```

GROUP BY Clause Syntax

With auto aggregation on the Oracle BI Server, there is no need to submit a `GROUP BY` clause. When no `GROUP BY` clause is specified, the `GROUP BY` specification defaults to all of the nonaggregation columns in the `SELECT` list. If you explicitly use aggregation functions in the select list, you can specify a `GROUP BY` clause with different columns and the Oracle BI Server computes the results based on the level specified in the `GROUP BY` clause.

ORDER BY Clause Syntax

The Oracle BI Server accepts any valid SQL `ORDER BY` clause syntax, including referencing columns by their order in the select list (such as ORDER BY 3, 1, 5).

In addition, you can use the following syntax to alter the sort order for nulls in the query:

```
ORDER BY col1 NULLS LAST, ORDER BY col2 NULLS FIRST
```

Limiting and Offsetting Rows Returned

This is a short description.

You can use the `FETCH` and `OFFSET` clauses to constrain the number of rows returned by the `SELECT` statement and to skip a specified number of rows from the beginning of the result set. Both clauses are optional and can be used together, or independently. The fetch and offset clauses are part of the `SELECT` statement and are placed at the end.

These clauses are useful for situations where you have a large result set (such as with a large dimension), and you want to present, for example, the first 100 rows to the user. The Oracle BI Server stops processing when the limit is reached, improving overall performance and conserving resources. In addition, the limit is pushed to the back-end database in many cases so that the database can optimize the query.

Technically, both clauses can be used without an `ORDER BY` clause, but the results would be non-deterministic. Because of this, both clauses should always be used with `ORDER BY`.

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If **OFFSET** is not specified, the default value is 0, which means that results are returned starting from the first row. If **FETCH** is not specified, it means that there is no limitation on the number rows returned.

Both clauses are evaluated after the **WHERE** clause, aggregation, **HAVING** clause, window analytic function, and **ORDER BY** clause.

Syntax for OFFSET Clause

```
OFFSET n ROW[S]
```

n is the number of rows you want to skip from the beginning of the result set. Note that **n** must be greater than zero.

Syntax for FETCH Clause

```
FETCH FIRST | NEXT n ROW[S] ONLY
```

n is the number of rows you want to skip from the beginning of the result set.. Note that **n** must be greater than zero.

Typically, **FIRST** is used when the limit clause is used independently of the offset clause, while **NEXT** is used when the limit clause is used in conjunction with the offset clause.

```
SELECT employeeid, firstname, revenue
FROM sales.employee
ORDER BY revenue desc
OFFSET 2 ROWS
FETCH NEXT 4 ROWS ONLY0
```

The following table lists the entire result set without the **OFFSET** and **FETCH** clauses. When the **OFFSET** and **FETCH** clauses are included, only the rows shown in bold are returned.

Employeeid	FirstName	Revenue
4	Margaret	250187
3	Janet	213051
1	Nancy	202143
2	Andrew	202143
7	Robert	177749
8	Laura	141295
9	Annie	133301
6	Michael	82964
5	Steven	78198

Limitations of the FETCH and OFFSET Clauses

Because **ORDER BY** clauses are ignored in **UNION ALL** set-operator blocks, using these clauses in such queries would be non-deterministic. Do not use **FETCH** and **OFFSET** with these queries.

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Operators

There are two types of operators: SQL logical operators, and mathematical operators.

SQL Logical Operators

The following SQL logical operators are used to specify comparisons between expressions.

- *Between*: Used to determine boundaries for a condition. Each boundary is an expression, and the bounds do not include the boundary limits, as in less than and greater than (as opposed to less than or equal to and greater than or equal to). BETWEEN can be preceded with NOT to negate the condition.

- *In*: Specifies a comparison of a column value with a set of values.

- *Is Null*: Specifies a comparison of a column value with the null value.

- *Like*: Specifies a comparison to a literal value. Often used with wildcard characters to indicate any character string match of zero or more characters (%) or a any single character match (_).

Mathematical Operators

Mathematical operators are used to combine expression elements to make certain types of comparisons in an expression.

Operator	Description
+	Plus sign for addition.
-	Minus sign for subtraction.
*	Multiply sign for multiplication.
/	Divide by sign for division.
||	Character string concatenation.
(	Open parenthesis.
)	Closed parenthesis.
>	Greater than sign, indicating values higher than the comparison.
<	Less than sign, indicating values lower than the comparison.
=	Equal sign, indicating the same value.
<=	Less than or equal to sign, indicating values the same or lower than the comparison.
>=	Greater than or equal to sign, indicating values the same or higher than the comparison.
<>	Not equal to, indicating values higher or lower, but different.
AND	AND connective, indicating intersection with one or more conditions to form a compound condition.
OR	OR connective, indicating the union with one or more conditions to form a compound condition.
NOT	NOT connective, indicating a condition is not met.
,	Comma, used to separate elements in a list.

Conditional Expressions

Expressions are building blocks for creating conditional expressions that convert a value from one form to another.

CASE (Switch)

This form of the `CASE` statement is also referred to as the `CASE(Lookup)` form. The value of expr1 is examined, then the `WHEN` expressions. If `expr1` matches any `WHEN` expression, it assigns the value in the corresponding `THEN` expression.

If none of the `WHEN` expressions match, it assigns the default value specified in the `ELSE` expression. If no `ELSE` expression is specified, the system automatically adds an `ELSE NULL`.

If `expr1` matches an expression in multiple `WHEN` clauses, only the expression following the first match is assigned.

> 🖉 **Note:** In a `CASE` statement, `AND` has precedence over `OR`.

Syntax

```
CASE expr1
WHEN expr2 THEN expr3
{WHEN expr... THEN expr...}
ELSE expr
END
```

Where:

`CASE` starts the `CASE` statement. Must be followed by an expression and one or more `WHEN` and `THEN` statements, an optional `ELSE` statement, and the `END` keyword.

`WHEN` specifies the condition to be satisfied.

`THEN` specifies the value to assign if the corresponding `WHEN` expression is satisfied.

`ELSE` specifies the value to assign if none of the `WHEN` conditions are satisfied. If omitted, `ELSE NULL` is assumed.

`END` ends the `CASE` statement.

Example

```
CASE Score-par
WHEN -5 THEN 'Birdie on Par 6'
WHEN -4 THEN 'Must be Tiger'
WHEN -3 THEN 'Three under par'
WHEN -2 THEN 'Two under par'
WHEN -1 THEN 'Birdie'
WHEN 0 THEN 'Par'
WHEN 1 THEN 'Bogey'
WHEN 2 THEN 'Double Bogey'
ELSE 'Triple Bogey or Worse'
END
```

In this example, the `WHEN` statements must reflect a strict equality. For example, a `WHEN` condition of `WHEN < 0 THEN 'Under Par'` is illegal because comparison operators are not allowed.

CASE (If)

This form of the **CASE** statement evaluates each **WHEN** condition and if satisfied, assigns the value in the corresponding **THEN** expression.

If none of the **WHEN** conditions are satisfied, it assigns the default value specified in the **ELSE** expression. If no **ELSE** expression is specified, the system automatically adds an **ELSE NULL**.

> ✏ **Note:** In a CASE statement, AND has precedence over OR.

Syntax

```
CASE
 WHEN request_condition1 THEN expr1
 {WHEN request_condition2 THEN expr2}
 {WHEN request_condition... THEN expr...}
 ELSE expr
END
```

Where:

CASE starts the **CASE** statement. Must be followed by one or more **WHEN** and **THEN** statements, an optional **ELSE** statement, and the **END** keyword.

WHEN specifies the condition to be satisfied.

THEN specifies the value to assign if the corresponding **WHEN** expression is satisfied.

ELSE specifies the value to assign if none of the **WHEN** conditions are satisfied. If omitted, **ELSE NULL** is assumed.

END ends the **CASE** statement.

Example

```
CASE
 WHEN score-par < 0 THEN 'Under Par'
 WHEN score-par = 0 THEN 'Par'
 WHEN score-par = 1 THEN 'Bogie'
 WHEN score-par = 2 THEN 'Double Bogey'
 ELSE 'Triple Bogey or Worse'
END
```

Unlike the Switch form of the **CASE** statement, the **WHEN** statements in the If form allow comparison operators. For example, a **WHEN** condition of **WHEN < 0 THEN 'Under Par'** is legal.

Expressing Literals

A literal is a nonnull value corresponding to a given data type. Literals are typically constant values, or in other words, they are values that are taken as they are. A literal value must comply with the data type that it represents.

SQL provides mechanisms for expressing literals in SQL statements.

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Character Literals

A character literal represents a value of CHARACTER or VARCHAR data type. To express a character literal, enclose the character string in single quotes ('). The number of characters enclosed between the single quotes implies the length of the literal.

Examples

```
'Oracle BI Server'
```

```
'abc123'
```

Datetime Literals

The SQL 92 standard defines three kinds of 'typed' datetime literals, in the following formats:

```
DATE 'yyyy-mm-dd'
```

```
TIME 'hh:mm:ss'
```

```
TIMESTAMP 'yyyy-mm-dd hh:mm:ss'
```

To express a typed datetime literal, use the keywords `DATE`, `TIME`, or `TIMESTAMP` followed by a datetime string enclosed in single quotation marks, as in the preceding example. Two digits are required for all nonyear components even if the value is a single digit.

Examples

```
DATE '2000-08-15'
```

```
TIME '11:55:25'
```

```
TIMESTAMP '1999-03-15 11:55:25'
```

Numeric Literals

A numeric literal represents a value of a numeric data type (such as `INTEGER`, `DECIMAL`, or `FLOAT`). To express a numeric literal, type the number as part of a SQL statement.

Do not surround numeric literals with single quotes. Doing so expresses the literal as a character literal.

> ✎ **Note:** When treating literals as `NUMERIC`, be aware of the Oracle standard double promotion rules, including the following: `DOUBLE/NUMBER = DOUBLE`, `DOUBLE * NUMBER = DOUBLE` Because the parsing of numeric literals happens very early in the query processing before the actual data source is known, internally, the Oracle BI Server treats decimal numbers as `NUMERIC if ENABLE_ NUMERIC_DATA_TYPE is set to YES`, regardless of data source type. When `NUMERIC` is enabled and the Oracle BI Server executes an expression internally involving decimal literals, the server treats the literals as `NUMERIC` even if the back-end data source does not support the `NUMERIC` data type. However, the type promotion rules still apply. For example, if the Oracle BI Server retrieves the data from a data source as `DOUBLE` and combines that with a `NUMERIC` literal during internal execution, the final result is still be converted to `DOUBLE`.

Numeric literals include:

- *Integer Literals*
- Decimal Literals

- Floating Point Literals

Integer Literals To express an integer constant as a literal, specify the integer as part of a SQL statement (for example, in the `SELECT` list). Precede the integer with a plus sign (+) to indicate the integer is positive, or a minus sign (-) to indicate the integer is negative. Unsigned integers are assumed to be positive.

Examples

```
234
```

```
+2
```

```
567934
```

Decimal Literals To express a decimal literal, specify a decimal number. Precede the number with a plus sign (+) to indicate the number is positive, or a minus sign (-) to indicate the number is negative. Unsigned numbers are assumed to be positive.

Examples

```
1.223
```

```
-22.456
```

```
+33.456789
```

Floating Point Literals To express floating point numbers as literal constants, enter a decimal literal followed by the letter E (either uppercase or lowercase), followed by the plus sign (+) to indicate a positive exponent, or the minus sign (-) to indicate a negative exponent. No spaces are allowed between the integer, the letter E, and the sign of the exponent.

Examples

```
333.456E-
```

```
1.23e+
```

Variables

You can include and set variables in SQL statements. To do this, include the variable at the beginning of the SQL statement.

Syntax

```
SET VARIABLE variable_name = variable_value; SELECT_statement
```

If you are executing a query from the nqcmd utility, use a colon as a delimiter. Otherwise, you can use either a semicolon or a colon.

Examples

```
SET VARIABLE LOGLEVEL = 3; SELECT Products.Brand, Measures.Dollars FROM "Products"

SET VARIABLE DISABLE_CACHE_HIT=1, LOGLEVEL = 3, WEBLANGUAGE='en': SELECT
Products.Brand, Measures.Dollars FROM "Products"
```

Aggregate Functions

Aggregate functions perform operations on multiple values to create summary results.

AVG

This function calculates the average (mean) value of an expression in a result set. It must take a numeric expression as its argument.

Note that the denominator of **AVG** is the number of rows aggregated. For this reason, it is usually a mistake to use **AVG(x)** in a calculation in Oracle Business Intelligence. Instead, write the expression manually so that you can control both the numerator and denominator (x/y).

Syntax

    AVG(numExpr)

Where:

numExpr is any expression that evaluates to a numeric value.

Example:

AVG(TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."Req. Creation Date", "Requisition Dates"."Latest Filled Date"))

This returns, in Days, the average time between the Req. Creation Date and the Latest Filled Date.

Adding DISTINCT to the formula will give the average (mean) of all distinct values of an expression:

Syntax

AVG(DISTINCT numExpr)

BOTTOMN

This function ranks the lowest n values of the expression argument from 1 to n, 1 corresponding to the lowest numeric value. The **BOTTOMN** function operates on the values returned in the result set. A request can contain only one **BOTTOMN** expression.

Syntax

    BOTTOMN(numExpr, integer)

Where:

numExpr is any expression that evaluates to a numeric value.

integer is any positive integer. Represents the bottom number of rankings displayed in the result set, 1 being the lowest rank.

Example:

BOTTOMN("Candidate Counts"."# Submissions", 5)

This returns the 5 locations with the least number of Submissions.

COUNT

This function calculates the number of rows having a nonnull value for the expression. The expression is typically a column name, in which case the number of rows with nonnull values for that column is returned.

Syntax

`COUNT(expr)`

Where:

`expr` is any expression.

Example:

COUNT("Requisition Collaborator"."Collaborator Name")

This returns the number of Collaborators per Requisition.

Adding DISTINCT to the formula will give the count of all distinct values of an expression:

Syntax

COUNT(DISTINCT expr)

MAX

This function calculates the maximum value (highest numeric value) of the rows satisfying the numeric expression argument.

Syntax

`MAX(numExpr)`

Where:

`numExpr` is any expression that evaluates to a numeric value.

Example:

MAX("Submission Dates"."Hired Date")

This returns the last date/time a candidate was hired.

MEDIAN

This function calculates the median (middle) value of the rows satisfying the numeric expression argument. When there are an even number of rows, the median is the mean of the two middle rows. This function always returns a double.

Syntax

`MEDIAN(numExpr)`

Where:

`numExpr` is any expression that evaluates to a numeric value.

Example:

MEDIAN(TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."Req. Creation Date", "Requisition Dates"."Latest Filled Date"))

This returns, in Days, the median time between the Req. Creation Date and the Latest Filled Date.

MIN

This function calculates the minimum value (lowest numeric value) of the rows satisfying the numeric expression argument.

Syntax

        MIN(numExpr)

Where:

numExpr is any expression that evaluates to a numeric value.

Example:

MIN("Submission Dates"."Hired Date")

This returns the first date/time a candidate was hired.

NTILE

This function determines the rank of a value in terms of a user-specified range. It returns integers to represent any range of ranks. In other words, the resulting sorted data set is broken into several tiles where there are roughly an equal number of values in each tile.

NTile with **numTiles** = 100 returns what is commonly called the "percentile" (with numbers ranging from 1 to 100, with 100 representing the high end of the sort). This value is different from the results of the Oracle BI **PERCENTILE** function, which conforms to what is called "percent rank" in SQL 92 and returns values from 0 to 1.

Syntax

NTILE(numExpr, numTiles)

Where:

numExpr is any expression that evaluates to a numeric value.

numTiles is a positive, nonnull integer that represents the number of tiles.

If the **numExpr** argument is not null, the function returns an integer that represents a rank within the requested range.

Example:

NTILE("Candidate Counts"."# Submissions", 4)

When Req, Organization is included in Selected Columns, this formula will rank each organization in 4 groups (from 1st quartile to 4th quartile) according to the number of submissions.

PERCENTILE

Similar to NTILE, this function calculates a percent rank for each value satisfying the numeric expression argument but there will be 100 ranks, from 1st percentile to 100th percentile.

Example:

PERCENTILE("Candidate Counts"."# Submissions")

When Req. Organization is included in Selected Columns, this will rank each organization in 100 groups according to the number of submissions.

RANK

This function calculates the rank for each value satisfying the numeric expression argument. The highest number is assigned a rank of 1, and each successive rank is assigned the next consecutive integer (2, 3, 4,...). If certain values are equal, they are assigned the same rank (for example, 1, 1, 1, 4, 5, 5, 7...).

The rank is calculated based on the values in the result set.

Syntax

```
RANK(numExpr)
```

Where:

numExpr is any expression that evaluates to a numeric value.

Example:

RANK("Candidate Counts"."# Submissions")

When Req. Organization is included in Selected Columns, this will rank each organization starting with 1 according to the number of submissions.

STDDEV

This function returns the standard deviation for a set of values. The return type is always a double. **STDEV_SAMP** is a synonym for **STDDEV**.

Syntax

```
STDDEV([ALL | DISTINCT] numExpr)
```

Where:

numExpr is any expression that evaluates to a numeric value.

If **ALL** is specified, the standard deviation is calculated for all data in the set.

If **DISTINCT** is specified, all duplicates are ignored in the calculation.

If nothing is specified (the default), all data is considered.

Example:

STDDEV("Candidate Counts"."# Submissions")

When Req. Organization is included in Selected Columns, this returns the number of submissions for each organization and the amount of variation of the entire data set (in this case the number of submissions) from the average.

STDDEV_POP

This function returns the standard deviation for a set of values using the computational formula for population variance and standard deviation.

Syntax

```
STDDEV_POP([ALL | DISTINCT] numExpr)
```

Where:

`numExpr` is any expression that evaluates to a numeric value.

If `ALL` is specified, the standard deviation is calculated for all data in the set.

If `DISTINCT` is specified, all duplicates are ignored in the calculation.

If nothing is specified (the default), all data is considered.

SUM

This function calculates the sum obtained by adding up all values satisfying the numeric expression argument.

Syntax

```
SUM(numExpr)
```

Where:

`numExpr` is any expression that evaluates to a numeric value.

Adding DISTINCT to the formula will sum all distinct values of an expression

Syntax

SUM(DISTINCT numExpr)

NOTE: for most numeric fields, OBI will automatically sum the values without specifying the function in the code.

TOPN

This function ranks the highest n values of the expression argument from 1 to n, 1 corresponding to the highest numeric value. The `TOPN` function operates on the values returned in the result set. A request can contain only one TOPN expression.

Syntax

```
TOPN(numExpr, integer)
```

Where:

`numExpr` is any expression that evaluates to a numeric value.

`integer` is any positive integer. Represents the top number of rankings displayed in the result set, 1 being the highest rank.

Example:

TopN("Candidate Counts"."# Submissions", 5)

When Req. Organization is included in Selected Columns, this returns the top 5 organizations with the highest number of submissions.

String Functions

String functions perform various character manipulations, and they operate on character strings.

ASCII

This function converts a single character string to its corresponding ASCII code, between 0 and 255. If the character expression evaluates to multiple characters, the ASCII code corresponding to the first character in the expression is returned.

Syntax

ASCII(strExpr)

Where:

strExpr is any expression that evaluates to a character string.

Example:

ASCII('A')

This will give you the ASCII Code for the letter "A", which is 65.

CHAR

This function converts a numeric value between 0 and 255 to the character value corresponding to the ASCII code.

Syntax

CHAR(numExpr)

Where:

numExpr is any expression that evaluates to a numeric value between 0 and 255.

Example:

CHAR(65)

This will give you the letter corresponding to the ASCII Code 65, which is the letter "A".

CHAR_LENGTH

This function returns the length, in number of characters, of a specified string. Leading and trailing blanks are not counted in the length of the string.

Syntax

CHAR_LENGTH(strExpr)

Where:

strExpr is any expression that evaluates to a character string.

Example:

SUBSTRING("Candidate Identification"."Name" FROM 4 FOR CHAR_LENGTH("Candidate Identification"."Name"))

This will return the string within the Candidate Name starting with the 4th character and extending to the end of the record.

CONCAT

There are two forms of this function. The first form concatenates two character strings. The second form uses the character string concatenation character to concatenate more than two character strings.

Syntax for Form 1 (To Concatenate Two Strings)

```
CONCAT(strExpr1, strExpr2)
```

Where:

strExprs are expressions that evaluate to character strings, separated by commas.

Syntax for Form 2 (To Concatenate More Than Two Strings)

```
CONCAT(strExpr1, strExpr2 || strExpr3)
```

Where:

strExprs are expressions that evaluate to character strings, separated by commas and the character string concatenation operator || (double vertical bars). First, **strExpr2** is concatenated with strExpr3 to produce an intermediate string, then both **strExpr1** and the intermediate string are concatenated by the **CONCAT** function to produce the final string.

```
    Example:
```
CONCAT("Candidate Identification"."Last Name",CONCAT(', '"Candidate Identification"."First Name,))

OR

CONCAT("Candidate Identification"."Last Name", ', '||"Candidate Identification"."First Name,)This will return the string: Last Name, First Name.

LEFT

Returns a specified number of characters from the left of a string.

Syntax

```
LEFT(strExpr, integer)
```

Where:

strExpr is any expression that evaluates to a character string.

integer is any positive integer that represents the number of characters from the left of the string to return.

Example:

LEFT("Requisition Department"."Department Name",6)

This will return the first 6 characters of the Requisition Department Name.

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LENGTH

This function returns the length, in number of characters, of a specified string. The length is returned excluding any trailing blank characters.

Syntax

```
LENGTH(strExpr)
```

Where:

strExpr is any expression that evaluates to a character string.

Example:

SUBSTRING("Candidate Identification"."Name" FROM 4 FOR LENGTH("Candidate Identification"."Name"))

This will return the string within the Candidate Name from the 4th character to the end of the record.

LOCATE

This function returns the numeric position of a character string in another character string. If the character string is not found in the string being searched, the function returns a value of 0.

If you want to specify a starting position to begin the search, include the integer argument. The numeric position to return is determined by counting the first character in the string as occupying position 1, regardless of the value of the integer argument.

Syntax

```
LOCATE(strExpr1, strExpr2 [, integer])
```

Where:

strExpr1 is any expression that evaluates to a character string. Identifies the string for which to search.

strExpr2 is any expression that evaluates to a character string. Identifies the string to be searched.

integer is any positive (nonzero) integer that represents the starting position to begin to look for the character string. The integer argument is optional.

Example:

substring("Requisition Department"."Department Level 1 Name",locate('-',"Requisition Department"."Department Level 1 Name")+1,length("Requisition Department"."Department Level 1 Name"))

This will return the string within the Req. Department Name starting from the first character after the dash (notice the +1), wherever it is located in the Department Name, to the end of the record.

LOWER

This function converts a character string to lowercase.

Syntax

```
LOWER(strExpr)
```

Where:

strExpr is any expression that evaluates to a character string.

Example:

LOWER("Candidate Identification"."Name")

This will convert all upper case characters to lower case within the Candidate Name.

POSITION

This function returns the numeric position of strExpr1 in a character expression. If strExpr1 is not found, the function returns 0. See also *"LOCATE"* for related information.

Syntax

        POSITION(strExpr1 IN strExpr2)

Where:

strExpr1 is any expression that evaluates to a character string. Identifies the string to search for in the target string.

strExpr2 is any expression that evaluates to a character string. Identifies the target string to be searched.

Examples

This example returns 4 as the position of the letter d in the character string abcdef:

        POSITION('d', 'abcdef')

This example returns 0 as the position of the number 9 in the character string 123456, because the number 9 is not found.

        POSITION('9', '123456')

REPLACE

This function replaces one or more characters from a specified character expression with one or more other characters.

Syntax

        REPLACE(strExpr1, strExpr2, strExpr3)

Where:

strExpr1 is any expression that evaluates to a character string. This is the string in which characters are to be replaced.

strExpr2 is any expression that evaluates to a character string. This second string identifies the characters from the first string that are to be replaced.

strExpr3 is any expression that evaluates to a character string. This third string specifies the characters to substitute into the first string.

Example:

REPLACE("Candidate Identification"."Name",',',' ')

This will replace all commas within the Candidate Name with spaces.

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RIGHT

This function returns a specified number of characters from the right of a string.

Syntax

```
RIGHT(strExpr, integer)
```

Where:

strExpr is any expression that evaluates to a character string.

integer is any positive integer that represents the number of characters from the right of the string to return.

Example

RIGHT("Requisition Department"."Department Name",6)

This will return the last 6 characters of the Requisition Department Name.

SUBSTRING

This function creates a new string starting from a fixed number of characters into the original string.

Syntax

```
SUBSTRING(strExpr FROM starting_position)
```

Where:

strExpr is any expression that evaluates to a character string.

starting_position is any positive integer that represents the number of characters from the start of the left side of the string where the result is to begin.

Example:

SUBSTRING("Requisition Department"."Department Name",5,6)

Will give you 6 characters of the Requisition Department Name, starting at position 5.

TRIMBOTH

This function strips specified leading and trailing characters from a character string.

Syntax

```
TRIM(BOTH character FROM strExpr)
```

Where:

character is any single character. If you omit this specification (and the required single quotes), a blank character is used as the default.

strExpr is any expression that evaluates to a character string.

Example:

TRIM(BOTH '0' from "Requisition Identification"."Req. Identifier")

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This will remove all leading and trailing zeros from the Requisition Number. Zeros in the middle will remain.

TRIMLEADING

This function strips specified leading characters from a character string.

Syntax

```
TRIM(LEADING character FROM strExpr)
```

Where:

character is any single character. If you omit this specification (and the required single quotes), a blank character is used as the default.

strExpr is any expression that evaluates to a character string.

Example:

TRIM(LEADING '0' from "Requisition Identification"."Req. Identifier")

This will remove all leading zeros from the Requisition Number.

TRIMTRAILING

This function strips specified trailing characters from a character string.

Syntax

```
TRIM(TRAILING character FROM strExpr)
```

Where:

character is any single character. If you omit this specification (and the required single quotes), a blank character is used as the default.

strExpr is any expression that evaluates to a character string.

Example:

TRIM(TRAILING '0' from "Requisition Identification"."Req. Identifier")

This will remove all trailing zeros from the Requisition Number.

UPPER

This function converts a character string to uppercase.

Syntax

```
UPPER(strExpr)
```

Where:

strExpr is any expression that evaluates to a character string.

Example:

UPPER("Candidate Identification"."Name")

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This will convert all lower case characters to upper case within the Candidate Name.

Math Functions

The math functions perform mathematical operations.

ABS

This function calculates the absolute value of a numeric expression.

Syntax

```
ABS(numExpr)
```

Where:

`numExpr` is any expression that evaluates to a numeric value.

Example:

ABS(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Dates"."Submission Created Date", "Submission Dates"."Hire Start Date"))

This will give you the absolute value of the days between the Submission Created Date and the Hire Start Date. If the Hire Start Date is before the Submission Creation Date resulting in negative days between, ABS will give you the positive equivalent. For example, if days between is -2, ABS will show a value of 2.

CEILING

This function rounds a noninteger numeric expression to the next highest integer. If the numeric expression evaluates to an integer, the `CEILING` function returns that integer.

Syntax

```
CEILING(numExpr)
```

Where:

`numExpr` is any expression that evaluates to a numeric value.

Example:

CEILING("Candidate Counts"."# Submissions Complete"/"Candidate Counts"."# Submissions")

This will round the ratio value to the next highest integer.

FLOOR

This function rounds a noninteger numeric expression to the next lowest integer. If the numeric expression evaluates to an integer, the `FLOOR` function returns that integer.

Syntax

```
FLOOR(numExpr)
```

Where:

numExpr is any expression that evaluates to a numeric value.

Example:

FLOOR("Candidate Counts"."# Submissions Complete"/"Candidate Counts"."# Submissions")

This will round the ratio value to the next lowest integer.

RAND

Returns a pseudo-random number between 0 and 1.

Syntax

```
RAND()
```

ROUND

This function rounds a numeric expression to n digits of precision.

Syntax

ROUND(numExpr, integer)
Where:

numExpr is any expression that evaluates to a numeric value.

integer is any positive integer that represents the number of digits of precision.

```
Example:
```

ROUND("Candidate Counts"."# Submissions Complete"/"Candidate Counts"."# Submissions",3)

This will round the value of the ratio to 3 digits.

NOTE: The Data Format in Column Properties will need to be configured to more than 2 digits to see up to the 3 digits specified in the formula.

TRUNCATE

This function truncates a decimal number to return a specified number of places from the decimal point.

Syntax

```
TRUNCATE(numExpr, integer)
```

Where:

numExpr is any expression that evaluates to a numeric value.

integer is any positive integer that represents the number of characters to the right of the decimal place to return.

```
Example:
```

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TRUNCATE("Candidate Counts"."# Submissions Complete"/"Candidate Counts"."# Submissions",3)

This will remove the characters after the third decimal place without rounding the number. If the ratio yields 0.8745, TRUNCATE will show 0.874 (ROUND will show 0.875).

NOTE: The Data Format in Column Properties will need to be configured to more than 2 digits to see up to the 3 digits specified in the formula.

Calendar Date/Time Functions

The calendar date/time functions manipulate data of the data types **DATE** and **DATETIME** based on a calendar year. You must select these functions with another column; they cannot be selected alone.

CURRENT_DATE

This function returns the current date. The date is determined by the system in which the Oracle BI Server is running.

Syntax

    CURRENT_DATE

Example:

TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Fully Approved Date", CURRENT_DATE)

This will return the days between the First Fully Approved Date and today.

CURRENT_TIME

This function returns the current time. The time is determined by the system in which the Oracle BI Server is running.

Syntax

    CURRENT_TIME(integer)

Where:

integer is any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

CURRENT_TIMESTAMP

This function returns the current date/timestamp. The timestamp is determined by the system in which the Oracle BI Server is running.

Syntax

CURRENT_TIMESTAMP(integer)
Where:

integer is any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

DAY_OF_QUARTER

This function returns a number (between 1 and 92) corresponding to the day of the quarter for the specified date.

Syntax

`DAY_OF_QUARTER(dateExpr)`

Where:

`dateExpr` is any expression that evaluates to a date.

Example:

DAY_OF_QUARTER("Requisition Dates"."First Fully Approved Date")

This will return the corresponding day of the quarter for the First Fully Approved Date.

DAYNAME

This function returns the name of the day of the week for a specified date.

Syntax

`DAYNAME(dateExpr)`

Where:

`dateExpr` is any expression that evaluates to a date.

DAYOFMONTH

This function returns the number corresponding to the day of the month for a specified date.

Syntax

`DAYOFMONTH(dateExpr)`

Where:

`dateExpr` is any expression that evaluates to a date.

DAYOFWEEK

This function returns a number between 1 and 7 corresponding to the day of the week, Sunday through Saturday, for a specified date. For example, the number 1 corresponds to Sunday, and the number 7 corresponds to Saturday.

Syntax

`DAYOFWEEK(dateExpr)`

Where:

`dateExpr` is any expression that evaluates to a date.

DAYOFYEAR

This function returns the number (between 1 and 366) corresponding to the day of the year for a specified date.

Syntax

```
DAYOFYEAR(dateExpr)
```

Where:

dateExpr is any expression that evaluates to a date.

HOUR

This function returns a number (between 0 and 23) corresponding to the hour for a specified time. For example, 0 corresponds to 12 a.m. and 23 corresponds to 11 p.m.

Syntax

```
HOUR(timeExpr)
```

Where:

timeExpr is any expression that evaluates to a time.

MINUTE

This function returns a number (between 0 and 59) corresponding to the minute for a specified time.

Syntax

```
MINUTE(timeExpr)
```

Where:

timeExpr is any expression that evaluates to a time.

MONTH

This function returns the number (between 1 and 12) corresponding to the month for a specified date.

Syntax

```
MONTH(dateExpr)
```

Where:

dateExpr is any expression that evaluates to a date.

MONTH_OF_QUARTER

This function returns the number (between 1 and 3) corresponding to the month in the quarter for a specified date.

Syntax

MONTH_OF_QUARTER(dateExpr)

Where:

dateExpr is any expression that evaluates to a date.

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MONTHNAME

This function returns the name of the month for a specified date.

Syntax

```
MONTHNAME(dateExpr)
```

Where:

dateExpr is any expression that evaluates to a date.

NOW

This function returns the current timestamp. The **NOW** function is equivalent to the **CURRENT_TIMESTAMP** function.

Syntax

```
NOW()
```

QUARTER_OF_YEAR

This function returns the number (between 1 and 4) corresponding to the quarter of the year for a specified date.

Syntax

```
QUARTER_OF_YEAR(dateExpr)
```

Where:

dateExpr is any expression that evaluates to a date.

SECOND

This function returns the number (between 0 and 59) corresponding to the seconds for a specified time.

Syntax

```
SECOND(timeExpr)
```

Where:

timeExpr is any expression that evaluates to a time.

TIMESTAMPADD

This function adds a specified number of intervals to a specified timestamp, and returns a single timestamp.

In the simplest scenario, this function adds the specified integer value to the appropriate component of the timestamp, based on the interval. Adding a week translates to adding seven days, and adding a quarter translates to adding three months. A negative integer value results in a subtraction (such as going back in time).

An overflow of the specified component (such as more than 60 seconds, 24 hours, 12 months, and so on) necessitates adding an appropriate amount to the next component. For example, when adding to the day component of a timestamp, this function considers overflow and takes into account the number of days in a particular month (including leap years when February has 29 days).

When adding to the month component of a timestamp, this function verifies that the resulting timestamp has enough days for the day component. For example, adding 1 month to 2000-05-31 does not result in 2000-06-31 because June does not have 31 days. This function reduces the day component to the last day of the month, 2000-06-30 in this example.

A similar issue arises when adding to the year component of a timestamp having a month component of February and a day component of 29 (that is, last day of February in a leap year). If the resulting timestamp does not fall on a leap year, the function reduces the day component to 28.

These actions conform to the behavior of Microsoft SQL Server and the native OCI interface for Oracle Database.

Syntax

```
TIMESTAMPADD(interval, intExpr, timestamp)
```

Where:

interval is the specified interval. Valid values are:

- **SQL_TSI_SECOND**
- **SQL_TSI_MINUTE**
- **SQL_TSI_HOUR SQL_TSI_DAY**
- **SQL_TSI_WEEK**
- **SQL_TSI_MONTH**
- **SQL_TSI_QUARTER**
- **SQL_TSI_YEAR**

intExpr is any expression that evaluates to an integer value.

timestamp is any valid timestamp. This value is used as the base in the calculation.

A null integer expression or a null timestamp passed to this function results in a null return value.

Example:

TIMESTAMPADD(SQL_TSI_DAY, 7, CURRENT_DATE)

This will return a value of one week from today.

TIMESTAMPDIFF

This function returns the total number of specified intervals between two timestamps.

This function first determines the timestamp component that corresponds to the specified interval parameter, and then looks at the higher order components of both timestamps to calculate the total number of intervals for each timestamp. For example, if the specified interval corresponds to the month component, the function calculates the total number of months for each timestamp by adding the month component and twelve times the year component. Then the function subtracts the first timestamp's total number of intervals from the second timestamp's total number of intervals.

> ✏ **Note:** This section describes the **TIMESTAMPDIFF** behavior when the function is calculated in the Oracle BI Server. If this function is calculated in the data source, then the result might be different from the behavior described in this section. If the **TIMESTAMPDIFF** function result is different from the desired result, then you can disable **TIMESTAMP_DIFF_SUPPORTED** in the Features tab for the database object in the Administration Tool to ensure that the function is calculated in the Oracle BI Server. However, making this change might adversely affect performance.

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The **TIMESTAMPDIFF** function rounds up to the next integer whenever fractional intervals represent a crossing of an interval boundary. For example, the difference in years between 1999-12-31 and 2000-01-01 is one year because the fractional year represents a crossing from one year to the next (such as 1999 to 2000). By contrast, the difference between 1999-01-01 and 1999-12-31 is zero years because the fractional interval falls entirely within a particular year (that is, 1999). Microsoft SQL Server exhibits the same rounding behavior, but IBM DB2 does not; it always rounds down.

When calculating the difference in weeks, the function calculates the difference in days and divides by seven before rounding. Additionally, the function takes into account how the parameter **FIRST_DAY_OF_THE_WEEK** has been configured in the NQSConfig.INI file. For example, with Sunday as the start of the week, the difference in weeks between 2000-07-06 (a Thursday) and 2000-07-10 (the following Monday) results in a value of 1 week. With Tuesday as the start of the week, however, the function would return zero weeks since the fractional interval falls entirely within a particular week. When calculating the difference in quarters, the function calculates the difference in months and divides by three before rounding.

The Oracle BI Server pushes down the **TIMESTAMPADD** and **TIMESTAMPDIFF** functions to Microsoft SQL Server, Oracle Database, IBM DB2, and ODBC databases by default.

Syntax

    TIMESTAMPDIFF(interval, timestamp1, timestamp2)

Where:

interval is the specified interval. Valid values are:

- **SQL_TSI_SECOND**
- **SQL_TSI_MINUTE**
- **SQL_TSI_HOUR**
- **SQL_TSI_DAY**
- **SQL_TSI_WEEK**
- **SQL_TSI_MONTH**
- **SQL_TSI_QUARTER**
- **SQL_TSI_YEAR**

timestamp1 and timestamp2 are any valid timestamps.

A null timestamp parameter passed to this function results in a null return value.

Example:

TIMESTAMPDIFF(SQL_TSI_DAY, "Requisition Dates"."First Sourced Date", "Requisition Dates"."Latest Filled Date")

This will return the days between the First Sourced Date and the Latest Filled Date.

WEEK_OF_QUARTER

This function returns a number (between 1 and 13) corresponding to the week of the quarter for the specified date.

Syntax

    WEEK_OF_QUARTER(dateExpr)

Where:

dateExpr is any expression that evaluates to a date.

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WEEK_OF_YEAR

This function returns a number (between 1 and 53) corresponding to the week of the year for the specified date.

Syntax

WEEK_OF_YEAR(dateExpr)

Where:

dateExpr is any expression that evaluates to a date.

YEAR

This function returns the year for the specified date.

Syntax

YEAR(dateExpr)

Where:

dateExpr is any expression that evaluates to a date.

Example:

YEAR("Requisition Dates"."First Sourced Date")

This will give you the year of the First Sourced Date.

Conversion Functions

The conversion functions convert a value from one form to another. You can also use the **VALUEOF** function in a filter to reference the value of an Oracle BI system variable.

CAST

This function changes the data type of an expression or a null literal to another data type. For example, you can cast a customer_name (a data type of Char or Varchar) or birthdate (a datetime literal). The following are the supported data types to which the value can be changed:

CHARACTER, VARCHAR, INTEGER, FLOAT, SMALLINT, DOUBLE PRECISION, DATE, TIME, TIMESTAMP, BIT, BIT VARYING

Depending on the source data type, some destination types are not supported. For example, if the source data type is a **BIT** string, the destination data type must be a character string or another **BIT** string.

Use **CAST** to change to a **DATE** data type. Do not use **TO_DATE**.

The following describes unique characteristics of the **CHAR** and **VARCHAR** data types:

- Casting to a CHAR data type. You must use a size parameter. If you do not add a size parameter, a default of 30 is added. Syntax options appear in the following list:
    - o The recommended syntax is:

```
CAST(expr|NULL AS CHAR(n))
```

For example:

```
CAST(companyname AS CHAR(35))
```

o You can also use the following syntax:

```
CAST(expr|NULL AS data_type)
```

For example:

```
CAST(companyname AS CHAR)
```

> ✒ **Note:** If you use this syntax, the Oracle BI Server explicitly converts and stores as `CAST(expr|NULL AS CHAR(30))`

- Casting to a VARCHAR data type. You must use a size parameter. If you omit the size parameter, you cannot can save the change.

Examples:

CAST("Requisition Identification"."Req. Identifier" AS CHAR(40))

CAST("Submission Job Offer"."Sequence" AS VARCHAR(40))

CAST(AVG("Candidate Counts"."# Submissions") AS DOUBLE)

CAST("Submission Dates"."Hire Start Date" AS DATE)

CAST(TIMESTAMPDIFF(SQL_TSI_DAY, "Submission Dates"."Submission Created Date", CURRENT_DATE) AS INTEGER)

IFNULL

This function tests if an expression evaluates to a null value, and if it does, assigns the specified value to the expression.

Syntax

```
IFNULL(expr, value)
```

Where:

`expr` is the expression to evaluate.

`value` is the value to assign if the expression evaluates to a null value.

Example:

IFNULL("Submission Job Offer Flex Field"."UDF1", "Requisition Compensation Flex Fields"."UDF1")

This will return the value for Requisition Compensation UDF1 if the value for Submission Job Offer UDF1 is null.

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TO_DATETIME

This function converts string literals of dateTime format to a DateTime data type.

Syntax

```
TO_DATETIME('string1', 'DateTime_formatting_string')
```

Where:

string1 is the string literal you want to convert

DateTime_formatting_string is the DateTime format you want to use, such as yyyy.mm.dd hh:mi:ss. For this argument, yyyy represents year, mm represents month, dd represents day, hh represents hour, mi represents minutes, and ss represents seconds.

```
Example:
```

TO_DATETIME("Requisition Flex Fields"."UDF4", 'mm-dd-yyyy')

This will convert UDF4 to a date/time data type while also enabling the date format to be specified.

Database Functions

Users and administrators can create requests by directly calling database functions from either Oracle BI Answers, or by using a logical column (in the logical table source) within the metadata repository. Key uses for these functions include the ability to pass through expressions to get advanced calculations, as well as the ability to access custom written functions or procedures on the underlying database.

Support for database functions does not currently extend across all multidimensional sources. Also, you cannot use these functions with XML data sources.

EVALUATE

This function passes the specified database function with optional referenced columns as parameters to the back-end data source for evaluation. This function is intended for scalar calculations, and is useful when you want to use a specialized database function that is not supported by the Oracle BI Server, but that is understood by the underlying data source.

The embedded database function may require one or more columns. These columns are referenced by %1 ... %N within the function. The actual columns must be listed after the function.

Syntax

```
EVALUATE('db_function(%1...%N)' [AS data_type] [, column1, columnN])
```

Where:

db_function is any valid database function understood by the underlying data source.

data_type is an optional parameter that specifies the data type of the return result. Use this parameter whenever the return data type cannot be reliably predicted from the input arguments. However, do not use this parameter for type casting; if the function needs to return a particular data type, add an explicit cast. You can typically omit this parameter when the database-

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specific function has a return type not supported by the Oracle BI Server, but is used to generate an intermediate result that does not need to be returned to the Oracle BI Server.

column1 through **columnN** is an optional, comma-delimited list of columns.

```
    Example:
```

EVALUATE('NLS_INITCAP(%1)' AS VARCHAR(4000),"Requisition Identification"."Title (BL)")

This will capitalize the first letter in every word in the Requisition Title.

EVALUATE_ANALYTIC

This function passes the specified database analytic function with optional referenced columns as parameters to the back-end data source for evaluation.

The embedded database function may require one or more columns. These columns are referenced by %1 ... %N within the function. The actual columns must be listed after the function.

Syntax

```
    EVALUATE_ANALYTIC('db_function(%1...%N)' [AS data_type] [, column1, columnN])
```

Where:

db_function is any valid database analytic function understood by the underlying data source.

data_type is an optional parameter that specifies the data type of the return result. Use this parameter whenever the return data type cannot be reliably predicted from the input arguments. However, do not use this parameter for type casting; if the function needs to return a particular data type, add an explicit cast. You can typically omit this parameter when the database-specific analytic function has a return type not supported by the Oracle BI Server, but is used to generate an intermediate result that does not need to be returned to the Oracle BI Server.

column1 through **columnN** is an optional, comma-delimited list of columns.

Example:

EVALUATE_ANALYTIC ('LEAD(%1,1) OVER (ORDER BY %1)' AS TIMESTAMP,"Submission Dates"."Hired Date")

This will return the next hire according to the Hired Date.

EVALUATE_AGGR

This function passes the specified database function with optional referenced columns as parameters to the back-end data source for evaluation. This function is intended for aggregate functions with a GROUP BY clause.

The embedded database function may require one or more columns. These columns are referenced by %1 ... %N within the function. The actual columns must be listed after the function.

Syntax

```
    EVALUATE_AGGR('db_agg_function(%1...%N)' [AS data_type] [, column1, columnN)
```

Where:

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db_agg_function is any valid aggregate database function understood by the underlying data source.

data_type is an optional parameter that specifies the data type of the return result. Use this parameter whenever the return data type cannot be reliably predicted from the input arguments. However, do not use this parameter for type casting; if the function needs to return a particular data type, add an explicit cast. You can typically omit this parameter when the database-specific function has a return type not supported by the Oracle BI Server, but is used to generate an intermediate result that does not need to be returned to the Oracle BI Server.

column1 through **columnN** is an optional, comma-delimited list of columns.

    Example:

EVALUATE_AGGR('COUNT(DISTINCT CASE WHEN %1 = %2 THEN %3 END)' AS NUMERIC,"Submission CSW Status - Current"."Current Step Name","Interview","Submission General Info"."Submission Identifier")

This will return the number of submissions currently in the Step of Interview.

User Interface Reference

This appendix contains comprehensive reference information for each user interface item (dialogs, panes, editors, and so on) in Oracle Business Intelligence Enterprise Edition.

Topics are provided in alphabetical order by user interface item.

Action Link dialog

Use this dialog to add an action link to an initiative or objective in a Scorecard.

For more information, see:

- "*Actions*"
- "*Adding Actions to Initiatives and Objectives in a Scorecard*"

Components State Equals
Use this box to select the state of the initiative or objective under which the action link is to be enabled.

Action

Displays the action to be associated with the action link.

Create New Action

Use this button to select the type of action to create and display the , where you create the action.

Select Existing Action

Use this button to display the "*Select Existing Action dialog*", where you select an existing action.

Link Text

Use this field to enter the text to display as the link to execute the associated action.

Action Links dialog

Use this dialog to add an action link to a KPI threshold range.

For more information, see:

- *"Actions"*
- *"Adding Actions to a KPI"*

Components Action Links List>
Displays the action links that have been added to the KPI, including the text of the action links and the actions associated with the links.

Add Action Link

Use this option to display the *"New Action Link dialog"*, where you create an action link.

Edit Action Link

Use this button to display the *"Edit Action Link dialog"*, where you edit the selected action link.

Remove Action Link

Use this button to remove the selected action link.

Action Link Menu Properties dialog

Use this dialog to set the properties of an action links menu on a dashboard page.

For more information, see:

- *"Actions"*
- *"Actions in Dashboard Pages"*

Components Menu Label

Use this field to enter the text to display for the menu.

Caption

Use this field to enter a caption to be displayed above the menu text.

Action Links

Displays a list of action links associated with the action links menu.

Add

Use this button to display the "Action Link Properties dialog", where you add an action link to the action links menu.

Edit

Use this button to display the *"Action Link Properties dialog"*, where you edit the currently selected action link.

Delete

Use this button to delete the currently selected action link.

Notes

- Use the arrows to the right of the Action Links list to reorder the list of action links and change the order of how they are displayed in the action link menu.

Action Link Properties dialog

Use this dialog to set the properties of an action link on a dashboard page.

For more information, see:

- "*Actions*"
- "*Actions in Dashboard Pages*"

Components Link Text

Use this field to enter the text to display as the link to execute the associated action.

Caption

This field is available only for actions links that are not displayed on an action link menu.

Use this field to enter a caption to display above the link text.

Action

Displays the action to be associated with the action link.

New Action

Use this button to select the type of action to create and display the , where you create an inline action. For more information on inline actions, see "*Inline Actions*".

Select Action

Use this button to display the "*Select Existing Action dialog*", where you select a named action. For more information on named actions, see

Edit Parameter Mapping

This button is available only for named actions that have parameters that are not fixed or hidden.

Use this button to display the "*Edit Parameter Mapping dialog*", where you edit the action parameters. For more information on action parameters, see

More (>>)

Displays these options for the currently selected action:

- Edit Action - Use this option to display the "*Edit Action dialog*", where you edit an action.
- Remove Action - Use this option to remove the action.
- Save Action As - Use this button to display the "*Save As dialog*", where you save the action to the Oracle BI Presentation Catalog. If the action is an inline action, then the action is saved to the catalog rather than saved with the dashboard. If the action is a named action, then you can save the action with the same name or another name.

Open Link in New Window

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This box is available only for actions that navigate to related content, such as Navigate to a Web Page and Navigate to BI Content actions.

Use this box to specify, for an action link that navigates to a URL or to other BI content, whether to open the link in a new browser window or new tab (if the browser supports tabs). Select this box to open the action link in a new browser window or tab. Deselect this box to open the action link in the same browser window or tab.

> ✎ **Note:** If you selected a named action for this action link, the default value for this component is determined by the definition of the named action (that is, by the value specified for the Open In New Window component in the . You can override this default value. The value you set here ultimately determines whether to open a new window or new tab.

Add to Briefing Book

This box is available only for Navigate to BI Content actions.

Use this box to specify whether the action associated with the action link can be executed in a briefing book, but only if the number of briefing book navigation links to be followed is greater than 0. (You set the number of briefing book navigation links to be followed in the *"Save Briefing Book Content dialog"* or in the *"Page Properties dialog"*.)

If you select this box, then the action can be executed in a briefing book. A briefing book icon is displayed to the left of the action link on the dashboard page and in the briefing book to indicate that the action can be executed.

If you deselect this box, then the action cannot be executed in the briefing book.

See *"Briefing Book"*.

Show Link

Use this box to specify one of the following options:

- Always - Use this option to specify that the action link is always to be enabled.

- Conditionally - Use this option to specify that the action link is to be enabled only if the associated condition is satisfied. Selecting this option displays the Condition area.

Condition

(Displayed only if the Conditionally option is selected.)

Use this area to specify the condition under which the action link is to be enabled. It includes the following components:

- New Condition - Use this button to display the *"New Condition dialog"*, where you create a condition.

- Select Condition - Use this button to display the *"Select Condition dialog"*, where you select an existing condition.

- More (>>) - Display these options:

  - Test Condition - Use this button to test if the condition evaluates to true or false.

  - Edit Condition - Use this button to display the *"Edit Condition dialog"*, where you edit the condition.

  - Remove Condition - Use this button to remove the condition.

  - Save Condition As - Use this button to display the *"Save As dialog"*, where you save the condition to the catalog.

Action Options dialog

Use this dialog to customize information to display to users when they execute an action.

For more information, see:

- "*Actions*"
- "*Specifying the Settings for a New Action*"
- "*Create New Action dialog*"

Components Invoke Action

Use the to:

- Specify whether to display a confirmation prompt to users when they execute the action
- Customize the dialog that is displayed to users when they must supply action parameter values before the action is executed
- Customize the invocation successful message that is displayed to users
- Customize the invocation failure message that is displayed to users

Action Results

This tab is available only for Invoke a Web Service actions.

Use the to customize a dialog to display information to users about the results of the action, if the action executed successfully.

Add Comment dialog

Use this dialog to add new comments to or reply to existing comments attached to initiatives, objectives, and KPIs. (Remember that a comment is associated with a specific point of view.)

For more information, see:

- "*Comments*"

This dialog is also displayed as:

New Comment dialog

Reply dialog

Components Subject

Use this box to enter the subject of the comment.

Comment

Use this box to enter your comment.

History

This area is not available when the New Comment dialog is displayed from the "*Collaboration pane*".

Displays any comments that previously have been added to the initiative, objective, or KPI for the current point of view.

To expand or collapse the History area, click the Expand All or Collapse All button.

Notes

- Ensure that you save objectives, initiatives, and KPIs after adding new comments to or replying to existing comments attached to them.

Add Dashboard Page dialog

Use this dialog to specify the name and description of the page that you are adding to a dashboard.

For more information, see "*Adding New Pages to a Dashboard*".

Components Page Name

Use this field to enter a name for the page.

Page Description

Use this field to enter a description for the page.

Add KPI dialog

Use this dialog to provide a label for a KPI usage or to pin (or set) the value of one or more KPI dimensions.

Pinning is optional. Typically, it is best not to pin most of the dimensions so that the data is controlled by the point of view settings. See "*Dimensions and Pinned Dimension Values*" for additional information about pinning.

You pin values of KPI dimensions, for example, when you add a KPI to one of the following tables:

- Initiatives & KPIs watchlist in the "*Analytics pane*" of the "*Scorecard editor: Initiative Details tab*"
- Objectives & KPIs table in the in the "*Analytics pane*" of the "*Scorecard editor: Initiative Details tab*"
- New KPI watchlist in the "*KPI Watchlist editor: Performance tab*"

When you view the KPI, the data displayed is determined by the dimension values that you selected.

This dialog also displays as:

Edit Watchlist Entry dialog
Components KPI Name

Displays the name of the saved KPI that you are adding (for example, Revenue KPI).

Subject Area

Displays the name of the subject area that contains the KPI dimension or dimensions.

Dimension>

This box is not available for a dimension whose value has been set in the KPI.

Use this box to specify a dimension value. Consider the following options:

- For all dimensions, you can select a column value or roll up value (for example, for the Dimensions.Geog dimension, you can drill and select North American, or drill further and select Los Angeles).

- Select Point-of-View to set no dimension value. If you use this option, at runtime a dimension field displays in the point of view area where the user can select a dimension value.

- For measures column, you can select Use Variable to set the dimension's value with either a session or repository variable. When you select this option, the *"Select Variable dialog"* displays. See *"Using Variables"* for additional information.

Label

Use this field to enter a user-friendly, descriptive KPI name to display in the watchlist or the Objectives KPIs table.

> ✎ **Note:** Tip: If you select a specific value for a dimension, rather than the Use Point-of-View option, then enter a label that describes the pinning. For example, if you select Central for the Region dimension, you might enter Sales Central Region.

Add/Remove Subject Areas dialog

Use this dialog to add or remove related subject areas from which to select columns.

> ✎ **Note:** In BI Composer, this dialog shows all Subject Areas, not just related ones.

For more information, see:

- *"What Are Subject Areas and Columns?"*
- *"Specifying the Criteria for Analyses"* *"Specifying the Criteria for Analyses"*
- *"Creating a Column Filter"*
- *"Creating a Column Prompt"*

Components List of Subject Areas

Displays the primary subject area and any related subject areas that you have permission to access. The primary subject area (which you select when you create an analysis, a new named filter, or a new dashboard prompt) is always listed first.

A check mark beside a subject area identifies a related subject area that has been added. A grayed-out check mark identifies the primary subject area or a related subject area whose data is currently being used in the analysis, named filter, or column prompt. You cannot remove a primary subject area. You can remove a related subject area only if its data is not currently being used.

Use this list to add or remove related subject areas. Check a related subject area to add it. Deselect a subject area to remove it.

Agent editor

Use this editor to create or edit an agent.

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For more information, see:

- *"Creating Agents"*

Components Overview

Displays a summary of the current settings for the agent. Use the Plus and Minus buttons to expand and collapse this summary.

General

Use the *"Agent editor: General tab"* to specify the priority of the content that the agent is to deliver and how to send the delivery content

Schedule

Use the *"Agent editor: Schedule tab"* to specify whether the agent is to be run based on a schedule, how often it runs, and when its running is to start and end.

Condition

Use the *"Agent editor: Condition tab"* to specify whether the agent always delivers its content and executes its actions, or conditionally delivers its content and executes its actions.

For more information about conditions, see *"Working with Conditions."*

Delivery Content

Use the *"Agent editor: Delivery Content tab"* to specify the content to deliver with the agent, such as a dashboard page or a saved analysis.

Recipients

Use the *"Agent editor: Recipients tab"* to specify who is to receive the delivery content of the agent and who is allowed to subscribe to the agent.

Destinations

Use the *"Agent editor: Destinations tab"* to specify where the content is to be delivered.

Actions

Use the *"Agent editor: Actions tab"* to specify one or more actions to execute when the agent finishes.

For more information about actions, see *"Actions"*.

Toolbar

The toolbar contains the following buttons:

- Save this Agent - Use this button to save the agent.
- Save this Agent as - Use this button to save a copy of the agent by another name.
- Delete this Agent from the Catalog - Use this button to delete the agent.
- Discard changes made to this page - Use this button to discard any changes you have made on the current tab.
- Run Agent Now - Use this button to run the agent.This is helpful, for example, to test the agent.

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Agent editor: Actions tab

Use this tab of the *"Agent editor"* to specify one or more actions to execute when an agent finishes.

You can specify actions to execute under the following circumstances:

- Only if the agent condition evaluates to true or if there is no condition associated with the agent
- Only if the agent condition evaluates to false

For more information, see:

- *"Creating Agents"*
- *"Actions"*.

Components Agent Condition True or No Condition Exists

Use this area to specify one or more actions to execute only if the agent condition evaluates to true or if there is no condition associated with the agent.

Agent Condition is False

This area is enabled only when a condition has been specified for the agent. See *"Agent editor: Condition tab"*.

Use this area to specify one or more actions to execute only if the agent condition evaluates to false.

Invoke per Row

This box is enabled only when a condition has been specified for the agent. It is not available for Invoke Server Script actions, Invoke Agent actions, or actions for which one of the parameters is a result set mapping.

Use this box to specify whether to execute the action for each row returned by the condition. Select this box to execute the action for each row. Deselect this box to execute the action only once, regardless of the number of rows returned.

Add New Action

Use this button to display the *"Create New Action dialog"*, where you create an action.

Add Existing Action

Use this button to display the *"Select Existing Action dialog"*, where you select an existing action.

Edit Action

Use this button to display the *"Edit Action dialog"*, where you edit the selected action. For inline actions, you can edit the action definition. For named actions, you can edit only parameter values.

Delete Action

Use this button to delete an action.

Agent editor: Condition tab

Use this tab of the *"Agent editor"* to specify whether an agent always delivers its content and executes its actions, or conditionally delivers its content and executes its actions.

To determine whether the agent delivers its content and executes its actions, you use a condition. (For more information on conditions, see *"Working with Conditions."*)

For more information, see:

- *"Creating Agents"*

Components Settings

Use this box to select one of the following options:

- Do Not use a Condition (always deliver content and run actions) - Use this option to specify that the agent is always to deliver its content and execute its actions.
- Use a Condition - Use this option to specify that the agent is to conditionally deliver its content and execute its actions.

Create

Use this button to display the *"Create Condition dialog"*, where you create an inline condition.

Browse

Use this button to display the *"Select Condition dialog"*, where you select a named condition.

Edit Condition

This button is available only if you created an inline condition.

Use this button to display the *"Edit Condition dialog"*, where you edit an inline condition. (You cannot edit named conditions.)

Customize

This button is available only if you selected a named condition that is based on an analysis that includes one or more prompted filters.

Use this button to display the *"Customize Condition dialog"*, where you can customize the condition.

Test Condition

Use this button to test whether the condition evaluates to true or false.

Save To Catalog

This button is available only if you created an inline condition.

Displays the *"Save As dialog"*, where you save the condition to the catalog as a named condition.

Agent editor: Delivery Content tab

Use this tab of the *"Agent editor"* to specify the content to deliver with the agent, such as a dashboard page or a saved analysis. You can also specify:

- The delivery format for the content, such as HTML, PDF, Excel, CSV Format, or Plain Text
- A subject line to include with the content
- A text message to provide context for an agent attachment
- A narrative text description of the conditional analysis (but only when you specify that the conditional analysis is also the delivery content)

- An explanation to deliver when an agent is to be delivered conditionally and the condition evaluates to false

For more information, see:

- "*Creating Agents*"

Components Subject

Use this field to enter the subject line for the agent.

Content

Use this box to select the type of content to deliver:

- Analysis - Use this option to deliver saved analyses (shared and private).

- Dashboard Page - Use this option to deliver dashboard pages from My Dashboard or dashboard pages from public (shared) dashboards.

- Briefing Book - Use this option to deliver a briefing book.

- Condition Analysis - This option is available only if you have specified a condition on the Conditions tab. Use this option to deliver the results of the analysis on which the condition is based.

    Note: If you attempt to clear the content or select different delivery content, and you have selected the option to show only relevant rows to each user on the "Agent editor: Recipients tab", then a message is displayed. The message alerts you that the option to show relevant rows will be reset if you proceed with clearing the content or selecting different delivery content. Click Yes to proceed, or No to retain the current delivery content choice. If you click Yes, then the recipients will still be determined from the conditional analysis, but users will receive all content, and not only the content that pertains to them.

Browse

Use this button to display the , where you select the content.

Customize

(This button is not available if you have specified Condition Analysis as the delivery content. Instead, the customizations specified on the Conditions tab are used.)

Use this button to display the , where you customize the content to be delivered.

Clear

Use this button to remove content previously selected.

Format

Use this box to select the format in which to deliver the content. The format options depend upon the type of delivery content. The format options are:

- (Device default) - Uses the device default to determine the content format.

- HTML - Sends delivery content as HTML.

- Plain Text - Sends delivery content in plain text format.

- CSV Format - Sends delivery content as a Comma Separated Value (CSV) attachment.

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- Tab delimited Format - Sends delivery content as a tab-delimited attachment.

- Excel - Sends delivery content as a spreadsheet attachment.

- PowerPoint 2003 or PowerPoint 2007+ - Sends delivery content as a Powerpoint presentation attachment.

- PDF - Sends delivery content as a PDF attachment.

- Narrative Text - (This option is available only if you have specified the Condition Analysis as the delivery content.) Sends a narrative description of the results of the analysis on which the condition is based. If you select this option, a box is displayed in which you enter the narrative description to send. To include column n from the results in your text, use @n.)

> ✏️ **Note:** Content that is delivered to the Home page and dashboard is delivered in HTML only. (You specify whether content is to be delivered to the Home page and dashboard in the *"Agent editor: Destinations tab"*.

Delivery

Use this area to select whether to deliver the content directly or as an attachment:

- Deliver Results Directly - This option is available only for these format options: (Device default), HTML (except for dashboard pages), Plain Text, and Narrative Text. Use this option to deliver the content directly.

- Deliver as Attachment - Use this option to deliver the content as an attachment.
  If CSV data, Excel, or PDF is selected in the Format box, then this option is automatically selected.
  If you select the Deliver as Attachment option, in the Attachment Note field, then enter a text message to provide context for the agent attachment.

Attachment Note

Use this field to enter a text message to provide context for the agent attachment.

If Condition is False

Use this area to specify whether to deliver a text message to recipients when there is no agent content to deliver to them. To deliver a text message, select Deliver this Message and then enter the text message to be delivered.

Notes

- You can reference variables in the Subject, Attachment Note, and If Condition is False Deliver this Message fields. For the syntax to use, see *"What Is the Syntax for Referencing Variables?"* For more information on variables, see *"Using Variables"*.

- To use the @ character, precede it with the \ (backslash) character to separate it from the variable syntax. For example, Dear @{NQ_SESSION.DISPLAYNAME}, \@ New York, is displayed as Dear Joe Smith, @ New York.

Agent editor: Destinations tab

Use this tab of the *"Agent editor"* to specify where content is to be delivered.

For more information, see:

- *"Alerts"*
- *"Creating Agents"*

Components Home Page and Dashboard

Use this box to specify whether content is to be delivered to the Home page and dashboard pages. (For how content is delivered as an alert to the Home page and dashboard, see *"Alerts"*.)

Devices

Use this option to specify whether content is to be delivered to specified devices. If you select this option, then you must select one of the following options:

- Active Delivery Profile - Use this option to specify that content is to be delivered to the devices specified in the active delivery profile.

  The active delivery profile is configured through the *"My Account dialog: Delivery Options tab"*.

- Specific Devices - Use this option to specify that content is to be delivered to specific devices and then select one or more of the following device options:

  - Email
  - Pager
  - Digital Phone
  - Handheld Device

  If you select a specific device here, then the default device selected in the My Account dialog: Delivery Options tab overrides the devices that are set in the active delivery profile for a user. Devices that are specified here are used instead of the devices specified in the active delivery profile. An agent, for example, need not be dependent upon a user's configuration. The agent can be configured to use device information from default devices in the Devices area in the My Account dialog: Delivery Options tab.

  For more information about active delivery profiles and devices, see .

Oracle BI Server Cache (For seeding cache)

This option is available only for administrators who have been granted the Manage Catalog Groups privilege.

Use this option to specify whether to seed the cache.

Administrators can create Server cache for individual users. The cache seeding operation enables administrators to run analyses on dashboard pages or analyses that are stored in the catalog, and to create a Server cache. This speeds up response time for users when they actually run the analyses on the dashboards. If data exists in the cache for a given analysis, then the data is deleted and refreshed when the agent runs.

The cache for the analysis or the dashboard page is created at the appropriate schedule for the indicated set of users.

> ✏️ **Note:** To have the cache created for each user, select the Run As Recipient or Specified User box in the General tab.

Generally, if you are using the analysis that you have specified as the content for this agent to seed the cache, then you do not select any other user destinations (such as Email).

Agent editor: General tab

Use this tab of the "*Agent editor*" to specify the priority of the delivery content that an agent is to deliver and how to generate the delivery content.

For more information, see:

- "*Creating Agents*"

Components Priority

Use this option to specify the priority of the delivery content - High, Normal, Low. The priority works with the delivery profile for a user to determine the destination for delivery content of different priorities.

For more information on delivery profiles, see "*Devices and Delivery Profiles*" and .

Run As

Use this option to specify how to generate the delivery content (that is, what user to run the query as):

- Recipient - Select this option to use the credentials of each recipient.
- Specified User - This option is available only to the administrator. Select this option to use the credentials of a specified user. All recipients receive the same content as if they were the specified user. Then specify the user by typing the user's name in the box to the right of the option or by clicking the Set User button to display the "*Select Business Owner dialog*", where you can select a user.
- Use Agent Owner's Credentials - This option is not available to administrators. Select this option to use the credentials of the agent owner. All recipients receive the same content as if they were the agent owner.

Created by

This information is displayed when the agent has been saved.

Displays the name of the person who created the agent.

Last Modified

This information is displayed when the agent has been saved.

Displays the date and time when the agent was last modified.

Description

This information is displayed when the agent has been saved.

Displays the description of the agent that was provided when the agent was saved.

You can edit the description of the agent by navigating to the agent on the "*Catalog page*" and using the Properties option on the More menu.

Agent editor: Recipients tab

Use this tab of the "*Agent editor*" to specify who is to receive the delivery content of the agent and who is allowed to subscribe to the agent.

For more information, see:

- *"Creating Agents"*

Components Select Recipients

Use this area to view and specify who is to receive the delivery content of the agent.

To:

- Add users, Application roles, and Catalog groups, click the Add Recipient button to display the , where you select the users, Application roles, and Catalog groups.

- Add email recipients, click the Add Email Recipient button to display the , where you enter their email addresses.

   The Add Email Recipient button is not available if you selected Recipient for the Run As option on the *"Agent editor: General tab"*.

- Delete a selected recipient, select the recipient in the list and then click the Delete button.

- Show only a particular set of selected recipients, use the Show box to select one of the following options: All, Users, Emails, Catalog Groups & Application Roles.

   Note: When a user subscribes to and customizes an agent, if you then select the same user as a recipient, then the user's customizations are lost when the agent is next run.

Get Recipients from the Request Used in the Agent Condition

This box is enabled only if you have specified a condition that is based on an analysis for the agent. In addition, you must include the recipient information in the conditional result set (that is, you must include a column that contains who the recipient should be for each row).

Use this box to specify whether recipients are to be determined dynamically from the results of a conditional analysis. Select this box to have recipients determined dynamically from the results of a conditional analysis. Deselect this box to have the recipients determined from the Select Recipients area.

Get Recipients from the Request Used in the Agent Condition is not available.

   Note: If you select the option to allow the recipients to be determined from the results of a conditional analysis and choose to show only relevant rows to each user, then it is assumed that you want the results of the conditional analysis set as the delivery content in the *"Agent editor: Delivery Content tab"*. If the content has been set to something else (through clicking Clear or Browse), then a message is displayed asking if you want to update the delivery content to be the results of the conditional analysis. Click Yes to proceed and update the delivery content, or No to retain the current delivery content. If you click No, then the recipients will still be determined from the conditional analysis, but users will receive all content, and not only the content that pertains to them.

Column Containing Recipients

This box is available only if the Get Recipients from the Request Used in the Agent Condition box is selected.

Use this box to select the column in the conditional analysis that contains the desired recipients.

2nd Column Containing Recipients (optional)

This box is available only if the Get Recipients from the Request Used in the Agent Condition box is selected.

Use this box to optionally select an additional column in the conditional analysis that contains desired recipients.

Only Return Rows Relevant to the User Running the Agent

This box is available only if the Get Recipients from the Request Used in the Agent Condition box is selected.

Use this box to specify whether only rows in the results that are relevant to the user running the agent are sent in the delivery content. Select this box to send only rows that are relevant to the user running the agent. Deselect this box to send all rows.

Publish for subscription

Use this box to specify whether the agent is to be published so that users can subscribe. Note the following:

- When you deselect the Publish Agent for subscription box, any selected subscribers are disabled, and the Allow Subscribers to Customize Agent box is deselected and disabled.

- You can only publish agents that have content and actions (if any) that can be shared.

For more information on how to subscribe to agents, see *"Subscribing to an Agent"*.

Allow Subscribers to Customize Agent

This box is available only when the Recipient box is selected on the *"Agent editor: General tab"*.

Use this box to specify whether subscribers can customize their subscription of the agent, for example, by providing values for a prompted filter associated with an analysis.

For more information on how to customize an agent subscription, see .

Agent Subscribers

Use this area to view and specify who is allowed to subscribe to this agent. In the list of agent subscribers, the Name column identifies the users, Application roles, and Catalog groups that are allowed to subscribe to the agent and the Currently Subscribed column identifies (with a check mark) those users, Application roles, and Catalog groups that are currently subscribed.

To:

- Add users, Application roles, and Catalog groups that are allowed to subscribe to this agent, click the Add Subscriber button to display the "Select User dialog", where you select the users, Application roles, and Catalog groups.

- Delete a user, Application role, or Catalog group from the list of users, Application roles, and Catalog groups who are allowed to subscribe to the agent, select the user, Application role, or Catalog group in the list and then click the Delete button.

- To unsubscribe a user, Application role, or Catalog group that is currently subscribed to the agent, select the user, Application role, or Catalog group in the list and then click Unsubscribe.

    ✎ **Note:** The **Unsubscribe** button is available only to administrators and users who have been granted the privilege Modify Current Subscriptions for Agents.

- Show only a particular set of users and groups who are allowed to subscribe to this agent, use the Show boxes. In the first box select the All, Users, or Catalog Groups & Application Roles, and in the second box select All, Unsubscribed, or Subscribed. To show:

    o All subscribed and unsubscribed users, Application roles, and Catalog groups, select All and All

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- o All unsubscribed users, Application roles, and Catalog groups, select All and Unsubscribed

- o All subscribed users, Application roles, and Catalog groups, select All and Subscribed

- o All subscribed and unsubscribed users, select Users and All

- o Only unsubscribed users, select Users and Unsubscribed

- o Only subscribed users, select Users and Subscribed

- o All subscribed and unsubscribed Catalog groups and Application roles, select Catalog Groups & Application Roles and All

- o Only unsubscribed Catalog groups and Application roles, select Catalog Groups & Application Roles and Unsubscribed

- o Only subscribed Catalog groups and Application roles, select Catalog Groups & Application Roles and Subscribed

Agent editor: Schedule tab

Use this tab of the "*Agent editor*" to specify whether the agent is to be run based on a schedule, how often it runs, and when its running is to start and end.

Agents can execute based on a specified schedule. You can define a starting date and time for the agent, a recurrence schedule, and an ending date.

You can also create a nonscheduled agent. This is useful when you want to create an agent that runs only as part of an agent chain, or an agent that is initiated by an external process.

For more information, see:

- • "*Creating Agents*"

Components Enabled

This box is disabled when the Frequency box is set to Never.

Use this box to specify whether to enable the agent to run as scheduled. This is useful if you have defined a schedule for an agent but find you want to stop it for a certain period of time.

You also can enable and disable an agent's schedule from the "*Catalog page*". See .

Frequency

Use this box to select one of the following options to specify how often the agent runs:

- • Never - Creates a nonscheduled agent.

- • Once - Runs the agent one time only.

- • Daily - Runs the agent on a daily schedule. If you select this option, then the following additional option is displayed:

  - o Days - Use this box to specify the daily interval, such as every 3 days.

- • Weekly - Runs the agent on a weekly schedule. If you select this option, then the following additional options are displayed:

  - o Weeks -Use this box to specify the weekly interval, such as every 6 weeks

  - o On - Use this option to specify the days of the week, such as Monday and Friday

- Monthly - Runs the agent on a monthly schedule. If you select this option, then the following additional options are displayed:

  - o On - Use this option to specify either the day occurrence (such as the first Tuesday or the first day of the month) or the day of the month.
  - o Months -Use this box to specify the months, such as March, June, September, December.

Start

Use this box to specify the date and time to start the agent and the time zone. Click the Select Date and Time button to display the Select Date and Time dialog, where you select the date, time, and time zone.

Re-run Agent Every

Use this box to specify whether to run the agent multiple times within a day. Select this box to run it multiple times within a day. Then enter the interval between executions (in minutes) and specify the time to stop the repetition by clicking the Select Time button to display a dialog in which to select the time.

Deselect this box to run it one time within the day.

End

Use this area to specify when to end the running of the agent:

- No End Date - Use this option to specify that the agent is to be run indefinitely.

- Select End Date - Use this option to specify an end date. Click the Select Date button to display the Select Date dialog, where you specify the date on which to end the running of the agent.

Notes

When you select the date and time, for time zones where daylight savings applies, the time zone reflects the daylight savings time. For example, if, during the summer months, you select (GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London, this means BST (British Summer Time).

Alerts dialog

Use this dialog to:

- View a list of your alerts

- View the content for an alert

- Clear an alert

- Edit the agent that generated the alert, if you have permission to modify the agent

- Run the agent that generated the alert, if you have permission to execute the agent

- Subscribe to an RSS feed for alerts

- Clear all of your alerts

For more information, see:

- "*Accessing and Managing Your Alerts*"

Components Alerts

Displays a list of your alerts, including the name, priority (High, Normal, or Low), last delivery date and time, and number of occurrences for each alert.

To view the latest occurrence of an alert, click its name. The is displayed, where you can view information about the alert and the content of the alert. You can also edit and run the agent that generated the alert.

Each alert contains a toolbar that displays when you hover over the alert name. The toolbar contains the following buttons:

- Edit Agent - (This button is available only if you have permission to modify the agent.) Displays the agent that generated the alert in the *"Agent editor"*, where you can edit the agent.

- Run Agent - (This button is available only if you have permission to execute the agent.) Use this button to run the agent that generated the alert.

- Clear alert/Clear all recurrences of this alert - Use this button to delete the alert, or if the alert has recurrences, delete all recurrences of the alert.

Subscribe to RSS feed

Displays the browser's page that lets you subscribe to an RSS feed. Using this page, you can subscribe to an Oracle BI Alerts feed (that is, the channel that contains the delivered agents).

Clear All

Use this button to delete all alerts. When you clear all alerts, the Alerts! button in the global header and the Alerts area on the *"Home page"* are no longer displayed.

Refresh

Use this button to refresh the list of alerts.

Analysis editor

Use this editor to create or edit an analysis. Analyses let you explore and interact with information by visually presenting data in tables, graphs, pivot tables, and so on. You can include the views that you create in an analysis for display in dashboards.

For more information, see:

- *"What Is the Process for Constructing Analyses?"*
- *"Saving Analyses"*

Components Criteria

Use the *"Analysis editor: Criteria tab"* to specify the criteria for an analysis, including columns and filters. You can work with selection steps after displaying the *"Selection Steps pane"*.

Results

Use the *"Analysis editor: Results tab"* to create different views of the analysis results such as graphs, tickers, and pivot tables. You can also work with selection steps.

Prompts

Use the Analysis editor: Prompts tab to access the *"Prompt editor"* to create prompts that allow users to select values that dynamically filter all views within the analysis or all analyses on a dashboard.

Advanced

Use the *"Analysis editor: Advanced tab"* to examine or edit the XML code and logical SQL statement that is generated for
an analysis.

Toolbar

The toolbar includes the following items:

- Return to dashboard name> - This link displays if you are viewing a dashboard and click the embedded analysis'
  Analyze or Edit link. Use this link to return to the dashboard.

- Save Analysis - Use this button to save an analysis.

- Save As - Use this button to save an analysis as another name.

Related Topics

Analysis editor: Advanced tab

Use this tab of the *"Analysis editor"* to examine or edit the XML code and logical SQL statement that is generated for an
analysis. This tab is for use only by advanced users and developers who have the appropriate privileges. See *"Examining the
Logical SQL Statements for Analyses"* for additional important information on working with this tab.

For more information, see:

- *"Examining the Logical SQL Statements for Analyses"*

Components Referencing the Results

Use this area at the top of the tab to access links that are identified with the name of the analysis and offer the following
functions:

- Displaying individual pages that contain links for refreshing, modifying, and viewing the results of the analysis. You
  can bookmark these pages for use as links from other web pages and portals.

- Generating and downloading a Web Query (.IQY) file, which enables you to work with the tables and pivot tables of
  the analysis in Microsoft Excel.

These links execute for the analysis as it is currently saved. If you update the analysis later, then the links are also changed for
those updates. The links are not visible if you have not yet saved an analysis.

Analysis XML

Use this area to view and modify the XML code for an analysis.

> ✎ **Note:** Caution: Analyses are stored in the Oracle BI Presentation Catalog in XML format. If you change the
> XML code, then you change the analysis in the catalog.

Use the following components in this area:

- XML Code Box - Use this box to view the XML code for the analysis and to enter any changes to that code.

- Apply XML - Click this button to commit the XML code modifications that you made to the catalog.

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- Partial Update - Use this box to specify whether to update the SQL statement and HTML code only for views or for the entire analysis in response to an event.

    o Select either Default or Affected Views to update the SQL statement and HTML code only for the views that have been affected by an event such as drilling or sorting. These settings ensure better performance because the SQL statement and HTML code is generated only for affected views, which prevents the entire analysis from redrawing.
    o Select Entire Report to rebuild and redraw the entire analysis.

    ✏ **Note:** To apply this setting, you must also click the Apply SQL button at the bottom of the tab.

- Bypass Oracle BI Presentation Services Cache - Use this box to specify whether you want the query to use the Oracle BI Presentation Services Cache. In general, you should avoid selecting this box as disabling the cache has potential performance degradation issues.

    ✏ **Note:** To apply this setting, you must also click the Apply SQL button at the bottom of the tab.

SQL Issued

Use this read-only box to view the SQL statement that is sent to the Oracle BI Server when the analysis is executed.

New Analysis

Click this button to display the , in which you create an analysis using the SQL statement from the current analysis as the starting point. Any hierarchical columns, selection steps, groups, or formatting that are specified in the current analysis are removed before the dialog is displayed. You can edit the SQL statement in this dialog.

Advanced SQL Clauses

Use this area to modify the SQL statement for an analysis. You can include additional SQL clauses and change the subject area or the FROM clause for certain analyses. All but one of these features are disabled for analyses that contain hierarchical columns, member selections, or groups. Only the ability to specify a prefix is enabled.

Use the following components in this area:

- Issue an Explicit Distinct - Select this box to send a SELECT DISTINCT SQL statement to the Oracle BI Server. If you deselect this box, then a simple SELECT command is sent to the Oracle BI Server. The SELECT DISTINCT command ensures that you obtain only unique results, with no duplicate values.

- FROM - Enter either the name of the subject area to use for the analysis or enter a complex FROM clause.

- GROUP BY - Enter a comma-delimited list of columns from the analysis to use in a GROUP BY command.

- Prefix - Enter any SQL statements to be run before the SQL statement for the analysis runs. For example, you can modify the values of session variables.

- Postfix - Enter any additional SQL clauses that you would like to include with the analysis, including a full SQL statement. For example, you can affect the SQL statement for the analysis by entering JOIN, UNION, or ORDER BY commands. If you include an ORDER BY command, then you override any ORDER BY commands from the SQL statement for the analysis.

    In general, only enter statements for Postfix if you are very familiar with SQL code.

Apply SQL

Click this button to apply the:

- Partial Update box setting

- Bypass Oracle BI Presentation Services Cache box setting

- SQL statement modifications that you made

✎ **Note:** Use care when clicking this button. When you do, Oracle BI EE essentially creates a new analysis based on the SQL statement that you have added or modified. Therefore, you lose all views, formatting, and so on that you had previously created for the analysis. The XML code is also modified for the new analysis.

Query Performance

Use this area to set the following components:

- When view prompts are used - Use this area to specify, for views that have page edge prompts based on hierarchical columns, whether to improve query performance:

    o Exclude prompt values that would return no results - Select this option to exclude, in the page edge list, values that return no data.

      This option is recommended in most cases.
    o Include prompt values that would return no results, if includes at least one hierarchical column - Select this option to include, in the page edge list, values that return no data.

      This option is not valid for OLAP sources. It is only valid for relational physical sources.

- Query sharing - Use this area to specify whether to allow the Oracle BI Presentation Services query cache to be shared with other users:

    o Do not share query - Select this option to not allow the Presentation Services query cache to be shared with other users.
    o Share query with multiple users (may improve performance after initial run) - Select this option to allow the Presentation Services query cache to be shared with other users.

      Selecting this option improves query performance for users who access this analysis subsequent to the first user. Note that length of time that the Presentation Services query cache is available to other users depends on the cache settings at your organization. For more information on Presentation Services cache settings, see "" in .

      This option is recommended for an analysis that does not contain any specific user data and that will be accessed by many users.

      You can view information about the cache for an analysis using the .

      This option impacts usage tracking. For more information on usage tracking, see "" in .

Apply

Use this button to apply the settings for the options in the Query Performance area.

Notes

- You can also enter SQL statements using the .

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- To combine an analysis with a similar analysis from the same subject area or another subject area, where you can perform Set operations such as UNION or INTERSECT on the results, click the Combine results based on union, intersection, and difference operations toolbar button on the *"Selected Columns pane"*. For more information, see *"Combining Columns Using Set Operations"*.

Analysis editor: Criteria tab

Use this tab of the *"Analysis editor"* for:

- *"Specifying the Criteria for Analyses"*
- *"Editing the Formula for a Column"* *"Editing the Formula for a Column"*
- *"Formatting Columns in Analyses"*
- *"Creating a Column Filter"*
- *"Working with Selections of Data"*

Common Components Subject Areas

Use the *"Subject Areas pane"* to select the columns and hierarchy levels for an analysis and to work with subject areas.

Catalog

Use the *"Catalog pane"* to drag and drop objects from the catalog to add to the analysis.

General Components

Use the following components when you are not creating a direct database request.

Selected Columns

Use the *"Selected Columns pane"* to modify the columns and hierarchy levels that have been selected for an analysis.

Filters

Use the *"Filters pane"* to create new filters for an analysis.

Selection Steps

Use the *"Selection Steps pane"* to create and modify steps for data selections. This pane is not visible until you click the button on the toolbar to display it.

Toolbar

The toolbar contains the following buttons:

- Show/Hide Filters pane - Click this button to show and hide the *"Filters pane"*.
- Show/Hide Selection Steps pane - Click this button to show and hide the *"Selection Steps pane"*.
- Edit Analysis Properties - Click this button to display the *"Analysis Properties dialog"*, where you specify properties for the entire analysis.

Direct Database Request Components

Use the following components when you create a direct database request.

For more information, see .

Connection Pool

Enter the name of the connection pool for the database that is defined in the physical layer of the Oracle BI Administration Tool. A sample name is sql_samples.

For information about connection pools, see .

SQL Statement

Enter the SQL statement to send directly to the database. Oracle BI Server security rules for data are bypassed and cannot be applied when you send a direct database request.

The statement that you execute is affected by the user name that is specified for this connection pool in the Oracle BI Administration Tool. You might find that not all columns from the database are returned to you, if the specified user name is not permitted to see them.

Validate SQL and Retrieve Columns

Click this button to validate the SQL statement and retrieve any columns that you have specified in the request. The columns are displayed in the Result Columns area.

If any errors are returned from the database, then you see them in the area below this button. See Oracle Database SQL Language Reference for information on resolving any errors.

Bypass Oracle BI Presentation Services Cache

Use this box to specify whether to use the Oracle BI Presentation Services Cache. Select this box to specify that you do want the request to use the Presentation Services cache. In general, you should avoid selecting this box as enabling the cache has potential performance degradation issues.

Result Columns

Use this area to work with the columns that are returned, if any, from the valid SQL statement. This area includes each column name and data type with the following options:

- Column Properties - Click this button to display the *"Column Properties dialog"*, in which you modify the properties of the column. The *"Column Properties dialog: Conditional Format tab"* is not available in this case, because you cannot apply conditional formatting to a column that is returned using a direct database request.

- Edit Formula - Click this button to display the , in which you modify the aggregation rule for the column.

To change which columns that are returned, modify and validate the SQL statement.

Analysis editor: Results tab

Use this tab of the *"Analysis editor"* to create different views of the analysis results such as graphs, tickers, and pivot tables. For more information, see *"Displaying the Results of Analyses"*.

Components Subject Areas

Use the *"Subject Areas pane"* to select the columns and hierarchy levels for an analysis and to work with subject areas.

Catalog

Use the *"Catalog pane"* to display objects from the catalog to use with views.

Views

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Use the *"Views pane"* to create and modify views to work with analyses.

Compound Layout

Use the *"Compound Layout"* to assemble different views for display on a dashboard and to create additional layouts.

Selection Steps

Use the *"Selection Steps pane"* to create and modify steps for data selections.

Toolbar

This toolbar contains the following buttons:

- Print this analysis - Use this button to specify whether to print the views for the analysis as HTML or PDF.

- Export this analysis - Use this button to select an option for exporting the views for the analysis. For information, see *"Export Menu Options for Views and Results"*.

- Schedule - Use this button to save the analysis and then display the *"Agent editor"*, where you can create an agent from the analysis. For more information, see .

- Show how results will look on a Dashboard - Use this button to preview how the edited view is displayed on a dashboard.

    ✏ **Note:** If the Show how results will look on a Dashboard button is not available, then the administrator has suppressed its display.

- Print Options - Use this button to display the *"Print Options dialog"*, where you specify settings for printing.

- Refresh the results of the current analysis - Use this button to refresh the results of the current analysis. Clicking this button does not bypass the Oracle BI EE server cache.

- New View - Use this button to add a new view to the analysis and to access the recommended visualizations feature. The view is added to the current compound layout. You can select the Recommended Visualization for option to see a submenu of visualization specialties, such as Analyzing Trends or Comparing Percentages. Click on a visualization specialty to access the Select Visualization list, where you then choose from a ranking of recommended view types. If you would rather have the best view created for you immediately, without being presented with a list of recommendations, you can instead select the Best Visualization option.

    For information on recommended visualizations, see

- New Group - Use this button to display the , where you create a group.

- New Calculated Item - Use this button to display the *"New Calculated Item dialog"*, where you build calculated items.

- Edit Analysis Properties - Use this button to display the *"Analysis Properties dialog"*, where you specify properties for the entire analysis.

- Import formatting from another analysis - Use this button to display the *"Open dialog"*, where you select an analysis from which to import formatting for columns and views. For more information, see .

- Create Compound Layout - Use this button to create an instance of the compound layout. A new compound layout is displayed in a tab in the *"Compound Layout"* and contains only a title.

- Copy Compound Layout - Use this button to create a copy of the current compound layout. The copy is displayed in a tab in the Compound Layout and contains the same views as the compound layout that you copied.

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When you copy, you do not actually create additional copies of the analysis or its views. The analysis and views exist only once. Any changes that you make to the analysis or its views are reflected in the multiple instances of the compound layout.

- Delete Compound Layout - Use this button to delete the current compound layout. The views on the layout are not deleted from the analysis. This button is not available if you attempt to delete the last compound layout in the analysis.

- Rename Compound Layout - Use this button to display the *"Rename View dialog"*, where you provide a new name for the compound layout.

- Show/Hide Selection Steps Pane - Use this button to show or hide the display of the *"Selection Steps pane"* in the Results tab.

Analysis Properties dialog

Use this dialog to specify properties for an analysis.

For more information, see *"Specifying the Criteria for Analyses"*.

Components Results Display

Use the to specify how results that are returned from an analysis are to be handled.

Interactions

Use the *"Analysis Properties dialog: Interactions tab"* to specify which interactions (for example, Drill) are available when users right-click in a table, pivot table, or trellis view at runtime.

Data

Use the *"Analysis Properties dialog: Data tab"* to specify how data is to be handled in an analysis.

Analysis Properties dialog: Data tab

Use this tab of the *"Analysis Properties dialog"* to specify how data is to be handled in an analysis.

Components

Include Null Values

Use this check box to include null values in your analysis when the entire row or column contains all nulls. When this check box is selected, null values will not be suppressed for the analysis. This turns off null suppression for all views and applies to the entire edge (that is, the row and columns axis) of the analysis. See for additional information.

Display of Columns Added in Criteria Tab

Displays options to specify how columns that are added to an analysis from the *"Analysis editor: Criteria tab"* after displaying the analysis results are handled:

- Display in existing and new views - Use this option to specify that the newly added columns are to be included in any existing views as well as in any new views that are added.

- Exclude from existing views, but display in new views - Select this option to specify that the newly added columns are to be excluded from any existing views (that is, placed in the Excluded drop target) but included in any new views that are added.

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For more information on the Excluded drop target, see .

Hierarchy Display

Use the buttons within this area as follows, to control the placement of a member total for hierarchical columns in this analysis:

- Parent values before children - Use this option to place the member total before the children.
- Parent values after children - Use this option to place the member total after the children.

Placement of Added Members

Use the buttons within this area as follows, to control how members are added to hierarchical columns in this analysis using selection steps:

- Within the Hierarchy: Does not display duplicate members within all hierarchies in the analysis. If the member is in the view, within the hierarchy, then this setting is ignored. Applies only to level-based hierarchies.
- Outside the Hierarchy: Members are added at the bottom. Members, groups, and calculated items are added below the last members at the top level of the hierarchy, in the order in which they are added.

For more information on selection steps, see .

Analysis Properties dialog: Interactions tab

Use this tab of the *"Analysis Properties dialog"* to specify which interactions (for example, Drill) are available when users right-click in a table, pivot table, or trellis view at runtime.

Note that the administrator can specify defaults for these right-click interactions. For more information, see "" in .

See for additional information.

Components

Views Run-time Options

Use this area to specify which interactions are available when users right-click in a table, pivot table, or trellis view at runtime. One or more of the following interactions are available:

- All Interactions
- Drill (when not a primary interaction)

    ✎ **Note:** You set Drill as a primary interaction in the *"Column Properties dialog: Interaction tab"* when you specify Drill as the value for the Column Heading or Value field.

- Move Columns
- Sort Columns
- Add/Remove Values
- Create/Edit/Remove Groups
- Create/Edit/Remove Calculated Items
- Display/Hide Sub-totals
- Display/Hide Running Sum

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- Include/Exclude Columns
- Hide Columns

Restore Admin Settings

Use this button to restore the Views Run-time Options settings to the default settings specified by the administrator.

Analytics pane

Use this pane as follows:

- For an initiative or objective, to specify basic information about the initiative or objective, to identify the KPIs and other initiatives or objectives that support and measure the performance of the initiative or objective, and to add action links.
- For KPI details, to view basic KPI settings and a graph that presents actual values and target values, to pin dimensions, and to run actions.

For more information, see:

- *"Working with KPI Details"*
- *"Creating an Initiative"*
- *Creating an Objective*

This pane is part of the *"Scorecard editor: KPI Details tab"*, the *"Scorecard editor: Initiative Details tab"*, and the *"Scorecard editor: Objective Details tab"*.

Components for KPI Details

History

Displays a graph that presents actual values and target values that enable you to view KPI performance over time or using dimensions selected from the following:

- The point of view area
- The Dimensionality area below the graph

The graph shows multiple time periods only if trending was enabled in the KPI's definition.

Parent Initiative or Parent Objective

Displays the name of the parent initiative or the parent objective whose progress is measured by the KPI.

Actions

Displays the action links associated with each KPI performance level or range. Use to perform actions in response to the KPIs current performance state. (You add or edit the action links in the KPI definition. See *"Adding Actions to a KPI"* and .)

Performance

Displays the following KPI values and data:

- Actual - The KPI value that was manually entered, calculated, or referenced from the subject area.
- Change - If you enabled trending, this is the value by which the current actual value differs from that from the previous period. For example, if the actual value for an "Annual Sales" KPI is 30000 and was 2650 last year, the change is 27350.

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- Target - The value that you want the KPI to achieve.

- Variance - The amount by which the actual value differs from the target value.

- % Variance - The amount by which the actual value differs from the target value expressed as a percentage.

- % Change - If you enabled trending, this is the value by which the actual value differs from that from the previous period, as a percentage.

Indicator Type

Displays the following options to indicate whether the performance of the KPI drives other KPIs, or is affected by the performance of other KPIs, or other data or processes:

- Undefined - Use this option to not define an indicator type.

- Leading - Use this option to indicate that the performance of the KPI drives the performance of other KPIs. For example, a Sales KPI would lead a Profits KPI.

- Lagging - Use this option to indicate that the performance of the KPI is affected by the performance of other KPIs, or by other data or processes.

Perspective

Displays the perspectives available for the scorecard. Select the perspective with which to align the initiative or objective. For example, you might align an objective for Increased Product Sales with the Financial perspective.

For more information on perspectives, see *Perspectives*

Dimensionality

Displays the dimensions associated with the KPI. Use this area to pin the dimensions.

Pinning is optional. Typically, it is best not to pin most of the dimensions so that the data is controlled by the point of view settings. For more information about pinning, see *"Dimensions and Pinned Dimension Values"*

To pin a dimension, click the down-arrow button to the right of the dimension and select one of the following options:

- A specific value

- Use Point-of-View - Use this option to use the value currently selected in the point of view area.

- Use Variable - Use this option to display the *"Select Variable dialog"*, where you specify a variable to use to set the value. For more information on variables, see *"Using Variables"*.

Components for Initiatives and Objectives

Score

Displays the score for the initiative or objective in a gauge and numerically.

For more information on scores, see *"Understanding Initiative or Objective Performance Assessment"*.

Parent Initiative or Parent Objective

Displays the name of the parent initiative (for an initiative) or the parent objective (for an objective).

Start Date

This box is available only for initiatives.

Use this box to specify the date on which the initiative is to begin and the time zone. To select a date, click the Select Date button to display the Select Date dialog.

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Due Date

This box is available only for initiatives.

Use this box to specify the date on which the initiative is due and the time zone. To select a date, click the Select Date button to display the Select Date dialog.

Completion Date

This box is available only for initiatives.

Use this box to specify the date on which the initiative was actually completed and the time zone. To select a date, click the Select Date button to display the Select Date dialog.

Children

Displays for the initiative or objective:

- The number of its child initiatives or child objectives in each status.
- The number of its child KPIs in each status.

If there is at least one child objective, initiative, or KPI for a particular status, the status name is a hyperlink that displays the *"Scorecard editor: Breakdown tab"*, showing the child object or objects.

Descendants

Displays for the initiative or objective:

- The number of its descendant initiatives or objectives in each status.
- The number of its descendant KPIs in each status.

If there is at least one descendant objective, initiative, or KPI for a particular status, the status name is a hyperlink that displays the *"Scorecard editor: Breakdown tab"*, showing the descendant object or objects.

Perspective

Displays the perspectives available for the scorecard. Select the perspective with which to align the initiative or objective. For example, you might align an objective for Increased Product Sales with the Financial perspective.

See *Perspectives*

Assessment Formula

Displays the following options to specify the rule to be used to assess the overall performance of the initiative or objective:

- Worst case - Use this option to specify that the status of the worst performing child KPI or objective is to be used.
- Best case - Use this option to specify that the status of the best performing child KPI or objective is to be used.
- Most Frequent (Worst Case) - Use this option to specify that, if half the child KPIs and objectives have high performance and half have low performance, then use the status of the worst performing child KPI or objective.
- Most Frequent (Best Case) - Use this option to specify that, if half the child KPIs and objectives have high performance and half have low performance, then use the status of the best performing child KPI or objective.
- Weighted - Use this option to use a weighted average based on the weights you have assigned to the child KPIs and objectives.

Indicator Type

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Displays the following options to indicate whether the performance of the objective drives other objectives, or is affected by the performance of other objectives or other data or processes:

- Undefined - Use this option to not define an indicator type.

- Leading - Use this option to indicate that the performance of the objective drives the performance of other objectives. For example, an objective for Increased Sales would drive an objective for Increased Profits.

- Lagging - Use this option to indicate that the performance of the objective is affected by the performance of other objectives or by other data or processes.

Priority

This box is available only for initiatives.

Displays the options High, Medium, and Low to identify the importance and urgency of an initiative.

Actions

Displays the action links that have been added to an initiative or objective, including the text of the action links, the actions associated with the links, and under which states of the objectives or initiatives the action links are enabled.

Use this area to view and manage action links:

- To add a new action link, click the New Row button to display the .

- To edit an action link, select the link in the list and click the Edit Row button to display the .

- To delete an action link, select the link in the list and click the Delete Row button.

Initiatives & KPIs or Objectives & KPIs

Lists the following:

- For an initiative, the KPIs and the child initiatives that are used to evaluate the performance of the initiative

- For an objective, the KPIs and the child objectives that are used to evaluate the performance of the objective

Use this watchlist to view and manage these initiatives, objectives, and KPIs. For more information about watchlists, see "*Watchlists*".

To add a KPI to the watchlist, drag it from the "*Catalog pane for Scorecard*" and drop it on the watchlist. The "*Add KPI dialog*" is displayed, where you pin dimension values or assign a label for this usage of the KPI.

Watchlists

A watchlist is a table that lists scorecard objects (that is, initiatives, objectives, and KPIs) that are related to a particular aspect of a scorecard or are grouped together for a particular purpose.

See for additional information.

Components

Objects

Displays these options:

- Open - This option is not available in the New KPI watchlist. Use this option to open the selected initiative, objective, or KPI.

- Open KPI Definition - This option is available only in the New KPI watchlist. Displays the "*KPI editor*", where you edit the selected KPI.

- Edit Watchlist Entry - This option is available only in the New KPI watchlist. Displays the , where you edit the dimension values and label for the selected KPI.

- Delete - This option is not available in the New KPI watchlist or the Breakdown watchlist. Use this option to delete the selected initiative, objective, or KPI.

- Remove KPI - This option is available only in the New KPI watchlist. Removes the selected KPI from the watchlist.

- Analyze - Use this option to create an analysis based on the KPI. The analysis is automatically saved in the catalog in the My Folders/Drills folder.

> ✎ **Note:** Because the My Folders/Drills folder is used for temporary storage, the analysis might not persist after the Oracle Business Intelligence session ends. To preserve the analysis, copy it to another directory. For example, to preserve an analysis that you plan to use in a shared dashboard, copy it to a folder in / Shared Folders.

- Contact Owner - Use this option to display the *"Contact Owner dialog"*, where you can send a message to the business owner of the selected initiative, objective, or KPI.

- Add KPI - This option is available only for the watchlist in the New KPI Watchlist editor, and for the watchlists on the Objective Details and Initiative Details tabs in the Scorecard editor. Use this option to display the , where you select a KPI to add.

View

Displays these options:

- Show More Columns - Use this option to display the *"Show More Columns dialog"*, where you add columns to or remove columns from the watchlist. lists and describes some of the commonly used columns.

- Change Column Labels - This option is available only in a New KPI watchlist. Use this option to display the , where you change the labels of the columns. lists and describes some of the commonly used columns.

- Clear Column Sort - This option is available only in a smart watchlist. Use this option to clear any column sorting in effect.

  With this option, the order of the rows may change. If the filter criteria for the smart watchlist does not imply a sort order (for example, Best Performance implies sorting on the% variance), the rows might display indentation to show object hierarchy.

Summary

Displays, of the initiatives, objectives, and KPIs that are used to evaluate the performance of this initiative, objective, or KPI, the number that fall into each assessment range, for example, OK (2), Critical (1). For a smart watchlist, it also displays the total number of objects that are listed.

Pinned Key Performance Indicator (in a cell in the Label column)

This blue pin indicates that a KPI has one or more pinned dimensions. See *"Dimensions and Pinned Dimension Values"* for additional information.

Sort Ascending

This button is not available in all watchlists. Displayed when you hover the mouse pointer over a column heading. Use this button to sort the values in a column by ascending order.

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Column sorting is preserved only in smart watchlists. In a smart watchlist, column sorting:

- Can be cleared using the Clear Column Sort option on the View menu.

- Is preserved when the smart watchlist is saved, but only if the Scorecard editor is in Edit mode. It is not preserved if the Scorecard editor is in View mode.

- Disables any indentation in the watchlist.

Sort Descending

This button is not available in all watchlists. Displayed when you hover the mouse pointer over a column heading. Use this button to sort the values in a column by descending order.

Column sorting is preserved only in a smart watchlist. In a smart watchlist, column sorting:

- Can be cleared using the Clear Column Sort option on the View menu.

- Is preserved when the smart watchlist is saved, but only if the Scorecard editor is in Edit mode. It is not preserved if the Scorecard editor is in View mode.

- Disables any indentation in the watchlist.

Red asterisk (in a cell in the Status column)

This symbol is available only if there are status overrides applied to an initiative, objective, or KPI. Use this symbol to display the *"Status window"*, where you can view the overrides that previously have been applied or apply another override.

Blue triangle (in the upper-right corner of a cell in the Status column and in other columns for a KPI)

This symbol is available only if there are comments attached to an initiative, objective, or KPI for the current dimension settings. Use this button to display the *"Status window"*, where you can read the comments that previously have been added, add another comment, or reply to a comment.

Highlighted Actual Value or Target Value Cells

A box displays around actual values and target values that have been set to writeable in the *"KPI editor: General Properties page"*. This means that you or the end user can modify the value and submit that value to the repository. If you submit a value for a value to which you were not granted access, then the box will display red and the "Insufficient dimensional slice security for slice with dimension values" error message displays. For more information, see .

Right-click menu in a column cell

The options that are available depend on the tab in which the watchlist is displayed and on the column in which you right-clicked, and can include the following:

- Action Links - Displays the action links that are available for the current status of the initiative, objective, or KPI. Click a link to execute the action.

- Open KPI (for a cell in a KPI row only) - Displays the KPI details for the selected KPI (that is, the details are displayed in the *"Scorecard editor: KPI Details tab"*).

- Remove KPI (for a cell in a KPI row only) - Use this option to remove the selected KPI from the KPI watchlist.

- Open Initiative or Open Objective (for a cell in an initiative or objective row only) - Use this option to open the selected initiative or objective (that is, it is displayed in the *"Scorecard editor: Initiative Details tab"* or *"Scorecard editor: Objective Details tab"* in the current mode).

- Delete Initiative or Delete Objective (for a cell in an initiative or objective row only) - Use this option to delete the selected initiative or objective.

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- Analyze (for a cell in a KPI row only) - Use this option to create an analysis based on the selected KPI. The analysis is automatically saved in the catalog in the My Folders/Drills folder.

    > ✎ **Note:** Because the My Folders/Drills folder is used for temporary storage, the analysis might not persist after the Oracle Business Intelligence session ends. To preserve the analysis, copy it to another directory. For example, to preserve an analysis that you plan to use in a shared dashboard, copy it to a folder in / Shared Folders.

- Contact Owner - Use this option to display the *"Contact Owner dialog"*, where you compose a message to the business owner.
- Add Comment (for a cell in the Status column only) - Displays the *"Add Comment dialog"*, where you add a comment to an initiative, objective, or KPI for the current point of view.
- Override Status (for a cell in the Status column only) - Displays the *"Status Override dialog"*, where you override the status of an initiative, objective, or KPI for the current point of view or cancel an override.

Status window

The Status window shows the following information:

- If you are working with comments, all the comments that have been added to, and all status overrides and override cancellations that have been applied to an initiative, objective, or KPI for the current point of view.
- If you are working with status overrides, all status overrides and override cancellations that have been applied to an initiative, objective, or KPI for the current point of view.

Use this window to view and manage this information as follows:

- To add a new comment, click the New Comment button to display the *"Add Comment dialog"*.
- To override a status or cancel an override, click the New Override button to display the *"Status Override dialog"*.
- To expand or collapse all comments, click the Expand All or Collapse All button.
- To expand or collapse an individual comment, click the Expand or Collapse button.
- To reply to a comment, click Reply to display the *"Reply dialog"*.
- To pin the Status window so that it stays open as you work, click the Pin button in the top-right corner of the window.

Archive dialog

Use this dialog to specify if and how you want to apply the existing folder or object permissions and if you want to include timestamps when preparing the archive file. See

Components

Keep Permissions

Use this option to maintain the object or folder's existing permissions. If you do not select this option, then the archiving process does not include any permissions. Upon unarchiving, the system assigns the parent folder's permissions to all of the objects and folders.

Keep Timestamps

Use this option to maintain the CreationTime, LastModified, and LastAccessed timestamps assigned to the object or folder. Upon unarchiving, the LastModified timestamp is updated to indicate the time at which the object or folder is unarchived. If

you select this option, the Old option in the Paste Overview area of the Preferences dialog is available when unarchiving. You use the Old option to overwrite existing catalog items that are older than the catalog items in the archive.

If you do not select this option, then the archiving process does not include timestamp information and the Old option in the Paste Overview area of the Preferences dialog is not available.

Notes

Before you archive, ensure that the Archive\Unarchive privilege is assigned to your account.

BI Composer wizard -- Create Analysis: Select Views panel

Use this panel of the "*BI Composer*" to:

- Select the views that are to be included in the analysis. You can include one of each of the following types of views:

    o Title

    o Tabular

    o Graph

    ✎ **Note:** Some graph types (for example, gauges) are not supported.

- Preview the results.

For more information, see:

This panel is also displayed as:

Edit Analysis Analysis_Name: Select Views panel
Components

Title

Use this field to enter the title for the analysis.

Table

Use this box to select the type of tabular view to include in the analysis:

- None - Use this option to specify no tabular view.
- Table (recommended) - Use this option to specify a table. (This is the recommended table type for nonhierarchical data).
- Summary Table - Use this option to specify a table that also includes summaries of the data (for example, grand totals).
- Pivot - Use this option to specify a pivot table (recommended for hierarchical data).
- Summary Pivot - Use this option to specify a pivot table that also includes summaries of the data (for example, grand totals).

Graph

Use this box to select the type of graph view to include in the analysis:

- None - Use this option to specify no graph view.

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- Bar (recommended) - Use this option to specify a bar graph. (This is the recommended graph type by default.)

- Area - Use this option to specify an area graph.

- Scatter - Use this option to specify a scatter graph.

- Pie - Use this option to specify a pie graph.

- Line-Bar - Use this option to specify a line-bar graph.

Layout

Use this box to select the placement of the tabular and graph views in the analysis. The options are:

- Table above Graph

- Table below Graph

- Table to left of Graph

- Table to right of Graph

Preview

Use this box to specify whether to display a preview of the results:

- Select this box to display a preview of the actual analysis and data.

    ✏ **Note:** Selecting this box might impact performance if the query for data results in very large data sets.

- Deselect this box to display an image that represents each view in the analysis.

Show how results will look on a dashboard

Use this button to show a fully interactive view where you can page through large result sets, drill, and so on.

Report XML

Use this button to show the XML code for the analysis. This information is helpful for debugging purposes.

BI Composer wizard -- Create Analysis: Edit Table panel

This panel is available only if you have added a tabular view to the analysis using the .

Use this panel of the "*BI Composer*" to:

- Edit the layout of the tabular view (if you have included a tabular view). You can create prompts, use a column to section the analysis, and exclude certain columns from the tabular view.

- Preview the results.

For more information, see:

This panel is also displayed as:

Edit Analysis Analysis_Name: Edit Table panel
Components

Rows

This target area is available only for a pivot table.

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Displays the columns that are to be shown as rows in a pivot table.

Use this target area to modify the way that data is arranged in the pivot table by moving rows to different target areas.

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Columns

Displays the columns that are to be shown as columns in a table or pivot table.

Use this target area to modify the way that data is arranged in the table or pivot table by moving columns to different target areas.

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Move To

Displays the following options to move a column to a different target area:

- Rows - (This option is not available in the Move To menu in the Rows target area.) Moves the column to the Rows target area.

- Columns - (This option is not available in the Move To menu in the Columns target area.) Moves the column to the Columns target area.

- Prompt For - (This option is not available in the Move To menu in the Prompt For target area.) Moves the column to the Prompt For target area.

- Section By - (This option is not available in the Move To menu in the Section By target area.) Moves the column to the Section By target area.

- Excluded - (This option is not available in the Move To menu in the Excluded target area.) Moves the column to the Excluded target area.

Additional Layout Options

Use this option to display the following target areas Prompt For, Section By, and Excluded.

Prompt For

Displays the columns that are to be displayed as prompts.

Use this target area to move a column to another other target area.

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Section By

Displays the columns that are to be to used to divide the table or pivot table into sections.

Use this target area to move a column to another target area.

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Excluded

Displays the columns that are to be excluded from the view.

Use this target area to move a column to another target area.

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

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Up and Down Arrows

Use these buttons to reorder the columns in the target areas.

Preview

Use this box to specify whether to display a preview of the results:

- Select this box to display a preview of the actual analysis and data.

  > ✏️ **Note:** Selecting this box might impact performance if the query for data results in very large data sets.

- Deselect this box to display an image that represents each view in the analysis.

Show how results will look on a dashboard

Use this button to show a fully interactive view where you can page through large result sets, drill, and so on.

Report XML

Use this button to show the XML code for the analysis. This information is helpful for debugging purposes.

BI Composer wizard -- Create Analysis: Edit Graph panel

This panel is available only if you have added a graph view to the analysis using the .

Use this panel of the "*BI Composer*" to:

- Edit the properties and layout of the graph (if you have included a graph view). You can create prompts, use a column to section the analysis, and exclude certain columns from the graph.
- Preview the results.

This panel is also displayed as:

Edit Analysis Analysis_Name: Edit Graph panel
Components

Subtype

Use this box to select the graph subtype.

Vary Color By

This target area is not available for pie graphs.

Displays the columns for which each column value or column value combination is to be shown in a different color.

Use this target area to modify the way that data is arranged in the graph by moving columns to different target areas (or positions).

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Group By or Points

This target area is named Group By for bar, area, and line-bar graphs, and Points for scatter graphs.

This target area not available for pie graphs.

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Displays the columns for which the axis labels are to be clustered into groups. For example in a vertical bar graph whose criteria includes the Region, District, and Dollars column, if this target area contains the Regions column, then the data is grouped by region on the horizontal axis.

Use this target area to modify the way that data is arranged in the graph by moving columns to different target areas (or positions).

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Slices

This target area is available only for pie graphs.

Displays the columns for which each column value or column value combination is to be shown as a separate slice of the pie.

Use this target area to modify the way that data is arranged in the graph by moving columns to different target areas (or positions).

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Pies

This target area is available only for pie graphs.

Displays the columns for which each column value or column value combination is to be shown as a separate pie.

Use this target area to modify the way that data is arranged in the graph by moving columns to different target areas (or positions).

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Move To

Displays the following options to move a column to a different target area:

- Group By - (This option is not available in the Move To menu in the Rows target area.) Moves the column to the Rows target area.

- Vary Color By - (This option is not available in the Move To menu in the Columns target area.) Moves the column to the Columns target area.

- Prompt For - (This option is not available in the Move To menu in the Prompt For target area.) Moves the column to the Prompt For target area.

- Section By - (This option is not available in the Move To menu in the Section By target area.) Moves the column to the Section By target area.

- Excluded - (This option is not available in the Move To menu in the Excluded target area.) Moves the column to the Excluded target area.

Additional Layout Options

Use this option to display the following target areas Prompt For, Section By, and Excluded.

Prompt For

Displays the columns that are to be displayed as prompts. Use this target area to move a column to another other target area.

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

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Section By

Displays the columns that are to be to used to divide the graph into sections. Use this target area to move a column to another target area.

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Excluded

Displays the columns that are to be excluded from the view. Use this target area to move a column to another target area.

To move a column, select the column, click Move To, and then select one of the options on the Move To menu.

Up and Down Arrows

Use these buttons to reorder the columns in the target areas.

Preview

Use this box to specify whether to display a preview of the results:

- Select this box to display a preview of the actual analysis and data.

    ✏ **Note:** Selecting this box might impact performance if the query for data results in very large data sets.

- Deselect this box to display an image that represents each view in the analysis.

Show how results will look on a dashboard

Use this button to show a fully interactive view where you can page through large result sets, drill, and so on.

Report XML

Use this button to show the XML code for the analysis. This information is helpful for debugging purposes.

BI Composer wizard -- Create Analysis: Sort and Filter panel

Use this panel of the *"BI Composer"* to:

- Specify sorting for the results that are displayed in graphs, pivot tables, and tables. You can sort attribute and measure columns. You cannot sort hierarchical columns.
- Create filters on attribute and measure columns. You cannot create filters on hierarchical columns.

    For more information on filters, see *"Filters and Selection Steps"*

- Preview results.

This panel is also displayed as:

Edit Analysis Analysis_Name: Sort and Filter panel
Components

Expand Sort or Collapse Sort

Use this button to expand or collapse the Sort area.

Sort

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Use this area to specify and manage sorting. This area contains the follow components:

- Add Sort - Use this button to select the column on which to specify a sort order and to add a sort order entry to the Sort table.
- Sort Table - Displays an entry for each column that is to be sorted. You manage each entry as follows:
  - To specify the sort order, click a sort order option, for example, Ascending, or Low to High.
  - To prioritize the sort entries, use the up and down arrows to reorder the entries in the table.
  - To delete an entry, click Delete.

Expand Filter or Collapse Filter

Use this button to expand or collapse the Filter area.

Filter

Use this area to specify and manage filters. This area contains the follow components:

- Add Filter - Use this button to select the column on which to filter and to add a filter entry to the Filter table. When selecting the column on which to filter you can select one of the columns in the analysis or one of these options:
  - More Columns - Use this option to display the Select Column dialog, where you select a column from the same subject area as the columns in the analysis but is not included in the analysis.
  - Saved Filters - Use this option to display the Saved Filters dialog, where you can select a filter that has been saved to the catalog.
- Show - Use this box to select one of the following options to combine filters:
  - Data Satisfying All Filters - Use this option to specify that the criteria specified in each filter must be met.
  - Data Satisfying Any Filter - Use this option to specify that the criteria that is specified in at least one of the column filters must be met.
- Filters Table - Displays an entry for each column that is to be filtered. You manage each entry as follows:
  - To specify the operator for the filter, select the operator in the Operator box. The operator list from which you can select is populated based on the type of column. For more information about each operator, including the is prompted operator option, see *"Operators"*.
  - To specify one or more values to use when applying the filters, enter or select the value or values in the Value field. Use a semicolon to separate multiple values.
    You can use the Search button (available only for certain operators) to display the *"Select Values dialog"*, where you can search for a value. (Note that this version of the Select Values dialog contains only a limited number of the components of the standard version.)
  - To delete an entry, click Delete.
- Saved Filters Table -Displays an entry for each saved filter that you added using the Save Filters option. You manage each entry as follows:
  - To delete an entry, click Delete.

Preview

Use this box to specify whether to display a preview of the results:

- Select this box to display a preview of the actual analysis and data.

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> ✏ **Note:** Selecting this box might impact performance if the query for data results in very large data sets.

- Deselect this box to display an image that represents each view in the analysis.

Show how results will look on a dashboard

Use this button to show a fully interactive view where you can page through large result sets, drill, and so on.

Report XML

Use this button to show the XML code for the analysis. This information is helpful for debugging purposes.

BI Composer wizard -- Create Analysis: Highlight panel

This panel is available only if you have added a tabular view to the analysis using the .

Use this panel of the "*BI Composer*" to:

- Apply conditional formatting to measure columns in tabular views. Conditional formatting helps direct attention to a data element if it meets a certain condition. For example, you can show below-quota sales figures in a certain color.

  (You cannot apply conditional formatting to attribute or hierarchical columns.)

- Preview the results.

For more information, see:

This panel is also displayed as:

Edit Analysis Analysis_Name: Highlight panel
Components

Expand Formatting or Collapse Formatting

Use this button to expand or collapse the Formatting area.

Formatting

Use this area to specify and manage conditional formatting on columns. It contains the follow components:

- Add Column Format - Use this button to select the column to which to apply conditional formatting and to add a formatting entry to the Formatting table.

- Formatting Table - Displays an entry for each column to which conditional formatting is to be applied. You manage each entry as follows:

  - To enter the values for the threshold that divide each formatting range, use the threshold fields.

    For example, suppose that you are working with the # of Orders column, and you want orders that fall below 5000 highlighted in red, orders between 5000 and 8000 highlighted in yellow, and orders over 8000 highlighted in green. To do so, in the first threshold field, you enter 5000, and in the second threshold field you enter 8000.

  - To select the color to represent each formatting range, click the down arrow to the right side of the Color box to display the color dialog.

  - To delete an entry, click Delete.

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Preview

Use this box to specify whether to display a preview of the results:

- Select this box to display a preview of the actual analysis and data.

  > ✎ **Note:** Selecting this box might impact performance if the query for data results in very large data sets.

- Deselect this box to display an image that represents each view in the analysis.

Show how results will look on a dashboard

Use this button to show a fully interactive view where you can page through large result sets, drill, and so on.

Report XML

Use this button to show the XML code for the analysis. This information is helpful for debugging purposes.

BI Composer wizard -- Create Analysis: Save panel

Use this panel of the "*BI Composer*" to save the analysis with the same name or with a different name. You can also:

- Create new folders in which to save the analyses
- Rename folders and analyses
- Delete folders and analyses
- Expand and collapse folders

For more information, see:

This panel is also displayed as:

Edit Analysis Analysis_Name: Save panel
Components

Analysis Name

Use this field to enter a name for the analysis.

Description

Use this field to enter a description of the analysis.

Save In

Use this area to select the location in which to save the analysis.

To:

- Create a new folder, click Create New Folder to display the Create New Folder dialog, where you enter the name of the folder.
- To manage an existing folder, right-click the folder to display the following options:
  - ○ Delete - Use this option to delete the selected folder.
  - ○ Rename - Use this option to display the Rename dialog, where you enter a new name for the folder.

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○ Collapse - Use this option to collapse the selected folder.

○ Expand - Use this option to expand the selected folder.

○ Expand All Below - Use this option to expand all folders below the selected folder.

○ Collapse All Below - Use this option to collapse all folders below the selected folder.

○ Show as Top - This option is not enabled and should be ignored.

Catalog page

Use the Catalog page to locate objects in the catalog and perform tasks specific to those objects. The objects and options that are available to you are determined by your system privileges and the permissions assigned to individual folders and objects.

Use the Catalog page to:

- Perform basic tasks. For example, open, copy, delete, search for objects, and create folders.
- Move objects by dragging and dropping them to different locations within the catalog.
- Perform object-specific tasks. For example, assigning an agent or adding an object to a briefing book.
- Archive specific folders, objects, or the entire catalog.
- Set permissions on individual objects and folders.

For more information, see:

Components

Folders pane

Use the *"Folders pane"* to display the catalog as a directory hierarchy or to display only those folders and objects that you created or that you marked as your favorites.

Search pane

Use the to provide search criteria and initiate a catalog search.

Catalog area

Use the to view the results of your search, open folders to browse content, and initiate tasks specific to an object.

Tasks pane

Use the to initiate tasks specific to an object.

Preview pane

Use the to preview the object that you selected in the Catalog area. This pane is not visible until you click the button to display it.

Toolbar

The buttons that are enabled for the toolbar vary between object types. The toolbar contains the following buttons:

- User View - Defaults to User View. You can select Admin View if you have administrative permissions. Admin View enables you to perform all administrative tasks and access the catalog root folders, which provide detailed information about all users and system objects.

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- New - Use to create new objects. After you select the object to create, the object's editor displays where you can begin building the object.

  If you have administrative permissions, then the New menu displays the Folder link that you can select to create a catalog folder.

- Refresh - Use to update the catalog with content or folder changes.

- Up - Use to navigate to a parent folder or directory.

- Show/Hide folders panes - Use to hide or show the Folders pane and Tasks pane.

  Taleo Users can't see Hidden Folders, so if you hide folders, you must request Tech Support to unhide them.

- Search - Use to display the Search pane. Deselect this button to display the Folders pane.

- Change list view type - Use this list to select how much information about folders and objects to display in the Catalog area.

    o Descriptive - Select to display the object or folder's name, type, owner, and date modified and Expand, Open, Edit, and More links. This view enables you to perform tasks directly from the object's listing.
    o Details - Select to display the object or folder's name, type, owner, and date modified.
    o List - Select to display object and folder name, only.

- View - Use to view the selected object. For example, if you select a report and click this button, the report viewer launches and shows you the report.

- Edit - Use to modify a selected object using the associated editor or run a script, URL, or web service action.

- Print - Use to print the current dashboard page, analysis, or the information in the Preview pane.

  You can print a dashboard page or analysis using a standard print layout (Printable HTML or Printable PDF). For a dashboard page, you can also print using a custom print layout, if one or more custom print layouts are available for the dashboard page. For information on custom print layouts, see .

- Export - Use to export a copy of an object or the object's data to a variety of formats (for example, PDF or spreadsheet).

- Delete - Use to remove a selected object or folder from the catalog.

  When deleting shared folders or objects, be aware that other users who have added shared objects to their personal dashboards no longer have access to them.

- Copy - Use to copy a selected object or folder to paste in another directory.

- Paste - Use to paste a copied object to another location.

Location

Displays the directory path of a selected object. Use as a way to determine where you are within the directory structure.

Show Hidden Items

Select to display all object-related settings and data such as system privileges, metadata, and cached data. When you select this option, hidden folders, including the following folders, are displayed: _Portal, _Filters, _Prefs, _Alerts, _Agents, and _Delivers.

Catalog area

Use this area to view your search results and browse business intelligence objects and folders. If you use the full-text search, messages will display at the top of the Catalog area indicating the indexing status (indexing makes the objects available to the search) or if you need to refine your search.

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You can also use this pane to perform object-specific tasks and to move objects by dragging and dropping them to different areas within the Catalog. You can drag and drop objects within the Catalog area or from the Catalog area to the *"Folders pane"*.

This area is part of the *"Catalog page"*.

For more information, see:

Components

Type

Use this list to specify which object type to display in the catalog area. Selecting an object type applies only to the folder that you are viewing and not to the whole catalog. For example, if you are viewing content in the /My Folders location and select the Dashboard object type, only the dashboards within the /My Folders location display in the Catalog area.

Sort

This field displays if you selected either the List or Descriptive view type in the Change list view type list located in the "Catalog page" toolbar.

Use this list to specify how you want to sort the objects in the Catalog area. By default, objects display in alphabetical order (A-Z). For example, you can select the Last Modified Ascending option to view the object chronologically.

Show More Details

This field displays if you selected the Descriptive view type in the Change list view type list located in the "Catalog page" toolbar.

Use to display more information about specific object types. For example, if the Catalog pane listing contains agents and you select the Show More Details option, the information listed with the agent includes last run, next run, recipient, and priority information.

Object/Folder Links

Use to view a list of catalog objects and to initiate a specific task from an object. The way in which the objects display in this area (for example, list or details) is determined by the view type selection that you made in the Change list view type list located in the "Catalog page" toolbar.

The tasks available for each object depend upon the object's type, the object's permissions, and your privileges. The tasks that display in the Catalog area also display in the *"Tasks pane"*. For descriptions of these tasks, see .

If the Catalog area displays results from a full-text search and those results contain dashboards, the Catalog area provides the Open with Search Filter option which, when clicked opens and applies the search criteria values as prompt values to the dashboard.

Catalog pane

Use this pane to add objects from the Oracle BI Presentation Catalog to analyses, dashboards, and so on. The objects available for you to add depend on the task that you are performing. For example, if you are creating:

- A dashboard, you can add objects that are appropriate to add to a dashboard (such as pages, columns, analyses, and prompts) and for which you have appropriate permissions.

- An analysis, you can add filters, calculated items, and groups for which you have appropriate permissions.

This pane is displayed in numerous places, including the tabs of the *"Analysis editor"*, the *"Dashboard builder"*, and the *"New Calculated Item dialog"*.

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For more information, see:

- "*Specifying the Criteria for Analyses*"
- "*Dashboard Content*"

Components

List

This box is not available in the Dashboard builder or the New Calculated Item dialog.

Use this box to select which objects to display in the Catalog Tree. The options can vary depending on whether the Catalog pane is displayed but can include the following:

- All -Use this option on the "*Analysis editor: Criteria tab*" to display all filters (for Criteria tab only), calculated items, and groups. On all other tabs of the Analysis editor, use this option to include all calculated items and groups.
- Filters - Use this option to display only filters.
- Calculated Items - Use this option to display only calculated items.
- Groups - Use this option to display only groups.

Catalog Tree

Displays catalog objects that are appropriate for the task that you are currently performing and for which you have appropriate permissions.

Use this tree to:

- Add a filter, calculated item, and group to an analysis. To do so, select the filter, calculated item, or group and click the Add More Options button.
- Add an object to a dashboard. To do so, drag and drop the object to the "*Page Layout area*".
- Add a group or calculated item as a selection step. To do so, drag and drop the object to the appropriate column in the "*Selection Steps pane*".

Toolbar

This toolbar is available only in the Catalog pane displayed in the tabs of the Analysis editor.

The toolbar contains the following buttons:

- Add More Options - Use this button to add a filter, calculated item, or group to the analysis. To do so, first select the object, and then click this button:
  - o For a filter, the is displayed, where you specify how the filter is to be applied to the analysis.
  - o For a group, the following options are displayed:
    - Add - Use this option to add the group to the analysis. You see an "Add: group-name" step in the Selection Steps pane. You see an outline value for the group in a table or pivot table.
    - Add Members - Use this option to add the members of the group to the analysis. You see an "Add: Members of group-name" step in the Selection Steps pane. You do not see an outline value in a table or pivot table; you see the members of the group.
  - o For a calculated item, use this button to add the calculated item to the view.
- View - This button is available only when you select a filter. Use this button to view information about the selected object. When you click this button, the appropriate view dialog displays. For example, from the , you can view the

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filter's Catalog path and the syntax of the filter (for example, Region is equal to/is in EASTERN REGION; SOUTHERN REGION).

- Edit - Use this button to edit the selected object.

- Refresh - Use this button to refresh the objects that are displayed in the Catalog Tree. For example, if you cannot locate a specific saved filter, then click the Refresh button to display it in the Catalog Tree.

Catalog pane for Scorecard

Use this pane to work with objects in the Oracle BI Presentation Catalog. For example, if you are creating an objective, you can add predefined KPIs to evaluate the objective's performance and progress by dragging and dropping KPIs from this pane to the objective.

For more information, see:

- *Creating an Objective*
- *"Creating an Initiative"*

This pane is part of the *"Scorecard editor"* and the *"KPI Watchlist editor"*.

Components

Catalog Tree

Displays catalog objects for which you have appropriate permissions.

Use this tree to work with the catalog objects. For example, you can add a KPI to an objective or initiative by dragging and dropping it, you can open a KPI, and so on.

Toolbar

The toolbar contains the following buttons:

- New Object - (This button is available only in the KPI Watchlist editor when the editor is displayed within a scorecard.) Displays these options:
  - New Folder - Use this option to create a folder. To rename the folder, right-click the folder, select Rename, and enter a new name.
  - KPI - Use this option to create a KPI. When you select this option the Select Subject Area menu is displayed, where you select the subject area, and then the *"KPI editor"* is displayed.
  - Create Agent - (This option is available only when you select a KPI.) Use this option to display the *"Create New Agent dialog"*, where you create an agent from the KPI.

- Open - Use this option to open the selected object. (Whether you can open an object and whether the object opens as read-only depends on your privileges and permissions and on the type of object.)

- Delete - (This option is available only in the KPI Watchlist editor when the editor is displayed within a scorecard.) Use this option to delete the selected folder or object.

- Refresh - Use this button to refresh the objects that are displayed in the Catalog Tree. For example, if you cannot locate a specific saved filter, then click the Refresh button to display it in the Catalog Tree.

Causal Linkage dialog

Use this dialog to specify the strength of a cause and effect relationship, and how the values of one impact the values of the other.

For more information, see:

- "*Related Items pane*"

Components

Strength

Use this box to specify whether the strength of the cause and effect relationship is Strong, Moderate, or Weak.

Proportionality

Use this box to specify whether changes in performance or value in the cause and effect relationship are directly proportional (Direct) or inversely proportional (Inverse).

Cause & Effect Map Preferences dialog: General tab

Use this tab of the to specify which types of cause and effect relationships are to be displayed on a cause & effect map. You can also specify the slant of the lines that link objects and how many levels of the strategy hierarchy are to be displayed.

For more information, see:

- "*Cause & Effect Maps*"
- "*Creating a Cause & Effect Map*"

Components

Show Link Strengths

Displays the following boxes to specify which types of cause and effect relationships are to be displayed on the map:

- Strong - Use this option to specify that strong cause and effect relationships are to be displayed.
- Moderate - Use this option to specify that moderate cause and effect relationships are to be displayed.
- Weak - Use this option to specify that weak cause and effect relationships are to be displayed.

Show Link Interactions

Displays the following boxes to specify whether only associated objectives and KPIs whose changes in performance or value are directly proportional to the objective are to be displayed on the map, or only associated objectives and KPIs whose changes in performance or value are inversely proportional to the objective are to be displayed on the map, or both:

- Direct - Use this option to specify that only associated objectives and KPIs whose changes in performance or value are directly proportional to the objective are to be displayed.
- Inverse - Use this option to specify that associated objectives and KPIs whose changes in performance or value are inversely proportional to the objective are to be displayed.

Link Angle

Use this box to specify the degree to which the lines that link objects on the map are to slant. To use straight lines, specify 0.

Number of Levels

Use this box to specify how many influencing, child objectives, to display on the map. This is helpful to reduce the visual complexity of the map.

Related Topics

Cause & Effect Map tab: Details tab

Use this tab of the *"Scorecard editor: Cause & Effect Map tab"* to specify supporting information for a cause & effect map.

For more information, see:

- *"Cause & Effect Maps"*
- *"Creating a Cause & Effect Map"*

Components

Name

Displays the name of the cause & effect map.

Description

Use this field to enter a description of the cause & effect map.

Business Owner

Displays the user ID of the person responsible for managing the cause & effect map. To specify the business owner, click the Set User button to display the , where you can search for and select the business owner.

Objectives and KPIs

Lists the objectives and KPIs that are displayed in the cause & effect map.

Use this watchlist to view and manage these objectives and KPIs. For more information about watchlists, see *"Watchlists"*.

Related Documents

Use the *"Related Documents area"* to view and manage documents that provide supporting information to the cause & effect map.

Related Documents area
Displays the documents that provide supporting information to a scorecard object, such as an objective.

Use this area to view and manage the documents:

- To add a new document, click the New Row button to display the *"New Related Document dialog"*.
- To edit document, select the document in the list and click the Edit Row button to display the .
- To delete a document, select the document in the list and click the Delete Row button.

Cause & Effect Map tab: Diagram tab

Use this tab of the *"Scorecard editor: Cause & Effect Map tab"* to create a diagram that illustrates the cause and effect relationships of an objective or KPI.

For more information, see:

- *"Cause & Effect Maps"*
- *"Creating a Cause & Effect Map"*

Components

Diagram

Use this area to drag and drop the objective or KPI whose cause and effect relationships you want to diagram.

Each node (that is, the representation of an objective or KPI) on the diagram shows the status of the objective or KPI by displaying the icon and color that represents the assessment range. A KPI node also displays the actual value of the KPI and the percent variance from the target.

To:

- Display options that allow you to work with a node, right-click the node or click the Options button (on the right side of the node) to display the *"Node Options Menu"*.

- Display additional performance data for the KPI, such as target value or variance, click the down arrow at the bottom center of the node. To collapse this data, click the up arrow.

- Edit a causal linkage, right-click the linkage line and select Edit Causal Linkage. The *"Causal Linkage dialog"* is displayed.

- Delete a causal linkage, right-click the linkage line and select Delete Causal Linkage.

- Zoom in and out of the diagram or to set preferences, use the toolbar buttons on the *"Scorecard editor: Cause & Effect Map tab"*.

- Work with comments (if any), click the Comment button in the upper-right corner of a node to display the *"Status window"*, where you can read the comments that previously have been added, add another comment, or reply to a comment. See *"Comments"*.

- Work with status overrides (if any), click the red asterisk in a node to display the *"Status window"*, where you can view the overrides that previously have been applied or apply another override. See *"Status Overrides"*.

Legend

Use the to view the legend for the cause & effect map.

Collaboration pane

Use this pane to identify information that is helpful for collaborating on KPI details, an initiative, or an objective, including the business owner, key resources, and related documents.

For more information, see:

- *"Working with KPI Details"*
- *"Creating an Initiative"*
- *Creating an Objective*

This pane is part of the *"Scorecard editor: KPI Details tab"*, *"Scorecard editor: Initiative Details tab"*, and *"Scorecard editor: Objective Details tab"*.

Components

Comments

Displays the comments that have been added to the KPI, initiative, or objective. For more about comments, see *"Comments"*.

Use this area to view and manage the comments. Before you begin to work with comments, ensure that the point of view controls reflect the values for which you want to add or view comments.

To:

- Add a new comment, click the New Comment button to display the *"New Comment dialog"*.

- Reply to a comment, click the Reply link to display the *"Reply dialog"*.

- Expand or collapse all comments, click the Expand All or Collapse All button.

- Expand or collapse an individual comment, click the Expand or Collapse button.

Business Owner

Displays the user ID of the person responsible for managing the initiative, objective, or KPI. To specify the business owner, click the Set User button to display the *"Select Business Owner dialog"*, where you can search for and select the business owner.

Related Documents

(for KPI details) Displays links to documents that provide supporting information to the KPI. You added these links when you created or edited the KPI. For more information, see *"Creating a KPI"*.

(for initiatives and objectives) Use the *"Related Documents area"* to view and manage documents that provide supporting information to the initiative or objective.

Key Resources

This area is available only for initiatives.

Displays the key resources for an initiative, that is the users who are working on an initiative.

Use this area to view and manage the key resources:

- To add a new key resource, click the New Row button to display the *"Key Resource dialog"*.

- To edit a key resource, select the key resource in the list and click the Edit Row button to display the *"Key Resource dialog"*.

- To delete a key resource, select the key resource in the list and click the Delete Row button.

Column Properties dialog

Use this dialog to:

- Edit the properties for a column or hierarchy level to control the appearance and layout of a column or hierarchy level and its contents

- Specify formatting to apply only if the contents of the column or hierarchy level meet certain conditions

- Specify the interactions that are to occur when users click in a data view

- Set the properties of a column that affect write back

This dialog is also displayed as:

Hierarchical Level Properties dialog
For more information, see:

- *"Formatting Analyses, Views, and Dashboard Pages"*

- *"Adding Actions to an Analysis"*

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Components

Style

Use the *"Column Properties dialog: Style tab"* to format the content of columns and hierarchy levels.

Column Format

Use the *"Column Properties dialog: Column Format tab"* to modify how folder and column headings are displayed in the analysis and to specify how repeated values display in the column.

Data Format

Use the to override the data's default display characteristics.

Conditional Format

Use the *"Column Properties dialog: Conditional Format tab"* to add a condition, or filter, to the column or hierarchy level.

Interaction

Use the *"Column Properties dialog: Interaction tab"* to specify what you want to happen when the user clicks a value for a column or hierarchy level.

Write Back

Use the to set the properties of a column that enables it for writing back values from a table.

Save As Default

Use this button to affect the default property settings for columns and hierarchy levels, based on the specifications in this dialog. You need the appropriate privileges to save the properties as a systemwide default.

- Select Restore properties defaults to return the property values for the column or hierarchy level back to the last saved default values.

  To restore the defaults that were shipped with the product, you must manually delete the default formats file from the Oracle BI Presentation Catalog.

- Select Save as the system-wide default for <name> to save these properties as the systemwide default for this column or hierarchy level in all analyses in which it is used.

- Select Save as the system-wide default for this data type to save these properties as the systemwide default for all columns or hierarchy levels that have the same data type as this column or hierarchy level.

Click OK to save these properties for this column or hierarchy level in this analysis only.

The Save as Default button applies slightly differently to the various tabs of this dialog:

- The properties on the Style, Column Format, and Data Format tabs are saved or restored when you select an option with this button.

- The settings on the Conditional Format tab cannot be saved or restored.

- On the Write Back tab, only the Enable Write Back property can be saved or restored.

- On the Interaction tab, you can save and restore properties, but the display differs for action links. If you set the interaction mode to action links, then you can create action links and they are displayed in the Action Links area of the tab. If you save the default settings, click OK to close the dialog, then re-display the dialog, you do not see the action links in the Action Links area. You can click the Add Action Link button to display a list of the saved actions so that you can select one to use.

Column Properties dialog: Column Format tab

Use this tab of the *"Column Properties dialog"* to modify how folder and column headings are displayed in the analysis and to specify how repeated values display in the column or hierarchy level.

This dialog is also displayed as:

Hierarchical Level Properties dialog: Level Format tab

For more information, see *"Formatting Analyses, Views, and Dashboard Pages"*.

Components

Hide

Not available for hierarchy levels. Use this box to hide the column in the analysis. You can hide columns whose appearance adds no value to the analysis. Hidden columns do not affect the aggregation of the values. For example, you want to build an analysis that includes only customers located in Illinois. To build the proper filter, you must include the column called Customers.State. Because this column was added for filtering purposes, only, and its appearance adds no value to the analysis, then you can hide this column.

Folder Heading and Column Heading

Not available for hierarchy levels. Use these fields to view or modify the name of the folder or column that is provided by the repository in which the column resides. To modify this field, you must first select the Custom Headings box, then you can specify a different heading to use. To modify the heading's appearance, click the Edit Format button.

You can reference variables in the Folder Heading and Column Heading fields. For the syntax to use, see *"What Is the Syntax for Referencing Variables?"* For more information on variables, see *"Using Variables"*.

Edit Format

Use this button to modify the corresponding heading's format. For example, you can modify the heading to be displayed in 14-point bold Helvetica font. Any formatting changes that you specify override the Oracle BI EE style sheet and any formatting preferences that you specified on the *"Column Properties dialog: Style tab"* for this column.

Custom Headings

Use this box to enable the Folder Heading and Column Heading fields for editing. The fields are read-only until you select this box.

Show TimeZone

This box displays only for the columns and hierarchy levels that have the date/time data type. Use this box to include the Time Zone button with the column or hierarchy level. Click the box multiple times to move through the three different states. When the box is selected, the button is displayed. When the box is not selected, the button is not displayed. When the box appears to be not available, then the default system behavior is used.

The Time Zone button displays with the data column or hierarchy level in a view, and you can click the button to view the name of the display time zone. For more information about modifying the time zone, see in .

Value Suppression

Use the buttons in this area to affect the display of repeating data values for the column or hierarchy level.

The data in one column or hierarchy level of a folder might be repeated in relation to rows of data in other columns or hierarchy levels in the folder. For example, if one column lists customer names and another column lists the regions that those customers are in, then the region data could be repeated for each customer row. You can choose to display duplicate data

only once, or display it for every row. Displaying repeating or duplicated data only once can make a table somewhat easier to read, and can make distinctions in that data more apparent.

You can select one of the following buttons:

- Suppress - Displays repeating data only once and suppresses the duplicate rows in the column or hierarchy level.
- Repeat - Displays repeating data for every row in the column or hierarchy level.

Column Properties dialog: Conditional Format tab

Use this tab of the *"Column Properties dialog"* to add a condition to a column or hierarchy level. You specify a condition to affect the formatting of values based on certain criteria. The formatting that you specify for a column or hierarchy level on this tab is visible in any view that can display data and its formatting, except for graphs, funnel graphs, and gauges. For information on conditional formatting in graphs, see *"Graph Formatting Based on Columns"* .

This dialog is also displayed as:

Hierarchical Level Properties dialog: Conditional Format tab Conditional Formatting dialog
For more information, see *"Applying Conditional Formatting to Tables, Pivot Tables, and Trellises"* .

Components

Add Condition

Use this button to begin the process of creating a conditional format by adding a condition to any type of column or to a hierarchy level.

When you access the *"New Condition dialog"* *"New Condition dialog"* from the Conditional Format tab, the dialog shows the options that apply to conditional formats. For example, the Operator list contains the operators that are used in conditional formats, and you can apply presentation variables. For information on presentation variables, see *"Using Variables"*.

When you have created a conditional format, you see it listed at the top of this tab. Use the buttons that are displayed with the conditional format to edit the condition, format the values, or delete the format.

Clear All

Use this button to delete from the tab any conditional formats that you have created. This button is available only when at least one format exists.

Column Properties dialog: Data Format tab

Use this tab of the *"Column Properties dialog"* to override the data's default display characteristics by specifying custom formats. The options that display on this tab depend upon the data type (text, numeric, or date) of the column or hierarchy level. For example, if the data type is numeric, then you can add the thousands separator to the values.

This dialog is also displayed as:

Data Format dialog Hierarchical Level Properties dialog: Data Format tab
Components

Override Default Data Format

This box is displayed for all data types.

Use this box to specify to enter an override format for the column or hierarchy level. Selecting this box enables the remainder of the settings on the tab.

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Treat Text As

This list is displayed for the text data type.

Use this list to specify how you want to display the text for the values. You can select from options such as plain text, HTML, or a link. Based on your choice, the field displays the applicable HTML string used to display the data.

If you select the Custom Text Format option, then you can type the custom format into the Custom Text Format field.

Custom Text Format

This field is displayed for the text data type.

Use this field to view the HTML string that corresponds to the option that you selected in the Treat Text As list. This field is read-only for all options except the Custom Text Format option.

When you specify the Custom Text Format option, you use this field to write HTML calls that provide formatting. You can also type any valid HTML string, including JavaScript, VBScript, and so on.

The first character must be an at sign character (@). This enables devices that are incapable of displaying the custom format to display the data in the appropriate default format.

For example, the following example HTML code sets the width and height of a column or hierarchy level in tables and pivot tables. In the example, the text html enclosed in brackets ([html]) means to use HTML, and the at sign (@) character represents the dynamic contents of the column or hierarchy level.

```
@[html]<span style="width:200px; height:50px">@</span>
```

If you are unfamiliar with HTML, JavaScript, VBScript, and so on, then consult a third-party reference.

Treat Number As

This list is displayed for the numeric data type.

Use this list to specify how you want to display the number values. You can select from options such as Currency, Percentage, and Month Name. The option that you select determines the fields that display in the Data Format tab.

Currency Symbol

This list is displayed if you selected the Currency option in the Treat Number As list.

Use this list to select the currency symbol to be displayed in the column or hierarchy level. For example, you can select the British Pound or the Polish Zloty.

To use the symbol of a user's preferred currency, select the User's Preferred Currency option. (Users specify their preferred currencies in the *"My Account dialog"*.)

Negative Format

This list is displayed if you selected the Number, Currency, or Percentage option in the Treat Number As list.

Use this field to specify how you want negative numbers to be displayed in the column or hierarchy level. For example, you can select negative numbers to be displayed as -123 or (123).

Decimal Places

This list is displayed if you selected the Number, Currency, or Percentage option in the Treat Number As list.

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Use this list to specify how many numbers you want to include after the decimal point when displaying the value in a view. For example, you can specify two decimal places. Decimal values are always rounded rather than truncated.

In this list, you can use the up to options to indicate the maximum number of decimal places to include. In the database, values for a single column or hierarchy level can be stored with various numbers of decimal places. Some might have 2, 4, or 6 for example. If you specify up to 4 in this list, then values are displayed with no more than 4 decimal places, but potentially with less if the value has less than 4 decimal places.

Use 1000's Separator

This box is displayed if you selected the Number, Currency, or Percentage option in the Treat Number As list.

Select this box to include a separator, such as a comma, in numbers that are 1000 or greater.

Custom Numeric Format

This field is displayed if you selected the Custom option in the Treat Number As list.

Use this field to enter a custom number format or to create a custom format mask for a numeric field. See for custom format strings that you can enter or see to create a custom format mask for a numeric field.

You can use the number sign (#) to include significant digits, and the number zero (0) to include as many digits as specified, even if the number does not contain that detail.

For example, specifying ##.# shows 12.34 as 12.3, and specifying ##.000 shows 12.34 as 12.340.

Date Format

This list is displayed for the date and time zone data type.

Use this list to specify how you want the date to display in the column or hierarchy level. For example, 5/8/2003 07:34:57 AM or 05/08/2003 7:34:57. If you select the Custom option, then you can create a date format in the Custom Date Format field.

Custom Date Format

This field is displayed for the date and time zone data type and only if you selected the Custom option from the Date Format list.

Use this field to enter a date format. For custom format strings that you can enter, see .

Display Time Zone

This list is displayed for the date and time zone data type.

Use this list to select and apply a specific time zone to the column or hierarchy level. Note the following default conditions:

- If you select the Default option and the administrator has specified a system default time zone, then the system default time zone is used to display the time value in the column or hierarchy level.

- If you select the Default option and the administrator has not specified a system default time zone, then the user's preferred time zone is used to display the time value in the column or hierarchy level.

- If you select the Data time zone option, then the time values are displayed in the column or hierarchy level exactly as they are stored in the database.

- If you select a specific time zone (for example, GMT +05:45 Kathmandu) and the administrator has specified a system default time zone, then the system's default time zone is converted into the specific time zone that you selected.

Data Time Zone Offset

This field is displayed for the date and time zone data type.

Use this field to specify an offset for the time zone that you selected. For example, suppose you selected GMT +05:45 Kathmandu. You can specify an offset of 15 minutes to use when displaying time values for columns or hierarchy levels.

Column Properties dialog: Interaction tab

Use this tab of the *"Column Properties dialog"* to specify what you want to happen when the user clicks a column heading or value (for example, the user can click a column value to drill down into the data that was summed to create the column value).

This dialog is also displayed as:

Hierarchical Level Properties dialog: Interaction tab
For more information, see:

- *"Drilling in Results"*
- *"Actions"*
- *"Adding Actions to an Analysis"*

Components

Column Heading: Primary Interaction and Value: Primary Interaction

Use this box to specify what happens when you click either the column heading or a value in the column or hierarchy level. The values that are available depend on the type of column and on column heading versus value.

- Default (type) - Specifies what happens by default when you click the column heading or a value. When you first install Oracle Business Intelligence, the default depends on the type of column. You can change the default by selecting another option from this list, then clicking the Save as Default button to save that option as the default for the column.

- None - Specifies that nothing happens when you click the column heading or a value. This option turns off drilling for attribute columns; it does not turn off drilling for hierarchical columns.

- Drill - Not available for hierarchical column headings. Specifies that you drill up or down after clicking the column heading or a value for a column.

- Action Links - For hierarchical column headings, this option is Drill + Action Links. Displays the Action Links area, where you add action links that apply when you click the column heading or a value.

- Send Master-Detail Events - Available only for attribute column values and is shown as Drill + Send Master-Detail Events for hierarchical column values. Use this option to specify that data views in this analysis are to act as master views in master-detail relationships and send master-detail events. This option also displays the Specify channel field, which you must complete if you select this option.

  For more information on master-detail relationships, see *"Master-Detail Linking of Views"*

Specify channel

This field is displayed only if you select Send Master-Detail Events in the Primary Interaction field for a value.

Use this field to enter one or more channels on which data views are to send master-detail events. Note that the name of the channel is case sensitive.

Action Links

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The Action Links area is displayed if you select Action Link from the Column Heading: Primary Interaction box or Value: Primary Interaction box.

Displays the action links that have been added to a column heading or value, including the text of the action links, the actions associated with the links, and whether the action links are always enabled or enabled conditionally.

Use this area to view and manage action links:

- To add a new action link, click the Add Action Link button to display the following options:

    o Action (where Action is the name of an action that has been saved as a default) - Use this option to add the action to the analysis. For more information on saving defaults, see the *"Column Properties dialog"*.

    o New Action Link - Use this option to display the *"New Action Link dialog"*, where you create an action link.

- To edit an action link, select the link in the list and click the Edit Action Link button to display the *"Edit Action Link dialog"*.

- To delete an action link, select the link in the list and click the Delete Action Link button.

- To specify that, when only one action link is available at runtime, the action link is to be executed immediately rather than be displayed in a menu for selection, select the Do not display in a popup if only one action link is available at run time box.

Column Properties dialog: Style tab

Use this dialog to specify properties for displaying values in various locations such as in a column or hierarchy level of data, in a view such as a table, and in a column or section that you are adding to a dashboard page.

In this dialog, a setting of Default (System) indicates that a user has not yet overridden the default values that were provided during installation. Each property has only one default setting at a time.

For table, pivot table, and trellis views, the formatting that you specify in this dialog applies to the look of the view. The formatting is displayed slightly differently in a pivot table. For example, the default colors differ for tables and pivot tables.

For more information, see:

- *"Formatting Analyses, Views, and Dashboard Pages"*
- *"Dashboard Content"*

This dialog is also displayed as:

Column Properties dialog Edit Column Format dialog Edit Font Format dialog Edit Format dialog Format Caption dialog Format Container dialog Format Legend View dialog Format Logo dialog Format Narrative View dialog Format Static Text View dialog Format Subtitle dialog Format Text dialog Format Time dialog Format Title dialog Format Title View dialog Hierarchy Level Properties dialog: Style tab Section Heading Properties dialog Section Properties dialog Sections Formatting dialog: Sections Format tab Values Formatting dialog
Components

✎ **Note:** Not all components are available in each version of this dialog.

Toolbar

The toolbar displays only in those instances in which you can copy and paste cell formatting properties from one location to another. The toolbar contains the following buttons:

- Clear Cell Format (restore defaults) - Use this button to remove the specifications that you have made and to return the settings to the values that they had when defaults were last saved.

  The Clear Cell Format (restore defaults) and the Copy Cell Format buttons affect the settings in the following ways:

  - If the dialog has no tabs, then the button affects all the settings in the dialog.
  - If the dialog has multiple tabs, then the button affects only those settings in the tab in which the button is displayed.

- Copy Cell Format - Use this button to copy the formatting specifications from the dialog, so that you can apply them elsewhere.

- Paste Cell Format - Use this button to paste the formatting that you have copied into the appropriate location.

Caption

This box applies to totals that you include with tables and pivot tables. Use this box to specify custom text to insert into a total heading. Enter the text as follows

- @ - Displays the value of the data

  For example, if a total is specified for the Region column, and you enter the following text into the Caption field for the total heading:

  - All values in the @

  The total heading would display the following text for the Western Region:

  - All values in the Western Region

- "@" - Displays the @ symbol
- "\"" - Displays the double quote
- "\\" - Displays the \ symbol
- \ - Displays the \ symbol

  The double quote syntax is not limited to a single character. In general you can use a backslash escaped string inside double quotes. For example:

  "1234567890\\abc\\d\"x\"yz!@#$%^&*()-+=_{}[];:'|?/><,.` ~"

  Is displayed as:

  1234567890\abc\d"x"yz!@#$%^&*()-+=_{}[];:'|?/><,.` ~

For more information, see "*Adding Totals to Tables and Pivot Tables*".

Family

Use this box to select the font family.

Size (Cell)

Use this field to enter the font size.

Color

Use this box to select the font color.

Style

Use this box to select the font style, such as bold or italic.

Effects

Use this box to select the font effects, such as underline or strike through.

Horizontal Alignment

Use this box to select the type of horizontal alignment, such as left, right, or center.

Background Color

Use this box to select the color of the background.

Vertical Alignment

Use this box to select the type of vertical alignment, such as top, bottom, or center. Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

Image

Use this field to specify the image to display inside of the cell. When you click the field, the Graphics dialog is displayed. For more information, see .

Wrap Text

Use this box to wrap the text within the column.

Note that if the width of a word extends beyond the width of the column, then the column is extended so as not to divide the word.

Border Position

Use this box to select the position of the border of the cell, column, or section, such as none or all. You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position list.

Border Style

Use this box to select the style of the border, such as single, double, or thick.

Border Color

Use this box to select the color of the border.

Size (Additional Formatting Options)

These options are available only when this dialog is displayed as the Column Properties dialog or the Section Properties dialog.

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Use these options to specify how a container (that is, a column or section) in a dashboard page is to be sized:

- Best Fit - The way this option sizes the container depends on the setting of the Page Size option in the *"Dashboard Properties dialog"*. If Page Size is set to:
  - o Fit Content, then this option:
    - Sizes the container to fit the content
    - Aligns content within the container to the left, by default
  - o Fill Browser Window, then this option:
    - Expands the container to fill the browser window, if the browser window is bigger than the content
    - Aligns content within the container to the center, by default

  This Best Fit option is the default for new dashboards.

- Specific Size - Sets the container to the size specified in the Width and Height fields. If the container is smaller than needed to fit the content, a scroll bar is displayed.

  If a dashboard page contains a frozen column, you might need to set this option to ensure that any remaining content on the page will be visible. For more information on freezing a column, see *"Properties Buttons for Objects"*.

  Note that this option is set automatically if you enter a value in the Width or Height field.

- Minimum Size - Sets the container to at least the size specified in the Width and Height fields but increases the size if necessary to accommodate the content. A scroll bar is never displayed with this option.

When you print a dashboard page that includes a container in which a scroll bar is displayed, the entire container is printed, including the scroll bar.

You can also set the page size (either Fit Content or Fill Browser Window) at the dashboard level. For more information, see *"Dashboard Properties dialog"*.

Width

Use this field to specify the width of the cell, column, or section on the page.

Height

Use this field to specify the height.

Indent (Left Padding)

Use this field to specify the indent (that is, the left padding).

Right Padding

Use this field to specify the indent (that is, the right padding).

Top Padding

Use this field to specify the indent (that is, the top padding).

Bottom Padding

Use this field to specify the indent (that is, the bottom padding).

Use Custom CSS Style

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Use this box to specify a custom cascading style sheet style to use for formatting, for example, background-color: #ff0000; font-size:28pt.

Use Custom CSS Class

Use this box to specify a custom cascading style sheet class to use for formatting.

> ✏️ **Note:** Attributes within the Border, Additional Formatting Options, and Custom CSS Style Options (HTML only) sections are not available for performance tile views.

Compound Layout

Use this area to assemble different views for display on a dashboard. The views are displayed in separate containers within a compound layout. Each container has a toolbar.

Use this area also to view multiple compound layouts, each on its own tab. For more information, see *"Creating Additional Compound Layouts"*.

Components

Views

Displays the views assembled for display on a dashboard, according the selected compound layout.

When you run a new analysis, the default assemblage of views can include a title view and either a table or pivot table view. The administrator might have configured a different default assemblage for your company.

Toolbar

The toolbar for each view contains the following buttons:

- Format Container - Use this button to display the , where you format the container in a compound layout for the view. For example, you can place a green background behind the view in the compound layout. To format the view itself, click the Edit View button.
- Edit View - Use this button to display the editor for the view.
- Remove View from Compound Layout - Use this button to remove the view from a compound layout. The view remains as part of the analysis.

Contact Owner dialog

Use this dialog to send a message to the business owner of a Scorecard object, such as an initiative or objective.

Components

Owner

Displays the name of the person who is responsible for managing and improving the business value and performance of the scorecard object.

Subject

Use this box to enter the subject of your message.

Priority

Displays the options High, Normal, and Low to identify the importance and urgency of your message.

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Message

Use this box to enter the text of your message.

Create Delivery Profile dialog

Use this dialog to create a delivery profile.

You can create any number of delivery profiles. However, only one profile can be active at any given time.

For more information, see:

- *"Devices and Delivery Profiles"*

This dialog is also displayed as:

Edit Delivery Profile dialog

Components

Name

Use this field to enter the name of the delivery profile. For example, for your office phone, you might use Phone - Office.

Device Priorities

Use this area to indicate, for each of your delivery devices, what priority content is to be delivered to the device. To do so, next to each delivery device to use when this profile is the active profile, select one or more of the priority content options - High, Normal, or Low.

For example, if you have a pager as one of your delivery devices, you might associate it with high priority content only. When you know that you must be away from your office frequently, and out of email range, you might associate your email device with low priority content.

> ✏️ **Note:** Do not set the priority for devices that you do not want to use. Devices that do not have a priority selected are not used by the profile.

Create Device dialog

Use this dialog to create a delivery device.

For more information, see:

- *"Devices and Delivery Profiles"*

This dialog is also displayed as:

Edit Device dialog

Components

Name

Use this field to enter the name of the device.

Category

Use this box to select the device category. For example, if you are adding an email device, select Email. The value in this box affects the values that are available in the Device Type box.

Device Type

Use this box to select the type of device. For example, if you are adding an email device, select either HTML Email for Plaintext Email.

The list of device types is specified on the .

Address/Number

Use this field to enter the address for the device. For example, for an email device, enter the email address or for a phone, enter the phone number.

> ✏ **Note:** When typing a phone number for a device, do not use punctuation such as spaces, dashes, or parentheses.

Create New Action dialog

Use this dialog to create an action.

For more information, see *"Actions"*.

This dialog is also displayed as:

Add New Action dialog New Action dialog
Edit Action dialog

Components

Browse

This button is not available for all action types.

Displays one of the following dialogs:

- For a Navigate to BI Content action, the , where you select the Oracle BI EE content to which to navigate

- For a Navigate to EPM Content action, the , where you select the EPM content to which to navigate

- For an Invoke a Web Service action, the , where you select a Web Service operation to be invoked

- For an Invoke a Java Method action, the , where you select the Java method to be invoked

- For an Invoke a Browser Script action, the , where you select the function to be invoked

> ✏ **Note:** Before a JavaScript function can be used in an action, your administrator must first include it in the JavaScript file that contains user-defined scripts.

- For an Invoke Agent action, the , where you select the agent to be invoked

> ✏ **Note:** In order for Hyperion resources, Web Service operations, EJBs, and functions to be exposed in their respective dialogs, some setup is required beforehand. For how to expose Hyperion resources, Web Service operations, EJBs, and functions in their respective dialogs, see .

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URL

This field is available only for Navigate to a Web Page and Invoke an HTTP Request actions and only if URL aliases have been defined for these actions.

Use this field to enter the URL of the web page.

Be sure to encode the URL, if required. See .

> ✎ **Note:**   Tip: Copy the URL from the browser and paste it in this field.

If URL aliases have been defined for Navigate to a Web Page and Invoke an HTTP Request, and you want to specify an alias for the URL, click the Show URL location aliases button (that is, the down arrow) and select the alias.

For more information on defining URL aliases, see .

Request

Use this box to select one of the following options:

- GET - Use this option to retrieve information from the URL. Any parameters added to the action are appended to the URL using the following syntax:

  `&paramName1=paramValue1&paramName2=paramValue2 (and so on)`

- POST - Use this option to post information to the URL. Any parameters added to the action are posted to the URL as name value pairs.

This field is available only for Invoke an HTTP Request actions.

Define Parameters

This button is available only for Navigate to a Web Page and Invoke an HTTP Request actions

Use this button to display the Define Parameters area. It also automatically parses the specified URL for parameters and lists them in the Define Parameters area.

For example, this URL:

`http://finance.google.com/finance?q=ORCL`

Becomes this:

`http://finance.google.com/finance?q=@{1}`

And an action parameter with the name **1** and a default value of **ORCL** is displayed in the Define Parameters area.

Any part of a URL can be converted into a token if the token name matches the parameter name. When an action is executed, the value of the parameter is used in the final URL.

Language

This box is available only for Invoke Server Script actions.

Use this box to select the script type - either JavaScript or VB Script.

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Script Path

This field is available only for Invoke Server Script actions.

Use this field to enter the path of the script to be executed. By default, the scripts are stored in the following directory: ORACLE_INSTANCE\bifoundation\OracleBISchedulerComponent\coreapplication_obischn\scripts\common. For example D:\OBI11g\instances\instance1\bifoundation\OracleBISchedulerComponent\coreapplication_obisch1\scripts\common.

However, the Administrator can change this default path by modifying the value of the DefaultScriptPath element in the instanceconfig.xml file for Scheduler. For more information on the DefaultScriptPath element, see "" in .)

Function Name

This field is available only for Invoke a Browser Script actions.

Use this field to enter the name of the JavaScript function to be executed. Click Browse to display the , where you can select a script.

Path

This field is available only for Invoke Agent actions.

Displays the path to the agent that is to be invoked.

Execute for Recipients

This box is available only for Invoke Agent actions.

Use this box to select one of the following options to specify the scope of the recipients:

- of specified Agent - Specifies the recipients of the agent to be invoked (that is, the agent specified in the Path box).

- of current Agent - Specifies the recipients of the current agent (that is, the agent to which the action is being added).

- of both specified and current Agent - Specifies the recipients of both the agent to be invoked and the current agent.

- common to specified and current Agent - Specifies the recipients that are common to both the agent to be invoked and the current agent.

- of specified Agent, and not current Agent - Specifies the recipients of the agent to be invoked but with the recipients of the current agent excluded.

Define Parameters

Use this area to define the action parameters.

Depending on the action type, some action parameters might be displayed automatically in this area. For example:

- For an Invoke a Web Service action, the parameters are read and displayed from the Web Service Definition Language file.

- For an Invoke a Browser Script action, the parameters are read and displayed from the script file, if they have been declared and published in the file.

- For a Navigate to E-Business Suite action, these parameters are displayed:

  - FunctionCode - The name of the function that relates to the target E-Business Suite form, for example, GLXIQJRN.
  - ConnectionPool - The name of the connection pool for the Oracle E-Business Suite database in the Oracle BI repository, for example, EBS12.

You can also define optional parameters for passing the context from Oracle Business Intelligence to EBS forms.

This area includes, depending on the type of action, some of the following buttons and columns:

- Add Document Parameter - This button is available only for an Invoke Server Script action. Use this button to add a document parameter. A document parameter enables you to pass either the delivery content or the results of the analysis on which the agent condition is based to the script.

- Add Parameter - Use this button to add a parameter. (Whether you can add a parameter for an action, depends on the action type.)

- Delete Parameter - Use this button to delete a parameter.

- Name - Use this column to view, edit, or enter the name of the parameter.

  For Navigate to a Web Page and Invoke an HTTP Request actions, to embed a parameter value anywhere within the URL, enter the token @{Name} where 'Name' is the value specified in the Name column below. There is no limit to the number of parameters that can be embedded.

- Prompt - Use this column to enter the prompt to be displayed to users, if the user is to provide the parameter value.

- Value - Use this column to specify the parameter value. To specify a the value:

  o For a parameter row, click the Change type of value button to select one of the following types of values and then specify the value:

    - Value - Select this option to specify a value and then enter the value in the field.
    - Session Variable - Select this option to use the value of a session variable, and then enter the name of the session variable in the field, or click the Show popular Session variables button (to the right of this field) and select a session variable from a list of commonly-used variables.
    - Repository Variable - Select this option to use the value of a repository variable and then enter the name of the repository value in the field.
    - Request Column - Select this option to display the , where you select the column in an analysis whose value is to be used as the value of an action parameter.

      This option is available only when you are adding an inline action to an agent that is conditionally executed based on an analysis.

    - Column Value - Select this option to use a column value in your analysis criteria and then click the Column Value button and select the column.

      For example, suppose you have the Region and District columns in your analysis criteria and define an action link on the District column that maps a parameter to the Region column. When you execute that action link (by clicking on a district), the region value for that district is used. Note that in a pivot table, the mapped values depend on the current layout or state of the table.

      This option is available only when you are adding an inline action to an analysis.

    For more information on session and repository variables, see "*Using Variables*".

  o (for an Invoke Server Script action only) For a document parameter row, click the Format button to select the format in which the content is to be passed (PDF, MIME HTML, Text, XML, Comma-separated values, Excel, Excel 2000, Microsoft PowerPoint) and then select the type of content to be passed. Valid types of content are:

    - Delivery Content - Use this option to specify that the delivery content of the agent is to be passed. (You specify the delivery content in the "*Agent editor: Delivery Content tab*".)

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- Condition Analysis - Use this option to specify that the results of the analysis on which the agent condition is based is to be passed. (You specify the analysis on which an agent condition is based in the *"Agent editor: Condition tab"*.)

- Fixed - Use this column to specify whether to allow users to see but not set the parameter. Select the box to allow users to see but not set the parameter. Deselect this box to allow users to see and set the value.

- Hidden - Use this column to specify whether to hide the parameter from users. Select the box to hide the parameter from users. Deselect this box to show the parameter to users.

- Optional - Use this column to specify whether the parameter requires a value before the action can be executed. Select this box to make the value optional. Deselect this box to make the value required.

Filters

This area is available only for an action that invokes an agent that is conditional based on an analysis that filters its data by a column prompt.

Use this area to map any column of the specified agent (that is, the agent to be invoked) that contains a column prompt to any to column of the current agent (that is, the agent to which the action is being added). At runtime, the system generates a filter based on the data returned by the execution of the conditional analysis of the current agent.

For more on how filters work in an Invoke Agent action, see .

Options

This button is available only for actions where it is appropriate to display information to users. For example, this option is not available for actions added to agents.

Use this button to display the *"Action Options dialog"*, where you specify information to display to users when they run an action.

Save As

This button is available only on the Edit Action dialog for named actions.

Use this button to display the dialog, where you save the action to the catalog as a new action with another name.

Notes

- Some action types (for example, Navigate to Siebel CRM and Invoke a Web Service) require some configuration before you can use them. For more information on the required configuration, see .

About Encoding the URL for a Navigate to a Web Page or Invoke an HTTP Request Action

If the URL that you specify for a Navigate to a Web Page or Invoke an HTTP Request action contains characters outside the ASCII character set or contains characters in an international language, you must encode it. Encoding involves replacing the characters that are outside the ASCII character set or the characters in an international language with "%" and the two hexadecimal digits that correspond to the character values in the ISO-8859-1 character set. Note the following about encoding the various parts of a URL:

- The protocol (that is, http:// or https://) - You usually do not need to encode this part.

- The address (for example, foo.example.com:9704) - You usually do not need to encode this part unless it contains characters in an international language.

- The path (for example, /a/path/to/a/resource) - You must encode this part if it contain characters that require encoding. If you used variables for parts of the path, then you do not need to encode those parts as they are encoded automatically when the variable is substituted with a value.

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- The query string (that is, the part of the URL which follows the path and is separated from it by a '?') - You must encode this part if the names of the query parameters (for example, report=foo&destination=email) or any fixed values (unless they come from an analysis) contain characters that require encoding. (Within the query string, individual parameters are separated by a '&' character, for example, analytics/saw.dll?report=foo&destination=email.)

The following example shows an encoded URL:

```
http://myservice.example.com:4579/path/to/my%20service/endpoint/@{bivariable1}?
parameter1=fixed&parameter2=@{bivariable2}
```

Note that in the example URL:

- The path required encoding, as indicated by the %20.

- The @{...} parts did not require encoding as it included variables, which are encoded automatically.

- If @{bivariable2} or @{bivariable1} expands to a company name, for example, "Example Corporation", then the ' ' (space) in "Example Corporation" is replaced automatically with the encoded form "Example%20Corporation".

Create New Agent dialog

Use this dialog to create an agent from a KPI.

For more information, see:

- "*Creating Agents From KPIs*"
- "*Delivering Content*"

Components

Name

Use this field to enter a name for the agent.

Description

Use this field to enter a description of the agent.

Location

Use this field to select a folder or create a folder in which to save the agent. To create a folder, click the New Folder option in the list to display the . To select a folder that is not listed, click the Folder button to display the .

Trigger Agent if KPI Status is

Use this box to select the KPI status that is to initiate the agent to deliver its content and execute its actions.

Qualify

Displays the dimensions that must be pinned. Select a value for each dimension.

Custom View Properties dialog

Use this dialog to specify a background image, a background color, or both for the diagram in a custom view.

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For more information, see:

- "*Custom View tab: Diagram tab*"
- "*Custom Views*"
- "*Creating a Custom View*"

Components

Background Image

Use this field to enter the URL to the background image.

Note that when you enter a URL in the Background Image field, the Width and Height fields are automatically populated with the actual image size (if possible).

> ✏️ **Note:** A custom view uses the Adobe Flash component to render its content. The background image is fetched by the Adobe Flash component and rendered. Flash components have security restrictions on the content to which they have access. Generally, Flash components can load or render the content from the same domain from which the original Flash movie was downloaded (that is, the Oracle BI Server). If you want a background image from any other server or domain, then the remote server must allow access to the BI Server's domain to retrieve the image. This is done by configuring the crossdomain.xml on the remote server. For how to configure the crossdomain.xml on the remote server, see the following knowledge base article:

Position

Use this area to specify the position of the background image in the diagram. To do so, specify the following:

- In the pixels from left box, the number of pixels from the left of the diagram at which to position the image.
- In the pixels from top box, the number of pixels from the top of the diagram at which to position the image.

Size

Use this area to specify whether to maintain the aspect ratio or to size the image to fit the diagram. To do so, select one of the following options:

- Maintain aspect ratio - Use this option to maintain the aspect ratio. A visual indicator showing that the width and height of the image are tied together is displayed.
- Size to fit - Use this option to size the image to fit the diagram. Note that when you select this option, the Width and Height fields are disabled.

Background Color

Use this box to display the Color dialog, where you select the color to use for the background of the diagram.

Custom View tab: Details tab

Use this tab of the "*Scorecard editor: Custom View tab*" to specify supporting information for a custom view.

For more information, see:

- "*Custom Views*"
- "*Creating a Custom View*"

Components

Name

Displays the name of the custom view.

Description

Use this field to enter a description of the custom view.

Business Owner

Displays the user ID of the person responsible for managing the custom view. To specify the business owner, click the Set User button to display the , where you can search for and select the business owner.

Objectives and KPIs

Lists the objectives and KPIs that are displayed in the custom view.

Use this watchlist to view and manage these objectives and KPIs. For more information about watchlists, see *"Watchlists"*.

Related Documents

Use the *"Related Documents area"* to view and manage documents that provide supporting information to the custom view.

Custom View tab: Diagram tab

Use this tab of the *"Scorecard editor: Custom View tab"* to create a diagram that shows a customized view of your business and strategy data.

For more information, see:

- *"Custom Views"*
- *"Creating a Custom View"*

Components

Diagram area

Use this area to drag and drop objectives and KPIs to show in your customized view.

Each node (that is, the representation of an objective or KPI) on the diagram shows the status of the objective or KPI by displaying the icon and color that represents the assessment range. A KPI node also displays the actual value of the KPI and the percent variance from the target.

To:

- Display options that allow you to work with a node, click the Options button (on the right side of the node) to display the *"Node Options Menu"*.
- Display additional performance data for the KPI, such as target value or variance, click the down arrow at the bottom center of the node. To collapse this data, click the up arrow.
- Zoom in and zoom out of the diagram, or to specify a background image, a background color, or both for the diagram, use the toolbar buttons on the *"Scorecard editor: Custom View tab"*.
- Work with comments (if any), click the Comment button in the upper-right corner of a node to display the *"Status window"*, where you can read the comments that previously have been added, add another comment, or reply to a comment. See *"Comments"*.

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- Work with status overrides (if any), click the red asterisk in a node to display the *"Status window"*, where you can view the overrides that previously have been applied or apply another override. See *"Status Overrides"*.

Customize Condition dialog

Use this dialog to customize a condition that is based on an analysis that includes one or more prompted filters. (A prompted filter is a filter whose operator is set to Is Prompted.)

For more information, see *"Agent editor: Condition tab"*.

This dialog is also displayed as:

Customize Delivery Content dialog
Components

Edit the Prompted Filters

Displays the prompted filters associated with the analysis.

Click the Edit button adjacent to a prompted filter to display the *"Edit Parameter Filter dialog"*, where you edit the filter.

Customize Gauge Limit dialog

Use this box to customize the minimum or maximum gauge limit.

For more information, see .

Components

Gauge Limit

Use this box to specify the custom gauge limit by selecting one of the following options:

- Static Value - Select this option to specify a static value, such as 1000. You can specify either an actual value or a percentage. The value you specify depends on the range of data points. For example, the maximum gauge limit should be more than the maximum data point so that all data points are shown on the gauge.

- Variable Expression - Select this option to specify a string. When you select this option, the Default Value field is displayed in which you enter the string.

  You can reference one or more variables in the string (or expression). For example, you might reference a presentation variable named MaxSales. For guidelines on referencing a variable in an expression, see . For more information on variables, see *"Using Variables"*.

- Column - Select this option to specify a measure column and then select the name of the column, for example, Dollars.

  > ✏ **Note:** Only columns that are in the metadata repository or that are based on repository columns (such as Dollars*0.10) are displayed as selections.

- SQL Statement - Select this option to specify a SQL statement and enter the SQL statement, for example:

```
"Sales Measure"."Year Ago Dollars"*10
```

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Customize Subscription to Agent dialog

Use this dialog to customize an agent subscription.

For more information, see .

Components

Condition

Use to customize prompted filters for an analysis that is used in an agent condition.

Content

Use to customize prompted filters for an analysis that is the delivery content for an agent.

Dashboard builder

Use this Dashboard builder to build or edit dashboards. The process of building or editing a dashboard includes:

- Adding and changing pages, objects, and other content on the dashboard
- Changing the properties of the dashboard

For more information, see:

- "*Creating a Dashboard*"
- "*Editing a Dashboard*"

Components

Page Tabs

Use the tabs across the top of the editor to select the dashboard page to edit.

Dashboard Objects

Use the "*Dashboard Objects pane*" to select the objects to include on a dashboard page and drag and drop them to the Page Layout area.

Catalog

Use the "*Catalog pane*" to select objects from the Oracle BI Presentation Catalog to include on a dashboard page and drag and drop them to the Page Layout area. This adds a shortcut to the content as saved in the catalog. If the content changes, then the change is reflected on the dashboard page.

To locate the content, you can browse by either the catalog folder it is stored in, or by the dashboard on which it is located.

Page Layout

Use "*Page Layout area*" to layout and place the content (that is, objects from the Dashboard Objects pane and the Catalog pane) to include on a dashboard.

Toolbar

The toolbar contains the following buttons:

- Add Dashboard Page - Use this button to display the "*Add Dashboard Page dialog*", where you create a page in this dashboard. The page is displayed in a new tab in the Dashboard builder.

- Delete Current Page - Use this button to delete the current dashboard page.

- Tools - Use this button to display a menu with the following options.
    o Dashboard Properties - Use this option to display the *"Dashboard Properties dialog"*, where you specify properties of the dashboard and of dashboard pages.
    o Print and PDF Properties - Use this option to display the *"Print Options dialog"*, where you specify settings for printing a dashboard page.
    o Page Report Links - Use this option to display the *"Report Links dialog"*, where you specify the links to apply to all analyses in the dashboard page, unless customized settings have been specified for particular analyses.
    o Prompts Buttons on Current Page - Use this option to specify whether to include or exclude the prompt's Apply and Reset buttons on the dashboard page at runtime. This setting applies to the dashboard page and overrides the Apply and Reset button settings for the prompt definition and dashboard properties unless the Prompts Apply Button and Prompts Reset Button fields on the *"Dashboard Properties dialog"* are set to Use Page Settings.

      Note the following options, which are available for Apply buttons and Reset buttons:
        - Use Prompt Setting - Choose this option to use the buttons as defined in the prompt definition. These settings were specified in the *"Prompt editor"*.
        - Show All Buttons - Choose this option to show the buttons for the prompts. This setting overrides the prompt definition button settings or dashboard properties button settings unless the Prompts Apply Button and Prompts Reset Button fields on the *"Dashboard Properties dialog"* are set to Use Page Settings.
        - Hide All Buttons - Choose this option to hide the buttons for the prompts. This setting override the prompt definition button settings or dashboard properties button settings unless the Prompts Apply Button and Prompts Reset Button fields on the *"Dashboard Properties dialog"* are set to Use Page Settings.
    o Allow Saving Personal Customizations - Use this option to specify whether users can save personal customizations. For more information on allowing the saving of personal customizations, see "" in .
    o Publish Page to Dashboard - Use this option to display the *"Publish Page to Dashboard dialog"*, where you specify the dashboard to which you want to publish the current dashboard page. See *Publishing a Dashboard Page*.

- Preview - Use this button to view how a dashboard page is displayed to an end user. This is helpful to see what the page looks like before you save the content.

- Run - Use this button to exit the Dashboard builder and return to the dashboard in runtime.

- Save - Use this button to save your changes to the dashboard.

- Save Dashboard As - Use this button to save the dashboard by another name.

Page Layout area

Use this area to layout and add the content that you want on a dashboard by dragging and dropping objects from the *"Dashboard Objects pane"* and *"Catalog pane"*. After you drop an object to this area, you can modify the object using the buttons on its Toolbar.

This area is part of the *"Dashboard builder"*.

Components

Object Representations

Each object that you drag and drop to the Page Layout area is represented by a rectangle.

Object Toolbars

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Each object dropped to the Page Layout area contains a toolbar that displays when you hover over the object. The Object Toolbar contains the following buttons:

- Properties - Use this button to select from various options for modifying the object. What this button displays depends on the type of object. For some objects a properties dialog is displayed. For other objects, a menu of options is displayed. See *"Properties Buttons for Objects"*.

- Delete - Use this button to delete the object from the dashboard page.

- Vertical Layout - This button is available for sections only. Use this button to arrange the objects in the section so that they are stacked one on top of another.

- Horizontal Layout - This button is available for sections only. Use this button to arrange the objects in the section so that they are positioned side-by-side.

Properties Buttons for Objects

Each object that is represented on the *"Page Layout area"* has a toolbar that contains a Properties button. What the button displays depends on the type of object. The following sections describe, for each type of object, what the Properties button displays.

Column Properties

This button displays the following options:

- Break - This option is available only if the page has multiple columns and only for columns after the first column. Use this option to display the , where you add page and column breaks to the page layout.

- Column Properties - Use this option to display the *"Column Properties dialog"*, where you specify the properties for the column, such as cell alignment, border color and so on.

- Freeze Column - This option is available only when a column is alone at an outer edge of the page layout. If two columns are on adjacent edges and overlap at the corner, then both columns can be frozen. Use this option to freeze a column at an edge (top or left) of the page layout. When a column is frozen, it remains anchored at the edge of the page layout and will not scroll off the page as you scroll the content in other columns.
  When you freeze a column, you may need to set a specific size for the column (in the) to ensure that any remaining content on the page will be visible. You might want to do this, for example, if the content of the column that you freeze is very large and you want to reduce the size of the column.

Section Properties

This button displays the following options:

- Condition - Use this option to display the *"Section Condition dialog"*, where you specify the condition to be used to determine whether the section is to be displayed. See .

- Permissions - Use this option to display the , where you specify which accounts are granted or denied access to the section.

- Format Section - Use this option to display the *"Section Properties dialog"*, where you specify the properties for the section, such as cell alignment, border color and so on.

- Rename - Use this option to display the , where you rename the section.

- Drill in Place - Use this option to specify how the results are displayed when a user drills in an analysis.
  To:
  - o Show the new results directly in the dashboard, replacing the original analysis, click this option until a check mark is displayed next to the option. This is the default behavior. The area occupied by the original analysis resizes automatically to hold the new results.

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o Replace the entire dashboard with the new results, click this option until the check mark is removed.

This option applies to all drillable analyses within the section. The user can click the browser's Back button to return to the original analysis or the dashboard.

Use this option for prompts that are created for hierarchical columns.

For more information, see "*Drilling in Views*".

- Collapsible - Use this option to specify whether the user can expand and collapse this section on a dashboard page or whether the section is always expanded.

- Show Section Header - Use this option to specify whether to display the header for the section, which initially includes the title of the section. You can hide the title using the Show Section Title option.

- Show Section Title - Use this option to specify whether to display the title of the section.

  To format the title, use the Rename option to display the .

Alert Section Properties

This button displays the following option:

- Format Section - Use this option to display the "*Section Properties dialog*", where you specify the properties for the alert section, such as cell alignment, border color and so on.

Action Link Properties

Use this button to display the "*Action Link Properties dialog*", where you set the properties of an action link.

Action Link Menu Properties

Use this button to display the "*Action Link Menu Properties dialog*", where you set the properties of an action links menu.

Link or Image Properties

Use this button to display the "*Link or Image Properties dialog*", where you specify properties for a text link or image link that you are adding to a dashboard page.

Embedded Content Properties

Use this button to display the , where you specify the URL and other information about content to embed on a dashboard page.

Text Properties

Use this button to display the "*Text Properties dialog*", where you specify properties for a text object, including the text and formatting tags.

Folder Properties

Use this button to display the "*Folder Properties dialog*", where you add a view of a Catalog folder and its contents.

BI Publisher Report Properties

Use this button to display the , where you specify the information for adding an Oracle BI Publisher report.

Analysis Properties

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This button displays the following options:

- Display Results - Displays the following options to specify how to display the results of the analysis:

    o Embedded in Section - Use this option to execute the analysis automatically and display the results directly in the dashboard page

    o Link - Within the Dashboard - Use this option display a link that users must click to execute the request and see the results within the dashboard

    o Link - In a Separate Window - Use this option display a link that users must click to execute the request and see the results in a new window

- Report Links - Use this option to display the *"Report Links dialog"*, where you select which links are displayed with the analysis on the dashboard page.

- Show View - Use this option to specify how to display the analysis, either as a default compound view or as one of the available views. (Note that the icon representing the object changes to indicate the type of view.) For more information on views, see. *"Adding Views for Display in Dashboards"*.

- Rename - Use this option to display , where you rename the analysis.

- Edit Analysis - Use this option to edit the analysis in the *"Analysis editor"*.

Prompt Properties

This button displays the following options:

- Edit - Displays the *"Prompt editor"*, where you create prompts.

- Scope - Displays the following options to specify the scope of the prompt:

    o Dashboard - Use this option to specify that the prompt applies to the entire dashboard.

    o Page - Use this option to specify that the prompt applies to the dashboard page.

- Prompt Links... - Use this option to display the *"Prompt Links dialog"*, where you specify whether to display the Edit and Copy links in the dashboard's prompts region. These links, which display at runtime, allow users (with the proper privileges) to edit the prompt or copy the prompt's link.

Scorecard Object Properties

This button displays the following options:

- Edit Pinnings - Displays the , where you pin (or set) the value of one or more KPI dimensions. For more information about pinning, see *"Dimensions and Pinned Dimension Values"*

- Edit View - Displays the scorecard object in the *"Scorecard editor"*.

- Format View - Displays the , where you specify how the scorecard object is to be formatted.

Dashboard Filters and Variables dialog

Use this dialog to add hidden named prompts to a dashboard or a dashboard page.

For more information, see:

- *"Dashboard Properties dialog"*

This dialog is also displayed as:

Filters and Variables - page dialog

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Components

Embed New Hidden Dashboard Prompt

Use this button to access the *"Open dialog"*, which enables you to browse and select the named prompt to add to the dashboard. After you select a prompt, its path displays in the Prompts Path table.

Edit

Use this button to access the *"Open dialog"*, which enables you to browse and replace the currently selected prompt with another prompt. After you select another prompt, its path is displayed in the Prompts Path table.

Remove

Use this button to delete the selected prompt.

Prompt Path

Displays the paths of the hidden prompts that you added to the dashboard. You can select a prompt and then click the Edit or Remove button to replace or delete the prompt.

Dashboard Objects pane

Use this pane to select the dashboard objects to include on a dashboard page and drag and drop them to the *"Page Layout area"*.

For more information, see *"Dashboard Content"*.

This pane is part of the *"Dashboard builder"*.

Components

List of Objects

Use the list of dashboard objects to decide what to include on a dashboard page. Drag and drop an object from the list to an appropriate location in the page layout area on the right side of the Dashboard builder.

For more information on dragging and dropping, see " *Dragging and Dropping Objects to the Page Layout Area in the Dashboard Builder*".

lists and describes the dashboard objects that you can include on a dashboard page.

Table E-2 List of Dashboard Objects

Dashboard Object	Description
Column	Used to align content on a dashboard. (Sections within columns hold the actual content.) You can create as many columns on a dashboard page as you need, and you can place columns on a dashboard horizontally or vertically. Note that the columns used in the Dashboard builder are not related to the columns used in the Analysis editor.
Section	Used within columns to hold the content, such as action links, analyses, and so on. You can drag and drop as many sections as you require for a column.
Alert Section	Used to add a section in which to display Alerts from agents, if any. On users' My Dashboard, an Alert section is added automatically to the first page, if you do not manually place one there. You cannot disable the appearance of an Alert section on the first page of

Dashboard Object	Description
	users' My Dashboard. You can add an Alert section to an additional dashboard page so that section is then displayed on both dashboard pages.
Action Link	Used to add an action link. An action link is a link that you embed in an analysis, dashboard page, or KPI that, when clicked, runs an associated action. For more information, see *"Actions"*.
Action Link Menu	Used to add an action link menu. An action link menu let users choose, from a list of action links, the right action to be executed. For more information, see *"Actions"*. Tip: If you add an action link to an action link menu and later decide that you do not want the link to be displayed in the menu, you can simply drag and drop it elsewhere on the page.
Link or Image	Used to add text links and image links and specify what should happen when a user clicks them. For example, you can direct users to another web site or dashboard, open documents, launch applications, or perform any other action that the browser supports. You can also add an image or text only, without any links.
Embedded Content	Used to add embedded content. Embedded content is any content that is displayed within a window (called a frame) inside the dashboard, as opposed to content that is accessed by clicking a link. Content that you might want to embed includes analyses, Excel charts, documents, web sites, tickers from web sites, and so on. When you embed content into a dashboard, the required HTML is automatically added to the target content. Analyses are embedded by default. Embedding an analysis in a dashboard causes it to execute automatically and to display the results within the dashboard. This provides access to current results. Note: Some third-party web sites, because of the way they have been created, cannot be embedded within another web page. If you see unexpected results when viewing an embedded web site, then you might need to click the browser's Back button until an Oracle Business Intelligence screen reappears, or close and then reopen the browser. Then, remove the embedded web site from the dashboard.
Text	Used to add plain text or, if allowed at your organization, HTML. See the administrator to find out if adding HTML is allowed at your organization. To add embedded content, which is content that is displayed in a window within the browser, then use the Embedded Content object instead. Then, using the Embedded Content feature, specify the name and location of the target, and the required HTML is wrapped around the target for you.
Folder	Used to add a view of a Catalog folder and its contents. For example, you might add a folder that contains a collection of saved analyses that you run frequently. Then from the dashboard, you can open the folder, navigate to a saved request, and click it to run it.

Dashboard page

Use a dashboard page to view and navigate a dashboard.

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For more information, see:

- *"Opening and Using a Dashboard"*

Components

Page Tabs

Use the tabs across the top of the viewer to select the dashboard page to view and navigate.

Toolbar

The toolbar contains the Page Options button, which displays the following options:

- Edit Dashboard - Use this button to display the *"Dashboard builder"*, where you modify the dashboard, if you have the appropriate permissions.

  Permissions to modify dashboards (personal and shared) are granted by the administrator.

  For more information on the Dashboard builder, see *"Dashboard Builder"*

- Print - Use this option to print the current dashboard page. You can print the page using a:

  - Standard print layout (Printable HTML or Printable PDF).
  - Custom print layout, if one or more are available for the dashboard page.

    Using a custom print layout allows you to produce high-quality printed dashboard content. For information on custom print layouts, see .

  For how to print a dashboard page, see .

- Export to Excel - Displays these options:

  - Export current page - Use this option to export the current dashboard page to Microsoft Excel 2007+.
  - Export entire dashboard - Use this option to export the entire dashboard to Microsoft Excel 2007+.

  When you export to Excel, the state of the dashboard (such as prompts or drills) is maintained.

  When you export the entire dashboard, each page is included on its own sheet in the Excel workbook, and each sheet is given the name of its corresponding dashboard page.

  For how to export a dashboard or dashboard page to Excel, see .

- Refresh - Use this option to refresh the results of analyses included in the dashboard page.

- Add to Briefing Book - (This option is not available on an empty dashboard page or if the Show Add to Briefing Book box in the *"Dashboard Properties dialog"* has not been selected for the page.) Use this option to display the *"Save Briefing Book Content dialog"*, where you add the contents of a dashboard page to a briefing book.

  For more information, see and *"Adding Content to a New or Existing Briefing Book"*.

- Create Bookmark Link - Use this option to create a bookmark link.

  If drilling in an analysis that has been set to replace a dashboard with the new results (rather than show the new results directly in the dashboard), then the Create Bookmark Link is displayed as a link under the new results rather than as an option on the Page Options menu. (To specify how drilling works in an analysis, you use the Drill in Place option on the Properties menu for a section. For more information, see *"Properties Buttons for Objects"*.

This option is not available if the administrator has disabled it. For more information on controlling the display of this option, see "" in .

For more information, see and *"Creating a Dashboard Page Link"*.

- Create Prompted Link - Use this option to create a prompted link.

  This option is not available if the administrator has disabled it. For more information on controlling the display of this option, see "" in .

  For more information, see and *"Creating a Dashboard Page Link"*.

- Apply Saved Customization - Use this option to apply a saved customization - either a personal saved customization or a shared saved customization.

  For more information, see *"Applying a Saved Customization"*.

- Save Current Customization - Use this option to save your current customization.

  > ✏️ **Note:** Values that you pin for KPI dimensions referenced in scorecards are not saved with this option. For more information on pinning values, see *"Dimensions and Pinned Dimension Values"*

  For more information, see .

- Edit Saved Customizations - Displays the *"Edit Saved Customizations dialog"*, in which you edit details of your saved customizations.

  For more information, see *"Editing a Saved Customization"*.

- Clear My Customization - Use this option to clear your current customization.

  For more information, see .

Dashboard Properties dialog

Use this dialog to change the properties of a dashboard and its pages.

For more information, see .

Components

Style

Use this option to select a style for the dashboard. Styles control how dashboards and results are formatted for display, such as the color of text and links, the font and size of text, the borders in tables, the colors and attributes of charts, and so on. The administrator might have created styles that you can choose from. If not, results are formatted using a default style.

Oracle BI EE provides two styles:

- FusionFX (default)
- blafp

Description

Use this field to enter a description for the dashboard. Descriptions are displayed when administrators use the Catalog Manager. The description is not displayed on the dashboard.

Page Size

Use these options to specify how a dashboard page is to be sized:

- Fit Content - This option sizes the container to the content with no wrapping. If the browser window is smaller than needed to fit the content, a scroll bar is displayed. Specifically, it:

    o Sizes dashboard columns to the largest section in each column.

    o Adds any additional space in the browser window to the right of the content.

    o Aligns content within columns and sections to the left, by default.

    o Sizes all rows to the widest row on the page and flush to the right, if multiple columns are placed in a row

    This option is the default for new dashboards.

- Fill Browser Window - This option:

    o Sizes dashboard columns to the largest section in each column.

    o Expands columns (except columns for which a specific absolute size has been specified) and sections proportionally to fill the browser window, if there is any additional horizontal space in the browser window.

    If all columns have a specific absolute size specified, then the additional space is distributed equally between and around the columns.

    If some columns have a specific absolute size specified and some do not, then the columns that do not are expanded proportionally to fill the browser window.

    o Aligns content within columns and sections in the center, by default.

You can also specify how a container (that is, a column or section) in a dashboard page is to be sized. For more information, see the or the *"Section Properties dialog"*.

Filters and Variables: Edit

Click this button adjacent to the Filters and Variables heading to display the *"Dashboard Filters and Variables dialog"*, where you add hidden named prompts to the whole dashboard. See .

Dashboard Report Links: Edit

Use this button to display the *"Report Links dialog"*, where you select which links are to be displayed with all analyses on the dashboard, unless customized settings have been specified for an individual dashboard page or analysis.

Prompts Apply Buttons

Use this list to specify if you want to include or exclude the prompt's Apply buttons on the dashboard at runtime. This setting applies to the entire dashboard, but you can use the *"Dashboard builder"* to override this setting on individual dashboard pages. Note the following options:

- Use page setting - Select this option to use the Apply buttons as defined by the dashboard page settings. You specify the dashboard page settings in the *"Dashboard builder"* toolbar.

- Show All Apply buttons - Select this option to override the dashboard page setting's Apply button preferences and show the Apply buttons for the prompts included on the dashboard and embedded analyses.

- Hide All Apply buttons - Select this option to override the dashboard page setting's Apply button preferences and hide the Apply buttons for the prompts included on the dashboard and embedded analyses.

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Prompts Reset Buttons

Use this list to specify whether you want to include or exclude the prompt's Reset buttons on the dashboard at runtime. The Reset button provides the user with three reset options: Reset to last applied values, Reset to default values, and Clear All. The Prompts Reset Buttons setting applies to the entire dashboard, but you can override this setting on individual dashboard pages.

Note the following options:

- Use page setting - Select this option to use the Reset buttons as defined on the dashboard page settings. You specify these page settings in the *"Dashboard page"*, displayed by clicking the Edit button in the Display pane of the *"Prompt editor"*.

- Show All Reset buttons - Select this option to override the dashboard page setting's Reset button preferences and show the Reset buttons for the prompts included on the dashboard and embedded analyses.

- Hide All Reset buttons - Select this option to override the dashboard page setting's Reset button preferences and hide the Reset buttons for the prompts included on the dashboard and embedded analyses.

Prompts Auto-Complete

Use this option to enable or disable the auto-complete functionality for the dashboard. When enabled, Oracle BI EE suggests and highlights matching prompt values as the user types in the dashboard's prompt selection field, and highlights matching prompt values in the *"Select Values dialog"*. See

Dashboard Pages

Displays the pages in the dashboard. Use this area to perform operations (such as hide or rename) on dashboard pages using the dashboard pages toolbar buttons.

Dashboard Pages Toolbar

This toolbar contains the following buttons:

- Rename - Use this button to display the , where you specify a new name for the page in the dashboard.

- Select a prompt to capture default filters and variables - Use this button to display the , which enables you to add hidden named prompts to the dashboard page. See .

- Permissions - Use this button to display the *"Permission dialog"*, where you specify which accounts have which levels of access to the contents of the dashboard page.

  The Permissions button is displayed for shared dashboards only, and only if your user ID is authorized to access the security features.

- Delete - Use this button to delete the page from the dashboard. After you click the button, you see a page that prompts you to confirm the deletion.

- Specify Who Can Save Shared Customizations - Use this button to display the Permission dialog, where you specify which accounts can save shared customizations for the page.

- Specify Who Can Assign Default Customizations - Use this button to display the Permission dialog, where you specify which accounts can assign default customizations for the page.

  For more information on setting these permissions, see "" in .

🖊 **Note:** These operations are not reversed when you click Cancel in this dialog.

Hide Page

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Use this box to specify whether the page is to be displayed when the dashboard is shown. This option is helpful when you are working with a dashboard page and want to hide it from users until your changes are complete. When you select this option, the page remains visible to any users who are currently viewing it.

Show Add to Briefing Book

Use this box to specify whether the Page Options menu for the page contains the Add to Briefing Book option. For more information on the Add to Briefing Book option, see .

Reorder

Use these buttons to specify the order of the pages on the dashboard.

- To move a dashboard page up in the list, click the Move Up button.

  On the dashboard, this moves the tab for the page to the left.

- To move a page down in the list, click the Move Down button.

  On the dashboard page, this moves the tab for the page to the right.

Definition pane

Use this pane to add, organize, and manage the prompt's columns. You can use column prompts, image maps, currency prompts, and variable prompts.

For more information, see:

- "*Creating a Column Prompt*"
- "*Creating a Variable Prompt*"

This pane is part of the "*Prompt editor*".

Components

Definition Table

Use this table to view high-level information about the prompt's columns. You can also use this table to select columns for editing or deleting, arrange the order in which the prompts are displayed to the user, or insert row or column breaks between prompt items.

Note the following Definition Table components.

- Label - This column displays the prompt label that you specified when creating the item. This field is read-only. To edit this field, select the table row and click the Edit button.

- Type - This column displays the prompt type that corresponds to the item. The prompt types are: column, image, currency, or variable. This field is read-only.

- Prompt For - This column displays the data column that corresponds to the item. This field is read-only.

- Description - This column displays the items description that you entered in the Edit Prompt or New Prompt page. You can edit this column by placing your cursor in the field and typing.

- Required- When this column contains a green check mark, it indicates that the user must select or enter a value for this prompt item. The content designer designates a prompt as required by selecting the Require user input box in the "*New Prompt dialog*". When no check mark is displayed in this column, the user does not have to select or enter a value and can select to skip the prompt item. This field is read-only.

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- New Row or New Column - This column indicates how the items in the prompt are organized on the page. Click either the Row-based Layout button or the Column-based Layout button on the toolbar to specify which layout option you want. A row-based layout saves space because it organizes prompts horizontally. A column-based layout aligns prompts into neat columns. After you select how you want the prompts laid out, then in the New Row or New Column column in the Definition Table, click the box corresponding to where you want to add a new column or row to the prompts page.

Toolbar

The toolbar contains the following buttons:

- Preview - Use this button to view and test the prompt. When you preview the prompt, it displays in a new browser window and includes data from the subject area.

- New - Click this button to add a column to the prompt. After you click this button, you then choose which prompt type you want to add (for example, Column Prompt or Image Prompt).

  The page that displays after you click the New button depends upon the prompt item type that you select. Note the following:

  o Select Column Prompt, Variable Prompt, or Currency Prompt to display the *"New Prompt dialog"*.

    The Currency Prompt option is available only if the administrator has configured the userpref_currencies.xml file as described in "" in .

  o Select Image Prompt to display the *"Image Map Prompt Properties dialog"*.

- Open - Click this button to display the *"Open dialog"*, where you can open a saved Catalog object.

- Row-based Layout - Click this button to specify a row-based layout for the prompts page. A row-based layout saves space because it organizes prompts horizontally. Clicking this button displays the New Row column in the Definition Table, along with check boxes in the column's cells. Use the check boxes to specify at which prompt items new rows are to be added on the prompts page.

- Column-based Layout - Click this button to specify a column-based layout for the prompts page. A column-based layout aligns prompts into neat columns. Clicking this button displays the New Column column in the Definition Table, along with check boxes in the column's cells. Use the check boxes to specify at which prompt items new columns are to be added on the prompts page.

- Insert Page Break - Click this button to insert a new prompts page after the selected prompt item. This functionality, along with the New Column and New Row options in the Definition table, enables you to arrange a complex prompt into an intuitive, easy-to-use interface.

  After you insert a new prompts page, you can highlight the page's row in the table and click the Edit button to display the . Use this dialog to modify the page title, instructions, and page formatting.

- Edit - Click this button to display the *"New Prompt dialog"*, where you can modify the prompts preferences. For example, click this button to change a column's display option from Radio Button to Check Box.

- Delete - Click this button to delete the prompt item that you selected in the Definition Table.

Dimension Pinnings dialog

Use this dialog to pin (or set) the value of one or more KPI dimensions. You set values of KPI dimensions, for example, when you add a strategy map that contains one or more KPIs that are dimensioned to a dashboard.

Pinning is optional. Typically, it is best not to pin most of the dimensions so that the data is controlled by the point of view settings.

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For more information, see:

*
* *"Dimensions and Pinned Dimension Values"*

Components

List of Dimensions

Displays a list of the dimensions to be pinned.

To pin a dimension, click the down arrow to the right of the dimension and select one of the following options:

* A specific value
* Use Variable - Use this option to display the *"Select Variable dialog"*, where you specify a variable to use to set the value. For more information on variables, see *"Using Variables"*.
* Not Pinned - Use this option to specify that, initially, all dimension values are to be used. However, if, on a dashboard page, Scorecard, or KPI Watchlist, a control is provided, then a user can dynamically change the value to explore the data.

Display pane

Use this pane to view the prompt's layout and design. The Display pane is updated as you use the *"Definition pane"* to arrange the prompt items and the *"Prompt editor"* to add and modify prompt items. The items displayed in the Display pane do not access the prompt's data source and, therefore, do not include the columns' data selection options. To test the prompt with data selection options and view the resulting dashboard or analysis, click Preview.

For more information about creating and adding prompts, see:

* *"Creating a Column Prompt"*
* *"Creating a Variable Prompt"*

This pane is part of the *"Prompt editor"*.

Components

Edit

Use this button to access the to specify the prompt page's title and instructional text, and the text and tables formats (for example, font size, cell color, and border width).

Edit dialog

Use this dialog to work with values as part of the *"Select Values dialog"*.

Components

Edit

Use this area to work with values in the following ways:

* Enter values into the list of selected values.
* Copy values from a previously saved list (for example a list of values in Excel) into the list of selected values.
* Copy values from the selected list of values.

Separate values that you enter with carriage returns (Enter key) or pipe (|) characters. Values that you copy in can be separated by carriage returns (the Enter key), | (pipe) characters, or tabs.

Press the Tab key to move the focus to the OK button.

Edit Background Map dialog

Use this dialog to edit a map from the Background Maps tab of the . Before editing a background map, add layers using the Layers tab. A background map is a non-interactive map that serves as a base for the map view. It might display a satellite image or a map with roads. (A background map is referred to as a "tile" in MapViewer.)

For more information, see "" in .

Components

Name

Use this field to enter the name of the map.

Location

Displays the location of the background map in the data source from MapViewer. Click the Location button to display the for importing a different map. If you select a background map that includes a different number of zoom levels, then the zoom levels are automatically adjusted for the layers that are associated with the map by scaling their ranges.

Description

Use this field to enter a description of the map, which is displayed in the following locations:

- On the Background Maps tab of the Administration: Manage Map Data page.

- As a tooltip for the map when selecting a map from the list, when editing the map view.

Interactive BI Layers and Feature Layers area

Use this area to specify the available map layers from either an Oracle Database or other non-BI associated content (known as a Feature layer) and their zoom level. The first time that you display this dialog after adding a map, this area lists any appropriate layers that are specified on the Layers tab, with their default zoom level settings.

A Feature layer is used to overlay predefined styles on maps and is indicated by an icon with a small yellow and black diamond.

The layers are listed from bottom to top, in terms of how they are applied to the map. A sample order is Countries, States, Cities. The lower level layers generally have the lower zoom levels. For example, if you have a States layer and a Cities layer, then include lower zoom levels for State than City.

This area contains the following components:

- Click the Add Layers button to display a list of the layers that have been imported on the Layers tab, then select the layers to add to the map. When you add a layer that is part of the map definition from MapViewer, the layer displays at its default zoom levels. If the layer is not part of the map definition, then specify the zoom levels yourself.

- Click the Sort Layers By Zoom Level button to list the layers in ascending or descending order based on visibility on the map. The sort order that is specified here does not affect the order in which layers are applied on the map. Instead, the sorting order affects the zoom levels. For example, the States layer might have zoom levels 1 through 3 and the Cities layer has zoom levels 4 through 9. The lower layers have the lower zoom level numbers. The zoom levels that you specify correspond to the tick marks on the zoom slider on the map.

You can include both layers that have been associated with a BI column by using the and layers that have not been associated. Ensure that BI layers are ordered higher than non-BI layers. If a non-BI layer is ordered higher than any BI layers, then the non-BI layer is displayed on top of the lower BI layers on the map, which prevents the BI layers from being interactive.

- Click the Turn On Layer Visibility or Turn Off Layer Visibility button to control the visibility of layers on the map. Use the buttons to indicate whether the layer is visible in the Preview map in this dialog only. The layer is still visible on a map view. You can modify the zoom levels for a layer with a visibility turned off.

- Click a cell under a zoom level for a layer to see one of the following:

   o If you click a blue cell that is between other blue cells, then you see a popup menu with Clear Left and Clear Right buttons, which allow you to change the zoom level in either direction. For example, if you click the cell for zoom level 4 and click the eraser on the right, all cells to the right are cleared for that zoom level.

   o If you click a blue cell that at the end of a line of blue cells, then the cell turns white to indicate that it is no longer part of that zoom level.

   o If you click a white cell, then you increase the zoom level on either side of the existing blue cells. For example, suppose cells 4 through 6 are colored blue to reflect the zoom level. If you click in cell 2, then the zoom level becomes 2 through 6.

   If you do not set any zoom levels for a layer, then that layer does not display on the map.

- Hover over the layer name to display a More menu from which you can make the following selections:

   o Delete - Deletes the layer from the Interactive BI Layers area. The layer continues to be available on the Layers tab and can be added to this area again.

   o Move Up or Move Down - Moves the layer up or down so you can specify the order in which layers are applied to the map.

   o Reset to Default Visibility - Resets the current visibility range for this layer as defined in the underlying map definition. If this layer is not natively associated with the map, then this option is disabled for that layer.

- Use the yellow border that surrounds the column of boxes for a zoom level to determine which zoom level is currently displayed in the map area.

Map area

Use this area to specify how the map is displayed to users. Use the panning and zooming controls to affect the display of the map. If you hover over the zoom slider, then you see tooltips that specify the names of the layers that are currently associated with that zoom level.

Edit Briefing Book dialog

Use this dialog to edit a briefing book. You can reorder content, delete content, and change the content type, the number of navigation links to follow, and the content description.

Components

Content

Displays the contents of the briefing book. To edit or delete content, select the content and then use the toolbar buttons. To reorder content, select the content and drag and drop it to the desired location.

Toolbar

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This toolbar contains the following buttons:

- Edit Page - Use this button to display the *"Page Properties dialog"*, where you can change the content type, the number of navigation links to follow, and the content description of the currently selected content.

- Delete Page - Use this button to delete the currently selected content.

Related Topics

"Adding Content to a New or Existing Briefing Book"

Edit Column Formula dialog

Use this dialog to:

- Specify custom text for headings for a column's folder and for a column.

- Specify the aggregation rule for the column totals for an attribute or measure columns or for a KPI-related formula.

- Edit the formula for an attribute or measure column. A column formula specifies what the column values represent. By editing this formula, you can present analysis results in a variety of ways.

- Create formulas that calculate KPI actual values, target values, and thresholds.

You cannot customize headings, specify the aggregation rule, or edit the formula for a hierarchical column or for a hierarchy level; however, you can specify a hierarchical column within a formula for an attribute or measure column.

For more information, see:

- *"Editing the Formula for a Column"*

Components

Formula

Use the *"Edit Column Formula dialog: Column Formula tab"* to customize headings, specify the aggregation rule, and edit the formula for a column.

Bins

Use the *"Edit Column Formula dialog: Bins tab"* to combine values for the column into sets.

Edit Column Formula dialog: Bins tab

Use this tab of the *"Edit Column Formula dialog"* to perform "binning," which enables you to combine values for the column into sets. For example, suppose that the Region column has a value EASTERN. You can specify "My Home Region" instead as the text that displays for that value in the view that displays that column's data.

Binning differs from groups in that groups allow the view to display each member that is part of the group. For information, see

For more information, see *"Editing the Formula for a Column"*.

Components

Add Bin

Use this button to display the *"New Filter dialog"*, where you can create a filter expression to display as a CASE statement in the Formula area of the *"Edit Column Formula dialog: Column Formula tab"*.

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You can combine multiple values or ranges of values from a given column into bins. When you add and name the bins, all instances of the various values that comprise the bin in the result set are replaced by the bin name. Aggregations are performed accordingly as well. For example, you can specify that all values over $10M are displayed as "My10M."

Bins List

Displays the list of bins that you have created for this column using the Add Bin button. Use the following buttons within this list:

- Edit Bin Filter - Displays the , where you can edit the filter for the bin.

- Edit Bin Name - Displays a dialog in which you can edit the name for the bin.

- Delete - Removes the bin from the list.

- Move Up or Move Down - Moves the bin up or down one place within the list. The order of bins in the list is significant. You can include a certain value within multiple bins. However, the value is used only by the first bin that encounters it.

Create a bin for all other values

Use this box to create an entry in the Bins list called "All other values" and to display the dialog in which you can enter a name for this bin. This bin includes all values that have not yet been included in another bin in the list. You cannot edit the filter for this bin nor can you reorder it. It must be the last bin in the list.

Treat result as a numeric value or expression

Use this box to indicate that binned numeric values that you specify are treated as numbers, rather than as the default of text. For example, suppose that you specify 35 as the bin name. If you do not select this box, then the name is treated as text, rather than as the number 35 when it is displayed in views. If you select this box, then the value 35 is treated as a number, which affects operations that are specific to data types such as sorting.

Clear All

Use this button to remove the bins that you have created. When you click this button, a message prompts you to decide whether to keep the CASE statement in the formula on the Formula tab:

- If you select Yes, then you clear all bins from the Bins tab and the formula with the CASE statement is available for you to edit on the Formula tab.

- If you select No, then you clear all bins and the formula on the Formula tab returns to its default value.

Notes

- The Bins tab is not affected by the button bar in the Formula area in the Formula tab. However, if you create a CASE statement using the Bins tab, the button bar is hidden when you click the Column Formula tab. The button bar is displayed only if you clear all bins.

Edit Column Formula dialog: Column Formula tab

Use this tab of the "*Edit Column Formula dialog*" to:

- Specify custom text for headings for the column's folder and for the column.

- Specify the aggregation rule for the column totals for an attribute or measure columns or for a KPI-related formula.

- Edit the formula for an attribute or measure column. A column formula specifies what the column values represent, for example, "Sales Measures"."Dollars". By editing this formula, you can present analysis results in a variety of ways.

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* Create formulas that calculate KPI actual values, target values, and thresholds.

For more information, see:

* *"Editing the Formula for a Column"*

This dialog is also displayed as:

Edit Formula dialog
Components

Folder Heading

Not available for KPIs.

Use this field to enter the text for the heading for the column's folder. To enable this field, select the Custom Headings box.

Column Heading

Not available for KPIs.

Use this field to customize the heading to reflect the data in the column. To enable this field, select the Custom Headings box. For example, to change the column heading to "Dollars Increased by 10%", select the Custom Headings box and then, in the Column Heading field enter Dollars Increased by 10%.

Custom Headings

Not available for KPIs.

Use this box to enable the Folder Heading and Column Heading fields so that you can customize the headings to suit your needs. For example, if you change the formula of a column, you might want to change the column heading to something that is more representative of the column.

Aggregation Rule (Totals Row)

Use this box to select the aggregation rule for the:

* Column totals for attribute or measure columns. For example, if you want column totals to show the minimum value of the rows in the result set, then select Min. If you want them to show the sum of all the values in the result set, then select Sum, which is the default.

* KPI-related formula

For a list of the valid values, see .

Available

Displays the primary subject area and any related subject areas that have been added to the *"Subject Areas pane"*. Use this area to select columns to use in formulas. To insert a column in a formula, select the column and click the Add Column button (the arrow button between the Available and Column Formula areas). Note that when you insert a column, if you have something highlighted in the Column Formula area, it is replaced.

Column Formula

Use this area to perform these tasks:

* Create or edit the formula for an attribute or measure column.

* Create the formula to calculate a KPI actual value, target value, or range.

When you have text selected in the Column Formula box, it is replaced by values that you select elsewhere, such as in the Available list or by inserting functions or filters. The selected text is also displayed in the Insert Function and Insert Filter dialogs when you invoke them.

You can enter the formula manually or use these components:

- f(. . .) - Use this button to display the , where you select a function from a tree of function groups. For example, you can build a formula based on a SQL function, such as RANK("Sales Measures"."Dollars").

- Filter. . . - Use this button to display the , where you can add a SQL filter. For example, you can build a formula that uses the SQL FILTER function to filter the data, such as FILTER("Sales Measures"."Dollars" USING ("Markets"."Region"='EASTERN REGION').

- Column > - Use this button to select a column from a list of the available attribute and measure columns that are included in the analysis criteria to use in the formula. This is helpful for example, if you have cleared the formula area and want to get back to where you started.

- Variable > - Use this button to select the type of variable (Session, Repository, or Presentation) to add. The is displayed, where you specify the name of the variable.

    For example, you can build a formula using a presentation variable, such as "Sales Measures".Dollars + @{PercentIncrease}{1.50}, where PercentIncrease is the name of the presentation variable and 1.50 is its default value.

- + - Use this button to insert the addition operator to add values.

- - - Use this button to insert the subtraction operator to subtract values.

- x - Use this button to insert the multiplication operator to multiply values.

- / - Use this button to insert the division operator to divide values.

- % - Use this button to insert the percent sign to divide values by 100.

- (- Use this button to insert the left parenthesis to enclose data in brackets.

-) - Use this button to insert the right parenthesis to enclose data in brackets.

- ||- Use this button to insert the concatenation operator.

Treat as an attribute column

Available only for measure columns and only when the dialog is invoked from the Criteria tab. The default is that the box is not selected. Use this box to specify that a measure column be treated as an attribute column. This setting forces a Group By of the column values when the measure column is positioned outside the Measures area to an edge of the view This setting is not applied to a measure column in the Columns and Measures area of a table or the Measures area for a pivot table or graph.

This box is required to facilitate functionality in this release that specifies to not show all the detail when a measure column is moved to an edge but rather to aggregate the measure column to the grain of the edge. For example, aggregating dollar values to the Region grain.

Suppose that you have an analysis that contains the Region, Units, and Dollars columns. Using the Bins tab of the Edit Column Formula dialog for Units, you create one bin for values greater than or equal to 10 million and you specify that bin name as X. All other values use the bin name of Y. These bins create a CASE statement in the formula for this column.

When you display that analysis in a table on the Results tab, you see values for X and Y in the Units column. If you display that analysis in a pivot table with the Units column on the Measures edge, you also see values for X and Y. If you move the Units column to another edge, such as the row edge of a pivot table, then you see only values for X. This is because the values of the column were aggregated for each region and none are now less than 10 million.

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To resolve this problem and have views display data as in previous releases (prior to 11g), you select the Treat as an attribute column check box to specify that the measure column be handled as an attribute column, which prevents the aggregation of the values.

All analyses are upgraded from Release 10g with all measure columns having the Treat as an attribute column check box selected, to ensure that the measure columns are treated as attribute columns, as they were in Release 10g.

Notes

To manually enter a variable in an expression in the Formula area, follow the guidelines for referencing variables in expressions that are described in .

Related Topics

"Edit Column Formula dialog: Bins tab"

Edit Dimension Settings dialog

Use this dialog to set up the control for a dimension in the point of view area of a scorecard. Specifically, you can specify:

- A default value for the dimension
- Whether a control for the dimension is to be displayed in the point of view area
- The label to be displayed in the point of view area for the dimension

For more information, see:

- *"Point of View Area"*
- *"Setting Up the Point of View Controls"*
- *"Settings dialog: Dimension Settings tab"*

Components

Dimension

Displays the name of the dimension in the database, for example, "A - Sample Sales"."Products"."P1 Products".

Label

Use this field to enter a user-friendly label for the dimension's point of view control when no specific value has been set for the dimension. For example, you might enter Products for the dimension "A - Sample Sales"."Products"."P1 Products". Note that you do not need to specify a label for:

- A dimension that is pinned to a specific value (the value is displayed instead). You can pin the dimension to a specific value using the Default Value box.
- A dimension for which you prevent the display of a control in the point of view area. (You use the Prompted field to prevent the display of a point of view control.)

Default Value

Use this box to select one of the following options:

- A specific value for the dimension. If you specify a specific value, the value is for the dimension label.
- Search - Use this option to display the , where you search for a value for the dimension.
- Not Pinned - Use this option to specify that, initially, all dimension values are to be used. However, if you select the Prompted box, you later can change the value using the point of view control.

If you select a specific value and:

- Prevent the display of a control for this dimension in the point of view area by deselecting the Prompted box, then you are pinning the dimension to a constant value for this scorecard, and users cannot change the value.

- Display a control for this dimension in the point of view area by selecting the Prompted box, then you are pinning the dimension to an initial value for this scorecard, and users can change the value.

Prompted

Use this box to specify whether a control for this dimension is to be displayed in the point of view area of the scorecard:

- Select this box to specify that a control for this dimension is to be displayed in the point of view area.

- Deselect this box to prevent the display of a control for this dimension in the point of view area. You should prevent the display of a control in the following cases:

  o If you have pinned the dimension to a specific value or to all dimension values and you do not want users to change this setting.
  o If a dimension that is equivalent to this dimension is used in another KPI in the Scorecard and this dimension should share a point of view control with the other dimension.

    In this case, you must also complete the Prompted By box.

    For example, suppose two KPIs used in the Scorecard both have a Quarter dimension. The Quarter dimensions have the same values but come from different databases. In this case, for one of the Quarter dimensions, you should deselect the Prompted box for one of the Quarter dimensions and in the Prompted By box select the other Quarter dimension so that both dimensions share one control.

    > **Note:** Before you set up dimensions to share a point of view control, ensure that their values match exactly. After you to set up the shared control, test the control to ensure that it sets the value of each dimension that it controls.

Prompted By

This box is available only if you have deselected the Prompted box. Use this box to select the dimension whose control in the point of view area this dimension is to share.

Edit Footer or Header dialog

Use this dialog to specify the information for adding a footer or header to PDF and HTML output, when printing a dashboard page. Each header and footer can contain as many as three lines.

For more information, see:

"Print Options dialog"

Components

Bold, Italic, Underline

Use these buttons to apply Bold, Italic, or Underline to characters in the footer or header.

Line Break

Use this button to insert a line break between characters in the footer or header.

Contains HTML Markup

Use this option to work with HTML codes, as described in .

Insert Field

Use this menu to select a field to include in the header or footer, such as the author name, date, or page number.

Text

Use these fields to enter the text for the header or footer.

You can reference variables in these fields. For the syntax to use, see *"What Is the Syntax for Referencing Variables?"* For more information on variables, see *"Using Variables"*.

Edit Format

Click this button to display the *"Edit Format dialog"*, in which you specify formatting for the text in the footer or header.

Display in browser when applicable

Use this option to specify whether to display the header or footer in the HTML output. If you deselect this box, then the header or footer is displayed in the PDF output only.

Edit Layer dialog

Use this dialog to edit a layer from the Layers tab of the . One important task is to associate the layer of spatial data with data for Oracle BI EE.

Spatial data is managed in MapViewer and stored in an Oracle Database. To display data for Oracle BI EE on a map, you must associate a spatial layer with the appropriate columns of data from the Oracle BI Server. The combinations of BI data columns are referred to as "BI Keys." When you associate the layer of spatial data with data for Oracle BI EE, that layer becomes available for use with the specified columns in the specified subject areas.

For more information, see "" in .

Components

Name

Use this field to enter the name of the layer.

Location

Displays the location of the layer in the data source from MapViewer. Click the Location button to display the for importing a different layer.

Description

Use this field to enter the description of the layer, which is displayed in the following locations:

* On the Layers tab of the Administration page.
* When you hover over the layer name in the Map Formats area when editing the map.

Layer Key

Use this box to select the column of spatial data from MapViewer to associate with data for Oracle BI EE. Each column value corresponds to a shape that is stored in the Oracle database. For example, a MY_CITIES layer might have a layer key called CITY. By default, the selected value is a "best guess" at the appropriate column. Use the list to select the appropriate column.

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Click the Sample Data link to display an actual value for that column that you can use as an example.

If the box is empty, then the administrator must define the key column for the shapes in the spatial table for that layer in MapViewer. The map is drawn only where common values exist between the spatial data column and the associated column of Oracle BI EE data. Otherwise, the map might show a white area to indicate a missing value. To verify that common values exist for the two columns, display the column of Oracle BI EE data in the Oracle BI Administration Tool and review its values. In MapViewer, verify that the associated layer contains all the appropriate geometry definitions for the values in the corresponding column of Oracle BI EE data.

The following list provides the reasons why a white area might be drawn, using the country of Mexico as an example:

- The column has a null value for the country of Mexico, but a shape exists for Mexico in the spatial column.

- The column has a value for the country of Mexico, but no shape exists for Mexico in the spatial column.

- The column has a value for the country of Mexico and the shape exists for Mexico in the spatial column, but the names are mismatched. The BI column might have the value MEX and the spatial column might have MXC.

BI Key Delimiter

Available only when multiple columns are specified for one key. Use this field to enter a single ASCII character (such as a comma or underscore) to function as a delimiter for combining the BI data columns that form a key.

Geometry Type

Use this box to specify whether the layer is a polygon, point, or line geometry layer. The specification for a layer affects the formatting that can be applied to that layer.

BI Key Columns Area

Use this area to select the columns of data from the Oracle BI Server to associate with the layer. You can have multiple columns associated with a single layer. You can select multiple columns from one subject area or from multiple subject areas. The columns and delimiter that you select must exactly match the name of the Layer Key value. Suppose the Layer Key value is STATE_CITY. You must select the STATE and CITY BI data columns and specify the underscore character as the delimiter for use in creating the BI Key to associate with the layer.

Click the following options:

- Add New BI Key - Displays the list of available subject areas. When you select one, the is displayed in which you select one or more columns of BI data to associate with the layer.

- Delete BI Key - Deletes the selected key from the Key area.

- Edit BI Key - Displays the where you edit the BI data columns for the selected key.

- Sample Data - Displays an actual value for that column that you can use as an example. Ensure that the values for the data column match those from the spatial data column.

When a content designer creates a map view, a default main map is selected as the basis for that map view. If at least one data column from the analysis is associated with a layer that is associated with a main map, then that main map is selected by default.

Show Qualified Names

Use this box to specify whether to display the fully qualified name of the column in the BI Key Columns Area or simply the column name.

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Edit Page Settings dialog

Use this dialog to modify the prompt page's title, instructions, and page formatting. For more information, see *"Definition pane"*.

Components

Title

Use this field to enter the title to display on the prompt page. You can format this title by clicking the Format button.

Instruction

Use this field to enter instructions for the prompt page. For example, "Use this page to specify sales measure prompt values."

Format

Click this button to display the *"Edit Format dialog"*, in which you specify the formatting options that you can apply to the prompt page. For example, you can specify a font size and style for the title and a background color for the cell.

Prompt Display

Use this field to specify if you want the prompt label to display beside the prompt field or above the prompt field.

Wrap label to fit

Use this field to specify if you want to wrap the prompt labels. Selecting this option moves long prompt labels to multiple rows, if necessary. Note that if the total row length is longer than the user interface, Oracle BI EE adds a horizontal scroll bar to the prompts page.

The default maximum label size is 250 pixels. Note that this value differs if the Administrator modified the default pixel value in the Oracle BI EE configuration file.

Set width of all prompts to

Use this field to specify if and how you want Oracle BI EE to adjust the field width for all prompts on the prompts page. When selected, this field overrides any prompt width settings that you added to individual prompts. The field width is where the prompt values display, and does not include the field's label. If you selected the is between operator, each field ("from" and "to") is sized to the pixel size that you specify.

Select this field to apply the specified width to all prompts on the prompts page. Deselect this field to set each prompt width individually in the *"New Prompt dialog"*.

After you select this field, you can specify the one of the following options:

- Select Dynamic if you want Oracle BI EE to size the field width up to 500 pixels. For most prompt types, a user can mouse-over a truncated member value and Oracle BI EE displays the member's full value.

- Select Pixels and specify a pixel value, if necessary. Oracle BI EE defaults a value of 250 pixels into this field. Note that this value differs if the Administrator modified the default pixel value in the Oracle BI EE configuration file. Enter a pixel value to override the default pixel value. Note that if the member values are longer than the pixel value that you specify, Oracle BI EE truncates the member name. For most prompt types, a user can mouse-over a truncated member value and Oracle BI EE displays the member's full value.

  Note the following items:

  o If you select Pixels and specify a value, Oracle BI EE writes this value to the Choice List Width field on the *"New Prompt dialog"*.

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> o If you change this field from Pixels to Dynamic, Oracle BI EE sets the Choice List Width field to Dynamic on the *"New Prompt dialog"*.
>
> o If you modify an individual prompt width value on the *"New Prompt dialog"*, Oracle BI EE clears the prompts page setting's Set width of all prompts to field.

Show Apply Button

Use this box to include or exclude the Apply button at runtime. If you deselect this box, the Apply button will be excluded and Oracle BI EE immediately applies the specified prompt value to the dashboard or analysis. If you select this box, the Apply button is included, which the user must click to apply the specified prompt value to the dashboard or analysis. Note that this setting can be overridden in the *"Dashboard builder"*.

Show Reset Button

Use this field to include or exclude the Reset button at runtime. If you deselect this box, the Reset button is excluded from the prompt. If you select this box, the Reset button is included and the user can click it to reset or clear the specified prompt values from the analysis or dashboard. The Reset button provides the user with three reset options: Reset to last applied values, Reset to default values, and Clear All. Note that this setting can be overridden in the *"Dashboard builder"*.

Place buttons on side of prompts

If you select to include either the Apply or Reset button or both the Apply and Reset buttons, use this list to specify where you want the buttons to display in relation to the prompt fields. You can place the buttons to the side of or below the prompt fields.

Apply display properties to all prompt pages

Use this field to apply the page display properties that you specified to all of the prompts pages. Deselect this field to apply the properties to the prompts page upon which you are working, only.

Edit Parameter Filter dialog

Use this dialog to edit a prompted filter that is associated with an analysis on which a condition is based.

For more information, see:

"Customize Condition dialog" *"New Condition dialog"*

Components

Filter

Displays the name of the column on which the filter is built.

Operator

Use this box to select the operator to apply to the value specified in the Value field. For guidelines on operators, see *"Operators"*.

Value

Use this field to specify the value to use when applying the filter. You can type a value or click the Show list of values button to search for one or more specific values.

To specify a session or repository variable as the value, click the Value label and select Session Variable or Repository Variable. The Value field label changes to either Session Variable or Repository Variable. Then, enter the name of the session or repository variable.

For more information on session and repository variables, see *"Using Variables"*.

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Show list of values

Use this button to display the "*Select Values dialog*", where you can select one or more values from a list of available values.

Add another filter value

Use this button to add another Value field.

Delete Filter Value

Use this button to delete the corresponding value and field.

Edit Parameter Mapping dialog

Use this dialog to edit the action parameters associated with an action.

For more information, see:

- "*New Action Link dialog*"
- "*Action Link Properties dialog*"

This dialog is also displayed as:

Add Existing Action dialog

Components

Define Parameters

Use this area to define the action parameters. It includes the following components:

- Name - Use this column to view or enter the name of the parameter.

  For Navigate to a Web Page or Invoke an HTTP Request actions, to embed a parameter value anywhere within the URL, enter the token @{Name} where 'Name' is the value specified in the Name column below. There is no limit to the number of parameters that can be embedded.

- Prompt - Use this column to enter the prompt to be displayed to users, if the user is to provide the parameter value.

- Value - Use this column to enter the parameter value. Click the Change type of value button to select one of the following types of value and then specify the value:

    o Value - Select this option to specify a value and then enter the value in the field.

    o Session Variable - Select this option to use the value of a session variable, and then enter the name of the session variable in the field, or click the Show popular Session variables button (to the right of this field) and select a session variable from a list of commonly-used variables.

    o Repository Variable - Select this option to use the value of a repository variable and then enter the name of the repository value in the field.

    o Request Column - Select this option to display the , where you select the column in an analysis whose value is to be used as the value of an action parameter.

      This option is available only when you are editing the parameters for an inline action added to an agent that is conditionally executed based on an analysis.

    o Column Value - Select this option to use a column value in your analysis criteria and then click the Column Value button and select the column.

For example, suppose you have the Region and District columns in your analysis criteria and define an action link on the District column that maps a parameter to the Region column. When you execute that action link (by clicking on a district), the region value for that district is used. Note that in a pivot table, the mapped values depend on the current layout or state of the table.

This option is available only when you are adding an inline action to an analysis.

For more information on session and repository variables, see *"Using Variables"*.

- Fixed - Use this column to specify whether to allow users to see but not set the parameter. Select this box to allow users to see but not set the parameter. Deselect this box to allow users to see and set the value.

- Hidden - Use this column to specify whether to hide the parameter from users. Select this box to hide the parameter from users. Deselect this box to show the parameter to users.

- Optional - Use this column to specify whether the parameter requires a value before the action can be executed. Select this box to make the value optional. Deselect this box to make the value required.

- Add Parameter - Use this button to add a parameter. (Whether you can add a parameter for an action, depends on the action type.)

- Delete Parameter - Use this button to delete a parameter.

Edit Saved Customizations dialog

Use this page to edit the customizations saved for a dashboard page. You can:

- Rename customizations
- Change which customization to use as your default
- Change permissions for those customizations that have been shared with others
- Delete customizations

For more information, see:

- *"What Are Saved Customizations for Dashboard Pages"*
- *"Editing a Saved Customization"*

Components

Saved Customizations

This area displays the customizations, both personal and shared, that have been saved for the dashboard page.

To rename a customization, overwrite the old name with the new name.

To set a customization as your default, select the button in the My Default column for the customization. To have no personal customizations as your default, select the button in the My Default column for the No Personal Customizations entry.

Permissions

Use this button to display the , where you specify the accounts that have permission to use the customization and whether the customization is to be the default customization for the accounts.

Delete

Use this button to delete the selected customization.

Embedded Content Properties dialog

Use this dialog to specify the URL and other information about content to embed on a dashboard page.

For more information, see "*Dashboard Content*".

Components

URL

Use this field to enter the location and name of the content to embed.

These are examples:

```
/dashboardfiles/piegraph.xls
```

The URL that you specify should begin with http:// unless you plan to use an item that is saved on the Web server. If you use a network path to indicate the location of the item, then ensure that you use the exact path. Items that are embedded on a shared dashboard must be located on a network drive that is accessible to all users.

Width

Use this field to specify the width of the embedded content in the dashboard. Note the following about width and height specifications:

- If you do not specify a value, then the system uses the default settings (300 by 150 pixels). If you have only specified one value, then the system uses the default value for the non-specified value.

- You can specify the value in either pixels (px) or percent (%). Because browsers cannot fully interpret percent values, only the width percentage is rendered. If you specify the height in percentage, then 150 pixels is substituted for the height value.

- If you do not specify either pixels or percent, then the value is interpreted in pixels.

- You can enter spaces within the value. For example, you can enter either 130px or 130 px.

Height

Use this field to specify the height of the embedded content in the dashboard. Adjust the height setting for the best display results.

Hide Scroll Bars

Select this box to indicate that the scroll bars for the embedded content are not displayed. If you do not select this box, then scroll bars are automatically added to the window if they are needed.

Enter Email Address dialog

Use this dialog to add email recipients who are to receive the delivery content of an agent.

For more information, see:

- "*Agent editor: Recipients tab*"

Components

Email address for content delivery (separate multiple addresses with commas)

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Use this field to enter the email address of each email recipient who is to receive the delivery content of the agent. Use commas to separate multiple addresses.

Enter Expression dialog

Use this dialog to enter a variable expression or SQL query to use to set a gauge threshold.

For more information, see:

- *"Settings pane"*

This dialog is also displayed as:

Enter SQL Query dialog
Components

Expression

Use this box to enter the expression or SQL query.

You can reference one or more presentation variables in the expression. For guidelines on referencing a variable in an expression, see . For more information on variables, see *"Using Variables"*.

Filter editor

Use this editor to create or edit a named filter.

For more information, see:

- *"Filters and Selection Steps"*
- *"What Are Subject Areas and Columns?"*

Components

Subject Areas

Use the *"Subject Areas pane"* to select the attribute column or measure column to be included in the filter. If your repository is configured for double columns, typically, you choose a display column on which to filter. However, you can choose a code column on which to filter but only if the code column is exposed in the Presentation layer in the Oracle BI EE repository. For more information on the Presentation layer, see .

After you select a column, the *"New Filter dialog"* displays where you specify the new filter's criteria.

Catalog

Use the *"Catalog pane"* to search for and drag and drop named filters from the catalog to the Filter editor. When you add a named filter to the Filter Editor, you are given the choice of either copying a catalog reference to the named filter or copying the named filter's contents to the analysis. When you include a reference to the named filter, you cannot modify the filter. When you include a copy of the named filter, you can modify the filter's contents and either save the filter as an inline or named filter.

Saved Filter

Use this area to work with a filter just as you would in the *"Filters pane"*.

Filters pane

Use this dialog to create or edit a named filter or inline filter.

For more information, see:

- *"Filters and Selection Steps"*
- *"Creating a Column Filter"*

This pane is part of the *"Analysis editor: Criteria tab"*.

This pane also displays as the Saved Filter pane on the *"Filter editor"*.

Components

Filters Pane Toolbar

The toolbar contains the following buttons.

- Create a filter for the current subject area - Use this button to choose an attribute column or measure column from a list of the columns that are currently selected for the analysis. You can also select the More columns option to display the *"Select Column dialog"*, where you can select an attribute column or a measure column from the current subject area. If your repository is configured for double columns, typically, you choose a display column on which to filter. However, you can choose a code column on which to filter but only if the code column is exposed in the Presentation layer in the Oracle BI EE repository. For more information on the Presentation layer, see .

    After you select a column, the *"New Filter dialog"* displays where you specify the new filter's criteria.

- Remove All Filters - Use this button to delete all of the filter items in the Filters pane. To delete a selected filter item, you must go to the listing of filter items in the Filters pane and click the Delete button for the item to remove.

- More Options - Click this button to access the following options:

    o Save Filters - Use this option to save the filter and all of its contents to the catalog. Filters saved to the catalog are called named filters and can be added to other analyses and dashboards. If you save the filter as a named filter and then continue to work on the filter within the Filters pane, any changes that you make are not automatically saved to the catalog. To re-save the named filter, you must again click the Save Filters option. Note that selecting the Save Filters option does not save the analysis and inline filter upon which you are working. To save the inline filter with the analysis, go to the Analysis Editor's toolbar and click the Save button.
    o Add EVALUATE_PREDICATE Function - Use this option to display the *"New EVALUATE_PREDICATE Function dialog"*, where you create a function.

Filter Item Toolbar

The filter item toolbar is the collection of buttons that displays when you hover over a filter item within the list of filter items. It includes the following buttons:

- Edit Filter - Use this button to display the , where you edit the filter item's criteria.

- Copy Filter - Use this button to copy the filter item. When you click this button, a copy of the filter displays below the original filter item. You can use this functionality to save time by copying an existing filter item upon which to base a new filter item rather than creating a new filter item from scratch.

- Delete- Use this button to delete the filter item.

Operator

Click the operator to toggle between AND and OR. When you add a filter item, the default operator is AND. The AND operator means that the criteria specified in each filter must be met. This is the default method for combining column filters. The OR operator means that the criteria that is specified in at least one of the column filters must be met.

If you have specified three or more filters and click AND, then Oracle BI EE automatically groups the filter item with the filter item above it. Grouped filters are indented in the filters list. You can click the operator to group the filters in several layers. Grouped filters are always processed before ungrouped filters.

Edit Filter Group

This button displays when you hover over a collection of grouped filters. Use this button to specify what you want to do with the corresponding group. If you are working with a multi-level group, then ensure that you are clicking on the correct Edit Filter Group button. Note the following options:

- Ungroup - Use this option to ungroup the highlighted filters group. If you are working with a group that has several layers of groupings, then clicking this option ungroups only the highlighted group.

- Delete Group - Use this option to delete the highlighted filter group from the filter.

- Duplicate Group - Use this option to copy and paste the highlighted filter group. When you click this option, Oracle BI EE pastes the copy below the copied filter group. The copied filter group is also nested within the filter group from which it was copied.

Folder Properties dialog

Use this dialog to add a view of a catalog folder and its contents, such as saved analyses, or a list of briefing books to a dashboard page. For example, if you have a collection of saved analyses that you run frequently, you can open the folder in the dashboard, navigate to a saved analysis, and click it to run it.

For more information, see:

- "*Dashboard Content*"

Components

Folder

Displays the path to the folder whose view you want to add to the dashboard page, for example, /Shared Folders/Briefing Books. Click the Browse button to display the "*Open dialog*", where you select the folder.

Expand

Use this option to specify whether to show an expanded view of the folder.

Show RSS Link

Use this option to specify whether to add an RSS feed option to the folder.

The RSS feed option enables a user to access the dashboard's catalog folder from an RSS 2.0 compatible reader that supports HTTP basic authentication. If Oracle BI Presentation Services uses HTTPS protocol, then the RSS Reader that you use must also support the HTTPS protocol. An RSS reader is a third-party program that enables the user to aggregate information from different web-based locations into one browser window (for example, news feeds or events listing).

When the RSS link is added to the dashboard's catalog folder, an XML button that provides the catalog's URL is displayed for that folder. When a user accesses a catalog folder from an RSS reader, the reader prompts the user to log in to the Oracle BI Server.

You can include an RSS feed option to a catalog folder that is displayed on a dashboard page. Users must have the proper privilege to add the RSS feed option to a dashboard page's catalog. The RSS Feeds privilege is granted by the administrator.

Folders pane

Use this pane to display and navigate the content of personal (My Folders) and shared folders that all users can access. Administrators can display the catalog root folder that contains all system, object, and user data and settings. You can also use this pane to move objects by dragging and dropping them to different areas within the Catalog. You can drag and drop objects within the Folders pane or from the Folders pane to the .

This pane is part of the *"Catalog page"*.

Components

Show Folder Tree

Use this button to display all folders in hierarchical directories.

Show Quick Access Folders

Use this button to list, excluding their hierarchy, these folders:

- My folders - Contains all the objects that you have created.

- Shared folders - Contains folders for agents, common objects such as reports, and the contents of the subject area.

- My <object> folder - Depending on the object, contains all the analyses, reports, agents, and scorecards that you have created or modified, or the agents to which you are currently subscribed. (Note that agents that you have been designated a recipient of are not included in the My Agent Subscriptions folder.)

My Folders

Contains all of your personal folders.

Shared Folders

Contains folders to which you have the permissions to access.

Font Format: Item dialog

Use this dialog to set formatting properties for a graph, gauge, or trellis, such as the font family for text.

For more information, see:

-
-
-

This dialog is also displayed as:

Format: Item dialog

> 🖉 **Note:** Depending on what you are formatting, this dialog might be displayed without tabs. If so, then it contains only the components in the .

Components

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Display Options

Use to set properties for the display of titles, scale labels, and data labels.

Font Format

Use the to set properties for displaying text.

Number Format

This tab is not always available in this dialog.

Use the to override the default numeric format in which data labels are currently displayed.

Font Format: Item dialog: Display Options tab

Use this tab of the to set properties for the display of titles, scale labels, and data labels in a graph, gauge, or trellis.

For more information, see:

-
-
-

This dialog is also displayed as:

Format: Item dialog: Display Options tab
Components

Truncate

This box is available only for titles.

Use this box to specify whether items are to be automatically truncated or truncated by a specified number of characters. If you select Specify, then enter the number of characters in the characters field.

Scale Labels

This box is not available for data labels.

Use this box to specify whether to show or hide scale labels.

Label Orientation

This box is not available for data labels.

Use this box to select the number of degrees scale labels are to be rotated.

Abbreviate

This box is available only for scale and data labels. It is not available for all graph types.

Use this box to select the abbreviation to use for scale and data labels. For example, if you select Million (m) for a scale label of 120,000,000, then the label is abbreviated to 120M.

Show Data Labels

This box is available only for data labels.

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Use this box to specify whether to hide or show data labels. Data labels are displayed when you hover the mouse over elements in a graph or gauge.

Data labels are enabled by default for selected 2D graph types. Data labels have no effect on graphs such as 3D bar and column.

Value

This list is only available for waterfall graphs.

Use this list to display the actual or cumulative value of the measure. The options are:

- Actual - Use this box to display the actual value of the measure.

- Subtotal - Use this box to display the cumulative value beginning with the first measure inclusive of the current measure.

✏️ **Note:** If the **Show Data Labels** box is set to Always, the data marker label displays above a positive bar and below a negative bar when you hover the mouse. The Show Data Labels box controls which values (Actual versus Subtotal) are displayed. Note that both values are displayed for the tooltip when hovering the mouse.

Font Format: Item dialog: Font Format tab

Use this tab of the to set properties for displaying text.

For more information, see:

-
-
-

This dialog is also displayed as:

Format: Item dialog: Font Format tab Font Format: Item dialog
Components

Toolbar

The toolbar contains the following buttons:

- Clear Cell Format (restore defaults) - Use this button to remove the specifications that you have made and to return the settings to the values that they had when defaults were last saved.

    The Clear Cell Format (restore defaults) and the Copy Cell Format buttons affect the settings in the following ways:

    o   If the dialog has no tabs, then the button affects all the settings in the dialog.

    o   If the dialog has multiple tabs, then the button affects only those settings in the tab in which the button is displayed.

- Copy Cell Format - Use this button to copy the formatting specifications from the dialog, so that you can apply them elsewhere.

- Paste Cell Format - Use this button to paste the formatting that you have copied into the appropriate location.

Family

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Use this box to select the font family.

Size

Use this field to enter the font size.

Color

Use this box to select the font color.

Style

Use this box to select the font style, such as bold or italic.

Effects

Use this box to select the font effects, such as underline or strike through.

Font Format dialog: Number Format tab

Use this tab of the to override the default numeric format in which data labels are currently displayed.

> ✏ **Note:** The numeric format is inherited from the representative column in the Criteria tab. If two or more columns are selected for the same axis, then numeric formatting is not inherited.

For more information, see:

-
-
-

This dialog is also displayed as:

Format: Item dialog: Number Format tab
Components

Override Default Data Format

Use this box to specify that you want override the default numeric format in which data labels are currently displayed.

Treat Numbers As

Use this box to specify whether data labels are numbers, percentages, or currency.

Currency Symbol

This box is available only if you select Currency in the Treat Numbers As box.

Use this box to select the currency symbol to show in data labels.

Negative Format

Use this option to specify whether to display negative data labels using a minus sign (for example, -123) or parentheses (for example, (123).

Decimal Places

Use this box to select the number of decimal places (to a maximum of 6) in which to display numbers (for example, 120,000,000.000).

Use 1000's Separator

Use this box to specify whether to separate each magnitude of a thousand by a comma. (for example, 1,000,000,000.00

Gauge Properties dialog

Use this dialog to edit the properties of gauge.

For more information, see:

- *"Editing a Gauge View"*

Components

Canvas

Use the *"Gauge Properties dialog: General tab"* to set properties related to the gauge canvas, such as, legend location.

Style

Use the to set properties that control the appearance of the gauge, such as width and height of the gauge.

Scale

Use the to set properties for gauge limits and tick marks.

Titles and Labels

Use the to set properties that control the display of titles, footers, and labels for the gauge or gauges in a gauge set.

Gauge Properties dialog: General tab

Use this tab of the *"Gauge Properties dialog"* to set properties related to the gauge canvas, such as legend location.

For more information, see:

- *"Editing a Gauge View"*

Components

Gauges Per Row

Use this field to enter the number of gauges that are displayed per row in a gauge set.

Legend Location

Use this box to specify whether a legend is to be displayed and its location. Select one of the following options:

- Default - Use this option to display the legend in the default location, that is, to the right of the gauge canvas.
- None - Use this option to specify that no legend is to be displayed.
- Top - Use this option to display the legend at the top of the gauge canvas.
- Right - Use this option to display the legend to the right of the gauge canvas.
- Bottom - Use this option to display the legend at the bottom of the gauge canvas.

- Left - Use this option to display the legend to the left of the gauge canvas.

Listen to Master-Detail Events

Use this box to specify whether the gauge is to act as a detail view in a master-detail relationship and listen for master-detail events. If you select this box, then complete the Event Channels field.

For more information on master-detail relationships, see "*Master-Detail Linking of Views*"

Event Channels

This field is enabled only if you select the Listen to Master-Detail Events box.

Use this field to enter the name of one or more channels on which the gauge is to listen for master-detail events raised by one or more master views. The channel name is case sensitive and must match exactly the channel name specified in the master view. Separate channels with commas, for example, channel a, channel b.

Include Null Values

Use this check box to override null suppression set at the analysis level. When selected for the gauge view, null values will not be suppressed for the gauge rows that contain all nulls. See for additional information.

Gauge Properties dialog: Scale tab

Use this tab of the "*Gauge Properties dialog*" to set properties for the following parts of a gauge:

- Gauge limits - The minimum and maximum points on the gauge value axis.
- Tick marks - The markings along the value axis of the gauge. They can identify regular intervals, from the minimum value to the maximum value, and can also indicate threshold values. (You set threshold values in the "*Settings pane*".)

For more information, see:

- "*Editing a Gauge View*"

Components

Gauge Limits

Use this area to specify the gauge limits as follows:

- Select the Default box to use the default gauge limits.
- Select the Specify box to specify custom gauge limits. Then, in the Minimum field enter the lowest point and in the Maximum field enter the highest point.
  Click the Customize Gauge Limit button to the right of the Minimum or Maximum field to display the "*Customize Gauge Limit dialog*", where you specify the custom gauge limit. You can specify the limits as an actual value or a percentage.

Tick Type

Displays the following options to specify the number of tick marks to display:

- Dynamic - Select this box to let the system automatically calculate (based on the data) the number of tick marks to display.
- Specify - Select this option to specify the number of tick marks to display.

Show Major Ticks

This box is not available for bulb gauges.

Use this box to specify whether major tick marks are to be shown.

To show major ticks, select this box and then specify the number of major tick marks to show.

Show Minor Ticks

This box is not available for bulb gauges.

Use this box to specify whether to show minor tick marks.

Minor tick marks show only in dial gauges that show one measure.

To show minor ticks, select this box and then specify the number of minor tick marks to show.

Gauge Properties dialog: Style tab

Use this tab of the *"Gauge Properties dialog"* to set properties that control the appearance of the gauge, such as width and height of the gauge.

For more information, see:

- *"Editing a Gauge View"*

Components

Dial Arch Length

This box is available only for dial gauges.

Use this field to enter length of the dial arc in degrees. The maximum value is 360 degrees.

Gauge Size

Use this box to specify the size of the gauge - Fit to Canvas, Small, Medium, Large or Custom.

If you select Custom, then you must complete the Width and Height fields, where you specify the width and height in pixels.

Width

This field is enabled only when you select Custom in the Gauge Size box.

Use this field to enter the width of the gauge in pixels.

Height

This field is enabled only when you select Custom in the Gauge Size box.

Use this field to enter the height of the gauge in pixels.

Marker Type

This area is available only for dial gauges.

Use this area to specify, for each measure in the gauge, the type and color of the indicator. The indicator is the part of the gauge that points to the value that is plotted.

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In the first box, select the type of indicator and then, in the second box, select the color. The types of indicators are:

- Needle - Use this option to use a needle to point to the value that is plotted.
- Line - Use this option to use a line to point to the value that is plotted.
- Fill - Use this option to fill the area inside the dial gauge to the value that is plotted. This option is ignored if the gauge has thresholds or if the gauge shows multiple measure columns.

Gauge Colors and Border: Background

This box is available only for dial gauges.

Displays the Color Selector dialog, where you select the color for the gauge background.

Gauge Colors and Border: Border

This box is available only for dial gauges.

Displays the Color Selector dialog, where you select the color for the border around the gauge.

Canvas Colors and Border: Background

Displays the Color Selector dialog, where you select the color for the canvas background.

Canvas Colors and Border: Border

Displays the Color Selector dialog, where you select the color for the border around the canvas.

Gauge Properties dialog: Titles and Labels tab

Use this tab of the *"Gauge Properties dialog"* to set properties that control the display of titles, footers, and labels for a gauge or gauges in a gauge set.

If the canvas consists of a gauge set, then titles and footers are displayed for each gauge. Titles and footers are optional.

For more information, see:

- *"Editing a Gauge View"*

Components

Gauge Set Title: Title

Use this field to enter the title for the gauge or gauge set. The title is displayed at the top of the canvas.

Use measure name as graph title

Use this check box to use the name of the measure column or columns (for example, Dollars) for the title of the gauge or gauge set.

Gauge Titles: Title

Use this field to enter a title to be displayed above each gauge.

You can use a token (@n) to include the results from the designated column in the gauge title. For example, @1 inserts the results from the first column, and @3 inserts the results from the third column.

Gauge Titles: Footer

Use this field to enter a footer to be displayed beneath each gauge.

You can use a token (@n) to include the results from the designated column in the gauge footer. For example, @1 inserts the results from the first column, and @3 inserts the results from the third column.

Format Title

Use this button (which is displayed next to each Title field and the Footer field) to display the , where you can format the title or footer.

Legend: Format Label

Use this button to display the , where you can format the legend.

Scale Labels or Data Labels: Format Label

Use this button to display the , where you can format the scale labels or data labels.

The Format Label button for scale labels is not available for bulb gauges.

Getting Started pane

Use this pane to learn how to use Oracle Scorecard and Strategy Management to drive and assess corporate performance, to link to the Oracle Business Intelligence glossary, and to link to information about how to create scorecards.

For more information, see .

This pane is part of the *"Scorecard editor: Overview tab"*.

Components

Overview

Use this link display overview information about scorecarding.

Glossary of Terms

Use this link to display a glossary of Oracle Business Intelligence terms.

How do I?

Use link to display information on how to create scorecard components, such as objectives, initiatives, perspectives, and views.

Graph Properties dialog

Use this dialog to edit the properties of a graph.

For more information, see:

- *"Editing Graph Views"*

Components

General

Use the *"Graph Properties dialog: Style tab"* to set properties related to the graph canvas, such as legend location.

Style

Use the to set properties that control the appearance of the graph, such as the style.

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Scale

Use the to set properties for axis limits and tick marks.

Titles and Labels

Use the to set properties that control the display of titles and labels for the graph.

Graph Properties dialog: General tab

Use this tab of the *"Graph Properties dialog"* to set properties related to the graph canvas, such as legend location.

For more information, see:

- *"Editing Graph Views"*

Components

Canvas Width

Use this field to enter the width of the graph canvas in pixels.

Canvas Height

Use this field to enter the height of the graph canvas in pixels.

Legend Location

Use this box to specify whether a legend is to be displayed and its location. Select one of the following options:

- Default - Use this option to display the legend in the default location, that is, to the right of the graph canvas.
- None - Use this option to specify that no legend is to be displayed.
- Top - Use this option to display the legend at the top of the graph canvas.
- Right - Use this option to display the legend to the right of the graph canvas.
- Bottom - Use this option to display the legend at the bottom of the graph canvas.
- Left - Use this option to display the legend to the left of the graph canvas.

Zoom and Scroll

This component is not supported for radar, funnel, and pie graphs.

Use this area to specify whether to enable zooming and scrolling on the horizontal and vertical axes:

- Enable for Horizontal Axis - Use this option to enable zooming and scrolling on the X axis.
- Enable for Vertical Axis - Use this option to enable zooming and scrolling on the vertical axis.

When you enable zooming and scrolling for an axis, the Zoom button (from which you can zoom and scroll) is displayed in the graph area when you hover the mouse over the graph.

For more information on how to zoom and scroll, see .

Listen to Master-Detail Events

Use this box to specify whether the graph is to act as a detail view in a master-detail relationship and listen for master-detail events. If you select this box, then complete the Event Channels field.

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For more information on master-detail relationships, see *"Master-Detail Linking of Views"*

Event Channels

This field is enabled only if you select the Listen to Master-Detail Events box.

Use this field to enter one or more channels on which the graph is to listen for master-detail events raised by one or more master views. The channel name is case sensitive and must match exactly the channel name specified in the master view. Separate channels with commas, for example, channel a, channel b.

Include Null Values

Use this check box to override null suppression set at the analysis level. (See for additional information.) When selected for the graph view, null values will not be suppressed for the graph rows that contain all nulls. The graph must have a Group By drop target or must be a funnel or pie graph. See *"Drop Targets"* for additional information.

Animate graph on Display

This box is not supported for funnel graphs.

Use this box to specify whether to show an initial rendering effect. The rendering effect varies from graph to graph. In a horizontal graph, for example, the bars start at the horizontal axis and move up to the current measurement level.

Graph Properties dialog: Scale tab

Use this tab of the *"Graph Properties dialog"* or of the to set properties for the following parts of a graph:

- Axis limits - The minimum and maximum points on the vertical and horizontal axes.

- Tick marks - The markings along the value axes of the graph. They can identify regular intervals, from the minimum value to the maximum value.

This tab is not available for pie graphs or funnel graphs.

For more information, see:

- *"Editing Graph Views"*

This dialog also displays as:

Trellis Properties dialog: Scale tab
Components

> ✎ **Note:** For a trellis, the components available in this tab depend on the type of trellis (simple or advanced) and the type of visualization (that is, graph) with which you are working. If a graph has both vertical and horizontal axes (for example in a scatter graph) or two vertical axes (for example in a line-bar graph), this tab contains sub-tabs so that you can set the scale properties for both axes. In a graph of the subtype 100% Stacked, the only component available in this tab is the , where the value you set for position or range of a scale marker is a percentage. In 100% stacked graphs, you do not set axis limits, you do not display tickmarks, and you do not use a logarithmic scale.

Axis Limits or Scale and Limits

This area is disabled for a pareto graph and for a 100% stacked graph.

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Use this box to specify the limits of the vertical or horizontal axis. Select one of the following options:

- Default (Dynamic) - Use this option to let the system determine the scale and set the axis to zero for positive numbers.

- Specify - Use this option to specify the minimum and maximum axis limits. Then in the Minimum field, enter the minimum axis limit and in the Maximum field, enter the maximum axis limit.

- Zoom to data range - Use this option to let the system determine the scale. The system evaluates the range of values on the axis, and chooses appropriate minimum and maximum values for the scale. This is useful when graphing a set of large values that are all within a small percentage of each other. The graph zooms in on the values so differences are more easily distinguished.

> ✏ **Note:** If your data range is expansive, dynamic scaling should be used for plotting your data points. To have the system dynamically scale your data range, select the Zoom to data range option for axis limit scaling.

Axis Scale or Scale Type and Tick Marks

This area is disabled for a 100% stacked graph.

Displays the following options to specify the number of tick marks to display:

- Dynamic - Select this box to let the system automatically calculate (based on the data) the number of tick marks to display.

- Specify - Select this option to specify the number of tick marks to display.

Note that the color you select color for the horizontal and vertical gridlines on the *"Graph Properties dialog: Style tab"*also is applied to the major and minor tick marks.

Show Major Ticks

Use this box to specify whether to show major tick marks. If you select this box, then specify the number of major tick marks to show.

Show Minor Ticks

This box is disabled for vertical axis 2 of a pareto graph.

Use this box to specify whether to show minor tick marks. If you select this box, then specify the number of minor tick marks to show.

Use logarithmic scale

This box is disabled for a pareto graph and for a 100% stacked graph.

Use this box to specify whether to use a logarithmic scale.

Visualization: Measure Tabs

Displays tabs that correspond to the measures (for example, Revenue and Billed Quantity) used in an advanced trellis. Click the tab of the measure for which you want to set visualization properties.

Click to edit Scale Markers

Displays the , where you define the scale markers for the graph.

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Notes

- For a time series line graph, you cannot set scale properties (that is, axis limits or major and minor ticks) for the horizontal axis.

- For a Pareto graph, you cannot specify:

  o Axis limits for either vertical axis 1 or vertical axis 2

  o Whether to show minor tick marks for vertical axis 2

  o Whether to use a logarithmic scale

  By definition, vertical axis 2 of the pareto graph ranges from 0% to 100%. In addition, vertical axis 1 is synchronized with vertical axis 2, so it cannot be changed.

Graph Properties dialog: Style tab

Use this tab of the *"Graph Properties dialog"* to set properties that control the appearance of the graph, such as the style.

For more information, see:

- *"Editing Graph Views"*

Components

Format

This list is only available for waterfall graphs. Use this list to define the color of the bars and which bars display for the graph. The options are:

- Increase, Decrease and Total

- First, Increase, Decrease, and Total

- Single Color

- Dual Color

- Custom - Once you customize the waterfall bar value by selecting a different color, Custom displays in the Format list.

See for additional information.

Style

This box is not enabled for bubble and radar graphs.

Use this box to select the graph style. The options are:

- For bar, line-bar, or pareto graphs: Default, Rectangle, Triangle, Cylinder, Diamond, Gradient or Pattern Fill

- For a line or time-series line graph: Default, Standard Line, Stepped Line, or Curved Line

- For an area or pie graph: Default, Solid Fill, Gradient Fill, or Pattern Fill

- For a scatter graph: Default, Standard Scatter, or Scatter-with-Lines

Style and Conditional Formatting

Displays the , where you specify formatting.

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3D

Use this box to specify whether the graph is to be three-dimensional.

Plot Area: Background

Displays the Color Selector dialog, where you select the color for the plot area background.

Gridlines

Use these boxes to specify whether to display the default gridlines or gridlines that you specify.

If you select the Specify option, then, for the major grid and for the minor grid, specify the gridlines that you want and their color using the following boxes:

- Horizontal Line - Use this box to display a horizontal gridline.

- Vertical Line - Use this box to display a vertical gridline.

- Color - Displays the Color Selector dialog, where you select the color for the horizontal and vertical gridlines. This color also is applied to the major and minor tick marks, which you specify on the .

If you select the Specify option only and do not select any check boxes for the major and minor grid, no gridlines (not even the ones shown by default) are displayed.

Note that, for a pareto graph, enabling the horizontal major or minor gridlines shows only the gridlines corresponding to vertical axis 1.

Legend: Background

Displays the Color Selector dialog, where you select the color for the legend background.

Legend: Transparent

Use this box to specify whether the legend is transparent (that is, has no background color).

Legend: Border

Displays the Color Selector dialog, where you select the color for the border around the legend.

Canvas Colors and Borders: Background

Displays the Color Selector dialog, where you select the color for the canvas background.

Canvas Colors and Borders: Gradient

Use this box to specify whether the canvas background color is to gradually fade from the specified color at the top to white at the bottom.

Canvas Colors and Borders: Border

Displays the Color Selector dialog, where you select the color for the border around the canvas.

Graph Properties dialog: Titles and Labels tab

Use this tab of the *"Graph Properties dialog"* to set properties that control the display of titles and labels for the graph.

For more information, see:

- *"Editing Graph Views"*

Components

Title

Use this field to enter a title for the graph.

Use measure name as graph title

Use this check box to specify whether to use the measure name or names as the graph title.

Vertical Axis 1 Title

Use this field to enter a title for the vertical axis 1.

Use measure name as axis title

Use this check box to specify whether to use the measure name or names as the vertical axis 1 title.

Vertical Axis 2 Title

Use this field to enter a title for the vertical axis 2.

Use measure name as axis title

Use this check box to specify whether to use the measure name or names as the vertical axis 2 title.

Horizontal Axis Title

Use this field to enter a title for the horizontal axis.

Use column name as axis title

Use this button to specify whether to use the column name or names as the horizontal axis title.

Format Title

Use this button (which is displayed next to each Title field) to display the , where you can format the title.

Legend: Format Label

Use this button to display the , where you can format the legend.

Format Label (for Vertical Axis Labels, Horizontal Axis Labels or Data Markers)

Use this button to display the , where you can format the vertical axis labels, horizontal axis labels, or data labels.

Totals

This area is only available for waterfall graphs. Use these two boxes to customize the text that displays on the waterfall graph. The options are:

- Subtotal - The subtotal text displays along the horizontal axis.
- Total - The total displays in the graph legend and along the horizontal axis for the last total bar.

Notes

For time series line graphs, no data formatting options are available for the time axis labels or data labels. You can modify font characteristics, but any other formatting selections are ignored.

For a time series line graph, labels that display on the time axis are locale-sensitive. For example, month and day names use the appropriate locale-sensitive short names.

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Graphics dialog

Use this dialog to select images to display for the following:

- Individual KPI performance thresholds
- A column cell

You can select a standard image or manually enter a path to a custom image.

Components

No Image

Use this box to indicate that no image is included in the column's layout. If you are creating a KPI threshold, select this option to display only KPI values and omit symbols that reflect performance levels or states.

Custom Image

Use this field to specify a custom image to include in the column's layout or with the KPI threshold. To do so, enter one of the following:

- The URL to a custom image.
- The fmap syntax to reference a custom image that is stored locally in the Oracle Business Intelligence environment. For more information on the fmap syntax, see .

> ✎ **Note:** If you are trying to save an object that uses the fmap syntax, then you must have the Save Content with HTML Markup privilege. See "" in for information on privileges.

The custom image should be one that is accessible to all users who view or edit the scorecard.

Custom images can be used for both conditional and unconditional column results.

Select Standard Image

Use this pane to select an image distributed with Oracle Business Intelligence. To select an image, click the option next to the image to include in the column. These images are useful in conditional formatting, such as meters and trend arrows. The left pane shows the categories of images. When you click an image category, the right pane shows the images in that category.

Image Placement

Use this field to specify where you want the image to be displayed relative to the column's data or heading.

Select Choose Image Only if you want the column to contain the image without the text. Choose Default to use the image's default position, which is usually to the left of the column's data or heading.

Home page

Use this page to:

- Quickly navigate to the area of the application where you can complete a specific task (for example, create a dashboard).
- Access your objects or the objects to which you have been given permission to view or edit.
- View your alerts.
- Access Oracle Business Intelligence documentation and other Oracle product information.

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- Download Oracle applications that can integrate or interact with Oracle BI EE.

- Quickly perform pre-defined searches (for example, search for all of your dashboards or Scorecard objects) or access the full-text catalog search option.

For more information, see:

- "*Accessing and Managing Your Alerts*"

Components

Create...

Provides links to initiate the most popular creation tasks by category (for example, Published Reports or Actionable Intelligence). Click the More link to access a list of the category's other creation tasks. Oracle BI EE populates this list of categories based on what is installed on your company's system and the pieces to which you have been given the rights to access.

Browse /Manage...

Provides the ability to search the folders and objects to which you have permission to access. You can click the Catalog Folders [Search] link to access the catalog search interface where you can search for an object by name, location, and type. For more information about the catalog and how to search it, see "*Managing Objects in the Oracle BI Presentation Catalog*".

This section also gives you the ability to quickly perform pre-defined searches of the catalog by clicking any folder/binocular button. For example, click My Scorecards folder/binocular button to access a list of all of the Scorecard objects located in your My Folders location. After you click a folder/binocular button, the Catalog page displays and contains the results of your search, as well as the pre-defined search's criteria defaulted into the Search fields.

Get Started...

Provides links to information and tools that will acquaint and help you with Oracle BI EE and other related Oracle technologies. Note that your administrator can customize this section to meet the informational needs of the users.

This section contains the following links:

- Oracle BI EE Documentation - Click this link to access the Oracle Business Intelligence documentation library, which contains the complete set of Oracle BI EE guides in HTML and PDF formats.

- Help Table of Contents - Click the drop down button to choose which product document's table of contents you want to access. Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition displays in this list, along with the tables of contents for products that integrate with Oracle BI EE (for example, Oracle Business Intelligence Publisher Enterprise and Oracle Marketing).

- Oracle Technology Network - Click this link to access the Oracle Technology Network (OTN), where you can search for technical articles about Oracle products, participate in discussions about Oracle products, ask the user community technical questions, and search for and download Oracle products.

- Download BI Desktop Tools - Displays options that allow you to download various BI desktop tools, such as Smart View for MS Office. The options available depend on the products that you are eligible to download.

  For more information on the BI Desktop tools, see .

  After you have installed or configured a product, the product download link is no longer displayed in the list.

Alerts

(This section is available only when one or more alerts are delivered to the Oracle BI EE Home page.)

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Displays your alerts (up to a maximum of five), including the priority (High, Normal, or Low) and last delivery date and time for each alert.

To view the latest occurrence of an alert, click its name. The is displayed, where you can view information about the alert and the content of the alert. You can also edit and run the agent that generated the alert, if you have the appropriate permissions.

Each alert has the following links:

- View - Use this link to display the Alert dialog, where you can view information about the alert and the content of the alert. You can also edit and run the agent that generated the alert, if you have the appropriate permissions.

- Clear - Use this button to delete the alert.

- More - Displays the following options:

  - Edit Agent - (This option is available only if you have permission to modify the agent.) Use this option to display the agent in the *"Agent editor"*, where you can edit the agent.
  - Run Agent - (This option is available only if you have permission to execute the agent.) Use this option to run the agent that generated the alert.
  - Subscribe to this feed - Use this option to display the browser's page that lets you subscribe to an RSS feed. Using this page, you can subscribe to an Oracle BI Alerts feed (that is, the channel that contains the delivered agents). For more information, see .
  - View all alerts - Use this option to display the *"Alerts dialog"*, where you can view and manage all your alerts.

If more than five alerts have been delivered, the View All Alerts link is displayed. Click this link to display the *"Alerts dialog"*, where you can view and manage all your alerts.

To configure an agent to deliver an alert to the Home page, you must select the Home Page and Dashboard option on the *"Agent editor: Destinations tab"*. For more information about creating agents, see *"Creating Agents"* .

Recent

Contains a list of the dashboards that you have recently viewed, created, or updated. Note that these dashboards display in the first row of this section. Click the More Dashboards link to access additional dashboards that you recently created and updated. All other recently created or updated objects display below the dashboard row.

The links that are included with an individual object (for example, Edit and Properties) are displayed based on the object's type and your permissions for that object. For example, if you can view but not edit a dashboard, only the Open link is displayed with the dashboard. If a dashboard that you created displays in this section, then the Open and Edit links display with the dashboard. Click the More link to access a list of more dashboard options, such as Properties.

Most Popular

Contains a list of recommended objects that other users with your same role viewed. You have not accessed these objects yet but may find them useful. Oracle BI EE compiles this list of recommendations by determining which objects similar users have accessed and compares those objects to your list of recently accessed object. Oracle BI EE includes only items to which you have the view permission. Only items saved to the Shared Folder display in this list.

The links that are included with an individual object are displayed based on the object type and your permissions for that object. For more information about how Oracle BI EE determines the object's links, see the Recent component in this topic.

Image Map Prompt Properties dialog

Use this dialog to specify information for the map column. For more information, see and .

Components

Caption

Use this field to enter a caption for the image map prompt. The caption is displayed as the prompt's field label. For example, "Click a region to see sales data." You can include HTML markup tags in the caption, such as <b>, <font>, and <table>.

Description

Use this field to enter a description that is saved with the prompt. Descriptions are displayed when an administrator uses the Catalog Manager.

Image URL

Use this field to specify the location of the image file.

The image file must reside on a Web server. Oracle recommends that you put the image files in the directory that contains all Web resource files (for example, `app\res\region3.jpg`). Placing the image files with the Web resource files prevents a security warning message from displaying when the user accesses the image from the dashboard or analysis.

However, if you are using a Web server, such as WebServices, where the resource files are located in the deploy directory, then you must put the image file in the deploy directory and the directory that contains all Web resource files.

You can reference variables in this field. For the syntax to use, see *"What Is the Syntax for Referencing Variables?"* For more information on variables, see *"Using Variables"*.

HTML

Use this field to specify the HTML <map> tags. In the map tags, you indicate the map region's shape, X and Y coordinates, and region name.

Extract Image Map from HTML

Use this link to extract the values that you specified in the HTML <map> tags and put them in a table where you can link the regions to data columns and values.

Import Background Maps dialog

Use this dialog to import maps to the Background Maps tab of the . For information, see "" in .

This dialog is also displayed as:

Add Layers dialog Import Images dialog Import Layers dialog
Components

Look in

Not available for the Add Layers dialog. Use this box to select the connection to a data source in MapViewer that contains the predefined background maps, layers, or images from which you want to select. Each data source can contain a set of background maps, layers, and images. The sets are not related to each other. (In MapViewer, background maps are referred to as "tiles.")

The list of connections includes all those that have been defined during the configuration of MapViewer.

Available Items

Use this list to select one or more background maps, layers, or images, depending on which dialog is displayed.

Previewing Area

Displays a preview of the selected background map, layer, or image. If multiple items are selected, then the last selected item is displayed. The name of the item is displayed at the top of the Previewing Area.

Preview Map

Available only in the Import Layers dialog. Use this list to select the background map to display for previewing the layer. If no background map is available, then a static image of the layer is shown in the Previewing Area. The default background map displayed is the map that covers the largest spatial area, because that map has the highest probability of displaying the points that comprise the layer.

Initiative Linkage dialog

Use this dialog to specify how strongly an initiative drives an objective or how strongly an objective is driven by an initiative.

For more information, see:

- "*Related Items pane*"

This dialog also displays as:

Objective Linkage dialog
Components

Initiative

Displays the name of the initiative that drives the objective.

Objective

Displays the name of the objective that is driven by the initiative.

Strength

Use this box to specify whether the strength of the relationship between the objective and initiative is Strong, Moderate, or Weak.

For example, an initiative called "Upgrade Out Of Date Software" might moderately drive an objective called "Improved Employee Productivity".

Proportionality

Use this box to specify whether changes in performance or value in one object are directly proportional (Direct) or inversely proportional (Inverse) to changes in performance or value in the other object.

For example, in a relationship between an objective named Reduce Customer Complaints to 4% and an initiative named Improve Quality Control, the proportionality would be inverse because improvements in quality control should result in lower numbers of customer complaints.

Initiatives pane

Use this pane to create, modify, and delete initiatives.

For more information, see:

- "*Initatives*"
- "*Creating an Initiative*"

This pane is part of the *"Scorecard editor"*.

Components

Initiative Tree

Displays the initiatives that have been defined for the scorecard and the KPIs that measure their progress hierarchically. It also shows the statuses of initiatives and KPIs using the appropriate colors and symbols that you specified for assessment mappings. For more information on assessment mappings, see *"Assessment Mappings"*.

Toolbar

This toolbar contains the following buttons:

- Create Initiative - Use this button to display the *"Scorecard editor: Initiative Details tab"*, where you create an initiative as a child of the selected initiative.

- Open - Use this button to open the selected object for editing or viewing, depending on the current mode.

- Delete - Use this button to delete the selected object and all of its descendants (if any), if you have the appropriate permission.

Right-Click Menu for an Object

Displays options for working with an object. See .

Right-Click Menu for Objects in the Initiatives Pane and Strategy Pane

The right-click menu for objects in the *"Initiatives pane"* or the *"Strategy pane"* provides a number of options that allow you to work with the objects in the pane. For example, you can open objects, delete objects, or reorder objects using cut and paste operations.

The options vary depending on the type of object, whether the object is in the Initiatives pane or Strategy pane, and whether the Scorecard editor is in edit or read-only mode:

- Open - Use this option to display the object for editing or viewing, depending on the current mode.

- Delete - Use this option to delete the selected object and all of its descendants (if any), if you have the appropriate permission.

- Cut - Use this option to remove the selected object and all of its descendants (if any) for pasting to another position within the tree.

  To cancel a cut, perform another action inside the Initiatives pane or Strategy pane in which you have initiated the cut action, press the Esc key, or paste back to the same location.

- Create Objective - Use this option to display the *"Scorecard editor: Objective Details tab"*, where you create an objective as a child of the selected objective.

- View Strategy Tree - Use this option to display the strategy tree for the selected object.

- View Cause & Effect Map - Use this option to display the cause & effect map for the selected object.

- Create Initiative - Use this option to display the *"Scorecard editor: Initiative Details tab"*, where you create an initiative as a child of the selected initiative.

- Analyze - This option is available only when you select a KPI. Use this option to create an analysis based on the KPI. The analysis is automatically saved in the catalog in the My Folders/Drills folder.

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> ✎ **Note:** Because the My Folders/Drills folder is used for temporary storage, the analysis might not persist after the Oracle Business Intelligence session ends. To preserve the analysis, copy it to another directory. For example, to preserve an analysis that you plan to use in a shared dashboard, copy it to a folder in / Shared Folders.

- Create Agent - This option is available only when you select a KPI. Use this option to display the *"Create New Agent dialog"*, where you create an agent from the KPI.
- Contact Owner - Use this option to display the *"Contact Owner dialog"*, where you can contact the business owner of the object.
- Permissions - Use this option to display the *"Permission dialog"*, where you can set permissions for an object.
- Paste Before - Use this option to move the object that you have cut before the selected object at a sibling level.
- Paste After - Use this option to move the object that you have cut after the selected object at a sibling level.
- Paste As Child - Use this option to move the object that you have cut to be a child of the selected object.

  The cut object will be pasted after the last existing child of the selected object if there are any, otherwise it will become the only child. You can use Paste Before or Paste After instead if you want to position the cut object relative to an existing child.

Notes

The guidelines for reordering objects in the Initiatives pane and Strategy pane are as follows:

- You cannot paste an object to itself or one of its descendants.
- You cannot paste an object as a child of a KPI. (KPIs cannot have children.)
- To paste an object, you must have the correct permissions for modifying the object that is to become its parent.
- You can cut and paste only one object (and its descendants, if any) at a time.
- You cannot cut and paste an object from the Initiatives pane to the Strategy pane or from the Strategy pane to the Initiatives pane.
- Because cutting and pasting an object may have an effect on weight assignments and permissions, after the paste you may need to manually adjust:
  - Weight allocations, if weighted assessment rules are being used
  - Permissions of the moved object or its new ancestor objects (if different).

Insert Filter dialog

Use this dialog to add a SQL FILTER function to a column formula in the *"Edit Column Formula dialog: Column Formula tab"*.

For more information, see:

- *"Editing the Formula for a Column"*

Components

Filter Function Area

Displays the SQL function in the form:

FILTER(expr USING filter_expressions)

Where:

- expr is an expression that contains at least one measure column. For example, the expression "sales + 1" is allowed if "sales" is a measure column. The expression "productid" is not allowed if "productid" is a scalar attribute.

- filter_expressions is a Boolean expression (evaluates to TRUE or FALSE) and does not contain any measure columns. Also, this expression cannot contain any nested queries.

    > **Note:** If you selected some text in the Formula area before clicking Filter, then it is incorporated in the inserted SQL function, replacing the expression token (expr). For example, if you had selected "Sales Measures".Dollars before clicking Filter, then the SQL function would look like this: FILTER("Sales Measures"."Dollars" USING filter_expressions). A complex filter statement might replace the filter_expressions token as follows: `FILTER("Sales Measures".Dollars USING ((Periods."Year"='1999') AND ((Markets.District='CINCINNATI DISTRICT") OR (Markets.District='DENVER DISTRICT'))))`

Use this area to define filter_expressions by adding a single filter expression or building a complex filter statement using multiple filter expressions.

For each filter expression to add, select a column from the Subject Areas pane. The *"New Filter dialog"* is displayed where you create the filter to add to the filter expression.

As you define the filter_expressions, you can use the following:

- Operator to toggle between AND and OR to specify the relationship between multiple filter expressions.
- Filter item toolbar to manage a filter expression. The filter item toolbar is the collection of buttons that displays when you mouse over a filter expression. It includes the following buttons:
    - Edit Filter - Use this button to display the , where you edit the filter expression's criteria.
    - Copy Filter - Use this button to copy the filter expression. When you click this button, a copy of the filter expression is displayed below the original filter expression.
    - Delete- Use this button to delete the filter expression.

Subject Areas

Use the *"Subject Areas pane"* to select columns to add to the filter expression.

Catalog

Use the *"Catalog pane"* to select filters from the catalog to add to the filter expression.

Insert Function dialog

Use this dialog to select a function to add to a formula in the *"Edit Column Formula dialog: Column Formula tab"*.

For more information, see:

- *"Editing the Formula for a Column"*
-
-

Components

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Functions

Use this tree to select a function to add to a formula. Expand a function group to show a list of functions within that group.

Selected

Displays the name of the function that is currently selected in the Functions tree.

Syntax

Displays the syntax of the function that is currently selected in the Functions tree.

Where

Displays descriptions of the arguments for the syntax.

Example

Displays an example of the function.

Description

Displays a description of the function that is currently selected in the Functions tree.

Notes

- When you click the f(...) button in the Edit Column Formula: Column Formula dialog (or the Edit Formula dialog), if:
  - Some text is selected in the Formula area, then the selected text is incorporated into the inserted function formula when you click OK.
  - If no text is selected in the Formula area, then the function's expression is inserted and the first argument (denoted by tokens expr or expr1) is automatically selected when you click OK.

Insert Variable dialog

Use this dialog to add a variable (either session, repository, or presentation) to a formula in the "*Edit Column Formula dialog: Column Formula tab*" or in the "*New EVALUATE_PREDICATE Function dialog*".

For more information, see:

- "*Editing the Formula for a Column*"
-
-
-

Components

Variable Name

This field is available only if you have selected Session and Repository as the variable type to add.

Use this field to enter the name of the session or repository variable, for example USER.

Variable Expression

This field is available only if you have selected Presentation as the variable type to add.

Use this field to enter the name of the presentation variable, for example MyFavoriteRegion.

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To type-cast (that is, convert) the variable to a string, enclose the name in single quotes, for example:

```
'user.displayName'
```

Default Value (Optional)

This field is available only if you have selected Presentation as the variable type to add.

Use this field to enter a default value for the presentation variable, for example EASTERN REGION.

Notes

- When you click OK in this dialog, the appropriate expression for the variable is created and inserted in the Formula area. For example:

  ```
  @{MyFavoriteRegion}{EASTERN REGION}
  ```

Related Topics

"Using Variables"

Invoke Action dialog

Use this dialog to provide values for action parameters and to run an action.

For more information, see:

- *"Actions"*
-
-

Key Resource dialog

Use this dialog to identify a user who is a key resource on an initiative.

For more information, see:

- *"Collaboration pane"*
- *"Initatives"*
- *"Creating an Initiative"*

Components

User

Displays the name of a user who is a key resource on the initiative. Click the Set User button to display the , where you search for and select the user.

Capacity

Use this field to enter the percentage of full time hours the user devotes to this initiative, for example, 80%.

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KPI editor

Use this editor to create and modify KPIs that monitor your company's performance and goals. The KPIs that you create define performance targets and evaluate the performance of objectives and initiatives.

For more information, see:

- *"Creating a KPI"*

This editor is also displayed as:

Scorecard editor: KPI tab
Components

General Properties

Use the *"KPI editor: General Properties page"* to enter the business owner, the actual value, the target value, and to turn on trending to compare KPI values with those from a previous period.

Dimensionality

Use the *"KPI editor: Dimensionality page"* to specify dimensions that determine how Oracle BI EE aggregates data in the KPI.

States

Use the *"KPI editor: States page"* to specify the performance thresholds and range of values that determine how KPI performance is evaluated and represented. Also use this page to create action links for the KPI.

Related documents

Use the *"KPI editor: Related Documents page"* to attach any relevant document or business intelligence object stored in the Oracle BI Presentation Catalog.

Custom Attributes

Use the *"KPI editor: Custom Attributes page"* to create custom columns for the KPI.

Related Topics

"Scorecard editor"

KPI editor: Custom Attributes page

Use this page of the *"KPI editor"* to create custom columns for the KPI. You can add a maximum of five custom columns.

For more information, see:

- *"Creating a KPI"*

This page is also displayed as:

Scorecard editor: KPI tab
Components

Custom Columns

Displays the custom columns for the KPI.

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Use this table to create custom columns. To add a custom column row to the table, click the Add button.

Label

Use this field to enter a name for the custom column.

Formula

Use this field to specify a value to compare to the target value. Consider the following options:

- Click the down-arrow button to access the subject area list and select a measure. For example, "Sales Measures"."Dollars".

- Place the cursor in the field and enter the formula that calculates the column values.

Add

Use this button to add a custom column row to the Custom Columns table.

Remove

Use this button to remove the row that is currently highlighted in the Custom Columns table.

Related Topics

"KPI editor: General Properties page" *"KPI editor: Dimensionality page"* *"KPI editor: States page"* *"KPI editor: Related Documents page"* *"Scorecard editor"*

KPI editor: Dimensionality page

Use this page of the *"KPI editor"* to add or remove KPI dimensions. This page also enables you to pin a value to a dimension.

Dimensions are based on attribute columns and hierarchical columns and determine how Oracle BI EE aggregates data in the KPI. For example, if you are creating a KPI for product sales, you could add dimensions that allow the user to view sales by both a specific region and a specific year.

Note that almost all KPIs should include a Time dimension (see *"Creating a KPI"* for additional information), except constants or metrics defined only to be current snapshots like "Inventory On Hand" or "Current Phone Support Wait Time." It is not necessary to pin the time dimension to a specific value. It is a best practice to leave Time unpinned within the KPI definition. For more information, see the below description for the Value field. An unpinned Time dimension enables a dashboard or scorecard user to select the time period to display and enables the creation of trend and historical charts or tables.

For more information, see:

- *"Creating a KPI"*
- *"Dimensions and Pinned Dimension Values"*

This page is also displayed as:

Scorecard editor: KPI tab

Components

Dimension

Displays the column name that you chose for the dimension. To add a dimension to the KPI, click the Add button.

Value

Use the down arrow to browse or search for and choose a value to filter the dimension. When a user views the KPI, the filtered or "pinned" value aggregates the KPI. Select is prompted to do one of the following:

- Allow the watchlist or scorecard designer to pin the dimension values when adding the KPI to a watchlist or scorecard.

- Provide the user with a field to select the dimension's value from the point of view area in the watchlist, scorecard, or dashboard.

Note that when the designer pins a dimension value, that value cannot be changed when a user adds the KPI to a watchlist or scorecard. Only the designer or user with the appropriate permissions can access the KPI editor to modify a dimension's pinned value.

Oracle suggests that you create KPIs that are not pinned in their initial definition.

Add

Use to access the KPI's subject area where you can select another attribute or hierarchical column as a dimension.

Remove

Use to delete the highlighted dimension from the KPI.

Related Topics

"KPI editor: General Properties page" *"KPI editor: States page"* *"KPI editor: Related Documents page"* *"KPI editor: Custom Attributes page"* *"Scorecard editor"*

KPI editor: General Properties page

Use this page of the *"KPI editor"* to specify the actual value (collected or calculated value) and the target value (desired value) of the KPI. You can enter, insert, or calculate these values.

Also use this tab to assign the business owner responsible for the KPI and specify if the KPI should support trending. Trending enables you to compare previous values to current values. For example, you can compare your December 2009 sales to the current year's sales.

To analyze KPIs by multiple dimensions (for example, Product, Geography, and Time), ensure that the data you use to calculate actual and target values is also dimensioned by Product, Geography, and Time.

For more information, see:

- *"Creating a KPI"*

This page is also displayed as:

Scorecard editor: KPI tab
Components

Description

Use this field to enter a description of the KPI.

Business Owner

Use this field to view and select the user ID of the person responsible for the business performance of the KPI. Business owners have the ability to override the KPI's statuses. If you do not set a business owner, then you cannot override the status.

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Click the Set User button to search for and select a business owner.

Set User

Use this button to open the *"Select Business Owner dialog"*, where you can search for the person whom you want to assign as the KPI's business owner.

Actual Value

Use this field to specify a value to compare to the target value. Consider the following options:

- Click the down-arrow button to access the subject area list and select a measure. For example, "Sales Measures"."Dollars".

  If you are working with a writeable Essbase data source, you must specify the filter. For example, FILTER("Basic2"."Basic - measure" USING "Scenario"."Gen2,Scenario"='Actual' AND "Measures"."Gen4,Measures" = 'Marketing').

- Place the cursor in the field and enter the actual value.

- Click Edit Actual Value Formula to access the *"Edit Column Formula dialog: Column Formula tab"* to create a formula that calculates the actual value. For example, ((Sales - Cost)/Sales) * 100.

  If you are working with a writeable Essbase data source, you must modify the filter. For example, FILTER("Basic2"."Basic - measure" USING "Scenario"."Gen2,Scenario"='Actual' AND "Measures"."Gen4,Measures" = 'Marketing').

Target Value

Use this field to specify the value that you want the KPI to achieve. The target value is a quantifiable goal for each measure. Consider the following options:

- Click the down-arrow button to access the subject area list and select a measure. For example, "Sales Measures"."Dollars".

  If you are working with a writeable Essbase data source, you must specify the filter. For example, FILTER("Basic2"."Basic - measure" USING "Scenario"."Gen2,Scenario"='Budget' AND "Measures"."Gen4,Measures" = 'Marketing').

- Place the cursor in the field and enter the actual value.

- Click Edit Target Value Formula to access the *"Edit Column Formula dialog: Column Formula tab"* to create a formula that calculates the actual value. For example, ((Sales - Cost)/Sales) * 100.

  If you are working with a writeable Essbase data source, you must modify the filter. For example, FILTER("Basic2"."Basic - measure" USING "Scenario"."Gen2,Scenario"='Budget' AND "Measures"."Gen4,Measures" = 'Marketing').

Writeable

Use this option to specify whether, if you are working with an Essbase data source, the corresponding Actual Value or Target Value field is writeable. At runtime, the changes that the user makes to these fields are saved to the repository. If you select this option:

- You must also use the Post-update Business Rule list to specify how you want the system to recalculate the data.

Post-Update Business Rule

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Use this list if you have selected the Writeable option for either the actual value or target value. This list displays the calculation scripts that the administrator created in Oracle Essbase. The calculation script that you select determines how the system recalculates the data after the user modifies the actual value or target value.

For more information about creating KPIs with writeable actual and target values, see .

Down Arrow

Use this button to access the subject area list for Actual Value, Target Value, and Compare to Prior. From this list you can browse for and select a column for the value.

Edit Value Formula

Use this button to access the *"Edit Column Formula dialog: Column Formula tab"* to create a formula that calculates the Actual Value or Target Value.

Enable Trending

Use this option to indicate the direction in which change occurs (up or down), the extent of the change (as a value and percentage), and if the change indicates an increase or decrease in performance. If trending is enabled, then users see a trend icon (see for additional information on trend icons) on nodes in Scorecard diagrams, in KPI watchlists, and in other tables within Scorecard that reference this KPI. Users also see a history chart on the KPI Details and KPI Overview tabs in Scorecard. See *"Creating a KPI"* for additional information.

To use trending, ensure that a time dimension is defined in the subject area.

Data Format

Displays an example of how the numeric data displays in the KPI. Click Edit to access the dialog where you specify the data format settings for the KPI.

Compare to Prior

Use this option to select the period of time to use for trend analysis. The period that you select determines the time periods displayed in history charts on the KPI Details tab and KPI Overview tab in Scorecard. See *"Creating a KPI"* for additional information.

For example, to compare Units Shipped quarterly, select "Fiscal Time"."Quarterly". In this example, the KPI trends upward, downward, or unchanged based on the KPI values from one quarter to the next. Any KPI change values are computed using "Quarterly" as the period of analysis.

Tolerance

Use this field to enter the tolerance value for the trend. This field enables you to prevent reporting non-significant trends, such as expenses being over-budget by $100.

The tolerance value that you enter must be a literal and can be expressed either as a percentage or absolute value (for example, 5,000 or 5%). The tolerance level must be met before the KPI displays the performance as improving or worsening.

Tolerance Down Arrow

Use this field to specify how to measure tolerance value that you entered in the Tolerance field. Choose % Change to measure it by percent or Change to measure tolerance by the actual value.

Related Topics

"KPI editor: Dimensionality page" *"KPI editor: States page"* *"KPI editor: Related Documents page"* *"KPI editor: Custom Attributes page"* *"Scorecard editor"*

KPI editor: Related Documents page

Use this page of the *"KPI editor"* to view and add links to business intelligence objects or web pages that provide additional information about or can be used with the KPI. After you add related documents to a KPI, the related documents display in the "KPI editor: Related Documents page" and on the "Scorecard editor: KPI Details tab".

For more information, see:

- *"Creating a KPI"*

This page is also displayed as:

Scorecard editor: KPI tab
Components

Name

Displays the link to the related item. Click this link to access the related document, or click Edit to modify the link.

Location

Displays the location of the related item. The location is either a location within the catalog or a URL to a location outside of the catalog.

Type

Displays the type of item. "Catalog" displays if the item is located in the catalog, or "Web" displays if the item is located outside of the catalog.

Add

Use to access the to add an item to the Related Documents table.

Edit

Use to access the to edit an item that has been added to the Related Documents table.

Remove

Use to remove the highlighted row from the Related Documents table.

Related Topics

"KPI editor: General Properties page" *"KPI editor: Dimensionality page"* *"KPI editor: States page"* *"KPI editor: Custom Attributes page"* *"Scorecard editor"*

KPI editor: States page

Use this page of the *"KPI editor"* to:

- Indicate if high, low, or target KPI values are desirable
- Specify the statuses and thresholds to be used to measure the performance of the KPI.

  KPI status is determined by comparing the actual value against the target value and then placing the result in a corresponding range that defines levels of performance status (for example, Good, Warning, or Critical).

- Specify the scores to which KPI statuses are to be mapped.

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In a scorecard, the scores of KPIs that are used to measure the progress of initiatives and objectives are mapped to Scorecard scores so that they can be used to measure the performance of the objectives or initiatives. For more on scoring in Scorecard, see "*Understanding Initiative or Objective Performance Assessment*".

- Create or assign action links that the user can click to initiate a predefined process based on KPI status.

For more information, see:

- "*Creating a KPI*"

This page is also displayed as:

Scorecard editor: KPI tab

Components

Goal

Use this list to specify if high, low, or closer to target values indicate the KPI's performance goal.

For example, select High values are desirable for a Customer References KPI or Low values are desirable for an Unresolved Support Calls KPI.

Status label

Use this field to enter the label for the status, for example, Critical.

Color

Use this button to access the where you can select a text color to represent the corresponding status, for example, red for Critical.

Icon

Use this button to access the where you can select an icon to represent the corresponding status, for example, a red X for Critical.

Actions

Use this button to display the "*Action Links dialog*" wherever the KPI displays, such as on objectives, initiatives, KPI Watchlist, or on the scorecard views on dashboards. This dialog specifies the processes or operations to be performed or invoked if the status of a KPI corresponds to a specific performance state. Action links display from the right-mouse click wherever the KPI displays, such as on an initiative or a KPI Watchlist.

For example, if a KPI for quarterly revenue is less than a particular amount, then an action is triggered that automatically schedules a mandatory meeting of sales directors and managers.

define as % of target value

Use this box to specify whether you want to define thresholds as discrete values or as percentages of the target value. Select this box to define thresholds as percentages of the target value. Deselect this box to define discrete values for thresholds.

Thresholds

Use these fields to enter the numeric values that set the boundaries for the status ranges.

Depending on whether you selected the define as % of target value box, you can specify either of the following:

- Percentages of the target value, for example 80%.

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- Discrete values.

    For example, to indicate that sales 120 and below indicate critical performance but that sales above 120 reflect acceptable performance, enter 120 in the field that corresponds to the critical status.

    You can use the following as thresholds:

    - The Actual Value or Target Value that you specified for the KPI.
    - Values that you enter.
    - Values calculated by a formula that you define in the *"Edit Column Formula dialog: Column Formula tab"*. To do so, click the Thresholds button.
    - Variables that you define in the *"Edit Column Formula dialog: Column Formula tab"*. To do so, click the Thresholds button. See *"Using Variables"* for additional information on variables.
    - Measures representing other business metrics from the subject area.

Remove

This button is displayed only if the Show Advanced Properties options is selected.

Use this button to remove the threshold.

Add

This area is displayed only if the Show Advanced Properties options is selected.

Use this button to add another threshold above or below the threshold.

Show Advanced Properties

Use this option to specify whether to display the scores to which KPI statuses are mapped.

Score

This area is displayed only if the Show Advanced Properties options is selected.

Uses this area to specify the scores to which KPI statuses are mapped. Use the Score button to display these options:

- Enter value - Use this option to specify a numerical value for each score.

- Use percent of target - Use this option to specify that the score is the percent the KPI's actual value is of the target value. For example, if the KPI's actual value is 85% of the target value, the score is 85.

- Use percent of variance - Use this option to specify that the score is the percent by which the KPI's actual value differs from the target value. For example, if the percent by which the KPIs actual value differs from the target value is 50%, the score is 50.

- Use a custom expression - Use this option to display the , where you create a custom expression to determine the score, for example Revenue * 5%.

If KPI returns no data

Use this box to specify the status to assign to a KPI that returns no data. The options are No status or one of the defined statuses, for example, Critical.

Related Topics

"KPI editor: General Properties page" *"KPI editor: Dimensionality page"* *"KPI editor: Related Documents page"* *"KPI editor: Custom Attributes page"* *"Scorecard editor"*

KPI Watchlist editor

Use this editor to create a KPI watchlist.

This editor is also displayed as:

Scorecard editor: KPI Watchlist tab

For more information, see:

- *"Scorecard editor"*
- *"KPI Watchlists"*

Components

Catalog

Use the *"Catalog pane for Scorecard"* to locate and drag and drop KPIs from the catalog to build a KPI watchlist.

Performance

Use the *"KPI Watchlist editor: Performance tab"* to build the watchlist by dragging and dropping KPIs from the catalog pane to the KPI Watchlist. The KPI watchlist displays the KPIs' performance levels and other KPI data.

Details

Use the *"KPI Watchlist editor: Details tab"* tab to supply a description of the KPI watchlist, specify a business owner, and attach any necessary related documents.

Toolbar

This toolbar contains the following buttons:

- Back - Use this button to go backward through your point of view history to select a previous point of view. The (Default Value) option returns to the point of view with which you started.
- Forward - Use this button to go forward through your point of view history to select a previous point of view.
- Save - Use this button to save the watchlist in the default location.
- Save As - Use this button to name and save the watchlist to another location.
- Contact Owner - Use this button to display the *"Contact Owner dialog"*, which you can use to quickly contact the watchlist's business owner.
- Refresh KPI Values - Use this button to refresh the KPI values displayed in the KPI Watchlist table.

KPI Watchlist editor: Details tab

Use this tab of the *"KPI Watchlist editor"* to specify supporting information for the KPI watchlist.

For more information, see:

- *"KPI Watchlists"*

Components

KPI Watchlist Name

Displays the name of the KPI watchlist.

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Description

Use this field to enter a description of the KPI watchlist.

Business Owner

Displays the user ID of the person responsible for managing the KPI watchlist. To specify the business owner, click the Set User button to display the , where you can search for and select the business owner.

Related Documents

Use the *"Related Documents area"* to view and manage documents that provide supporting information to the KPI watchlist.

Name

This field displays a name as a link to the related document.

Location

This field displays the location of the related document as either BI content (for example, an analysis or a dashboard page) or a web address.

KPI Watchlist editor: Performance tab

Use this tab of the *"KPI Watchlist editor"* to create a KPI watchlist. When you add a KPI to the watchlist, you add an instance of the KPI. You can then assign default dimension values to the KPI's instance. From this tab you can also modify the KPI stored in the catalog, or view the KPI instance as an analysis.

For more information, see:

- *"KPI Watchlists"*

Components

KPI Watchlist

Lists the KPIs whose performance you want to monitor.

Use this watchlist to manage these KPIs. For more information about watchlists, see *"Watchlists"*.

To add a KPI to the watchlist:

- If you are creating the watchlist within a scorecard, drag the KPI from the *"Catalog pane for Scorecard"*, *"Strategy pane"*, *"Initiatives pane"*, or the *"Scorecard Documents pane"* and drop it on the watchlist.
- If you are creating the watchlist outside a scorecard, select any KPI from the "Catalog pane" and drag it to the watchlist.

The *"Add KPI dialog"* is displayed, where you pin dimension values or assign a label for this usage of the KPI.

> ✎ **Note:** Within a scorecard, the dimension settings you make in the *"Settings dialog: Dimension Settings tab"* do not affect the dimension values for the KPIs in the watchlist. (For more information on dimension settings, see *"Setting Up the Point of View Controls"*.

Related Topics

"KPI Watchlist editor: Details tab"

Layout pane

Use this pane to specify the layout of data in data views (graphs, gauges, funnel graphs, pivot tables, tables, trellises, and performance tiles).

For more information, see:

- "*Modifying the Layout of Data in Views*"

This pane is part of the following editors:

- "*Results tab: Funnel editor*"
- "*Results tab: Graph editor*"
- "*Results tab: Gauge editor*"
- "*Results tab: Pivot Table editor*"
- "*Results tab: Table editor*"
- "*Results tab: Trellis editor*"

Components Common to All Data Views

> ✏ **Note:** This section describes the components that are common to all data views. Additional components are available in the Table and Pivot Table editors (see), in the Trellis editor (see) and in the Graph, Funnel, and Gauges editors (see).

Drop Targets

Use drop targets to modify the way that data is arranged in a view. By dragging columns from one drop target and dropping them in another, you can rearrange the data to suit your needs.

The drop targets that are displayed in this pane depend on the type of view. For more information, see "*Drop Targets*".

Properties

Use this button to display the Properties dialog for a drop target. For example, if you click the button beside the Sections drop target, then the "*Section Properties dialog*" is displayed. If you click the button beside the view type name for tables and pivot tables, then the Properties dialog for that type of view is displayed.

Additional Components Common to the Graph, Funnel, and Gauge Editors

This topic is not applicable for waterfall graphs.

Display as Slider

Use this box to specify whether the members of the columns dropped in the Sections drop target are to be displayed as a section slider rather than as unique views. Select this box to display the members as a section slider.

Deselect this box to display each member as a unique view.

Deselect this box to hide sliders in graph views that listen to master-detail events, if you want to simplify the appearance of an analysis or dashboard.

For more information on section sliders, see "*Defining a Section Slider in a Graph or Gauge*".

Use unified scale

This box is available only for line-bar graphs.

Use this box to specify whether to display the lines and bars using the same scale or two separate scales, one for the lines and one for the bars.

Select this box to use one scale for both the lines and bars. The measure column that has the higher values is used for the scale.

Deselect this box to use two scales.

Show In Legend

Use this box to specify whether a legend is to be displayed to show the color variation of the columns dropped in the Vary Color By (Horizontal Axis) drop target.

Additional Components Common to Waterfall Graphs

Show Legend

Use this check box to display the legend. This check box is automatically selected and borders are turned off by default. If the format of the graph is set to Single Color, the legend does not display. See for additional information.

Totals

Use this button to add a subtotal or total for the view and to display the following options:

- Total - By default, the last bar is a total bar. Deselect the measure to remove the total.

  o The total is annotated with a Summation icon by default.

  o You can insert subtotals for the second and second-to-last columns. The data layout must include at least three measures to include a subtotal bar.

- After - Use this option to include subtotals after the data items.

- Before - Use this option to include subtotals before the data items.

Group By (Horizontal Axis) - Use this button to perform groupings. Dimensions are dropped into this drop target. Select a single grouping column on which to subtotal, click the Totals button to the right of Group By, and then select one of the grouping columns from the list. The Summation icon displays on the grouping to which the subtotal was applied. The selection is reflected in the results pane, in the tooltip subtotals, and along the horizontal axis.

Additional Components Common to the Table and Pivot Table Editors

Totals

Use this button to add a grand total for that drop target for the entire view for attribute columns and hierarchical columns and to display the following options:

- None - Use this option to exclude totals.

- Before - Use this option to include totals before the data items. For example, if you add a total on a row that contains regions and select Before, the total is shown before individual districts in the region are listed. (For pivot tables only.)

- After - Use this option to include totals after the data items. (For pivot tables only.)

- At the Beginning - Use this option to stack all the totals at the top of the view. (For pivot tables only.)

- At the End - Use this option to stack all the totals at the bottom of the view (For pivot tables only.)

- Labels Only (no totals) - Use this option to display labels for totals, but not the total values. (For pivot tables only.)

- Format Labels - Use this option to display the *"Edit Format dialog"* where you specify the custom text to insert into a totals heading using the Caption field and where you format the labels.

- Format Values - Use this option to display the *"Edit Format dialog"* where you specify the formatting of the totals values.

More Options

Use this button to display the following options:

- Format Headings - Use this option to display the *"Edit Format dialog"*, where you apply cosmetic formatting to the headings.

  For more information about the cosmetic formatting that you can apply to headings, see *"Cosmetic Formatting"*

- Format Values - Use this option to display the *"Edit Format dialog"*, where you apply cosmetic formatting to the values.

- Hidden - Use this option to hide the column from the output, or, for the Measure Labels element in a pivot table, to hide the measure labels. For more information on the Measure Labels element, see *"Drop Targets"*.

  Hidden columns do not affect the aggregation of the values.

- Show Data As - Use this option to display a measure as either an actual or a relative value. You can display the relative value of the measure, compared to the total, without the need to explicitly create a calculated item for it.

  For more information, see .

  > ✏️ **Note:** The Show Data As options is available only for items that are stored or calculated measures.

  Select one of the following options:

  o Values - Use this option to display the actual values of the measure column.

  o Percent of - Use this option to convert a stored or calculated measure into a percent of one of the following:

    - Column - Shows the percentage of the column that the value constitutes.
    - Row - Shows the percentage of the row that the value constitutes.
    - Section - Shows the percentage of the section that the value constitutes.
    - Page - Shows the percentage of the page that the value constitutes.
    - Column Parent - Shows the percentage of the column parent that the value constitutes.
    - Row Parent - Shows the percentage of the row parent that the value constitutes.
    - Layer - Displays a menu from which you select the column in the view from which you obtain the percentage that the value constitutes.

    > ✏️ **Note:** The number of decimal places depends on the type of measure.

  o Index of - Use this option to convert a stored or calculated measure into an index value of one of the same options that are available for Percent of. For example, Column shows the index value of the column that this value constitutes.

- Aggregation Rule - Use this option to override the default aggregation rule for a measure in tables and pivot tables by selecting the aggregation rule to apply, as described in . For attribute columns, ensure that Report-Based Total is selected. This option is not available for the Prompts or Sections drop targets.

> ✎ **Note:** If the **Report-Based Total** option is not selected, then the Oracle BI Server calculates the total based on the entire result set, before applying any filters to the measure columns.

- Display as Running Sum - Use this option to display numeric measures as running sums, where each consecutive cell for the measure displays the total of all previous cells for that measure. This option is a display feature only that has no effect on actual pivot table results.

  For more information, see .

- New Calculated Item - Displays the "*New Calculated Item dialog*", where you create a calculated item for the column. It also automatically creates a selection step that contains the calculated item. See for additional information.

- Calculated Item - Displays the , where you can edit the calculated item.

- Hide Details - Use this option to suppress all column members except calculated items in the view. For example, suppose that you have a pivot table that is displaying Region on the row edge, and it is currently showing the values Eastern, Western, and Central. Suppose that you create a new calculated item called "Other Regions" that is the sum of Western + Central. If you select Hide Details, then Eastern, Western, and Central will be suppressed and only the "Other Regions" calculated item will show in the view.

  For a view in which columns have been combined from one or more subject areas using Set operations, Hide Details displays these options:

  - None - Use this option to not suppress any column members in the view.

  - Current View - Use this option to suppress all column members except calculated items in the current view.

  - All Views - Not available if the calculated item was applied to a specific view. Use this option to suppress all columns members except calculated items in all views.

- Duplicate Layer - Use this option to duplicate a column. You create a duplicate that applies only to this view. The duplicate does not retain filters, selection steps, or formatting that were applied to the original.

- Remove Column or Remove Duplicate - Use this option to remove the item on which you have clicked, such as a column or duplicated item. The column is removed from this view and all other views for the analysis. The duplicate is removed from this view only.

- Place Value in New Row - Use this option to display section values on different rows. Where section values are displayed together in a row, you can specify that a section value is displayed on a new row.

- Hide Repeated Values -Use this option to display column values for a section once and hide repeated values until the values change. When the section column value changes, it is displayed indented to the right to show the hierarchical structure.

- Format Measure Label - This option is available only for the Measure Labels element in a pivot table. Use this option to display the "*Edit Format dialog*", where you apply cosmetic formatting to measure labels. For more information on the Measure Labels element, see "*Drop Targets*".

Additional Components Common to the Trellis Editor

Visualization

Use this area to:

- Select the type of graph or graphs in which to display the data. To do so:

    o For a simple trellis, in the View As box, select one of the following options:

        - Vertical Bar - Use this option to specify a vertical bar graph.
        - Horizontal Bar - Use this option to specify a horizontal bar graph.
        - Line - Use this option to specify a line graph.
        - Area - Use this option to specify an area graph.
        - Line-Bar - Use this option to specify a line-bar graph.
        - Scatter - Use this option to specify a scatter graph.
        - Pie - Use this option to specify a pie graph.
        - Bubble - Use this option to specify a bubble graph.

    o For an advanced trellis, first select the measure for which you want to specify a graph type by using the Previous and Next buttons (above the View As box) and then, in the View As box, select one of the following options:

        - Numbers - Use this option to specify a numbers graph.
        - Spark Line - Use this option to specify a spark line graph.
        - Spark Bar - Use this option to specify a spark bar graph.
        - Spark Area - Use this option to specify a spark area graph.

- Modify the way that data is arranged in the view. By dragging columns from one drop target and dropping them in another, you can rearrange the data to suit your needs.

    The drop targets that are displayed in this pane depend on the type of graph. For more information, see *"Drop Targets"*.

More Options

Use this button to display the following options:

- Format Headings - Use this option to display the *"Edit Format dialog"*, where you apply cosmetic formatting to the headings.

    For more information about the cosmetic formatting that you can apply to headings, see *"Cosmetic Formatting"*

- Format Values - Use this option to display the *"Edit Format dialog"*, where you apply cosmetic formatting to the values.

- Hidden - Use this option to hide the column from the output, or, for the Measure Labels element in a pivot table, to hide the measure labels. For more information on the Measure Labels element, see *"Drop Targets"*.

    Hidden columns do not affect the aggregation of the values.

- New Calculated Item - Displays the *"New Calculated Item dialog"*, where you create a calculated item for the column. It also automatically creates a selection step that contains the calculated item. See for additional information.

- Calculated Item - Displays the , where you can edit the calculated item.

- Hide Details - Use this option to suppress all column members except calculated items in the view. For example, suppose that you have a pivot table that is displaying Region on the row edge, and it is currently showing the values Eastern, Western, and Central. Suppose that you create a new calculated item called "Other Regions" that is the

sum of Western + Central. If you select Hide Details, then Eastern, Western, and Central will be suppressed and only the "Other Regions" calculated item will show in the view.

For a view in which columns have been combined from one or more subject areas using Set operations, Hide Details displays these options:

- None - Use this option to not suppress any column members in the view.

- Current View - Use this option to suppress all column members except calculated items in the current view.

- All Views - Not available if the calculated item was applied to a specific view. Use this option to suppress all columns members except calculated items in all views.

- Duplicate Layer - Use this option to duplicate a column. You create a duplicate that applies only to this view. The duplicate does not retain filters, selection steps, or formatting that were applied to the original.

- Remove Column or Remove Duplicate - Use this option to remove the item on which you have clicked, such as a column or duplicated item. The column is removed from this view and all other views for the analysis. The duplicate is removed from this view only.

Aggregation Rules and Functions

The following list describes the aggregation rules that are available for measure columns in the *"Layout pane"* and for columns in the *"Edit Column Formula dialog: Column Formula tab"*. The list also includes functions that you can use when creating calculated items for analyses.

- Default - Applies the default aggregation rule as in the Oracle BI repository or by the original author of the analysis. Not available for calculated items in analyses.

- Server Determined - Applies the aggregation rule that is determined by the Oracle BI Server (such as the rule that is defined in the Oracle BI repository). The aggregation is performed within Presentation Services for simple rules such as Sum, Min, and Max. Not available for measure columns in the Layout pane or for calculated items in analyses.

- Sum - Calculates the sum obtained by adding up all values in the result set. Use this for items that have numeric values.

- Min - Calculates the minimum value (lowest numeric value) of the rows in the result set. Use this for items that have numeric values.

- Max - Calculates the maximum value (highest numeric value) of the rows in the result set. Use this for items that have numeric values.

- Average - Calculates the average (mean) value of an item in the result set. Use this for items that have numeric values. Averages on tables and pivot tables are rounded to the nearest whole number.

- First - In the result set, selects the first occurrence of the item for measures. For calculated items, selects the first member according to the display in the Selected list. Not available in the Edit Column Formula dialog.

- Last - In the result set, selects the last occurrence of the item. For calculated items, selects the last member according to the display in the Selected list. Not available in the Edit Column Formula dialog.

- Count - Calculates the number of rows in the result set that have a nonnull value for the item. The item is typically a column name, in which case the number of rows with nonnull values for that column are returned.

- Count Distinct - Adds distinct processing to the Count function, which means that each distinct occurrence of the item is counted only once.

- None - Applies no aggregation. Not available for calculated items in analyses.

- Server Complex Aggregate - Applies the aggregation rule that is determined by the Oracle BI Server (such as the rule that is defined in the Oracle BI repository). The aggregation is performed by the Oracle BI Server, rather than within Presentation Services. Not available for calculated items in analyses.

- Report-Based Total (when applicable) - If not selected, specifies that the Oracle BI Server should calculate the total based on the entire result set, before applying any filters to the measures. Not available in the Edit Column Formula dialog or for calculated items in analyses. Only available for attribute columns.

Legend pane

Use this pane to view the legend for a cause & effect map or strategy map.

For more information, see:

- *"Cause & Effect Maps"*
- *"Creating a Cause & Effect Map"*
- *"Strategy Maps"*
- *"Creating a Strategy Map"*

This pane is part of the *"Cause & Effect Map tab: Diagram tab"* or the .

Components

Legend

Displays and explains the symbols used on the cause and effect map or strategy map to indicate the proportionality. That is, whether changes in performance or value in the cause and effect relationship are directly proportional (direct) or inversely proportional (inverse) and strength (strong, moderate, or weak) of cause & effect relationships.

Link or Image Properties dialog

Use this dialog to specify properties for a text link or image link that you are adding to a dashboard page.

For more information, see *"Dashboard Content"*.

Components

Caption

Use this field to enter the text to display for the text link or image link.

Entering a caption for an image link is optional. If you do enter one, then you must also specify, in the Image Layout box, where the caption is to be displayed relative to the image.

Destination

Use this field to specify what is to happen when the user clicks the text or image:

- To add text or an image only, without any links, leave the field empty.
- To specify that an analysis or dashboard should be displayed when the user clicks the link or image, specify the destination as Analysis or Dashboard, and click Browse to display the *"Open dialog"* where you select the analysis or dashboard.
- To specify that another action should occur, such as opening a web site, document, or program, specify the destination as a URL and type the full path into the field that follows the Destination options.

  A link is defined as any URL that the browser can interpret. URLs can point to web sites, documents, images, FTP sites, newsgroups, and so on. Depending on the browser, the following are examples of valid URLs:

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```
ftp://ftp.microsoft.com
news:news.announce.newusers
```

See for more information about the kinds of internal or external content to which you can link.

> ✏ **Note:** Administrators should create a virtual directory on the Presentation server for shared documents called \DashboardFiles that maps to a shared network directory of the same name. This enables users with the appropriate permissions to publish files to this folder, and reference these files by their relative URL names rather than by their fully qualified network share names, for example, \DashboardFiles \AnnualReport.doc instead of \\SharedServer\CommonShare\DashboardFiles\AnnualReport.doc.

Target

Use this box to specify whether the information is to be displayed in the Current Window or in a New Window for the browser.

For every action except sending mail and executing a program, you can control how the link should be displayed. Select the current window when you want the action to occur in the display pane of the dashboard. This leaves the dashboard active but in the background. Choose a new window when you want the action to take place in a new browser window. This opens another instance of the browser.

Image

Use this field to enter the location and name of the image to be displayed. Specify the location as a URL. These are examples:

```
http://imageserver/MyImage.gif
/DashboardFiles/image.gif
```

If the image is not on the local server, then the URL must include http://. If the image is for use in a shared environment, then ensure that the image is located on a network drive that is accessible to all users.

Image Layout

Use this box to select where to display the image, such as to the right or left of the caption or above or below the caption, if you entered a caption.

Notes

- You can reference variables in the Caption, Destination and Image fields. For the syntax to use, see "*What Is the Syntax for Referencing Variables?*" For more information on variables, see "*Using Variables*".

- Table E-3 provides information about the kinds of internal or external content to which you can link:

  Table E-3 Link Options for Adding a Text Link or Image Using the Dashboard Editor

Link Option	Comments
Web site or document	You must locate the URL, or address, for the site or document. You can copy the destination address from the browser's address or location box, and then paste it.
	For a web site, you can omit the http:// portion of the address if the URL resides on the Web server, such as your intranet site.
	If the URL resides on your company's Web server, then you can enter the relative address of the file. For example:

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Link Option	Comments
	\DashboardFiles\Logo.gif
Local or shared document	If the document is for use in a shared environment, then ensure that it is located on a network drive that is accessible to all users. Examples of the kinds of documents that you can open are spreadsheets that contains recent sales reports, a slide presentation that introduces a new product, a Microsoft Word document that contains your company's annual report, a graphic file that contains a map from the airport to your corporate headquarters, and so on. For example, if the document is for your use only, a sample location might be: c:\mycomputer\reports\report.doc For a shared document, specify the UNC name, for example: \\ALLUSERS\reports\report.doc
Send email to a specified user	You must know the mailto URL, for example: mailto:support@oracle.com When the user selects this link, the browser launches the mail application with the To: field filled in. (The browser controls the launching of the mail program.)
Execute a program	If the program is for use in a shared environment, then ensure that it is located on a network drive that is accessible to all users. You can use this feature to download and run an application. (The operating system controls the launching of the application.) For example, to launch Microsoft Word for your use only, a sample location might be: c:\MSOFFICE\OFFICE\winword.exe For a multiuser-licensed program on a shared drive, specify the UNC name for the location, for example: \\ALLUSERS\SOFTWARE\MSOFFICE\OFFICE\WORD\winword.exe
Refresh your browser using JavaScript	Your browser must support JavaScript to use the following example. javascript:window.location.reload() In the Target area, choose the option Current Window.

Manage Favorites dialog

Use this dialog to organize and manage your favorite objects. Favorite objects are those catalog objects that you view regularly or want to view again at another time.

> ✎ **Note:** You cannot organize and manage your favorites in Oracle Business Intelligence Mobile. When working in Oracle Business Intelligence Mobile, you can only add an item to or remove an item from your favorites list. Your Oracle BI EE desktop and Oracle Business Intelligence Mobile favorites lists will synchronize when you log into either Oracle BI EE instance. For more information about favorites in .

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Components

Category Tree

Use this area to browse for and select a favorites category. After you select a category, any favorite objects or subcategories included in the selected category display in the Selected Category area.

You can use this area to organize your categories by dragging them and nesting them into other categories or subcategories. You can use this area to create new categories and subcategories, rename categories and subcategories, rearrange the order of the categories and subcategories, and copy, paste, and remove categories and subcategories.

Selected Category

Use this area to view the favorites objects and subcategories included in the category that you selected in the Category Tree area.

You can use this area to organize your favorites by dragging and dropping them into categories or subcategories. You can use this area to create new subcategories, rename a category, rearrange the order of the objects in the category, and copy, paste, and remove objects from your favorites list.

Toolbar

The toolbar contains the following buttons:

- New Category - Use this button to create a category. After you create a category, you can add your favorite objects to it by dragging and dropping them into the Selected Category area. Or, you can use the Category Tree area to rearrange categories and nest them.

- Copy - Click this button to copy the favorite category or object and then paste it into a new location.

- Paste - Click this button to paste the copied object into a new location. This button is enabled only after you copy a category or object.

- Rename - Click this button to rename the selected category. This button is enabled only after you select a category. You cannot use this button to rename objects.

- Remove - Click this button to remove the selected category or object from your list. Note that this option does not remove the item from the catalog.

- Sort - Click this button to sort the favorites categories or objects in the selected category by either ascending or descending alphabetical order.

Map Properties dialog

Use this dialog to edit the properties of a map view, such as its size and the options that are available on the toolbar.

For more information, see .

Components

Canvas

Use the to specify the size of the map.

Tools

Use the to specify which tools are available for display with the map.

Interaction

Use the to specify whether to automatically create formats when drilling in a map and to specify master-detail linking.

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Labels

Use the to specify whether to show the labels for certain layers on the map view.

Map Properties dialog: Canvas tab

Use this tab of the to specify the size of the map.

For more information, see .

Components

Canvas Size

Use this box to specify the size of the map within its container. You can select either Default, Custom, or a predefined size. If you select Default or a predefined size, then no other options are available and the map is sized to fit its container. The container is whatever area is holding the map, such as the area in the Map editor or the section of a dashboard page.

Width

Use this field to specify the width of the map in pixels.

Height

Use this field to specify the height of the map in pixels.

Map Wrap-Around

Use this box to specify a "wrap-around" feature when you include line formats on a map. Lines are the only format that cross map borders, such as an airplane flight from San Francisco to Tokyo. When this feature is turned on, you can pan the map so that lines are not broken.

Map Properties dialog: Interaction tab

Use the Interaction tab and the Labels tab of the to do the following:

- Specify whether to automatically create formats when users drill in a map. This setting applies to the entire map view, rather than to specific formats.

- Specify whether to show the labels for certain layers on the map view.

- Specify whether the map should dynamically focus on content or zoom to a saved view port when it is initialized.

- Specify an Event Channel on which to listen when Master-Detail linking is enabled.

The tab is also displayed as:

Map Properties dialog: Labels tab
For more information, see:

-

-

- "*Master-Detail Linking of Views*"

Components

Automatically create formats when drilling

Available on the Interaction tab. Use this box to specify whether to automatically create formats each time that you drill in a map. The formats that you create are listed in the Map Formats pane and are based on the formats that exist on the base drill layer. For example, if you have a Region color fill format and a Region pie graph format and you drill on that layer, then you automatically create a color fill format and a new pie format with the drill action.

You can also specify this option in the Map Formats area of the Map editor. The option is updated in both places when you make a change in either place.

Listen to Master-Detail Events

Use this check box to specify whether the map is to act as a detail view in a master-detail relationship and listen for master-detail events. If you select this check box, then complete the Event Channels field.

Event Channels

This field is enabled only if you select the Listen to Master-Detail Events check box.

Use this field to enter one or more channels on which the map is to listen for master-detail events raised by one or more master views. The channel name is case-sensitive and must match exactly the channel name specified in the master view. Separate channels with commas, for example, channel a, channel b.

Initial Map View

Available on the Interaction tab. Use the following options to specify the view port (the initial center of the map and zoom level) when a map view is first loaded or refreshed in a browser:

- Dynamic - Specifies that the map is zoomed or panned to the actual data on the map. (Default)

  This option focuses on the content that the user has added to the map view. This option is preferable for the initial displaying of the map view and for refreshing the map view, because it tries to display all BI content. The specification does not affect the printing of maps, because the coordinates and zoom level control all WYSIWYG interaction.

  This option specifies that you fit the initial display of the map to a layer. The selected layer must have visible contents and is selected based on the following order:

  a. BI Data Layers - The map first tries to display one of the layers that is checked in the BI Data Layers area of the Map editor in the Results tab. Each layer is searched based on the order that is specified in the Interactive BI Layers area of the .
  b. Custom Point Layers - If no BI data layers are available, then a custom point layer is selected, if available.
  c. Feature Layers - If no custom point layers are available, then a layer is selected based on those that are checked in the Feature Layer area of the Map editor in the Results tab and on the order in the .

  The map is zoomed to the maximum zoom-level that still allows the content to fit on the map. This zoom-level might exceed the minimum and maximum visible zoom-levels that are specified for this layer in the . If the minimum and maximum visible zoom-levels are exceeded, then the format is hidden.

- Saved - Specifies that the map is displayed at the last saved map center and zoom level.

  This option focuses on the last map window that the end user viewed. The display is based on the X (longitude) and (Y) latitude center coordinates and on the zoom level. While you can select this option for the initial view port, this option is preferable and is always used for printing maps and other WYSIWYG interactions.

For more information, see .

Show Labels for Spatial Layers

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Available on the Labels tab. Use this box to specify whether to show labels for all layers or specific layers on the map view. The tab includes a box for each layer on the map view. The labels are displayed in the same order as that of the layers listed in the Map Formats area of the Map editor. Custom point layers have labels hidden by default.

Map Properties dialog: Tools tab

Use this tab of the to specify which tools are available for display with the map.

For more information, see .

Components

Toolbar

Use this box to specify the display of the following buttons on the toolbar:

- Pan Hand
- Zoom In, Zoom Out

Overlay

Use this box to specify the display of the following options on top of the map:

- Pan Buttons
- Zoom Slider

Information

Use this box to specify the display of the following options in the Information panel of the map:

- Distance Indicator
- Map Overview

Mission tab: Details tab

Use this tab of the *"Scorecard editor: Mission tab"* and the *"Scorecard editor: Vision tab"* to specify supporting information for the mission or vision statement.

For more information, see:

- *"Mission Statement"*
- *"Defining a Mission Statement"*
- *"Vision Statement"*
- *"Defining a Vision Statement"*

The tab is also displayed as:

Vision tab: Details tab

Components

Name

Displays the name of the mission or vision statement.

Description

Use this field to enter a description of the mission or vision statement.

Business Owner

Displays the user ID of the person responsible for managing the mission or vision statement. To specify the business owner, click the Set User button to display the , where you can search for and select the business owner.

Related Documents

Use the *"Related Documents area"* to view and manage documents that provide supporting information to the mission or vision statement.

Mission tab: Document tab

Use this tab of the *"Scorecard editor: Mission tab"* and the *"Scorecard editor: Vision tab"* to enter and format your mission statement or vision statement.

For more information, see:

- *"Mission Statement"*
- *"Defining a Mission Statement"*
- *"Vision Statement"*
- *"Defining a Vision Statement"*

The tab is also displayed as:

Vision tab: Document tab
Components

Toolbar

This toolbar contains buttons (such as Bold, Increase Font Size) for formatting your mission or vision statement.

My Account dialog

Use this dialog to specify your personal preferences, such as your locale, time zone, preferred currency, and delivery options for the delivery of alerts by agents. The options that display on this dialog depend upon your privileges.

> ✏ **Note:** If the Delivery Devices and Deliver Profiles tabs contains devices and profiles, then do not make any changes to these tabs without first consulting the administrator, as any changes you make override the delivery device and profile information that was configured for you.

For more information, see:

- *"Devices and Delivery Profiles"*

Components

User ID

Displays the user ID that is shown in the user interface.

Display Name

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Displays the name that is shown in the user interface.

Preferences

Use the *"My Account dialog: Preferences tab"* to specify your account's display preferences.

BI Publisher Preferences

Use the to specify your Oracle BI Publisher preferences.

Delivery Options

Use the *"My Account dialog: Delivery Options tab"* to configure your devices and profiles for the delivery of alerts.

Roles and Catalog Groups

Use the to view a list of the Application roles and Catalog groups to which you have been assigned by the administrator.

Delegated Users

Use the to view a list of users who have been given the privileges to access your analyses and dashboards, if the administrator has configured this functionality.

My Account dialog: BI Publisher Preferences tab

Use this tab of the *"My Account dialog"* to modify the Oracle Business Intelligence Publisher preferences.

For more information, see:

-

Components

Report Locale

Use this box to select a locale for reports. This locale can be different than the locale that you specified in the *"My Account dialog: Preferences tab"*.

The reports that you view and create use the locale that you specify here. The locale usually corresponds to the language that you specify in the User Interface Language field that you selected in the "My Account: Preferences tab" or the country from where you are working. For example, your specified language is English and your locale can be English - United States or English - Canada. The locale that you select determines the date and time formats, daylight saving time settings, and currency formats settings.

Report Time Zone

Use this box to select the time zone to apply when viewing or creating reports. This time zone can be different than the time zone that you specified in the "My Account: Preferences tab."

This option is useful if you do not reside in the same physical location as the default time zone that was set by the administrator, and you want to select another time zone.

My Account Dialog: Delegated Users tab

Use this tab of the *"My Account dialog"* to view a list of users who can use the "Act As" functionality to access your analyses and dashboards. You cannot modify this list. This tab is available only if the administrator has configured this functionality.

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Depending upon the privileges, users can inherit your user privileges, which enables them to change your default dashboard and modify your content and preferences, or they are granted restricted access to only view your analyses and dashboards. When users are granted restricted access, they maintain their own user privileges when accessing your business intelligence content.

For more information, see:

-
-

My Account dialog: Delivery Options tab

Use this tab of the *"My Account dialog"* to configure your delivery devices and delivery profiles. Your delivery devices, along with your delivery profiles, control how you are reached when an alert is generated by an agent.

For more information, see:

- *"Devices and Delivery Profiles"*
- *"Alerts"*

Components

Devices

Use this area to configure your delivery devices. To do so, in the first box, select the category of the device, either Email, Phone, Pager, Handheld, or Other), and then to:

- Create a device, click the Create Device button to display the *"Create Device dialog"*, where you create a device.

  If you want a device to be the default device for the category, select the Default option in the Default column to the right of the device name.

  > 🖉 **Note:** When the destinations specified for agents are specific devices, the default devices you specify here override the devices in your active delivery profile. For example, if an agent is defined to be delivered to email devices, then default email device that you specify here is used rather than any email devices that you specify in your active delivery profile. (The destinations for agents are specified on the *"Agent editor: Destinations tab"*).

- Delete a device, select the device name and then click the Delete Device button.
- Edit a device, select the device name and then click the Edit Device button. The *"Edit Device dialog"* is displayed.

Delivery Profiles

Use this area to configure your delivery profiles. Click the Create Delivery Profile button to display the *"Create Delivery Profile dialog"*, where you create a delivery profile.

If you want a delivery profile to be your active profile, click the Active option in the Active column to the right of the profile name.

To delete a delivery profile, select the profile name and then click the Delete Profile button.

To edit a delivery profile, select the profile name and then click the Edit Profile button. The *"Edit Delivery Profile dialog"* is displayed.

My Account dialog: Preferences tab

Use this tab of the "*My Account dialog*" to specify your account's display preferences.

Components

Starting Page

Use this box to select the dashboard to display when you sign in to Oracle BI Enterprise Edition. Note the following options:

- Default - Select this option to set your company's default dashboard, as specified by the administrator, as your default dashboard. In some cases, the administrator might require you to use only the company's default dashboard as the dashboard that displays when you sign into Oracle BI EE.

- Home Page - Select this option to set the Home page as your default dashboard. You might select this option if creating objects or maintaining the catalog is your primary job responsibility.

- My Dashboard - Select this option to set your My Dashboard that you have created and saved as your default dashboard.

- Saved Dashboards - This list contains the names of all of the dashboards that have been created and saved to the catalog's dashboards subfolders (for example, Shared Folders then Marketing subfolder then Dashboards subfolder). You can set any of the dashboards that are displayed in this list as your default dashboard.

Locale (location)

Use this box to select a locale. The locale usually corresponds to the language that you specify in the User Interface Language field or the country from where you are working. For example, your specified language is English and your locale can be English - United States or English - Canada.

The locale that you select determines the date and time formats, daylight saving time settings, and currency formats settings.

User Interface Language

Use this box to select the language in which you want the Oracle BI EE interface to display. The language that you specify here persists, unless, for example, it is overridden for the session by the language that you specify in the . If your language is overridden, then the cause of the override displays in a second box within this field.

Time Zone

Use this box to select the time zone to apply when viewing content. This option is useful if you do not reside in the same physical location as the default time zone that was set by the administrator, and you want to select another time zone. For example, suppose that the Oracle BI Server that sends you alerts resides in the US Pacific time zone, but your work location is in the US Central time zone. After you set the Central time zone as your preferred time zone setting, the delivered time on your alerts is displayed in Central time.

Your account's time zone automatically applies to any items that you create, modify, run, receive, and print. The date and time columns included in analyses are displayed according to the content designer. The content designer can force a specific time zone to be displayed in the column or can allow your default time zone to be displayed in the column. A clock button is displayed in the column heading, and when you hover over this button, the name of the time zone used in the column is displayed.

For more information on how the administrator sets the Oracle BI Server time zone, see .

Currency

This box is available only if the administrator has configured the userpref_currencies.xml file. For information, see "" in .

Use this box to select the currency in which to view currency columns in dashboards and analyses.

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This selection:

- Takes effect in your current session.

- Is saved to the catalog and remains in effect for all sessions until you again modify and save it.

- Applies to all currency columns that have been converted by the Oracle BI Server and for which the currency data format has been set (by the content designer) to use the user's preferred currency.

The administrator defines the currency options that are available in this box.

Prompts Auto-Complete

Use this field to enable or disable the auto-complete functionality for your account. Choosing Off disables auto-complete for all dashboards that you access, and disables the auto-complete functionality when you search for prompt values in the "*Select Values dialog*".

When enabled, Oracle BI EE suggests and highlights matching prompt values as you type in the dashboard's prompt selection field and highlights matching prompts values in the search dialog. See

Analysis Editor

Use this option to specify which editor you want to use when you work with analyses:

- Full Editor - (Available only if you have been granted the Access to Analysis privilege by the administrator.) This option specifies to use the "*Analysis editor*" as the editor when you work with analyses.

  The Analysis editor is a more complex editor that allows you to explore and interact with information by visually presenting data in tables, graphs, pivot tables, and so on. For more information, see

  If you select this option, then also specify whether the Analysis editor is to open by default to the Criteria tab or the Results tab by selecting either Start on Criteria tab when editing Analysis or Start on Results tab when editing Analysis. This preference is applied when you click an analysis' Edit link from a dashboard, the Home Page, or the Catalog page.

- Wizard (limited functionality) - (Available only if you have been granted the Access to BI Composer privilege by the administrator.) This option specifies to use the "*BI Composer*" as the editor when you work with analyses.

  The BI Composer wizard is a simple-to-use wizard that allows you to quickly and easily create, edit, or view analyses without the complexities of the Analysis editor. For more information, see "*BI Composer*".

Accessibility Mode

Use this option to select whether content for Oracle BI EE is rendered in a browser in a way that facilitates the use of a screen reader.

If you select On, then the BI Composer wizard in accessibility mode will be used as the analysis editor, regardless of the setting of the Analysis Editor component.

If you select Off, and the setting of the Analysis Editor component is Wizard (limited functionality), then the BI Composer wizard in regular mode will be used as the analysis editor.

This setting persists unless it is overridden for the session by the accessibility mode setting in the .

If you had selected accessibility mode on sign in and you turn off accessibility mode here, it will override the accessibility mode setting in the Sign In page.

For information, see

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My Account dialog: Roles and Catalog Groups tab

Use this tab of the "*My Account dialog*" to view a list of the Application roles and Catalog groups to which you are assigned. You cannot modify this list. See the administrator to be added to or removed from Application roles.

An Application role defines a set of permissions. Any user or group assigned to an Application role is granted the permissions associated with that role. For example, you might belong to a role that enables you to view and not create business intelligence content.

A Catalog group is defined locally in Oracle BI Presentation Services and is used to grant privileges in the Oracle Business Intelligence user interface in addition to granting Oracle BI Presentation Catalog permissions.

For more information on Application roles and Catalog groups, see

New Action Link dialog

Use this dialog to create an action link to add to an analysis.

For more information, see:

- "*Actions*"
- "*Adding Actions to an Analysis*"

This dialog is also displayed as:

Edit Action Link dialog

Components

Link Text

Use this field to enter the text to display as the link to execute the associated action.

Action

Displays the action to be associated with the action link.

Create New Action

Use this button to select the type of action to create. If you selected:

- Navigate to BI Content, first the is displayed, where you select the Oracle BI EE content to which to navigate, and then the "*Create New Action dialog*" is displayed.
- Invoke a Web Service, the is displayed, where you select a Web Service operation to be invoked, and then the Create New Action dialog is displayed.
- Invoke a Java Method, the is displayed, where you select the Java method to be invoked, and then the Create New Action dialog is displayed.
- Any other action type, the Create New Action dialog is displayed.

Select existing action

Use this button to display the "*Open dialog*", where you select an existing action to add to the analysis.

Edit Parameter Mapping

This button is available only for named actions that have parameters that are not fixed or hidden.

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Use this button to display the *"Edit Parameter Mapping dialog"*, where you edit the action parameters.

More (>>)

Displays these options:

- Edit Action - Use this option to display the *"Edit Action dialog"*, where you can edit the action.

- Remove Action - Use this option to remove the action.

- Save Action As - Use this option to display the , where you can save the action to the catalog. If the action is an inline action, then the action is saved to the catalog rather than saved with the analysis. If the action is a named action, then you can save the action with the same name or another name.

Enable

Use this box to specify one of the following options:

- Always - Use to specify that the action link is always to be enabled.

- Conditionally - This option is not available when you are adding an action link to a column heading. Use to specify that the action link is to be enabled only under certain conditions. Selecting this option displays the Conditions area.

    For more information, see *Conditionally Enabled Actions*.

Conditions

(Displayed only if the Conditionally option is selected.)

Use this area to create one or more conditions to be used to conditionally enable the action link.

To create a condition, you select either an attribute column or a hierarchical column on which to base it but with these restrictions:

- If you select an attribute column, you can add multiple conditions.

- If you select a hierarchical column, you can add only one condition.

- You cannot combine conditions based on attribute columns with a condition based on a hierarchical column and vice versa.

If you add multiple conditions, then each additional condition you add is combined with the previous condition using the AND operator. The AND operator means that the criteria specified in each condition must be met. This is the default method for combining conditions. You can change the AND operator to OR by clicking AND. The OR operator means that the criteria specified in at least one condition must be met.

Depending on how you construct the condition combinations with the AND and OR operators, some conditions might be grouped. Grouped conditions are bounded by boxes.

This area includes the following components:

- New Condition - Use this button to first select the column on which to base the condition and then display the *"New Condition dialog"*, where you can create a condition.

- Edit Filter - Use this option to display the *"Edit Condition dialog"*, where you edit the condition.

- Copy Filter and Paste Filter - Use these options to add a copy of the condition to the list of conditions. The copy is added below the condition that you copied with the AND operator between them.

    You can then edit the copy of the condition. You can also change the operator to OR.

This option is useful to quickly add a condition to the list by modifying an existing one.

- Delete - Use this button to delete the condition.

- AND or OR - Use this button to toggle between the AND and OR operators.

- Edit Filter Group - This button displays only for a group of conditions.

   Displays these options:

   o Ungroup - Use this option to ungroup the group of conditions.

   o Delete Group - Use this option to delete the group of conditions.

   o Duplicate Group - Use this option to duplicate the group of conditions

New Calculated Item dialog

Use this dialog to create or edit a calculated item or a group.

For more information, see *"Groups and Calculated Items"* *"Groups and Calculated Items"*.

This dialog is also displayed as:

Edit Calculated Item dialog Edit Group dialog
New Group dialog

Components

> ✏ **Note:** Not all components are available in each version of the dialog.

Display Label

Use this field to specify the label for the calculated item or group when it is displayed in a view. This label can differ from the name under which the object is stored in the Oracle BI Presentation Catalog.

Values From

Use this box to select an attribute column or hierarchical column, which is included in the analysis, whose values you want to use for the calculated item or group. This field is read-only if you displayed the dialog from the Layout pane or from a location in which a column was previously selected.

Function

Use this box to select the function for the calculated item. Many of the functions are those described in .

In addition, you can select Custom Formula, which provides a toolbar with which you select mathematical operators to include in the function for the calculated item. You can also enter the following functions: Absolute, Ceiling, Floor, Round, Sqrt.

A formula creates a dynamic custom grouping within the view. All measures referenced in a formula must be from the same column and must be present in the results. Formulas can be inserted into, or combined with, other calculated items.

Instead of specifying a named item for attribute columns, you can specify $n or $-n, where n is an integer that indicates the item's row position. If you specify $n, then the measure is taken from the nth row. If you specify $-n, then the measure is taken from the nth to the last row.

Available

Use this area to select members to move to the Selected List area. The "*Catalog pane*" is displayed so you can select members or groups from there. When you move a member to the Selected List area, it is displayed with a green check mark beside it in the Available List area.

Search

Use this button to display the Search area of the "*Select Values dialog*", where you can locate members.

Selected

Use this area to view the values that you have selected from the Available area and moved to the Selected area. If you selected Custom Formula, then use the toolbar of mathematical operators at the bottom to create the formula for this calculated item. Use the following operators:

- + Plus sign, for an addition operation in the formula.
- - Minus sign, for a subtraction operation in the formula.
- * Multiply sign, for a multiplication operation in the formula.
- / Divide By sign, for a division operation in the formula.
- % percent sign, for include a percent in the formula.
- $ Dollar sign, for acting upon the row position in the resulting data view. This operator is not available for hierarchical columns.
- (Open parenthesis, to signify the beginning of a group operation in the formula.
-) Close parenthesis, to signify the ending of a group operation in the formula.

Format

Use this button to display the "*Edit Format dialog*" where you format the calculated item or group. If you apply formatting in this dialog, this formatting is applied first, then conditional formatting is applied.

Add to

Use these option buttons to apply the calculated item to either the Current View (the specific view that is currently active) or to All Views (all views within the Compound Layout).

Remove calculated item members from view

Use this box to suppress the display of the members that you have included in the calculated item in the view. For example, suppose that you have a pivot table that is displaying Region on the row edge, and it is currently showing the values Eastern, Western, and Central. Suppose that you create a calculated item called "Other Regions" that is the sum of Western + Central. If you select Remove calculated item members from view, then only two members are shown in the pivot table: Eastern and Other Regions.

If you select this box for a custom formula, then an implicit remove selection step is created using the items from either the custom formula or from the Selected list.

Selection Steps

Use this tab to see the steps that are saved as a group, if you select the Steps button. This tab is available only if you are editing a group that you have previously saved as a list of selection steps.

Results

Use this tab to see the members that have been specified by the selection steps.

Steps (generate results dynamically at run time)

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Click this button to save the selection steps for a group. The results of the selection are refreshed at runtime.

Results (generate results now and display every time)

Click this button to save a group as a list of members, rather than as a list of steps.

Notes

- To select multiple values, press the Ctrl key, then click the values.

- To select a range of values, click the first value in the range, press the Shift key, then click the last value in the range.

- To move one or more values from the Available List area to the Selected List area, use the Move or Move All button. You also can double-click a single value in the Available List area to move it to the Selected List area.

  For a group, the following options are displayed when you click Move. These options are not available when you create a nested group.

  - Add - Use this option to add the group to the analysis. You see an "Add: group-name" step in the Selected List area. You see an outline value for the group in a table or pivot table.
  - Add Members - Use this option to add the members of the group to the analysis. You see an "Add: Members of group-name" step in the Selected List area. You do not see an outline value in a table or pivot table; you see the members of the group.

- To remove one or more values from the Selected List area, use the Remove or Remove All button. You also can double-click a single value in the Selected List area to remove it.

New Category dialog

Use this dialog to specify the favorites category to create. For more information, see and "*Manage Favorites dialog*".

Component

Name

Use this field to enter the name of the favorites category. The category name that you enter will display when you click the Favorites list, located on the global header.

New Condition dialog

Use this dialog to create or edit a condition.

For more information, see "*Working with Conditions.*"

This dialog is also displayed as:

Create Condition dialog

Edit Condition dialog

Components

Create condition based on

Use this list to select whether the condition is to be based on an Analysis or KPI.

Browse

Use this button to display one of the following dialogs, where you select the analysis or KPI on which to base the condition:

- For an analysis, the *"Select Analysis dialog"* is displayed.
- For a KPI, the is displayed.

Condition Data

Displays the following:

- Selected Analysis - If the condition is based on an analysis, then use this button to view the analysis.
- Information about the analysis or KPI on which the condition is based.

Parameters

Displays the prompted filters associated with the analysis. (A prompted filter is a filter whose operator is set to Is Prompted.)

Click the Edit button adjacent to a prompted filter to display the *"Edit Parameter Filter dialog"*, where you edit the filter.

Dimension Value area

Displays the KPI dimensions whose values were set to Not Pinned in the KPI. Use the Value fields to specify values for these dimensions.

True If Row Count

This area is available only if the condition is based on an analysis.

Use this area to specify the evaluation criteria as follows:

- Operator - Use this box to select the operator to apply to the row count. Valid operators are:
    - is equal to - Use to evaluate whether the number of rows in the analysis is equal to the number of rows specified
    - is not equal to - Use to evaluate whether the number of rows in the analysis is not equal to the number of rows specified
    - is less than - Use to evaluate whether the number of rows in the analysis is less than the number of rows specified
    - is greater than - Use to evaluate whether the number of rows in the analysis is greater than the number of rows specified
    - is less than or equal to - Use to evaluate whether the number of rows in the analysis is less than or equal to the number of rows specified
    - is greater than or equal to - Use to evaluate whether the number of rows in the analysis is greater than or equal to the number of rows specified
    - is between - Use to evaluate whether the number of rows in the analysis is between the range of rows specified
    - is not between - Use to evaluate whether the number of rows in the analysis is not between the range of rows specified
- Row Count - Use this box or boxes to specify the row count to be evaluated. For a range of rows, the start and end values that you specify are included in the range.

Condition true if KPI

This area is available only if the condition is based on a KPI.

Use this box to specify the KPI status on which the condition is to be evaluated.

Test

Use this button to test whether the condition evaluates to true or false. Displays the Test Condition dialog, which provides the results of the condition evaluation.

New Condition Step dialog

Use this dialog to create a condition step as part of working with selection steps.

For more information, see *"Working with Selections of Data"*.

This dialog is also displayed as:

Edit Condition Step dialog
Components

Condition Type

Use to select from a list of condition types for the specified dimension column. The following list describes the categories of condition steps that you can create. The components in this dialog differ slightly, depending on which type you select.

- Exception - Conditions that select members using comparisons of values for measure columns. Sample conditions are "Sales > Cost" and "Sales <= Cost + 10%."

- Top/Bottom - Conditions that select the specified number of members after ranking the members by the specified measure column. You can specify an exact number of members or a percentage of the total members. Sample conditions are "Top 10 based on Sales" and "Top 5% based on Cost."

- Match - Conditions that select members based on matches with text strings and attribute values. A sample condition is "Name contains abc." You can use this condition only with columns that have a string data type.

- Time/Ordinal - Conditions that select members based on ranges of time and on hierarchical levels. A sample condition is "From July 2000 to December 2000." Available only for columns with a data type that relates to time.

Action

Use this box to select the type of action to create for the members that the condition step specifies. You can select to add the selected members to the selection, keep only the selected members and remove all others, or remove the selected members from the selection.

Use the box beside the action type to select the column for whose members you are creating the condition step.

Column

Use this box to select the attribute column on which to base the condition, when created condition steps of the type Match, All X Values where Y=values.

Operator

Use this area to select the operator, based on the type:

- For Exception, depends on the type. Sample values include Within, Not Within, Between, Greater than, and Equals.

- For Top/Bottom, whether the members have a ranking of top or bottom.

- For Time/Ordinal, either:

  - Whether to use the last or first number of time periods, using the value in the Number field.

        o Whether the members start with, end with, or come before or after the column value in the Time Period field.

- For Match, whether the members contain, begin with, end with, or match the string in the Text field.

Number

Enter the number of time periods, such as 3, when creating condition steps of type Time/Ordinal.

Time Period

Select the column value on which to base the condition, when creating condition steps of type Time/Ordinal.

Rank or Range

Enter the percentage to use for the rank or range, such as 5, when creating condition steps of type Exception or Top/Bottom.

Value

Enter the value to use for the comparison, when creating condition steps of type Exception.

Text

Enter the string to use for matching with the members, when creating condition steps of type Match. Select Match Case to provide case-sensitivity for the matching.

Override with

Use this box to specify that an analysis prompt, a dashboard prompt, or a variable can override the values that you specify in this condition step. Depending on what you are overriding, you can override certain values with a prompt, a presentation variable, a session variable, or a repository variable.

If you select a variable type, then enter the name of the variable in the field. For example, suppose that you have a column called EMPLOYEE_ID. You can specify USER as the session variable with which to override the value of that column. When a user logs in, the column value is set to his login name. For more information on variables, see "*Using Variables*".

In a list of steps for a column, specify that only one step in the list be able to be overridden by a prompt or presentation variable.

For information, see

Measure

Use this list to select the name of the measure column whose data values you want to compare, when creating condition steps of type Exception or Top/Bottom.

For

Use this area to qualify all of the dimensions of the analysis other than the dimension whose members you want to select, when creating condition steps of type Exception or Top/Bottom. For each dimension, you select which of its members to include. You can select specific members, or All, which specifies to aggregate the members when creating the condition. For example, suppose that you are qualifying the Region dimension. You can select a specific region, such as East, whose value is used in the condition. If you select All, then the values of all regions are aggregated and used in the condition.

You can use the For area to create a qualified data reference (QDR). A QDR is a qualifier that limits one or more of the dimensions to retrieve a single value for a measure column. A QDR is useful when you want to temporarily reference a measure column value without affecting the current status of the dimensions. The following is an example of a QDR:

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```
Add members of Total Products (Rgd Sk Lvl) where "A - Sample Sales"."Base Facts"."1- Revenue", For: Cust
Segments Hier: 'Active Singles', 'Baby Boomers' is greater than "A - Sample Sales"."Base Facts"."1- Revenue",
For: Cust Segments"
```

When you specify a QDR, you can specify multiple members for limiting the dimensions. When you specify multiple members, the measure column value is aggregated using the default aggregation from the Oracle BI Server. For example, suppose that you want to create a condition for displaying those Regions in which Units is greater than 100. Suppose that you create a QDR for the Year dimension that specifies 2000 and 2001 and that the default aggregation is Sum. If the values for 2000 and 2001 for the Central region are 50 and 60 respectively, then both those years are displayed, because their sum exceeds the 100 units that was indicated.

Offset

Use this list to select either addition or subtraction, to enter the number and to specify whether the number is a percent, when creating certain condition steps of type Exception.

Match in

Use this box to select the part of the member to match when creating condition steps of type Match. Options include any label, member ID, long label, medium label, and short label.

Note

To create a step that is based on a hierarchy, use the .

New Dashboard dialog

Use this dialog to specify the name, description, and location of the dashboard that you are creating.

For more information, see *"Creating a Dashboard"*.

Components

Name

Use this field to enter a name for the dashboard.

Description

Use this field to enter a description for the dashboard.

Location

Use this list to select a folder for the dashboard in the Oracle BI Presentation Catalog. If the folder you want is not in the list, click the Browse Catalog link (at the bottom of the list) to display the , where you can browse for the folder that you want.

If you choose a folder in which no dashboards have been saved, then a new "Dashboards" folder is automatically created in that folder in which to save the new dashboard. For example, if you choose folder named /Shared Folders/Sales in which no dashboards have been saved, a new Dashboards folder is automatically created and the Location entry changes to as /Shared Folders/Sales/Dashboards.

If you save the dashboard in the Dashboards subfolder directly under /Shared Folders/first level subfolder, then the dashboard is listed in the Dashboard menu in the global header. If you save it in a Dashboards subfolder at any other level (such as /Shared Folders/Sales/Eastern), then it is not listed.

Content

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Displays the following options:

- Add Content Now - Select this option to add content to the new dashboard now. The new dashboard that contains one blank page is displayed in the *"Dashboard builder"* for editing.

- Add Content Later - Select this option to add content to the new dashboard later. An an empty dashboard is created (but not displayed) to which you can add content later.

See *"Editing a Dashboard"*.

New EVALUATE_PREDICATE Function dialog

Use this dialog to create or edit the EVALUATE_PREDICATE function's formula.

For more information, see:

This dialog is also displayed as:

Edit EVALUATE_PREDICATE Function dialog
Components

Available

Displays the primary subject area and any related subject areas that have been added to the *"Subject Areas pane"*. Use this area to select columns to use in the formula. To insert a column in a formula, select the column and click the Add Column button.

Formula

Use this area to create the EVALUATE_PREDICATE function's formula.

You can enter the formula manually or use these components:

- Variable > - Use this button to select the type of variable (Session, Repository, or Presentation) to add. The is displayed, where you specify the name of the variable.

- + - Use this button to insert the addition operator to add values.

- - - Use this button to insert the subtraction operator to subtract values.

- x -Use this button to insert the multiplication operator to multiply values.

- / - Use this button to insert the division operator to divide values.

- % - Use this button to insert the percent sign to divide values by 100.

- (- Use this button to insert the left parenthesis to enclose data in brackets.

-) - Use this button to insert the right parenthesis to enclose data in brackets.

- ||- Use this button to insert the concatenation operator.

Notes

To manually enter a variable in an expression in the Formula area, follow the guidelines for referencing variables in expressions described in .

New Filter dialog

Use this dialog to create or edit a column filter, to specify a condition under which an action link is to be enabled, or to specify a condition for applying graph formatting.

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For more information, see:

- "*Filters and Selection Steps*"
- "*Creating a Column Filter*"
- "*Editing the Formula for a Column*"
- "*Adding Actions to an Analysis*"

This dialog is also displayed as:

Edit Condition dialog

Edit Filter dialog

New Condition dialog

Components

> ✏ **Note:** When this dialog is displayed as the New Condition dialog or the Edit Condition dialog, not all
> components are available.

Column

Displays the name of the column for the filter.

Edit Formula

Use this button to display the "*Edit Column Formula dialog*" where you can modify the column's formula for use with the filter that you are creating.

Data Time Zone

Use this button to select the time zone.

Operator

Use this list to select the operator to apply to the value specified in the Value. For guidelines, see "*Operators*".

Note that, if your repository is configured for double columns, and you are creating the filter on a display column and select the contains all, contains any, does not contain, begins with, ends with, is LIKE (pattern match), or is not LIKE (pattern match) operator, then filtering is always done by display values, not code values. For more information on double columns, see "*Understanding the Double Column Feature*".

Value

Use this field to specify one or more values to use when applying the filter or condition. You can:

- Type values.
- Select values from the list box or calendar.

  The number of values that display in this field is determined by the MaxDropDownValues configuration setting. The administrator can modify this setting. For information about this configuration setting, see "" in .

  To search for specific values from the list box, click Search in the list box. The "*Select Values dialog*" is displayed, where you can search for and select values.

If the analysis has other filters, the following options appear to the right of Search:

- o Limited Values - Use this option to limit the values by any other filters that are associated with the analysis.

- o All Values - Use this option to list all values, without limiting the values by any other filters that are associated with the analysis.

If your repository is configured for double columns, and you are creating the filter on a display column, then by default you specify display values. However, if your organization allows the display of code values, then you can specify code values rather than display values, but only if you use one of the following operators:

- is equal to / is in

- is not equal to / is not in

- is between

To specify code values, select the Select by Code Column box.

> ✏ **Note:** If you create or modify a filter or condition using code values and, subsequently, the code column for that value is removed from the Presentation layer using the Administration Tool, then filtering by code values remains in effect (although the code values are not visible). When you edit the filter or condition, the code value (for example, 1) is converted to the equivalent display value (for example, Excellent).

For more information on double columns, see "*Understanding the Double Column Feature*".

Select by Code Column

Available only if your repository is configured for double columns, you are creating the filter on a display column whose code column is exposed in the repository Presentation layer, and you selected either the is equal to / is in, is not equal to / is not in, or is between operator.

Use this box to allow code values to be specified in the Value field. When this box is selected, the list box displays both the code values and the display values (for example, 1 - Beverages) for selection and the Filter by box is selected but disabled. When this box is deselected, the list box displays only the display values (for example, Beverages).

Filter by Code Column

Available only if your repository is configured for double columns and you selected either the is equal to / is in, is not equal to / is not in, or is between operator.

Use this box to specify whether the column is to be filtered by code values or display values. Select this box to filter by code values. Deselect this box to filter by display values.

Saved Analysis

Available if you selected the is based on the results of another analysis operator.

Use this field to specify the saved analysis whose results are to be the basis for the filter.

Relationship

Available if you selected is based on the results of another analysis in the Operator field.

Use this list to select the appropriate operator to determine the analysis' column results that set the filter.

Use values in column

This field displays if you selected the is based on the results of another analysis operator.

Use this list to view a matching column name in the analysis, if there is one. To use another column, then select it instead. The values in this column set the filter.

Add More Options

Available for all operators except is prompted or the is based on the results of another analysis.

Click this button to add a SQL expression or a session, repository, or presentation variable to the filter. You can add one or more of these options. When you select an option, a corresponding field is displayed where you specify either a SQL expression or the name of the variable.

When this dialog is displayed as the New Conditions dialog from the *"Column Properties dialog: Conditional Format tab"* or as the Edit Condition dialog from the *"Edit Action Link dialog"*, you can add only a presentation variable.

For more information on variables, see *"Using Variables"*.

SQL Expression

Available if you selected SQL Expression from the Add More Options list.

Enter or paste a SQL expression.

Session Variable

Available if you selected Session Variable from the Add More Options list.

Enter the name of the session variable to use, for example USER.

Repository Variable

Available if you selected Repository Variable from the Add More Options list.

Enter the name of the repository variable to use, for example prime_begin.

Variable Expr.

Available if you selected Presentation Variable from the Add More Options list.

Enter the name of the presentation variable to use, for example MyFavoriteRegion.

(default)

Available if you selected Presentation Variable from the Add More Options list.

(Optional) Specify a default value to be used if no value is returned by the presentation variable.

Delete

Click this button to delete the corresponding value and field.

Clear All

Click this button to remove all values and codes. If you added a SQL expression or variable to the filter, then clicking the Clear Values button deletes all related values and fields.

Protect Filter

Select this option to protect the filter's value from being overridden by either a prompt value or when the user navigates to another analysis. When the user navigates from one analysis to another analysis, any prompt values that were specified in the first analysis transfer to the second analysis.

Convert this filter to SQL

Select this option to convert the filter that you have built to a SQL WHERE clause that you can edit manually. Note that after you convert a filter to SQL code, you can view and edit the filter item as SQL code in the "Advanced SQL Filter dialog", only. You can no longer view and edit the filter in the Edit Filter dialog.

Related Topics

"Creating and Editing the SQL Statements for a Column Filter in an Analysis"

Operators

Use the guidelines shown in when choosing an operator and specifying the required values. The operator list from which you can choose is populated based on the function you are performing (for example, creating a filter or creating a dashboard prompt) and the type of column that you selected.

Table E-4 Guidelines for Choosing an Operator When Creating a Column Filter

Operator	Usage Guidelines
is equal to / is in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column matches the value in the filter.
is not equal to / is not in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column does not match the value in the filter.
is less than	Valid for a column that contains numbers or dates. Specify a single value. Results include only records where the data in the column is less than the value in the filter.
is greater than	Valid for a column that contains numbers or dates. Specify a single value. Results include only records where the data in the column is greater than the value in the filter.
is less than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is less than or the same as the value in the filter.
is greater than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results include only records where the data in the column is greater than or the same as the value in the filter.
is between	Valid for a column that contains numbers or dates. Specify two values. Result include only records where the data in the column is between the two values in the filter.
is null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the absence of data in the column. Results include only records where there is no data in the column. Sometimes it might be useful to know whether any data is present, and using the is null operator is a way to test for that condition. For example, suppose your business has a worldwide address book and you want to extract the United States addresses only. You could do this by checking for the presence or absence of data in the "State" field. This field should be unpopulated (null) for non-United States addresses and populated (not null) for United States addresses. You can obtain a list of United States addresses without the need to check the column for a specific value.

Operator	Usage Guidelines
is not null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the presence of data in the column. Results include only records where there is data in the column.
is ranked first	Valid for a column that contains text or dates. Specify a single value. Results include only the first n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list that contains the first ten brand names in alphabetical order.
is ranked last	Valid for a column that contains text or dates. Specify a single value. Results include only the last n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list of the dates of the last ten sales transactions.
is in top	Valid for a column that contains numbers. Specify a single value. Results include only the first n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list of the top ten sales in dollars.
is in bottom	Valid for a column that contains numbers. Specify a single value. Results include only the last n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list of the customers reporting the fewest numbers of problems.
contains all	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column contains all of the values in the filter.
does not contain	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column does not contain any of the values in the filter.
contains any	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results include only records where the data in the column contains at least one of the values in the filter.
begins with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results include only records where the data in the column begins with the value in the filter.
ends with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results include only records where the data in the column ends with the value in the filter.
is LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percent sign character (%) as a wildcard character. You might specify up to two percent sign characters in the value. Results include only records where the data in the column matches the pattern value in the filter.
is not LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percent sign character (%) as a wildcard character. You might specify up to two percent sign

Operator	Usage Guidelines
	characters in the value. Results include only records where the data in the column does not match the pattern value in the filter.
is prompted	Valid for a column that contains text, numbers, or dates. Choosing this operator for a filter's column flags it as ready to be filtered by a prompt. This means when a prompt is used, results include only records where the data in the column that is prompted matches the user's choices. Note: This operator is required for columns included in prompts where no prefiltered values are desired.
is based on the results of another analysis	Valid for a column that contains text, numbers, or dates. This operator constrains the filter by using the value of a column from the same subject area in another saved request.
prompt user	Valid for a column that contains text, numbers, or dates. Choosing this operator enables the user to select the dashboard or analysis' prompt operator at runtime.

New Folder dialog

Use this dialog box to specify the folder to create in the Oracle BI Presentation Catalog. For more information, see the "*Catalog page*".

Component

Name

Use this field to enter the name of the folder.

New Prompt dialog

Use this dialog to define the column, variable, or currency prompt.

For more information, see "*Creating a Column Prompt*".

This dialog is also displayed as:

Edit Prompt Edit Prompt: Column dialog New Prompt: Column dialog
Components Common to Column, Currency, and Variables Prompts

> ✏ **Note:** This section describes the components that are common to column, currency, and variable prompts. Additional components are available for the column and variable prompts. See .

Label

Use this field to enter an appropriate label for the prompt. For example, "Select a date range," "Select a currency," or "Select a percentage by which to calculate the region's dollars." You can include HTML markup tags in the caption, such as <b>, <font>, and <table>.

Description

Use this field to enter a short description of the prompt. This description is displayed as tool tip text, which is displayed when the user mouses over the prompt's label in the dashboard or analysis.

Additional Components for Column and Variable Prompts

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Prompt for Column

This field displays for column prompts, only.

Use this field to view information about the column that you selected. You can edit the formula that displays in this field by clicking the Edit Formula button. For more information, see *"Edit Column Formula dialog"*.

Edit Formula

This field displays for column prompts, only.

This button displays for attribute and measure column types, but not for hierarchical columns; however, if you are creating a column or variable prompt and choose to modify the column's formula, you can specify a hierarchical column in the column's formula.

Use this button to display the *"Edit Column Formula dialog"* where you can modify the column's formula for use with the prompt.

If you added a SQL case statement to the analysis' column instance and you want to use that case statement within the prompt, then you must specify the same SQL case statement in the prompt's column formula.

For example, on the analysis' column, you can use the Edit Formula functionality to create a "Beverage Type" bin to group a long list of beverages into two categories called "Carbonated Beverages" and "Fruit Juices and Non-Carbonated Beverages." When building the prompt, you then add the same bin or SQL case statement to the prompt's column formula. When the prompt is completed and previewed, the "Carbonated Beverages" and "Fruit Juices and Non-Carbonated Beverages" items are displayed in the prompt's value list.

Data Time Zone

Use this field to set the time zone.

Prompt for

This field displays for variable prompts, only.

Use this field to select the type of variable to create and to type a name for the variable. This variable name is the name that you add to the analysis or dashboard where you want the variable prompt's value specified by the user to display. Currently, you can create only presentation variables.

Included Code Column

This field displays for display columns, only.

Displays the name of code column that is mapped to the display column.

For more information on display and code columns, see *"Understanding the Double Column Feature"*.

Operator

This field displays for column prompts, only.

Use this list to select the prompt's operator. For more information about each operator, see *"Operators"*.

Note the following items:

- If you want the user to select the operator at runtime, then select the *Prompt User operator.

- If you are creating a dashboard prompt for an Oracle Business Intelligence Publisher report that receives its data from an Oracle BI Server or SQL Server, then you must set the operator to is equal to/is in.

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- If you are creating a prompt that includes a group in the prompt's value selection list, the Operator must be set to either is equal to/is in or is not equal to/is not in. For more information about groups, see *"Groups and Calculated Items"*.

- If the repository is configured for double columns, and you are creating the prompt on a display column and select the contains all, contains any, does not contain, begins with, ends with, is LIKE (pattern match), or is not LIKE (pattern match) operator, then filtering is always done by display values, not code values. For all other operators, filtering is done by code values. For more information on double columns, see *"Understanding the Double Column Feature"*.

User Input

This field displays for column and variable prompts.

Use this list to specify the user interface component where the user selects the prompt values (for example, prompt the user with radio buttons to select only one prompt value or prompt the user with a text box that requires the user to enter one or more specific prompt values). The input option that you select determines the fields that are displayed in the dialog. For a description and example of each user input option type, see

User Input Values

This field displays for column and variable prompts.

Use this field to specify which data values you want to display in the user input method that you selected. For example, if you selected the Choice List user input method and the All Column Values option, then the user selects the prompt's data value from a list that contains all of the data values contained in the data source.

Note that for attribute columns and measures column, all choice list values type are available.

The User Input Values options are:

- All Column Values - Indicates that users can choose from a list that contains all the existing values or members.

  If the number of column values exceed the number that is specified in the Page Values box, the list that displays in the view contains a Search link that the user clicks to access the Select Values dialog. Users can use the search to locate more values.

- Custom Values - Indicates that users can select from a list of prompt values that you created rather than the values supplied by the column.

- Specific Column Values - For attribute columns and measures column, this option indicates that users can choose from a list that displays the values that you have selected for the column. This option is useful when prompting for multiple columns, or when the results contain a filter. It prevents the user from choosing values that would result in no data. For example, suppose an analysis contains a country column and a city column, and contains the filter Country=France. By selecting limited values for the city column prompt, the choices are constrained to cities in France only, which prevents the possibility of the user choosing a city that is not located in France, such as Country=France and City=Rome.

  This list can also contain a group as a selection option. Users can also click Search from the list of values to search for a value that does not display in the list of values. You can click the Plus button to display the Select Values dialog where you can search for and select the desired values to display to users. In the Column Values pane, you see all values for the column and you can select only those that you want users to choose from. If you are using either the is equal to/is in or the is not equal to/is not in operator, then you can expand the Catalog pane to browse and add a saved group. When you select a group, it is presented as one value in the list of values. For example, if the group is named Sales by Region and contains the Eastern and Southern members, within the prompt's list of values you see Sales by Region and when you select this value, the analysis contains the Eastern and Southern members.

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For hierarchical columns, this choice indicates that a list is displayed from which users can choose among the members that you have selected for the column. This list can also contain a group as a selection option. See the above paragraph for more information.

- SQL Results - Indicates that users can choose from a list that contains the values that you have specified through a SQL statement. A box is displayed where you can enter a SQL statement that creates the list of values from which users can choose. You likely want to enter a WHERE clause as part of the SQL statement to limit the number of values from which users can select and include sorting commands to have the values display in a logical order.

  If the SQL statement returns a list of values that exceeds the number that is specified in the Page Values box, then a Search link is displayed and when the user clicks this link, the Select Values dialog is displayed. Users cannot search in the Select Values dialog, but they can display more values to select from.

- Members of Groups - This option is not available for hierarchical columns.

  Indicates that users can choose from a list that contains all members included in a specified group or groups. For example, if the group you select is named Sales by Region and contains the Eastern and Southern members, at runtime you see Eastern and Southern regions listed in the prompt's list of values.

- All Column Values and Specific Groups - This option is not available for hierarchical columns. This option is available for the is equal to/is in or the is not equal to/is not in operators, only.

  Indicates that users can choose from a list that contains all column values and the groups that you have selected. When you select a group, it is presented as one value in the list of values. For example, if the group is named Sales by Region and contains the Eastern and Southern members, within the prompt's list of values you see Sales by Region and when you select this value, the analysis contains the Eastern and Southern members.

  > ✎ **Note:** If you have a prompt with a choice list value that contains a group and the prompt is then used
  > to override a Keep only or Remove selection step, then Oracle BI EE ignores the group at runtime. If the
  > override selection step is an Add selection step, then Oracle BI EE uses the group.

Select Values or Remove selected value buttons

These buttons display for column and variable prompts. These buttons display if you selected Custom Values, Specific Column Values, Members of Groups, or All Column Values and Specific Groups in the User Input Values field.

Use the Select Values button to open the "*Select Values dialog*" to search for and add values or groups to the Select List. The prompt presents this values list to the user. This functionality is useful when you want to limit the number of user choices to a small, intuitive list. For example, if you chose Radio Buttons as the user input method and created a specific values list of five dates, the prompt presents the user with five radio buttons, one for each date. If you selected Custom Values in the User Input Values field, the Enter Value dialog displays rather than the Select Values dialog, where you enter a custom value.

Use the Remove selected value button to remove the selected value.

SQL Statement

This field displays if you selected SQL Results in the User Input Values field.

Use this field to create or edit a SQL statement. When run, the SQL statement produces a group of values that is displayed in the Select List.

Include "All Choices" choice in the list

This box displays if you selected either the Choice List, List Box, or Radio Buttons user input type.

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Use this box to display the "All Choices" option in the value list. Users can select the "All Choices" option to select all of the values in the list.

Limit values by

This box displays if you selected either the Check Box, Choice List, List Box, or Radio Buttons user input type.

Use this box to select an existing prompt column or columns to limit the values that display in the select lists for the prompt column. This type of limitation is also known as a cascading prompt. Oracle suggests that you limit values by selecting multiple specific prompt columns rather than by selecting All Prompts.

Consider the following examples:

- Suppose you build a prompt containing the following columns: Year, Quarter, and Month. Then you limited the Quarter column by Year but do not limit the Month column. At runtime, if the user specifies a Year value of 2009, then the Quarter values available will be 2009 Q1, 2009 Q2, 2009 Q3, and 2009 Q4, only, and the Month values will be for all years (for example, 2006/01, 2007/02, and so on).

- Suppose you build a prompt containing the following column prompts: Year, Quarter, and Month. Then you limit the Quarter column by Year and the Month column by Year and Quarter. At runtime, if the user specifies a Year value of 2009, but does not specify a Quarter value, then the Month values available will be determined by the year (for example, 2009/01, 2009/02, and so on). If the user specifies a Year value of 2009 and a Quarter value of 2009 Q2, then the Month values will be limited to 2009/04, 2009/05, and 2009/06.

Enable user to select multiple values

This box displays if you selected either the Choice List or List Box user input type.

Use this box to allow the user to select multiple prompt values from the list of values. If you selected the Choice List user input option, then the prompt value selection list displays a check box before each prompt value.

If you selected the List Box option, then to select:

- Multiple values, the user presses the Control key, then clicks the values

- A range of values, the user clicks the first value in the range, presses the Shift key, then clicks the last value in the range

If you are creating the prompt on a hierarchical column, then this option is selected and you cannot deselect it. If you are creating a prompt with only one value, then use the "*Select Values dialog*" to select one value.

Enable user to type values

This box displays if you selected the Choice List user input type.

Use this box to allow the user to choose values from the choice list or place the cursor and type a value into the selection field. For example, select this box when the prompt's value list is lengthy and the user does not want to scroll through or search the list, or the user knows the specific prompt value. This option is useful when the prompt contains non-measure numeric values (for example, a product ID or employee ID) that cannot be easily or quickly located in a list of values.

If this option and the Enable user to select multiple values option are selected, users can enter multiple values (using the semicolon delimiter) into the prompt's selection field.

Require user input

This box displays for all user input types.

Use this box to make the prompt required. When the prompt is required, users cannot click the Go button to execute the prompt query until they have selected a prompt value. When you select this option, an asterisk displays to the left of the prompt label to indicate to the user that the prompt is required.

Slider Values

This field displays for the Slider user input type, only.

Use this field to specify the prompt values and value range to display in the slider. Currently, Within Specific Limits is the only available Slider Values option.

Lower limit

This field displays for the Slider user input type, only.

Use this field to specify the beginning prompt value that is displayed on the left-end of the slider. This prompt value is the lowest value that the user can select.

Upper limit

This field displays for the Slider user input type, only.

Use this field to specify the ending prompt value that is displayed on the right-end of the slider. This prompt value is the highest value that the user can select.

Show Spinbox

This box displays for the Slider user input type, only.

Use this box to display a spinbox where the user can click arrows to select a value. When the user clicks the spinbox's arrows, the slider resets to the same value. Deselect this box to remove the spinbox from the prompt.

Compress Values

This box displays for the Slider user input type, only.

Use this box to remove the zeros from values of 1,000 and over. For example, 1,000 displays as 1K and 1,000,000 displays as 1M. If you select this option and are using a non-English environment, the compressed value label is not translated. The value label is displayed in English (for example, 1K or 1M).

Slider Orientation

This field displays for the Slider user input type, only.

Use this field to specify whether you want the slider to be displayed horizontally or vertically on the prompts page.

Label location

This field displays for the Slider user input type, only.

Use this field to specify where you want the prompt's label to display in relation to the slider. Currently, Left of Slider is the only available Label location option.

Slider size

This field displays for the Slider user input type, only.

Use this field to choose the size of the slider. You can select Small, Medium, or Large.

Default selection

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Use this field to specify the prompt value that you want users to see initially. First select one of the following options, then (except for the None option) specify the value in the box that is displayed:

- None - Select this option if you do not want to specify a default selection.

- Specific Values - Select this option to choose a specific default value from the complete prompt list that Oracle Business Intelligence generates based on the option you selected in the Choice List Values field. When you select this option, the Default value field, the Select values button, and the Remove selected value button are displayed. Click the Select values button to access the *"Select Values dialog"* dialog, where you can search for, select, and deselect a default value. Use the Remove selected value button to remove the selected value from the Default value field.

- All Column Values - This option is available only when the Include "All Choices" choice in the list option is selected. Select this option to specify the "All Choices" default value for the prompt.

- Variable Expression - Select this option to specify a variable or an expression containing a variable. When you select this option, the Default value field is displayed in which you enter the variable or expression.

  For guidelines on referencing a variable in an expression, see . For more information on variables, see *"Using Variables"*.

- Server Variable - Select this option to specify a session or repository variable as the default value. When you select this option, the Default value field is displayed in which you enter the name of the variable. For a session variable, prefix the name with `NQ_SESSION` and a period, for example `NQ_SESSION.USER`.

  For guidelines on referencing a server variable, see . For more information on variables, see *"Using Variables"*.

  > ✎ **Note:** If you specify a session variable, and a request variable exists with the same name, the value of the request variable is used instead of the value of the session variable. For more information on request variables, see

- SQL Results - Select this option to set the prompt's default value based on the results of a logical SQL statement. If necessary, a presentation or server variable can be used in the logical SQL statement (for example, variables can be referenced in the "where" clause to constrain the default value based on another prompt).

  Each row of data returned by the SQL statement is treated as a value, and each row can have one or two columns. If each row contains one column, this would be both the display value and code value. If each row contains two columns, the first column is the display value and the second column is the code value. If the SQL statement returns multiple rows but the user interface can only accept one value, then the first row is used.

  If your repository is configured for double columns, and you are creating the prompt on a display column and specify a SQL statement containing the code column, then filtering is done on code values, and not display values. Consider the following SQL syntax:

  `SELECT` display_column, code_column `FROM` subject_area_name [Optional Where Clause]

  For example,

  `SELECT companyName, companyID FROM SampleSales`

Enable user to select by Code Column

This option displays for display columns, only.

Select this option to add a check box to the prompt that enables the user to specify whether to select prompt values by display values (for example, "Beverages") or by code-display values (for example, "1-Beverages"). This box is automatically

labeled with the partial caption of "Select by." If you select this option, then add a label in the Label field that identifies what the user is selecting by.

Label

This field displays for display columns, only.

Use this field to complete the "Select by" label for the check box that enables the user to specify whether to select prompt values by display values (for example, "Beverages") or by code-display values (for example, "1-Beverages"). For example, you might enter "product codes" so that the check box label is "Select by product codes."

Choice List Width

Use this field to specify the width of the prompt's field that displays on the prompts page. This field determines the width of the area where the prompt's member values display and does not include the field's label. Note the following options:

- Select Dynamic if you want Oracle BI EE to automatically size the field width to accommodate the prompt's member values. Note that Oracle BI EE might truncates the member values. A user can mouse-over a truncated member value and Oracle BI EE displays the member's full value.

- Select Pixels and specify the size in pixels to which you want Oracle BI EE to adjust the field width. Note that if member values are larger than the pixel value that you specify, then Oracle BI EE truncates the member name. A user can mouse-over a truncated member value and Oracle BI EE displays the member's full value. If you selected the is between operator for the prompt, then both fields ("from" and "to") are adjusted to the pixel size that you specify. This field's default size is 250 pixels. Note that this value differs if the Administrator modified the default pixel value in the Oracle BI EE configuration file.

Note that setting the Set width of all prompts to field on the overwrites what you specify in the Choice List Width field. Likewise, specifying preferences for the individual prompt in the Choice List Width field deselects the Set width of all prompts to check box in the . For more information, see the help for the "Edit Page Settings dialog."

Set a variable

Use this field to create a variable that this column prompt is to populate.

Select the type of variable, either Presentation Variable or Request Variable, then, enter a name for the variable. Note if you selected Request Variable, you must use the name of the session variable that you want this request variable to override.

> ✏ **Note:** If you are creating a dashboard prompt for an Oracle BI Publisher report that receives its data from an Oracle BI Server or SQL Server, then you must type "Presentation" in the Variable Name field.

For more information about using variables, see "*Using Variables*".

Column

This field displays if you selected either All Column Values, Specific Column Values, or Members of Groups from the User Input Values field.

This field displays the name of the column upon which you selected to populate the variable prompt's list of values. This field is read-only. To specify a different column name to display in this field, you must click the Select Column button and browse for and select another column.

Select Column

Use this button to display the "*Select Column dialog*" where you can browse for and select the column to use to generate the prompt's list of values.

New Related Document dialog

Use this dialog to add a document that provides supporting information to a scorecard object, such as an objective. A related document that you add is displayed as a link in the Related Documents table and can link to a dashboard page or analysis that is stored in the Oracle BI Presentation Catalog or to a web address. For example, you might want to add analysis as a related document for an objective.

For more information, see:

- *"Collaboration pane"*
- *"Related Documents area"*

This dialog is also displayed as:

Edit Related Document dialog

Components

Name

Use this field to enter the text to be displayed as the link to the related document.

If you did not specify a name, then Oracle BI EE defaults to the name of the dashboard or analysis, or a shortened form of the URL.

Type

Displays the following options to specify the type of related document:

- BI Content - Specifies that the related document is a dashboard page or analysis from the catalog.
- Web Address - Specifies that the related document is a web address.

Location

If you selected as the type:

- BI Content, this field displays the path to the dashboard page or analysis. This path is read-only. To specify another path, click the Browse button and select another dashboard page or analysis.
- Web Address, enter or paste the URL into this field.

Browse

This option is available only if you selected the BI Content type. Displays the , where you select the dashboard page or analysis from the catalog.

New Scorecard dialog

Use this dialog to create a scorecard.

For more information, see:

- *"Creating Scorecards"*

Components

Name

Use this field to enter the name of the scorecard, for example, Marketing.

Location

Use this list to select a folder or create a folder in which to create the scorecard. To create a folder, click the New Folder option in the list to display the . To select a folder that is not listed, click the Folder button to display the .

Description

Use this field to enter a description of the scorecard.

Use Default Perspectives?

Use this box to specify whether you want to use the default perspectives defined by the Balanced Scorecard Methodology. You can associate initiatives and objectives with these perspectives or to other custom perspectives that you create. For more information on perspectives, see *Perspectives*

Open dialog

Use this dialog to open objects, select objects, or save objects.

This dialog is also displayed as:

Choose Delivery Content dialog Create New Folder dialog Save dialog Save Action dialog Save Action As dialog
Save Agent dialog

Save As dialog
Save Selection Steps dialog

Select dialog Select Action dialog Select Agent Location dialog
Select Analysis dialog

Select an Object from the BI Catalog dialog Select BI Content For Action dialog
Select Condition dialog

Select Dashboard dialog
Select Existing Action dialog

Select Existing Agent dialog Select KPI dialog Select a KPI dialog Select Location dialog Select Request dialog Select Scorecard Location dialog
Components

Folders

Use this pane to select a folder in the Oracle BI Presentation Catalog to display in the Open In or Save In area.

Show Folder Tree

Displays the catalog folders in a tree structure.

Show Favorites

Displays your favorite folders in the Folder pane.

Open In or Save In

Displays the folder that is selected in the Folders pane and its contents.

You can save any object in any location. However, the Save In field sometimes recommends the best location based on the object type that you are saving. For example, you should save filters, groups, and calculated items within a subject area folder

so that these items are available when you build an analysis for the same subject area. If a subject area folder does not exist in your /My Folders or within /Shared Folders, then a subject area folder is created automatically. The "Save In" field defaults a save path to /My Folders/Subject Area Contents/<subject area>, however, the dialog's Folders area displays all instances of the subject area folder in the catalog.

You can save other objects such as analyses, prompts, and conditions in any folder. Bear in mind the distinctions between shared and personal folders, when deciding whether to share the object that you are saving with other users.

Up

Selects the folder that is one level higher in the folder structure.

New Folder

Adds a new empty folder under the folder that is specified in the Open In or Save In field.

Change list view type

Displays the following options to change the view of the list:

- List - Displays the contents of the folder that is specified in the Open In or Save In field as a list of file or folder names preceded by small buttons.

- Details - Displays the contents of the folder that is specified in the Open In or Save In field as a list of file or folder names preceded by small buttons and provides detailed information about the objects, including, name, type, the date modified, and owner.

Name

Use this box to specify the name of the object to open, select, or save.

To specify the name of the object, do one of the following:

- Click an object in the Open In area
- Enter the name of the object

The name is displayed in the tree structure when a user moves the mouse over the object.

Description

Use this field to enter a description of the object.

Descriptions are displayed when administrators use the Oracle Business Intelligence Catalog Manager. Descriptions for analyses are helpful when including them on dashboard pages.

Replace analysis in <dashboard name>

This box displays if you are viewing a dashboard, click the embedded analysis' Analyze or Edit link, edit the analysis, and select Save As in the "*Analysis editor*" toolbar to save and rename the analysis.

Use this box to include the modified analysis on the dashboard from which you accessed it for editing.

Display Label

Available only for selection steps.

Use this field to enter the label for the group when it is displayed in a view. The display label can differ from the name of the group as it is saved in the catalog.

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Steps

Available only for selection steps.

Click this button to save the selection steps for a group. The results of the selection are refreshed at runtime.

Results

Available only for groups.

Click this button to save a group as a list of members, rather than as a list of steps.

Replace current action (or steps, or condition) with a reference to the saved action (or group, or condition)

Use this box in the following situations:

- When you are saving an action or condition to the catalog, to specify whether to replace the reference to the current action or condition with the saved action or condition.
- When you are saving a series of steps to the catalog, to specify whether to replace the series of steps with the name of the group. For example, if you have created several selection steps for the Product column, click the Save button, then select this box in the dialog, the several steps are replaced by a single "Start with" step for the group.

Select this box to replace the reference with the saved action, group, or condition. Deselect this box to maintain the reference to the action, group, or condition.

Overview pane

Use this pane to view summary information about the selected initiative, objective, or KPI.

For more information, see .

This pane is part of the *"Scorecard editor: Overview tab"*.

Summary Information

This area displays summary information about the selected objective, initiative, or KPI. For more information on the specific information that is displayed, see:

Initiative or Objective Overview

This view is displayed in the when you select an initiative in the *"Initiatives pane"* or an objective in the *"Strategy pane"*. Use this view to view basic settings for the selected initiative or objective (for example, status, business owner, and so on) and a status summary showing the number of KPIs and initiatives, or KPIs and objectives, that evaluate progress in each performance state.

Components

Score

Displays the score for the selected initiative or objective in a gauge.

For more information on scores, see *"Understanding Initiative or Objective Performance Assessment"*.

Children

Displays for the selected initiative or objective:

- The number of its child initiatives or child objectives in each status.
- The number of its child KPIs in each status.

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If there is at least one child objective, initiative, or KPI for a particular status, the status name is a hyperlink that displays the *"Scorecard editor: Breakdown tab"*, showing the child object or objects.

Descendants

Displays for the selected initiative or objective:

- The number of its descendant initiatives or objectives in each status.

- The number of its descendant KPIs in each status.

If there is at least one descendant objective, initiative, or KPI for a particular status, the status name is a hyperlink that displays the *"Scorecard editor: Breakdown tab"*, showing the descendant object or objects.

Perspective

Displays the perspective with which the selected objective or initiative is associated. For example, an Improved Client Response Time objective might be associated with the Customer perspective.

For more information on perspectives, see *Perspectives*

Business Owner

Displays the user ID of the person responsible for managing the selected initiative or objective.

Assessment Formula

Displays the rule that is used to assess the overall performance of the selected initiative or objective, for example, Worst Case or Weighted.

Go to this initiative or Go to this objective

Displays the *"Scorecard editor: Initiative Details tab"* or the *"Scorecard editor: Objective Details tab"*) for the selected initiative or objective in the current mode (edit or view).

KPI Overview

This view is displayed in the when you select a KPI in the *"Initiatives pane"* or *"Strategy pane"*. Use this view to view basic KPI settings for the selected KPI and performance data.

Components

Score

Displays the score for the selected KPI in a gauge.

For more information on scores, see *"Understanding Initiative or Objective Performance Assessment"*.

Perspective

Displays the perspective with which the selected KPI is associated. For example, a Net Profit KPI might be associated with the Financial perspective.

For more information on perspectives, see *Perspectives*

Trend

Displays information in text or symbol format that indicates how the performance of the selected KPI has changed since the last reporting period or a date that you specify. Performance information text or symbols include the following:

- Decreasing (Bad) - Red down arrow (arrow displays vertically)

- Decreasing Slightly (Bad) - Red down arrow (arrow displays on a 45 degree angle pointing right)

- Decreasing (Good) - Down arrow outlined in green (arrow displays vertically)

- Decreasing Slightly (Good) - Down arrow outlined in green (arrow displays on a 45 degree angle pointing right)

- Increasing (Bad) - Red up arrow (arrow displays vertically)

- Increasing Slightly (Bad) - Red up arrow (arrow displays on a 45 degree angle pointing right)

- Increasing (Good) - Up arrow outlined in green (arrow displays vertically)

- Increasing Slightly (Good) - Up arrow outlined in green (arrow displays on a 45 degree angle pointing right)

- Unchanged - Light blue dashed line

Business Owner

Displays the user ID of the person responsible for managing the selected KPI.

Performance

Displays the following performance data for the selected KPI:

- Actual - Displays the current value of the KPI (for example, Product Sales).

- Target - Displays the desired value of the KPI (for example, Product Sales + 1500).

- Variance - Displays the amount by which the actual value differs from the target value. This partially determines the performance level of the KPI and indicates how realistic the target KPI value might be or if it must be adjusted.

- % Variance - Displays the amount by which the actual value differs from the target value expressed as a percentage.

- Change - If you enabled trending, displays the amount by which the current actual value differs from that of the previous period. For example, if an actual value for an "Annual Sales" KPI is 25000 but was 20000, the change is 5000.

- % Change - If you enabled trending, this displays the change value as a percentage.

History

Displays a graph showing, for the selected KPI, the actual values over time, such as for financial quarter, according to their assessed performance. For example, if four performance states (critical, warning, good, and excellent) were defined, KPI values are displayed according to these mappings.

The graph shows multiple time periods only if trending was enabled in the KPI's definition.

Go to this KPI

Displays the *"Scorecard editor: KPI Details tab"* for the selected KPI in the current mode (edit or view).

Page Properties dialog

Use this dialog to edit the content in a briefing book. You can change the content type, the number of navigation links to follow, and the content description.

For more information, see:

- *"Briefing Book"*

Components

Content Type

Use this area to select one of the following options:

- Updatable - Refreshes the data whenever the briefing book is downloaded, or when it is specified as the delivery content for an agent.
- Snapshot - Adds the content in its current state. Snapshot content preserves the original data and is not updated when the briefing book is rerun. Snapshot content is not updated when using agents.

Follow Briefing Book Navigation Links

This option applies only to updatable content, not to snapshot content.

Use this area to select one of the following options:

- No - Specifies that briefing book navigation links are not to be followed.
- Yes - Specifies that briefing book navigation links are to be followed. If you select this option, then you must also specify the number of links to follow.
- Number of links to follow - Specifies the number of briefing book navigation links to be followed, if you selected the Yes option.

Description

Use this field to enter a description of the content being saved to the briefing book.

Related Topics

"*Adding Content to a New or Existing Briefing Book*"

Performance Tile Properties dialog

Use this dialog to:

- Edit the properties for a performance tile.
- Select the tile size.
- Customize the size.
- Customize the background or border color.
- Change the values format.
- Edit conditional formatting.

For additional information, see:

-

Components

Tile Size

Use this list to determine the size of the performance tile. Sizes include:

- Small
- Medium
- Large
- Custom - Use this box to specify a custom size. If you select this box, then complete the Width or Height text fields for the performance tile.

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Width

This text field is available only if the Custom box is selected. Use this text field to enter the width of the tile in pixels.

Height

This text field is available only if the Custom box is selected. Use this text field to enter the height of the tile in pixels.

Background

Use this box to select the color of the background. Background color will be applied to the entire tile.

Border

Use this box to select the color of the border.

Values Format Compress Values

Use this check box to eliminate compression on the tile and to display the value in full precision.

- The value on the tile is compressed to fit the tile. In other words, 50 million appears as 50M, 125 thousand appears as 125K, and so on. By default, this value inherits its format from the Criteria page definition and then compression is applied. If you deselect the Compress Values check box, the full precision of the value is rendered. Measure values are never truncated on the tile. Any measure value less than 1,000 displays as the actual value. Compression is available only for numeric data (number, percentage, and currency).

Edit Conditional Formatting

Use this link to display the to add conditional formatting or to change the conditional formatting carried over from the Criteria page.

Permission dialog

Use this dialog to set permissions for a catalog object. Permissions determine which user, group, or role can view, open, or modify the object. If you are using this dialog to assign permissions to a catalog object and need more information about the privileges that further refine the tasks users can perform, see "" in .

For more information, see:

- "*Properties Buttons for Objects*"

This dialog is also displayed as the:

Section Permissions dialog
Components

> 🖉 **Note:** Not all components are available in each version of the dialog.

Location

Displays the folder in which the object resides.

Owner

Displays the account name of the object owner. To change the name that displays in this field, go to the Owner column in the Permission area and select the button corresponding to the account you want to assign as the owner. Note that this field

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sets the catalog owner of the object, which differs from setting the business owner for a KPI or scorecard object. For more information about the business owner, see *"KPI editor: General Properties page"*.

Permissions

Use this area to add accounts and assign permissions. Note the following options:

- To add accounts and assign permissions, use the Permissions toolbar buttons.

- To assign a permission to an account, in the Permission column, select the permission from the Permission list.

    o If you are working with section permissions, select Granted to include the section in the corresponding account's dashboard. Select Denied to remove the section from the corresponding account's dashboard. Where applicable, these permissions override the permissions that are set on the catalog object.

    o If you are working with catalog permissions, see and for more information about the permission options. For information about the options available for the Custom permission option, see . Note that most of the permissions in this list are compound permissions, made up of the most commonly used combinations of permissions, so when you select a permission from the list, Oracle BI EE displays a label listing what the selected permission includes. For example, if you selected the Modify permission, Oracle BI EE displays "Read, Write, Delete." If none of the permissions available in the permissions list meets your requirements, you can select the Custom option to access the Custom Permissions dialog where you can create your own compound permission for the object.

- To change the owner of the object, select the button in the Owner column for the account to designate as the owner.

Permissions Toolbar

This toolbar contains the following buttons:

- Apply effective permissions - Use this button to assign permissions based on the user's membership in a group. For example, if a user belongs to the Marketing group account which has full control permissions to a Corporate Sales scorecard directory, then the user also has full control to the directory.

- Replace with parent's folder permissions - Use this button to inherit the permissions defined for the highest folder in the directory hierarchy.

- Set parents folders permission to "Traverse Folder" - Use this button skip over any folders to which the permissions should not be applied.

- Add users/roles - Use this button to display the , where you select accounts to add.

- Apply permissions for selected users/roles - Displays the permissions menu. Use this menu to select a permission to assign to the selected account or accounts. To select multiple accounts, hold down the Control key and then click the accounts that you want. For more information about the permissions that you can select, see . For information about the options available for the Custom permission option, see .

- Delete selected users/roles - Use this button to delete the selected accounts.

Apply permissions to sub-folders

Use this option to assign permissions to the folder's subfolders, but not to the individual objects within the folder.

Apply permissions to items within a folder

Use this option to assign permissions to the folder's individual objects, but not to the subfolders within the folder.

Apply permissions to all descendants

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This option is available only in the *"Scorecard editor"* when you apply permissions to an object in the Initiatives pane tree or the Strategy pane tree.

Use this option to assign permissions to all descendants of an object in the *"Initiatives pane"* or the *"Strategy pane"*.

Perspectives pane

Use this pane to:

- Create custom perspectives
- Edit or view the four standard perspectives defined by the Balanced Scorecard Methodology (Financial, Customer, Internal Process, and Learning and Growth) and any custom perspectives that you have created
- Delete perspectives

For more information, see:

- *Perspectives*
- *"Creating a Custom Perspective"*

This pane is part of the *"Scorecard editor"*.

Components

Perspectives List

Displays a list of the perspectives for the scorecard.

Toolbar

This toolbar contains the following buttons:

- New Perspective - Use this button to display the *"Scorecard editor: Perspective tab"*, where you create a perspective.
- Open - Use this button to display the selected perspective for viewing or editing, depending on your privileges and permissions.
- Delete - Use this button to delete a perspective that you created or for which you have the permissions to delete.

Preview pane

Use this pane to preview the object that you selected in the Catalog page. Not all object types have previews available. For example, if you select an analysis or dashboard, those objects display in the Preview pane, but none of the interactive features such as drilling, pivoting, and sorting are available. However, if you select an action, the "View not available" message is displayed in Preview pane.

Working with the Preview pane expanded can consume considerable system resources, so Oracle recommends that you only open the Preview pane when needed.

This pane is part of the *"Catalog page"*.

Print Options dialog

Use this dialog to specify settings for printing dashboard pages and views. You can:

- Specify page settings and header and footer content for the PDF output.

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- Select which print layouts are to be available in the Print menu for a dashboard page.

- Create, edit, replace, and remove custom print layouts.

Dashboard pages are printed in Adobe Acrobat PDF format. Adobe Reader 6.0 or greater is required to print using Adobe PDF.

✏ **Note:** The print selections that you specify apply to PDF output only. If you then print the PDF on a local or network printer, then the print selections that are specified in the browser are in effect, such as the selection for paper size.

This dialog is displayed from the Print Properties option in the Tools menu on the *"Dashboard builder"* toolbar and Print Options button on the *"Analysis editor: Results tab"* toolbar.

For more information, see:

- *"Editing a Dashboard"*
- "*Changing Print Options for a View*"

Components

Paper Size

Use this list to select the size of the paper to use.

Orientation

Use this list to select the orientation, either Portrait or Landscape.

Print Rows

Use this list to specify which rows are displayed, either all rows or only the visible rows.

Hide Margins

Use this box to show or hide margins.

Include Header and Include Footer

Use these boxes to include a header, a footer, or both in the PDF output. Click Edit to display the *"Edit Footer or Header dialog"*, where you can specify the layout and formatting of the contents of the header or footer. You can also specify whether to display the header or footer in the HTML output.

Standard Print Layouts

Use this area to select which standard print layouts are to be available in the Print menu for the dashboard page. You can select Printable HTML, Printable PDF, or both.

Custom Print Layouts

Use this area to:

- Create, edit, replace, and remove custom print layouts. To do so, click the Custom Print Layouts button to display the following options:

    o Create Layouts - (Available only if no custom print layouts exist.) Use this option to create custom print layouts for the dashboard page. Selecting this option:

        - Generates a new layout based on the standard layout.
        - Generates a BI Publisher report and data model.
        - Opens BI Publisher in a new window and displays the generated layout as a thumbnail in the BI Publisher Layout Editor, where you can edit, delete, or create layouts.

      Note that the page settings and the header and footer settings are exported to BI Publisher. You can changes these settings in BI Publisher.

    o Create and Edit Layouts - (Available only if custom print layouts already exist.) Use this option to edit existing layouts. Selecting this option:

        - Creates a new layout based on the standard layout, if you specify that you want to remove existing layouts in the warning message that is displayed.
        - Generates a new data model.
        - Opens BI Publisher in a new window and displays the generated layout as a thumbnail in the BI Publisher Layout Editor, where you can edit, delete, or create layouts.

    o Replace Layouts - Use this option to remove all existing custom print layouts and create new layouts. Selecting this option:

        - Removes all existing layouts.
        - Generates a new layout based on the standard layout.
        - Removes the associated BI Publisher report and data model, and generates a new BI Publisher report and data model.
        - Opens BI Publisher in a new window and displays the generated layout as a thumbnail in the BI Publisher Layout Editor, where you can edit, delete, or create layouts.

    o Remove Layouts - Use this option to remove all custom print layouts as well as the associated BI Publisher report and data model.

If custom print layouts exist, they are listed in this area. Use this list to select which custom print layouts are to be available in the Print menu for the dashboard page.

Privilege dialog

Use this dialog to control the privileges that users are granted. Privileges control the rights that users have to access the features and functionality of Oracle BI Presentation Services. This dialog is displayed from the .

For more information, see "" in .

Components

Permissions

Use this area to add accounts and grant or deny privileges.

To add accounts and grant or deny privileges, use the Permissions toolbar buttons.

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To grant or deny a privilege to an account, in the Permission column, select either Granted or Denied.

Permissions Toolbar

This toolbar contains the following buttons:

- Add Users/Roles - Use this button to display the , where you select users, roles, or Catalog groups to add to the list in this dialog.

- Apply Permissions for Selected Users/Roles - Use this button to grant or deny privileges to the selected accounts.

- Delete Selected Users/Roles - Use this button to delete the currently selected accounts from the list in this dialog.

Prompt editor

Use this editor to create prompts.

For more information, see:

- "*Creating a Column Prompt*"
- "*Creating a Variable Prompt*"

This dialog is also displayed as:

Analysis editor: Prompts tab
Components

Definition

Use the "*Definition pane*" to create prompts that allow users to select values that dynamically filter all views within the analysis.

Display

Use the "*Display pane*" to view the prompt's layout and design.

Toolbar

The toolbar contains the following buttons:

- Save - Use this button to save the prompt.
- Save As - Use this button to make a copy of the prompt.

Prompt Links dialog

Use this dialog to specify whether to display the Edit link with a prompt. This link, which displays at runtime, allows users (with the proper privileges) to edit the prompt.

Components

Edit

Use this option to specify whether the Edit link is displayed with the prompt at runtime. When users with the proper privileges click the Edit link, the prompt is displayed in the "*Prompt editor*" where users can edit the prompt definition.

Copy

Use this option to specify whether the Copy link is displayed with the prompt at runtime. This link enables users to copy the prompt in its current state (that is, the prompt definition with the default or selected prompt values) to the Windows Clipboard.

Properties dialog

This dialog box is displayed when you select an object in the *"Catalog page"* and click Properties in the Tasks pane or click More, then Properties below the object.

Components

General

Use this area to view and modify general information about the object. You can view the object's name, type (such as action or analysis), and location in the catalog. You can also enter a description for the object.

Access

Use this area to learn the following information about an object:

- The date and time when it was created.
- The date and time when it was last modified.
- The date and time when it was last accessed.

Attributes

Use the options in this area to set the following attributes of the object:

- Hidden - Specifies that the object is hidden.
- System - Specifies that the object is a system object.
- Read Only - Specifies that the object is read-only.
- Do Not Index - Specifies that the object should not be included in the index that is used by the full-text catalog search. The full-text catalog search is available if the administrator configured Oracle BI Enterprise Edition to use Oracle Secure Enterprise Search or Oracle Endeca Server. If you select to exclude the object, then it does not display in the results of any full-text catalog search. The object, however, can still be found using the basic catalog search. See for more information about full-text and basic searches.

  PoA newly created object that is included in the index cannot be located during a full-text catalog search until a crawl of the catalog has occurred. See "" in for information.

Custom Properties

This area is read-only and contains system-generated information for troubleshooting object and catalog problems.

Ownership

Use this area to take ownership of the object. This area displays only if the proper privileges were assigned to the user, group, or role. Note that the owner of an object or folder cannot automatically access the object or folder. To access an object or folder, the user must have the proper permissions assigned in the object or folder's *"Permission dialog"*.

- Set Ownership of this item - Click to become the owner of the item.
- Set Ownership of this item and all subitems - Click to become the owner of the item and any subfolders or subitems contained within the item. For example, if you click this link for a scorecard, then you take ownership of all of the scorecard's components.

Publish Page to Dashboard dialog

Use this dialog to specify the shared dashboard to which you want to publish the current dashboard page so that you can share the page with others.

This dialog is displayed from the *"Dashboard builder"*.

For more information, see *Publishing a Dashboard Page*.

Components

Dashboard

Use this field to specify the dashboard to which to publish the current dashboard page. Click Browse to display the , where you select the dashboard.

Related Items pane

Use this pane to identify the following:

- For a KPI listed in the *"Strategy pane"*, objectives and KPIs that cause or effect the KPI.
- For a KPI listed in the *"Initiatives pane"*, initiatives and KPIs that cause or effect the KPI.

- For an objective, other objectives and KPIs that cause or effect the objective, and initiatives that drive the objective.
- For an initiative, the objectives that are driven by the initiative.

For more information, see:

- *"Working with KPI Details"*
- *"Creating an Initiative"*
- *Creating an Objective*

This pane is part of the *"Scorecard editor: KPI Details tab"*, the *"Scorecard editor: Initiative Details tab"* and the *"Scorecard editor: Objective Details tab"*.

Components

Causes

This table is available only in the Scorecard editor: KPI Details tab and the Scorecard editor: Objective Details tab.

Displays the following:

- For a KPI listed in the *"Strategy pane"*, displays the objectives and KPIs that cause the KPI.
- For a KPI listed in the *"Initiatives pane"*, initiatives and KPIs that cause the KPI.

- For an objective, other objectives and KPIs that cause the objective.

Use this table to view and manage the causes:

- To add an objective, initiative, or KPI, drag it from the Strategy pane or the Initiatives pane and drop it in the table. The *"Causal Linkage dialog"* is displayed, where you specify the strength of the cause and effect relationship and how the values of the added object impact or support the values of the object you are defining.
- To edit a causal linkage, select it in the list and click the Edit Row button to display the Causal Linkage dialog.

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- To delete a causal linkage, select it in the list and click the Delete Row button.

Effects

This table is available only in the Scorecard editor: KPI Details tab and the Scorecard editor: Objective Details tab.

Displays the following:

- For a KPI listed in the Strategy pane, displays the objectives and KPIs that effect the KPI.
- For a KPI listed in the Initiatives pane, initiatives and KPIs that effect the KPI.

- For an objective, other objectives and KPIs that effect the objective.

Use this table to view and manage the effects:

- To add an objective, initiative, or KPI, drag it from the Strategy pane or Initiatives pane and drop it in the table. The Causal Linkage dialog is displayed, where you specify the strength of the cause and effect relationship and how the values of the added object impact or support the values of the object you are defining.
- To edit a causal linkage, select it in the list and click the Edit Row button to display the Causal Linkage dialog.
- To delete a causal linkage, select it in the list and click the Delete Row button.

Initiatives driving this Objective

This table is available only in the Scorecard editor: Objective Details tab.

Displays the initiatives that drive the objective.

Use this table to view and manage the initiatives:

- To add an initiative, drag it from the Initiatives pane and drop it in the table. The Causal Linkage dialog is displayed, where you specify the strength of the cause and effect relationship and how the values of the added initiative impact or support the values of the objective you are defining.
- To edit an initiative linkage, select it in the list and click the Edit Row button to display the Causal Linkage dialog.
- To delete an initiative linkage, select it in the list and click the Delete Row button.

Objectives Driven by this Initiative

This table is available only in the Scorecard editor: Initiative Details tab.

Displays the objectives that are driven by the initiative.

Use this table to view and manage the objectives or KPIs:

- To add an objective, drag it from Strategy pane and drop it in the table. The Causal Linkage dialog is displayed, where you specify the strength of the cause and effect relationship and how the values of the added objective impact or support the values of the initiative you are defining.
- To edit an objective linkage, select it in the list and click the Edit Row button to display the Causal Linkage dialog.
- To delete an objective linkage, select it in the list and click the Delete Row button.

Rename dialog

Use this dialog to enter a different name for:

- An object in the catalog (a KPI or a dashboard page, for example)

- A favorites category

- A view, such as a table view

- A compound layout

For more information about the catalog, see:

- "*Managing Objects in the Oracle BI Presentation Catalog*"
- "*Editing a Dashboard*"

For more information about favorites, see:

This dialog is also displayed as:

Rename View dialog
Components

Name (or View Name)

Use this field to enter a new name for the object, favorites category, view, or compound layout.

Format

This button is available when you rename a section in the "*Dashboard builder*".

Use this button to display the , where you can format the name of a section.

Use Dashboard Object name as link text

This option is available when you rename an analysis in the Dashboard builder.

Use this option to specify whether to use the new name of the analysis as the link text when you display analysis results as a link on a dashboard.

Select this box to use the new name you specify. Deselect this box to use the name with which the analysis is stored in the catalog.

For more information on displaying the analysis results as a link, see the Display Results option on the Analysis Properties button described in "*Properties Buttons for Objects*".

Preserve references to old name of this item

This option is not available for all objects.

Use this option to specify to maintain any existing references to the previous name of the object. This creates a shortcut with the old name that points to the renamed object in the Oracle BI Presentation Catalog. If you do not select this option, then existing references break.

Replace Icon dialog

Use this dialog to select an icon to represent an assessment range.

For more information, see:

- "*Understanding Initiative or Objective Performance Assessment*"
- "*Assessment Mappings*"
- "*Settings dialog: Assessment Mappings tab*"

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Components

Standard Images

Use the to select a standard image to use as the icon.

Custom Images

Use the to specify a custom image to use as the icon.

Replace Icon dialog: Custom Image tab

Use this tab of the to specify a custom image to use as the icon to represent an assessment range.

For more information, see:

- "*Understanding Initiative or Objective Performance Assessment*"
- "*Assessment Mappings*"
- "*Settings dialog: Assessment Mappings tab*"

Components

Web Address

Use this field to specify a custom image. To do so, enter one of the following:

- The URL to a custom image.
- The fmap syntax to reference a custom image that is stored locally in the Oracle Business Intelligence environment. For more information on the fmap syntax, see .

> ✏ **Note:** If you are trying to save an object that uses the fmap syntax, then you must have the Save Content with HTML Markup privilege. See "" in for information on privileges.

The custom image should be one that is accessible to all users who view or edit the scorecard.

Update Preview

Use this button to display the image in the Preview area.

Preview

Displays the custom image.

Replace Icon dialog: Standard Images tab

Use this tab of the to select a standard image to use as the icon to represent an assessment range. Also use this dialog to select an image to display for a range of data on a map. You display this dialog from the .

This tab is also displayed as:

Select Image dialog
For more information, see:

- "*Understanding Initiative or Objective Performance Assessment*"
- "*Assessment Mappings*"

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- *"Settings dialog: Assessment Mappings tab"*

-

Components

Image Categories (left pane)

Displays the categories of images. Click a category to display the available images in the right pane. The bottom-most category, which is marked by a globe icon, indicates the list of images that you imported on the Image Library tab of the .

Standard Images (right pane)

Displays the standard images that are available for the category that you selected in the left pane. Click the image that you want.

If you must add an image, then see the administrator.

Report Links dialog

Use this dialog to specify the links that are to be displayed with analyses on a dashboard page. You can specify these link setting at the following levels:

- Dashboard level - The link settings apply to all analyses in the dashboard, unless customized settings have been specified for an individual dashboard page or analysis.

  To specify the report links at the dashboard level, click the Tools button on the *"Dashboard builder"* toolbar to display the *"Dashboard Properties dialog"* and then click the Dashboard Report Links Edit button.

- Dashboard page level - The link settings apply to all analyses in the dashboard page, unless customized settings have been specified for particular analyses.

  To specify the report links at the dashboard level page, click the Tools button on the Dashboard builder toolbar and then select Page Report Links.

- Analysis level - The link settings apply only to the particular analysis.

  To specify the report links at the analysis level, click the Properties button for the analysis in the *"Page Layout area"* of the Dashboard builder and select Report Links.

Components

Inherit Dashboard Settings

Select this option to specify that the link settings for the dashboard are to be used.

This option is available only when you are specifying the link settings at the dashboard page level.

For more information, see .

Inherit Page Settings

Select this option to specify that the link settings for the dashboard page are to be used.

This option is available only when you are specifying the link settings at the analysis level.

Customize

Select this option to customize the link settings for a particular dashboard page or analysis.

This option is available only when you are specifying the link settings for a dashboard page or an analysis.

Analyze

Select this option to specify that the Analyze link is to be displayed. This link displays the analysis in its current state (that is, with the current context, for example, with applied filters, prompts, and so on) in the *"Analysis editor"*, where users can edit it.

For more information on editing an analysis, see .

Edit

Select this option to specify that the Edit link is to be displayed. This link displays the analysis in its original state (that is, without the current context) in the *"Analysis editor"*, where users can edit it.

For more information on editing an analysis, see .

Export

Select this option to specify that the Export link is to be displayed. This link provides users with various options to export the results of the analysis, for example, Excel 2007+. For more information on the available export options, see *"Export Menu Options for Views and Results"*.

For more information on exporting an analysis, see .

Refresh

Select this option to specify that the Refresh link is to be displayed. This link enables users to refresh the analysis.

Add to Briefing Book

Select this option to specify that the Add to Briefing Book link is to be displayed. This link displays the *"Save Briefing Book Content dialog"*, where users can add the analysis to a briefing book.

For more information about adding an analysis to a briefing book, see *"Adding Content to a New or Existing Briefing Book"*.

Print

Select this option to specify that the Print link is to be displayed. This link provides users with the following print options:

- HTML - Displays a printer-friendly version of the analysis in HTML
- PDF - Displays a printer-friendly version of the analysis in Adobe PDF (Portable Document Format)

Copy

Select this option to specify that the Copy link is to be displayed. This link enables users to copy the analysis in its current state (that is, with the current context, for example, with applied filters, prompts, and so on) to Microsoft Office applications.

For more information about copying analyses to Microsoft Office applications, see .

Related Topics

"Dashboard Properties dialog"

Results tab: Column Selector editor

Use this editor of the *"Analysis editor: Results tab"* to edit a column selector view. A column selector is a set of drop-down lists that contain pre-selected columns. Users can dynamically select columns and change the data that is displayed in the views of the analysis.

For more information, see *"Editing a Column Selector View"*.

Components

Include Selector

Use this box to specify whether a drop-down list is to be displayed for the column that contains this box.

Label

Use this field to enter a label for this column in the selector.

Choices

Displays the columns that are to be displayed as the choices in the drop-down list for the column. To add a new column to a drop-down list, ensure that the column to which you want to add a new column is active by clicking it to highlight it. Then double-click the new column to add in the *"Subject Areas pane"*.

Column Properties

Use this button to display the *"Column Properties dialog"* for the column.

Edit Formula

Use this button to display the *"Edit Column Formula dialog"* for the column.

Delete

Use this button to delete the column from the drop-down list.

Clear Choices

Use this link to clear all the columns that are selected to be displayed in the drop-down list, except for the first column that was selected for the analysis.

Toolbar

The toolbar contains the following buttons and boxes:

- Buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.
- Label Position - Use this box to select a position for the label of each drop-down list, either Left or Above.
- Automatically refresh when a new column is selected - Automatically refreshes the drop-down list of columns in the editor when you add a column from the Subject Areas pane.

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Results tab: Create Segment editor

The editor is for users of the Oracle Siebel Marketing operational application, Version 7.7 (or higher), integrated with Oracle Business Intelligence.

Use this editor of the *"Analysis editor: Results tab"* to edit a create segment view, which displays a Create Segment link in the results. Users can click this link to create a segment in their Oracle Siebel Marketing operational application, based on the results data.

For more information, see:

- *"Editing Views"*
- The online help for the Marketing Segmentation interface

Components

Toolbar

The toolbar contains the buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Results tab: Create Target List editor

This editor is for users of Oracle's Siebel Life Sciences application integrated with Oracle's Siebel Life Sciences Analytics applications.

Use this editor of the *"Analysis editor: Results tab"* to edit a create target list view, which enables automatic integration of lists of contacts and accounts based on the results of an analysis. For example, you can create a target list in Oracle's Siebel Pharma Sales application and use it in Oracle's Siebel Pharma Mobile Analytics application.

When you add a create target list view, a link named Create Target List is displayed in an analysis on a user's interactive dashboard. The user can click this link to populate or refresh a list of contacts or accounts in the Life Sciences application.

For more information, see:

- *"Editing Views"*
- The documentation for the Siebel Life Sciences application

Components

Create Target List

Use this link to create a target list.

Toolbar

The toolbar contains the buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Results tab: Data View editor

Use this editor of the *"Analysis editor: Results tab"* to edit one of the following data views:

- Funnel
- Gauge
- Graph
- Map
- Pivot table
- Table
- Trellis
- Performance Tile

For more information, see:

- *"Editing a Gauge View"*
- *"Editing Graph Views"*
- *"Editing Table and Pivot Table Views"*
- *"Editing Trellis Views"*
- *"Editing Views"*

This editor is displayed as:

Results tab: Funnel editor

Results tab: Gauge editor

Results tab: Graph editor

Results tab: Map editor Results tab: Performance Tile editor
Results tab: Pivot Table editor

Results tab: Table editor

Results tab: Trellis editor

Components

Subject Areas

Use the *"Subject Areas pane"* to select the columns for an analysis and to work with subject areas.

Analysis Results

Displays the analysis results in a graph, funnel graph, gauge, map, trellis, performance tile, pivot table, or table, depending on the type of view.

Layout

This pane is not available for maps.

Use the *"Layout pane"* to specify the layout of the data for the view. Performance tiles have a unique Layout pane. See for additional information.

Catalog

Use the *"Catalog pane"* to drag and drop named groups and named calculated items from the Oracle BI Presentation Catalog to the view. The Catalog pane is not available for performance tiles in edit mode on the Results tab. For more information on named groups and named calculated items, see

Selection Steps

This pane is available only in the Graph, Map, Pivot Table, Table, and Trellis editors.

Use the *"Selection Steps pane"* to create and modify steps for data selections. Selection steps are not visible until you click the plus button (+) to expand the Selection Steps pane.

Settings

This pane is available only in the Funnel and Gauge editors.

Use the *"Settings pane"* to set the thresholds for a funnel graph or gauge.

Toolbar

The toolbar contains buttons that are common to all views and buttons that depend on the type of data view. For more information on the buttons common to all views, see *"Toolbar Buttons Common to All Views"*. For more information on specific data view buttons, see .

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Right-Click Menu

Displays interactions that allow you to work with views. This option is available when you right-click a column heading or member in a table, pivot table, or trellis. See for additional information.

Paging Buttons

These buttons are available only when editing or working with tables, pivot tables, and trellises.

When a table, pivot table, or trellis includes a large number of rows, a set of buttons can be displayed under the view. You can use the following buttons to page through the rows in the view:

- First x Rows - Displays the first x rows of data for the view. The number that is used for the First, Previous, and Next buttons is specified by the Rows per Page field in the *"Table Properties dialog: Style tab"*, *"Pivot Table Properties dialog"* or the .

- Previous x Rows - Displays the previous x rows of data for the view.

- Next x Rows - Displays the next x rows of data for the view.

- Display maximum (500) rows per page - Enables you to display as many as the maximum number of rows per page at one time temporarily. The default is 500. The administrator can specify a different maximum value that is displayed on the tooltip for the button using the MaxVisibleRows element in the configuration file.

Components Specific to Map

Map View Area

Use this area to interact with the components of the map such as the zoom controls, legend, and overview map.

BI Data Layers

Use this area to work with the applicable formats for the BI layers of the map. Not all formats are available for all layer types. For example, point layers cannot have Color Fill formats. The map cannot display multiple non-point formats at a time (at a single zoom level) but can display multiple point formats simultaneously, if they do not share the same latitude and longitude location. If multiple graph formats are specified at the same geographic layer, then they render on top of each other.

You can do the following:

- Click View then View All Formats to specify that all defined formats are listed in this area, or click View Visible Formats to specify that only those formats that are currently displayed on the map are listed in this area.

- Click New, select a format type, then select a layer to display the appropriate dialog for defining that format. You can select an existing layer, or you can choose to create a custom point layer, which enables you to apply formats to points on the map based on the latitude and longitude.

  When you add a format, it is displayed at the top of the list of formats, to ensure that you see it on the map.

- Select Automatically create formats when drilling to specify whether to automatically create formats when you drill in a map. The formats that are added are listed in the Map Formats pane. For example, suppose you drill from Districts to Cities. Additional formats are added for the Cities layer.

  You can also specify this option in the . The option is updated in both places when you make a change in either place.

- Hover over a layer name in the list to display the following buttons for modifying the layer:

  o Add New Map Formats - Displays a list of formats so that you can select the appropriate format to display the appropriate dialog for defining that format. The list contains only those formats that apply for the geometry of that layer. For example, bar graphs and pie graphs do not apply to point layers. After selecting a format, select the column to which it applies.

    If you add a format but do not see it on the map, then ensure that the map is showing the appropriate zoom level.

  o Delete - Removes the layer and all its formats from display on the map.

- Hover over a format name under a layer name in the list to display the following buttons for modifying the format:

  o Up or Down - Reorders the format in the lists of formats. The order is important, because formats higher in the list overlay those formats that are lower in the list.

  o Edit - Displays the dialog for modifying the format.

  o Delete - Deletes the format.

- Click the box beside a format name to make the format visible or invisible on the map.

- Re-order formats within a geographic layer (such as State).

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- Work with thresholds whether section sliders are displayed or not. If the slider is not displayed, then you can display a map format dialog to manipulate the threshold values.

If no layers are specified in the map formats area, then click New Map Format. The map prompts you to import the geo-encoded columns for displaying a format for a particular geo-layer, if the columns are not part of the analysis.

When you specify to create a map view, you likely see at least one layer available in the Map Formats area. If no layer is available, then the New Map Format link is displayed.

Limits exist for how much data can be displayed for formats on a map view. As you work with formats, you might exceed the data limit. If you do so, then you see a message that alerts you to the data limit and the fact that not all formatting can be displayed, so you can contact the administrator. The administrator controls the limit with the MaxRecords configuration element. For information on setting this element, see "" in .

Feature Layer

Use this area to add non-BI layers to the map. These layers have not been associated with BI data so are not interactive. Click New, then select the layer that you want to add to the map.

Components Specific to Performance Tiles

Styles pane

Use the Styles pane to select a predefined tile size option button or to select a new theme for your tile.

For more information, see:

Right-Click Menu for Tables, Pivot Tables, and Trellises
When editing or working with tables, pivot tables, and trellises, you can right-click to display a menu of interactions that are applicable to the view.

The interactions that are available when you right-click in a table, pivot table, or trellis depend on:

- The type of data view.
- The selected data. When you right-click a:
    - Column heading, the available right-click interactions are related to that column, for example, Exclude column, Show Subtotal, or Add Custom Calculated Item.
    - Member, the available right-click interactions are related to that member, for example, Expand and Create Group. Interactions that are related to the column that contains the member are also available.
- Whether you are working in design mode (for example, in the Analysis editor), in a dashboard, or in runtime mode. Note that a content designer can specify which right-click interactions are available for an analysis at runtime. For more information, see .

✎ **Note:** Right-click interactions are not available for graphs in trellis views (Simple Trellis and Advanced Trellis), but you can right-click on text in the trellis view in the same manner as in a pivot table. This includes data cells in an advanced trellis that have Visualization set to Text.

The right-click menu can include the following interactions (listed in alphabetic order):

- Add Custom Calculated Item - Available only in design mode. Displays the "*New Calculated Item dialog*", where you create a calculated item using a custom formula. It also automatically creates a selection step that contains the custom calculated item.
- Add Members - Available only in design mode. Displays the , where you select members to add.

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- Add Related - Available only for hierarchical columns. Creates a selection step that adds members to the selection based on a selected type of relationship.

  You can select a family relationship (such as Parents or Children), a specific hierarchy level (for level-based hierarchies only), or the selected member and a family relationship (such as Parents or Children). For more information on the family relationship, see .

- Collapse - Available only for hierarchical columns. Collapses the selected value.

- Collapse all items for this column - Available only for hierarchical columns. Collapses all the values in the column up to the top level.

- Collapse all items in view - Available only for a view that includes at least one hierarchical column. Collapses all the values in all the hierarchical columns in the view up to the top level.

- Column Name or Column Options -Displays a submenu of right-click interactions (such as Drill or Exclude column) for a column.

- Create Calculated Item - Creates a new calculated item based on the selected members and calculated items, and displays the *"New Calculated Item dialog"*, where you specify the label and the function for the new calculated item, and whether to remove the calculated members from the view. It also automatically creates a selection step that contains the calculated item. See for additional information.

- Create Group - Creates a new group based on the selected members and groups, and displays the , where you specify the label for the new group. It also automatically creates a selection step that contains the group. See for additional information.

  Be sure to select what you want to include in the group first before selecting this option because you cannot add more members or other groups from the New Group dialog.

- Drill - Drills down to more detailed information. When you drill in:
  - o An attribute column, you add the lower level to the view. All views are affected by drilling in an attribute column, which is equivalent to a filter drill. After you click the value, a column is added to the analysis and a filter is automatically created and listed in the Criteria tab
  - o A hierarchical column, you expand and collapse the nodes of data that are in the view. Drilling in a hierarchical column affects only that particular view. No other views are affected.

- Edit Calculated Item -Displays the , where you make changes to the calculated item.

- Edit Group - Displays the , where you make changes to the group.

- Exclude column - Moves the column to the Excluded drop target. For information, see . Excluding a column excludes it from the query.

- Exclude Custom Member - Displays a list of custom members (either calculated items or groups) that you want to exclude from your view. These custom members must have already been created for a column and were neither previously included in or excluded from the view.

- Expand - Available for hierarchical columns only. Displays the next level down in the hierarchy. For information, see *"Drilling in Results"*.

- Hide Column - Hides the column in the view. Hiding a column does not remove the column from the *"Analysis editor: Criteria tab"* and does not affect the query results.

- Include column - Displays a list of the columns that have been excluded from the view (that is, columns that are in the Excluded drop target). Select a column to include it in the view. Including a column includes it in the query.

- Include Custom Member - Displays a list of custom members (either calculated items or groups) that you want to include in your view. These custom members must have already been created for a column and were neither previously included in or excluded from the view.

- Keep Only - Creates a selection step that keeps only the selected members and removes all others.

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- Keep Only Related - Creates a selection step that keeps only certain members based on a selected type of relationship and removes all others.

  You can select a family relationship (such as Parents or Children), a specific hierarchy level (for level-based hierarchies only), or the selected member and a family relationship (such as Parents or Children). For more information on the family relationship, see .

- Move Column - Displays a menu of the following options:
  - Before Current Column - Moves the column to the left of its current location.
  - After Current Column - Moves the column to the right of its current location.
  - To Drop Target Name - Moves the column to the named drop target.

- Remove - Creates a selection step that removes the selected members from the view.

- Remove All Steps - Available only in design mode. Removes all the steps (whether they were added in the "*Selection Steps pane*" or from the right-click menu) for the selected column.

- Remove Calculated Item - Removes the selected calculated item and the selection step that contains the calculated item. (If the calculated item is a named calculated item, Remove Calculated Item does not remove it from the catalog.) See for additional information.

- Remove Group - Removes the selected group and the selection step that contains the group. (If the group is a named group, Remove Group does not remove it from the catalog.) See for additional information.

- Remove Related - Creates a selection step that removes members in the selection based on a selected type of relationship.

  You can select a family relationship (such as Parents or Children), a specific hierarchy level (for level-based hierarchies only), or the selected member and a family relationship (such as Parents or Children). For more information on the family relationship, see .

- Send master-detail event - Available only in accessibility mode and only when the primary interaction for the column value is set to Send Master-Detail Events in the "*Column Properties dialog: Interaction tab*". Sends a master-detail event, which passes information to update the data in a detail view. For more information on master-detail relationships, see "*Master-Detail Linking of Views*"

- Show Column level Grand Total - Displays the following options for showing column-level grand totals:
  - None - Select this option to omit column-level grand totals.
  - After Values - Select this option to show column-level grand totals after a group of values that can be totaled in relation to a higher-level column or level of a hierarchy.
  - Before Values - Select this option to show column-level grand totals before a group of values that can be totaled in relation to a higher-level column or level of a hierarchy.

- Show Row level Grand total - Displays the following options for showing row-level grand totals:
  - None - Select this option to omit row-level grand totals.
  - After Values - Select this option to show row-level grand totals after a group of values that can be totaled in relation to a higher-level column or level of a hierarchy.
  - Before Values - Select this option to show row-level grand totals before a group of values that can be totaled in relation to a higher-level column or level of a hierarchy.

- Show Running Sum - Available in pivot tables only. Displays numeric measures as running sums, where each consecutive cell for the measure displays the total of all previous cells for that measure.

  When you select this option a check mark is displayed to the left of the option. To hide running sums, right-click and select Show Running Sum again to deselect it.

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For more information on displaying running sums, see .

- Show Subtotal - Available only for attribute columns, depending on the column placement within the view (for example, inner-most attribute columns cannot have subtotals). Displays the following options for the location of subtotals in a column:
    - None - Select this option to omit subtotals.
    - After Values - Select this option to add subtotals after a group of values that can be totaled in relation to a higher level column or level of a hierarchy.
    - Before Values - Available only for pivot tables. Select this option to add subtotals before a group of values that can be totaled in relation to a higher level column or level of a hierarchy.
    - At the Beginning - Available only for pivot tables. Select this option to add subtotals of all values in the column at the beginning of the column.
    - At the End - Available only for pivot tables. Select this option to add subtotals of all values in the column at the end of the column.
- Sort or Sort Column - Displays the *"Sorting Options Menu"*, where you select options for sorting values. For more information on sorting data, see *"Sorting Data in Views"*.
- View Calculated Item Definition - Displays the , where you view the definition of the selected calculated item.
- View Group Definition - Displays the , where you view the definition of the selected group.

For more information on selections steps, see *"Working with Selections of Data"*. For more information on groups and calculated items, see *"Groups and Calculated Items"*.

Notes

- For the Add Related, Keep Only Related, and Remove Related interactions, you can select one of the following family relationship options:
    - Including selected and - Selects the selected member and all the members of the family relationship (such as Children) that you specify.

        For example, selecting Keep Only Related, Including selected and, then Children of 2011 returns: 2011, 2011 Q1, 2011 Q2, 2011 Q3, and 2011 Q4.
    - Descendants - Selects all members that are descended from the selected member.
    - Siblings - This option is not available for columns in a skip-level hierarchy. Selects all members that are on the same level and have the same parent as the selected member.
    - Parents - Selects the parent of the selected member.
    - Children - Selects all the children of the selected member.
    - Ancestors - Selects all members from which the selected member is descended.
    - Leaves - Selects all members that are descended from the selected member and that have no lower levels.
    - Members At Hierarchy Levels - Displays the Select Levels dialog, where you specify one or more hierarchy levels from which members are to be selected.
- To select multiple values in a view and apply a right-click interaction, press the Control key, right-click the values, then select the right-click interaction.

Toolbar Buttons Common to All Views
The following toolbar buttons are common to all views:

- Print This Analysis - Use this button to print the analysis as HTML or PDF. For more information on printing, see .

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- Export This Analysis - Use this button to select an option for exporting the analysis. For information, see *"Export Menu Options for Views and Results"*.

- Show how results will look on a Dashboard - Use this button to preview how the edited view is displayed on a dashboard.

- Duplicate View - Use this button to create a copy of the view that you are editing.

- Rename View - Use this button to display the *"Rename View dialog"*, where you specify a new name for the view.

- Refresh the results of the current analysis - Use this button to refresh the data that is displayed in the view.

Data View Editor Toolbar

The toolbar on a data view editor contains some buttons that are common to all data views and other buttons and boxes that are particular to specific views. See the following sections:

- *"Toolbar Buttons Common to All Views"*

Toolbar Buttons Common to All Data Views

The following toolbar buttons are common to all data views:

- New Group - Use this button to display the , where you add a new group.

- New Calculated Item - Use this button to display the *"New Calculated Item dialog"*, where you add a new calculated item.

- Data View Properties or Edit Data View Properties - Use this button to display the properties dialog for the view.

- Display Results - Use this button to specify whether to show the view's results in the editor.

- Show/Hide Layout Pane - Use this button to specify whether to show the *"Layout pane"* for all data views except for map.

- Show/Hide Selection Steps Pane - Use this button to specify whether to show the *"Selection Steps pane"*. This pane is not available for performance tile views.

Toolbar Buttons Specific to Graph and Funnel Graph Views

The toolbar contains the following buttons and boxes that are specific to a graph view:

- Type - Use this button to select the subtype of graph. Options depend on the type of graph.

- Style - Use this button to select the style for the graph. Options depend on the type of graph.

- Effect - Use this button to select either a 2D effect or a 3D effect for the graph.

- Format Styles - Use this button to select a specific format for waterfall graphs. See for additional information.

Toolbar Buttons and Boxes Specific to Gauge Views

The toolbar contains the following buttons and boxes that are specific to a gauge view:

- Show/Hide Settings Pane - Use this button to specify whether to show the *"Settings pane"*.

- Gauge Type - (Not available for funnel graphs.) Use this button to select the type of gauge. Options are: Dial, Horizontal Bar, Vertical Bar, and Bulb.

- Effect - (Not available for all gauge types.) Use this box to select either a 2D effect or a 3D effect for the gauge.

- Size - Use this box to specify the size of the gauge - Fit to Canvas, Small, Medium, Large or Custom.

  If you select Custom, then you must complete the Width and Height fields, where you specify the width and height in pixels.

Toolbar Buttons and Box Specific to Map Views

The toolbar contains the following buttons and box that are specific to a map view:

- Background Map - Use this box to select the background map for the map view.

- Pan - Click this button and click and drag to move the map either side to side or up and down so that you see a certain portion of it. When you can pan, the cursor is in the shape of a hand and you can move the map in various directions.

- Zoom In and Zoom Out - Click these buttons to zoom in and out of the map. When you can zoom in or out, the insertion point is in the shape of a magnifying glass with a plus or minus button over the glass.

- Legend - Use this button to display or hide the legend for the map.

- Auto Correct - Use this button to have the Map View compiler attempt to automatically correct a map error.

See for more information.

Toolbar Buttons and Box Specific to Pivot Table, Table, and Trellis Views

The toolbar contains the following buttons and box that are specific to a pivot table, table, or trellis view:

- Import formatting from another analysis - Use this button to display the *"Open dialog"*, where you select an analysis from which to import formatting for columns and views. For more information, see .

- Graph Pivoted Results - Available only for pivot tables. Click this button to display the results of the pivot table in a graph view, which is displayed alongside the pivot table. The two views are fully linked, which means that changes made to one view are automatically reflected in the other.

    The following items are added to the toolbar:

    - Position - Use this box to select the location of the graph relative to the pivot table that you created. Options are: Right, Below, Above, Left, Graph Only.
    - Edit Graph Properties - Use this button to display the *"Graph Properties dialog"*.
    - Available Graph Types - Use this option to select the type of graph. Options include: Bar, Line, Area, Pie, Line-Bar, Time Series Line, Pareto, and Radar.
    - Type - (Not available for all graph types.) Use this box to select the subtype of graph. Options depend on the type of graph.
    - Style - (Not available for all graph types.) Use this box to select the style for the graph. Options depend on the type of graph.
    - Effect - (Not available for all graph types.) Use this box to select either a 2D effect or a 3D effect for the graph.

    For information on available graph subtypes and styles, see .

Export Menu Options for Views and Results

You can use the following options to export the results of an analysis or a view. When you export the results of an analysis, any tables, pivot tables, trellises, or graphs that are displayed with the analysis are included.

For more information, see .

- PDF - Displays the File Download dialog, where you can open or save the results or view as a PDF file.

- Excel - Displays the Excel 2003 and Excel 2007+ options, each of which displays the File Download dialog, where you can open or save the results or view as a spreadsheet (for example, XLS or XLSX) file.

- Powerpoint - Displays the Powerpoint 2003 and Powerpoint 2007+ options, each of which displays the File Download dialog, where you can open or save the results, or view as a Powerpoint presentation (for example, PPT or PPTX) file.

- Web Archive (.mht) - Displays the File Download dialog where you can open or save the results or view as an MHT file. This enables you to export the underlying data for an existing analysis or view as a web page (MHTML) file.

- Data - Displays these options for exporting the raw data from the results or view:

  o CSV Format - Displays the File Download dialog, where you can open or save all the columns in the results or view as a CSV file. This export results in a comma-delimited list of values in a file that you can open in an application such as Excel.

    ✎ **Note:** Expanded members of hierarchical columns are not exported to the CSV file. For example, in a view that includes the Time Hierarchy, if Total Time is expanded to show Year, only Total Time is exported and not Year. To include expanded members in a CSV file, use selection steps instead to show the data in the view.

  o Tab delimited Format - Displays the File Download dialog, where you can open or save all the columns in the results or view as a CSV file. This export results in a tab-separated list of values in a file that you can open in an application such as Excel.

  o XML Format - Displays the File Download dialog, where you can open or save the results or view as an XML file. This file uses the Microsoft MD Data Set standard for representing data in XML format.

Sorting Options Menu

The options that are available on the Sorting Options menu depend on the type of data view and the location in which you right-clicked and can include the following options:

- Sort Ascending - Sorts the values in the column by ascending order, as a first-level sort. For example, string values sort alphabetically A through Z, numbers sort lowest to highest, and dates sort earliest to latest. In the Selected Columns pane, when you select this option as the first sort, a Sort button is displayed to the left of the column name in the Selected Columns pane. If you later add another sort, then the Sort button includes the number 1.

- Sort Descending - Sorts the values in the column by descending order, as a first-level sort. In the Selected Columns pane, when you select this option as the first sort, a Sort button is displayed to the left of the column name in the Selected Columns pane. If you later add another sort, then the Sort button includes the number 1.

- Add Ascending Sort - Specifies that an ascending sort for this column is added as another sort for the analysis. In the Selected Columns pane, when you select this option, a Sort button with a number such as 2 or 3 is displayed to the left of the column name in the Selected Columns pane.

- Add Descending Sort - Specifies that a descending sort for this column is added as another sort for the analysis. In the Selected Columns pane, when you select this option, a Sort button with a number such as 2 or 3 is displayed to the left of the column name in the Selected Columns pane.

- Clear Sort - Removes the sort specification for the specified column. This option works differently in the Selected Columns pane than in other places. If you make sort specifications in both the Selected Columns pane and in the view itself, then you return to the Selected Columns pane and click Clear Sort, only the sort that you specified in the Selected Columns pane is removed. A sort that you specified in the view remains.

- Clear All Sorts in All Columns or Clear All Sorts in View - Removes all sort specifications that you have made. The Clear All Sorts in All Columns option works differently in the Selected Columns pane than in other places. If you make sort specifications in both the Selected Columns pane and in the view itself, then you return to the Selected Columns pane and click Clear All Sorts in All Columns, only the sorts that you specified in the Selected Columns pane are removed. Sorts that you specified in the view remain.

In a pivot table that has more than one measure in a column (or a row), when you right-click and select one of the sorting options (such as Sort Ascending) to sort a row (or a column), options that allow you to select which measure to use in the sort are displayed.

For more information on sorting, see *"Sorting Data in Views"*.

Results tab: Filters editor

Use this editor of the *"Analysis editor: Results tab"* to view the filters in effect for an analysis.

For more information, see *"Editing Views"*.

Components

Toolbar

The toolbar contains the buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Notes

- If the column that is used in the filter is a display column, then the filter view shows display values rather than code values, unless the display values cannot be found. Then code values are displayed. For more information on display and code columns, see *"Understanding the Double Column Feature"*.

Results tab: Legend editor

Use this editor of the *"Analysis editor: Results tab"* to edit a legend view, which documents the meaning of special formatting used in an analysis, such as the meaning of custom colors applied to gauges. Legends are displayed in HTML and PDF output, and can be localized.

For example, suppose you use conditional formatting in an analysis to show critical items in the color red and items that need attention in the color yellow. You can add a legend with text that documents the meaning of the colors and captions that summarize the appropriate action. You can use cosmetic formatting to make the background colors of the text match the colors in the conditional analysis.

Each legend item consists of a legend symbol with sample text (for example, a red box that displays Critical) and a caption that documents the meaning of the legend symbol (for example, Requires Immediate Attention.

For more information, see *"Editing a Legend View"*.

Components

Title

Use this field to enter a title for the legend.

Format Title

Use this button to display the , where you format the title.

Caption

Use this field to enter, for each legend item, the meaning of the legend symbol, such as Requires Immediate Attention.

Format Caption

Use this button to display the , where you format the caption.

Sample Text

Use this field to enter, for each legend item, the text that is to be displayed within the legend symbol, for example, Critical.

Format Text

Use this button to display the , where you format the caption text.

Move Down and Move Up

Use these buttons to reorder captions by moving them up or down one row in the list. Available only when you have multiple captions.

Delete

Use this button to delete a caption.

Add Caption

Use this button to add another caption.

Toolbar

The toolbar contains the following buttons and boxes:

- Buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.

- Format Legend View - Use this button to display the , where you format the legend.

- Captions - Use this box to select a position for the caption relative to the legend symbol - Right, Left, or None.

- Legend items per row - Use this box to specify the number of legend items to display in a row.

- Import formatting from another analysis - Use this button to display the *"Open dialog"*, where you select an analysis from which to import formatting for views. For more information, see .

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Results tab: Narrative editor

Use this editor of the *"Analysis editor: Results tab"* to add one or more paragraphs of text to be displayed with the results. Narrative text is useful for providing information such as context, explanatory text, or extended descriptions along with column values. You can perform the following actions in the narrative view:

- Type a sentence with placeholders for each column in the results.

- Specify how rows should be separated.

- Use HTML formatting buttons to make text bold, italic, or underlined, and insert line breaks.

- Apply cosmetic formatting to the fonts used in the narrative view, or import the font formatting from a previously saved view.

- Add references to variables.

For example, suppose that you have created an analysis that shows a user's sales by region and want to provide explanatory text with the analysis. Using a narrative view, you can create the following explanatory text:

```
This report shows your sales by region. The regions are:
East Region
West Region
```

For more information, see *"Editing a Narrative View"*.

Components

Bold, Italic, Underline

Use these buttons to insert the HTML tags to begin and end bold, italic, or underlined text in the Prefix, Narrative, or Postfix fields.

Line Break

Use this button to insert a line break in the Prefix, Narrative, or Postfix fields.

> ✏️ **Note:** Pressing Enter does not result in multiple lines of text in the Prefix, Narrative, or Postfix fields.

Contains HTML Markup

Use this option to work with HTML codes, as described in . If you are trying to save a narrative object that contains HTML code, then you must have the Save Content with HTML Markup privilege. See "" in for information on privileges.

Prefix

Use this field to enter the header for the narrative. This text is displayed at the beginning of the narrative.

For example, the following prefix entry:

```
[b]This analysis shows your sales by region. The regions are:[/b][br/][br/]
```

Displays this text:

This analysis shows your sales by region. The regions are:

Narrative

Use this field to enter the narrative text that is displayed for each row in the results. You can include both text and column values. Include a line break code at the end of this field to force each line of text and values onto its own line.

To include values, use the at sign (@), as described in the following list:

- Use an at sign by itself to indicate the first column. If you include multiple at signs, then the first occurrence of the sign corresponds to the first column, the second occurrence corresponds to the second column, and so on.

- Use `@ n` to include the results from the designated column in the narrative. For example, `@1` inserts the results from the first column in the analysis, and `@3` inserts the results of the third column.

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For example, for an analysis that returns the region name in the second column, the following narrative entry:

@2

Displays this text:

East Region West Region

Row separator

Use this field to enter a row separator for each line from the Narrative field that contains values. For example you might enter a string of plus signs (+) between each line.

Rows to display

Use this field to enter the number of rows from the column to return. For example, enter 5 to display values from the first 5 rows of the column. For a hierarchical column, you can use selection steps to display hierarchy levels with the hierarchical column. For example, create a step to select members based on hierarchy and add members of the specified level. A hierarchy level is considered a row.

Postfix

Use this field to enter the footer text to be displayed at the bottom of the narrative. To display the footer information on a separate line from the actual narrative text, include markup tags in the Postfix field. Ensure that the narrative ends in a line break, or that the footer begins with a line break.

Toolbar

The toolbar contains the following buttons:

- Buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.

- Format Narrative View - Use this button to display the , where you format the view.

- Import formatting from another analysis - Use this button to display the *"Open dialog"*, where you select an analysis from which to import formatting for columns and views. For more information, see .

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Notes

- You can reference variables in the Prefix, Narrative and Postfix fields. For the syntax to use, see *"What Is the Syntax for Referencing Variables?"* For more information on variables, see *"Using Variables"*.

- The following characters are reserved characters:

    - @ (at sign, unless used as a column placeholder in the Narrative field)

    - [(left bracket)

    -] (right bracket)

    - ' (single quote)

    - \ (backslash)

> ✏ **Note:** If you want to include a reserved character, then precede it with a backslash character (\) to escape
> it. For example, to include a backslash character, type \\.

Results tab: Selection Steps editor

Use this editor of the *"Analysis editor: Results tab"* to view the selection steps in effect for the analysis.

For more information, see:

- *"Editing Views"*
- *"Working with Selections of Data"*

Components

Selection Steps Area

Displays the selection steps. Use the List box to specify which column to view in the area. If the selection steps contain a calculated item or group member link, the area will display a link that you can click to view more details. For example, if the selection steps contain a group, you can click the group link and the displays and shows the members of the group.

Note that you cannot modify the selection steps from this area. To modify the selection steps, you must exit the Selection Steps editor and in the Analysis editor: Results tab, go to the *"Selection Steps pane"*.

> ✏ **Note:** If a selection step was created by using the right-click interaction menu, then you must use the right-click interaction menu to remove the selection step. See *"Working with Selections of Data"* for additional information.

Toolbar

The toolbar contains the buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Results tab: Static Text editor

Use this editor of the *"Analysis editor: Results tab"* to edit a static text view, which enables you to add or edit text to be displayed with the analysis results.

The markup can contain anything that is supported by the browser, but only formatting defined using the buttons at the top of the workspace is displayed in PDF output.

For more information, see *"Editing Views"*.

Components

Bold, Italic, Underline

Use these buttons to insert the HTML tags to begin and end bold, italic, or underlined text in the Static Text field.

Line Break

Use this button to insert a line break in the Static Text field.

> ✏ **Note:** Pressing Enter does not result in multiple lines of text in the Static Text field.

Contains HTML Markup

Use this option to work with HTML codes, as described in .

Static Text

Use this field to enter the text to be displayed with the analysis results.

For the syntax to use for variables, see *"What Is the Syntax for Referencing Variables?"* For more information on variables, see *"Using Variables"*.

See the Notes section for some examples of static text.

Toolbar

The toolbar contains the following buttons:

- Buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.
- Format Static Text View - Use this button to display the , where you format the view.
- Import formatting from another analysis - Use this button to display the *"Open dialog"*, where you select an analysis from which to import formatting for columns and views. For more information, see .

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Notes

lists and describes several static text view examples.

Table E-5 Static Text View Examples

Static Text View Example	Description and Usage Notes

HTML text	Paste or type the HTML (or appropriate formatted text) into the text box. You can also click the HTML tag buttons. Based on the format of the text that you are entering, you can use markup tags to control the format of the text. The following are some examples of what you can do:
	
	  • To set font size and color:
	
	    `<FONT SIZE="4" COLOR="red">Red Text</FONT>`
	
	  • To combine tags for additional effects:

Static Text View Example	Description and Usage Notes
	`<B><FONT COLOR="red">Bold Red Text</FONT></B>`
ActiveX object	The Active-X object must be self-contained and supported by the browser. Paste or type the object into the HTML Text window, making sure to include the beginning and ending tags **`<object...>`** and **`</object>`**.
JavaScript or VBScript	The script must be self-contained and supported by the browser. Paste or type the script into the text box, making sure to include the beginning and ending tags **`<script>`** and **`</script>`**.
Audio	Ensure that you know where the audio clip is located. If the audio clip is for use in a shared environment, then it must be located on a network drive that accessible to all users.
	Use the HTML tag **`<EMBED>`** to add audio. The following format is an example format. Your browser might require a different format.
	`<EMBED SRC="audio" AUTOSTART="true" LOOP="true"` ` HIDDEN="true"></EMBED>`
	where **`"audio"`** is the location and name of the audio clip.
	To add an audio clip located on the hard drive, the following HTML is an example:
	`<EMBED SRC="c:\mycomputer\MIDIfiles\wakeup.mid"` ` AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>`
	To add the same audio clip from a shared location on the Web server, the following HTML is an example:
	`<EMBED SRC="\DashboardFiles\wakeup.mid" AUTOSTART="true"` ` LOOP="true" HIDDEN="true"></EMBED>`
Background image	The following example uses JavaScript.
	Ensure that you know where the image to use as the background is located. If the image is for use in a shared environment, then it must be located on a network drive that is accessible to all users.
	If the image is located in a shared dashboard files folder, then the following is example HTML:

	`<script language="javascript">`
	` document.body.background="/`
	`dashboardfiles/"NameOfGraphic";</script>`

	where **`NameOfGraphic`** is the name of the file to use, such as bricks.gif or sand.jpg.
Variables	The following example includes variables:

	`[u] Static Text View [/u][br/]`
	`Region: @{variables.myFavoriteRegion} - Year:`
	` @{variables.myFavoriteYear}[br/]`
	`System Time: @{system.currentTime}[dddd,MMMM dd,yyyy]`
	`[br/]`
	`Product Version: @{system.productVersion}[br/]`

Static Text View Example	Description and Usage Notes
[br/]	

Results tab: Ticker editor

Use this editor of the *"Analysis editor: Results tab"* to edit a ticker view, which displays the results of an analysis as a marquee (moving results that scroll across the page). You can customize the size of the scroll area, the speed and direction in which the results scroll, and other display settings.

> ✎ **Note:** If the web browser does not support moving text, then the results are displayed, but they do not scroll across the page.

For more information, see *"Editing Views"*.

Components

Behavior

Use this box to select how the results move in the ticker:

- Slide- The results start hidden, scroll on to the page, then stop once touching the other side.
- Scroll - The results start hidden, scroll on to the page, then off the page before repeating.
- Alternate - The results bounce back and forward inside the marquee.

Direction

Use this box to select the direction the results move in the ticker - Left, Right, Down, or Up.

Width

Use this field to enter the width of the ticker, either in pixels or as a percentage of the page width. For example, a value of 200 indicates a width of 200 pixels, and a value of 25% indicates a width of one-quarter of the page.

Height

Use this field to enter the height of the ticker, either in pixels or as a percentage of the page height.

Contains HTML Markup

Use this option to work with HTML codes, as described in . If you are trying to save a ticker object that contains HTML code, then you must have the Save Content with HTML Markup privilege. See "" in for information on privileges.

Beginning Text

Use this field to enter any optional text or graphics to display at the beginning of each redraw of the analysis results. You can use HTML to format the text.

If you include an image, then ensure you know where the image is located. If the image is for your use only, then the following is a sample location:

```
c:\mycomputer\temp\report.gif
```

If the image is for use in a shared environment, then it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:

```
\\ALLUSERS\graphics\report.gif
```

Row Format

Use this field to enter the HTML to use in formatting the rows in the results.

To include the results from a designated column, use `@ n`. For example, `@1` inserts the results from the first column, and `@3` inserts the results of the third column.

Row Separator

Use the field to enter the character that separates one row from another. The default character is a vertical bar (|).

Column Separator

Use this field to enter the character that separates one column from another. The default character is a vertical bar (|).

Ending Text

Use this field to enter any optional text or graphics to display at the end of each redraw of the analysis results. You can use HTML to format the text.

If you include an image, then ensure that you know where the image is located. If the image is for your use only, then the following is a sample location:

```
c:\mycomputer\temp\report.gif
```

If the image is for use in a shared environment, then it must be located on a network drive accessible to all users. For a shared image, specify the UNC name, for example:

```
\\ALLUSERS\graphics\report.gif
```

Set Defaults

Use this button to generate default settings for the most commonly used field.

> ✎ **Note:** If you click Set Defaults after entering values in other fields, your entered values are cleared.

Clear Fields

Use this button to clear all fields.

> ✎ **Note:** After you clear all fields, you can click Set Defaults to restore default settings for the most commonly used fields.

Advanced

Use this button to display the , where you specify additional options for the ticker, such as number of loops and background color.

Toolbar

The toolbar contains the buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Results tab: Title editor

Use this editor of the *"Analysis editor: Results tab"* to edit a title view. You can add a title, a subtitle, a logo, a link to a custom help or other related information, and timestamps to the analysis.

For more information, see *"Editing Views"*.

Components

Title

Use this field to enter the text to display as the title. Do not include HTML markup.

If you do not specify a title, then the name of the saved analysis is used as the title. For unsaved analyses, the Title text box is blank.

Format Title

Use this button to display the , where you format the title.

Display Saved Name

Use this box to specify whether to show the saved name of the analysis. Select the box to show the saved name. Deselect the box to hide it.

Logo

Use this field to specify a logo image or other graphic to display in the title. To do so, enter one of the following:

- The URL to a logo image or graphic.
- The fmap syntax to reference a logo image or graphic that is stored locally in the Oracle Business Intelligence environment. For more information on the fmap syntax, see .

> ✎ **Note:** If you are trying to save an object that uses the fmap syntax, then you must have the Save Content with HTML Markup privilege. See "" in for information on privileges.

The image or graphic file should be one that is accessible to all users who view the analysis.

Format Logo

Use this button to display the , where you format the logo.

Subtitle

Use this field to enter the text to display as a subtitle. The subtitle follows the title on a new line.

Format Subtitle

Use this button to display the , where you format the subtitle.

Started Time

Use the box to specify whether to display a timestamp indicating when an analysis started to execute. You can specify the date, the time, the date and time, or no display.

Format Time

Use this button to display the , where you format the time for the analysis.

Help URL

Use this field to display a Help icon (that is, a question mark) that links to a custom help file or other related information in the title. To do so, enter one of the following:

- The URL to a custom help file or other related information.

- The fmap syntax to reference a custom help file or other related information that is stored locally in the Oracle Business Intelligence environment. For more information on the fmap syntax, see .

✎ **Note:** If you are trying to save an object that uses the fmap syntax, then you must have the Save Content with HTML Markup privilege. See "" in for information on privileges.

The custom help file or other related information should be one that is accessible to all users who view the analysis.

Toolbar

The toolbar contains the following buttons:

- Buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.

- Format Title View - Use this button to display the , where you specify formatting for the view.

- Import formatting from another analysis - Use this button to display the *"Open dialog"*, where you select an analysis from which to import formatting for columns and views. For more information, see .

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Notes

- Titles and subtitles are formatted using the style sheet in use in your organization.

- You can reference variables in the Title, Logo, Subtitle and Help URL fields. For the syntax to use, see *"What Is the Syntax for Referencing Variables?"* For more information on variables, see *"Using Variables"*.

Storing Custom Files Locally and Using the fmap Function to Reference Them

You can store custom files, such as images and help files, locally in your Oracle Business Intelligence environment and then easily reference them using the fmap function. For example, you can store an image locally to display in a title view. Then, when you specify the image for the title view in the *"Results tab: Title editor"*, you can use the fmap function to reference it.

To store custom files locally, you must use the following directory and expose it according to the instructions for the HTTP Server that your organization uses:

```
ORACLE_INSTANCE/bifoundation/OracleBIPresentationServicesComponent/coreapplication_obipsn/
analyticsRes
```

> ✏️ **Note:** Because the analyticsRes directory gets replicated for every instance that is populated, the custom files must be replicated in each instance.

You can store files directly in this directory or in subdirectories in this directory. It is strongly recommended that you use ASCII characters for names of custom files that you reference using the fmap syntax.

> ✏️ **Note:** Custom files that were stored locally in previous releases (prior to 11g) of Oracle Business Intelligence must be manually migrated in Release 11g.

To easily reference custom files that are stored in the analyticsRes directory, use the following fmap syntax:

```
fmap:location/file_name
```

where:

- location/ is the subdirectory path in the analyticsRes directory in which the custom file resides, if the custom file resides in a subdirectory of analyticsRes (for example: Images/).

> ✏️ **Note:** Logo images and graphics located in the analyticsRes directory should all be stored in the same folder.

- file_name is the name of the custom file (for example: newlogo.gif).

The following are examples of fmap commands:

```
fmap:mylogo.gif
fmap:Images/newlogo.gif
```

If you are trying to save an object that uses the fmap syntax, then you must have the Save Content with HTML Markup privilege. See "" in for information on privileges.

Results tab: View Selector editor

Use this editor of the *"Analysis editor: Results tab"* to edit a view selector view, which enables users to select a specific view of an analysis from among the saved views. For example, users can select to display a graph view for the analysis.

For more information, see *"Editing a View Selector View"*.

Components

Caption

Use this field to enter a caption for the view selector.

Format Caption

Use this button to display the , where you format the caption.

Caption Position

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Use this box to select a position for the caption - Left, Above, or Right.

Available Views

Displays the views that are available to be included as choices in the view selector. Select a view and click the right arrow to move it into the Views Included area.

> ✏ **Note:** The None view shows the view selector only.

Views Included

Displays the views to be included as choices in the view selector. To change the order of the view in the list, select a view and use the up and down arrows. To remove a view from this area, select a view and click the left arrow.

Toolbar

The toolbar contains the following buttons:

- Buttons that are common to all views. For more information, see *"Toolbar Buttons Common to All Views"*.
- Import formatting from another analysis - Use this button to display the *"Open dialog"*, where you select an analysis from which to import formatting for columns and views. For more information, see .

Done

Use this button to save your edits and return to the compound layout view.

Revert

Use this button to restore the settings in effect prior to your edits.

Save Briefing Book Content dialog

Use this dialog to add content to a briefing book.

For more information, see:

- *"Adding Content to a New or Existing Briefing Book"*

Components

Content Type

Use this area to select one of the following options:

- Updatable - Refreshes the data whenever the briefing book is downloaded, or when it is specified as the delivery content for an agent.
- Snapshot - Adds the content in its current state. Snapshot content preserves the original data and is not updated when the briefing book is rerun. Snapshot content is not updated when using agents.

Follow Briefing Book Navigation Links

This option applies only to updatable content, not to snapshot content.

Use this area to select one of the following options:

- No - Specifies that briefing book navigation links are not to be followed.

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- Yes - Specifies that briefing book navigation links are to be followed. If you select this option, then you must also specify the number of links to follow.
- Number of links to follow - Specifies the number of briefing book navigation links to be followed, if you selected the Yes option.

Description

Use this field to enter a description of the content being saved to the briefing book.

Location

Use this field to enter the briefing book in which to save the content. Click Browse to display the *"Save As dialog"*, where you can select an existing briefing book or create a briefing book by entering the new briefing book name in the Name field.

Related Topics

Save Current Customization dialog

Use this dialog to save a customization for a dashboard page.

For more information, see:

- *"What Are Saved Customizations for Dashboard Pages"*
-

Components

Name

Use this field to enter a name for the saved customization.

Save For

Use this area to specify for whom the customization is to be saved. It contains the following components:

- Me - Use this option to save the customization for your own personal use.
- Others - Use this option to save the customization for use by others.
- Set Permissions - Use this button to display the , where you specify the accounts that have permission to use the customization and whether the customization is to be the default customization for the accounts.

Make this my default for this page

Use this option to specify whether to use this saved customization as your default customization when you display this page in a dashboard.

Saved Customization Permissions and Defaults dialog

Use this dialog to specify the accounts that have permission to use the customization and whether the customization is to be the default customization for the accounts.

For more information, see:

-
-
- *"Edit Saved Customizations dialog"*

Components

Permissions

Displays the accounts that have permission to use the customization and indicates whether the customization is to be the default customization for the accounts.

To indicate that the customization is to be the default customization for an account, click the Group Default box for the account.

Add Users/Roles

Use this button to display the , where you select the users, Application roles, and Catalog groups to have permission to use a saved customization.

Delete Selected Users/Roles

Use this button to delete the selected account.

Scale Markers dialog

Use this dialog to define scale markers for a graph.

Scale markers are accenting lines or shaded background ranges that mark key points, thresholds, ranges, and so on in a graph. There are two types of scale markers:

- Line - A line that is drawn across the graph at a specified position on the scale
- Range - A shaded background area that is displayed behind the graph

Line or range scale markers can be applied on one or more axes depending on the type of graph.

✎ **Note:** Some graph types do not use scale markers, such as pie graphs.

For more information, see .

Components

Click to add a new scale marker

Use this button to add a new scale marker row to the Scale Markers area.

Click to remove selected scale markers

Use this button to remove selected scale markers. To select a scale marker for removal, select the first box in the scale marker row.

Scale Markers

Use this table to define scale markers using the following components:

- Caption - Use this column to enter the caption to be displayed in the legend for the scale marker.
- Type - Use this box to specify the type of scale marker: Line or Range.
- Width (for a line) - Use this column to select a width (in pixels) for the line.
- Low (for a range) - Use this column to enter the low value of the range or click Customize Scale Markers to set the value.

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- Position (for a line) - Use this column to enter the position of the line or click Customize Scale Markers to set the value.

- High (for a range) - Use this column to enter the high value of the range or click Customize Scale Markers to set the value.

- Customize Scale Markers - Displays the , where you set the value for the position of a line or the low or high values of a range. To set the value, you can use a static value, a presentation variable, a measure column, or a SQL query.

- Color - Use this column to select the color of the scale marker.

Scorecard Breadth pane

Use this pane to view pie graphs that show how evenly the objectives (and the KPIs that support them) that compose your scorecard are distributed among the following categories:

- Financial versus non-financial

- Internal versus external

- Leading versus lagging

These pie graphs are helpful to determine how balanced your scorecard is.

This pane is part of the *"Scorecard editor: Overview tab"*.

Components

Financial versus Non-Financial Pie Graph

Displays how many objectives are finance-specific and how many are not finance-specific. To maintain a balanced scorecard, financial and non-financial perspectives should be equally implemented.

Internal versus External Pie Graph

Displays how many objectives are specific to your internal corporate processes, and how many are related to external, customer-related objectives.

Leading versus Lagging Pie Graph

Displays how many objectives drive the performance of other objectives (that is, how many are leading) and how many are affected by the performance of other objectives or by other data or processes (that is, how many are lagging).

Scorecard Content Properties dialog

Use this dialog to specify how a scorecard object that you have added to a dashboard page is to be formatted.

For more information, see:

- *"Dashboard Content"*

-

Components

Width

Use this field to enter the width of the object as a percentage of its original size.

Height

Use this field to enter the height of the object in pixels.

Hide Scroll Bars

Use this option to specify whether scroll bars are to be hidden.

Render as Watchlist

Use this option to specify whether the object is to be displayed as a watchlist (that is, as a table that lists the details) rather than as a diagram. For more information on watchlists, see .

Scorecard Documents pane

Use this pane to create scorecard objects that present and analyze corporate strategy, such as vision and mission statements, strategy maps, cause & effect maps, and so on.

For more information, see

- "*Defining a Vision Statement*"
- "*Defining a Mission Statement*"
- "*Creating Strategy Trees*"
- "*Creating a Strategy Map*"
- "*Creating a Cause & Effect Map*"
- "*Creating a Custom View*"
- "*KPI*"
- "*KPI Watchlists*"
- "*Creating Agents From KPIs*"

This pane is part of the "*Scorecard editor*".

Components

Object List

Displays a list of objects that present and analyze corporate strategy.

Toolbar

The toolbar contains the following buttons:

- Objects - Displays the following options:

    o Open - Use this option to open the selected object. (Whether you can open an object and whether the object opens as read-only depends on your privileges and permissions and on the type of object.)

    o Cut - Use this option to remove the selected folder or object for pasting in another folder.

    o Copy - Use this option to duplicate the selected folder or object and paste it in another folder.

    o Paste - Use this option to paste the folder or object that you have cut or copied in another folder.

    o Delete - Use this option to delete the selected folder or object.

- View - Displays the option System Objects. Use this option to display system folders or objects in the object list. (System folders or objects are those for which the system attribute is set in the "*Properties dialog*").

- New Object - Displays these options:

    - Create New Folder - Use this option to create a folder in which to organize objects. To rename the folder, right-click the folder and enter a new name.
    - Create Cause & Effect Map - Use this option to display the *"Scorecard editor: Cause & Effect Map tab"*, where you create a cause & effect map.
    - Create Custom View - Use this option to display the *"Scorecard editor: Custom View tab"*, where you create a custom view.
    - Create KPI - Use this option to display the *"KPI editor"*, where you create a KPI.
    - Create Mission - Use this option to display the *"Scorecard editor: Mission tab"*, where you define a mission statement.
    - Create Strategy Map - Use this option to display the *"Scorecard editor: Strategy Map tab"*, where you create a strategy map.
    - Create Strategy Tree - Use this option to display the *"Scorecard editor: Strategy Tree tab"*, where you create a strategy tree.
    - Create Vision - Use this option to display the *"Scorecard editor: Vision tab"*, where you define a vision statement.
    - Create KPI Watchlist - Use this option to display the *"Scorecard editor: KPI Watchlist tab"*, where you create a KPI watchlist.
    - Create Agent - (This option is available only when you select a KPI.) Use this option to display the *"Create New Agent dialog"*, where you create an agent from the KPI.

- Open - Use this option to open the selected object. (Whether you can open an object and whether the object opens as read-only depends on your privileges and permissions and on the type of object.)

- Delete - Use this option to delete the selected folder or object.

- Refresh - Use this button to refresh the objects that are displayed in the object list.

Scorecard editor

Use this editor to create a scorecard of your entire organization or of individual departments.

For more information, see:

- *"Creating Scorecards"*

Components

Point of View

Displays dimensions of KPIs that are used in the Scorecard to measure the progress and performance of initiatives and objectives. Use this area to pin values for the dimensions. See *"Point of View Area"* for additional information.

Strategy

Use the *"Strategy pane"* to create, organize, and leverage the objectives that form the strategic structure, also called a strategy tree, of the corporate entity (for example, department) to evaluate using KPIs or to drive by initiatives.

Initiatives

Use the *"Initiatives pane"* to create, organize, and leverage the initiatives that are the tasks required to achieve objectives. You can monitor the progress of initiatives by assigning KPIs.

Scorecard Documents

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Use the "*Scorecard Documents pane*" to create diagrams and views that provide different depictions of strategy dynamics and structures (for example, cause & effect maps and strategy maps).

You can also use this pane to build custom maps to present scorecard data and define mission and vision statements that articulate the overarching goal of the entity that you are scorecarding such as your organization or department.

Catalog

Use the "*Catalog pane for Scorecard*" to locate and drag and drop objects from the catalog to build a scorecard. For example, you might select a predefined KPI and drag it to the objective or initiative whose progress it measures.

Perspectives

Use the "*Perspectives pane*" to modify the default perspectives defined by the Balanced Scorecard Methodology, create custom perspectives, and delete perspectives.

Tab area

Displays tabs for the objects that you choose to view, create, or modify (for example, initiatives, strategy objectives, and strategy maps), including:

- "*Scorecard editor: Overview tab*"
- "*Scorecard editor: Breakdown tab*"
- "*Scorecard editor: Perspective tab*"
- "*Scorecard editor: Vision tab*"
- "*Scorecard editor: Mission tab*"
- "*Scorecard editor: Objective Details tab*"
- "*Scorecard editor: Initiative Details tab*"
- "*Scorecard editor: Strategy Map tab*"
- "*Scorecard editor: Strategy Tree tab*"
- "*Scorecard editor: Custom View tab*"
- "*Scorecard editor: Cause & Effect Map tab*"
- "*Scorecard editor: KPI Watchlist tab*"
- "*Scorecard editor: KPI Details tab*"
- "*Scorecard editor: Smart Watchlist tab*"

Toolbar

The toolbar contains the following buttons:

- Back - Use this button to go backward through your point of view history to to select a previous point of view. The (Default Value) option returns to the point of view with which you started.
- Forward - Use this button to go forward through your point of view history to select a previous point of view.
- Refresh KPI Values - Use this button to update the page to reflect changes.
- Scorecard Settings - Use this button to display the , where you define the score thresholds and assessment ranges to be used for scoring scorecard objects and edit dimension-related settings.
- Change Permissions on Scorecard - Use this button to display the "*Permission dialog*", where you change the permissions of the scorecard.

- Edit Mode Toggle - Use this button to toggle between these two modes:

  - Edit mode - Enables you to create, modify, and delete all scorecard objects and views.

  - View mode -Enables you to fully navigate scorecard but not add new data, or modify and delete existing data.

- Close Tab - Use this option to close the current tab.

Scorecard editor: Breakdown tab

Use this tab of the Scorecard editor to view and manage the objects that are used to evaluate the performance of an initiative or an objective.

You generate this tab dynamically (in either Edit mode or View mode) from the Children and Descendants components in the following panes:

- "Overview pane" of the *"Scorecard editor: Overview tab"*

- *"Analytics pane"* of the *"Scorecard editor: Initiative Details tab"* or the *"Scorecard editor: Objective Details tab"*

You cannot save this tab.

Using this tab, you can filter the objects in the list by descendants or children, by object type, and by status. For example, for an objective, you might want to show only the child KPIs that have a status of OK.

For more information, see:

- *"Objectives"*

- *"Initatives"*

Components

Show

Use this component to specify whether to display either the descendants or the children of the objective or initiative in the Breakdown table.

Type

Use this component to filter the objects displayed in the Breakdown table by type as follows:

- If the breakdown tab is for an objective, you can select Objectives, KPIs, or both Objectives and KPIs.

- If the breakdown tab is for an initiative, you can select Initiatives, KPIs, or both Initiatives and KPIs.

Status

Use this component to filter the objects displayed in the Breakdown table by the statuses that have been defined for the scorecard. For example if the defined statuses are OK, Warning, and Critical, you could select to display only objects with the OK status, only objects with the Warning status, only objects with the Critical status, or any combination of these statuses.

Breakdown

Lists the following:

- For an initiative, the KPIs and the child or descendant initiatives that are used to evaluate the performance of the initiative

- For an objective, the KPIs and the child or descendant objectives that are used to evaluate the performance of the objective

Use this watchlist to view and manage these initiatives, objectives, and KPIs. See *"Watchlists"* for additional information.

Scorecard editor: Cause & Effect Map tab

Use this tab of the *"Scorecard editor"* to create, view, and edit a cause & effect map.

For more information, see:

- *"Cause & Effect Maps"*
- *"Creating a Cause & Effect Map"*

Components

Diagram

Use the *"Cause & Effect Map tab: Diagram tab"* to create a diagram that illustrates the cause and effect relationships among objectives and KPIs.

Details

Use the *"Cause & Effect Map tab: Details tab"* to specify supporting information for a cause & effect map.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the cause & effect map.
- Save As - Use this button to display the *"Save As dialog"*, where you save the cause & effect map with another name.
- Contact Owner - Use this button to display the *"Contact Owner dialog"*, where you can contact the business owner of the cause & effect map.
- Zoom In - Use this button to enlarge the view of the diagram.
- Zoom Out - Use this button to minimize the view of the diagram.
- Cause & Effect Map Preferences - Use this button to display the , where you specify how cause and effect relationships are to be displayed on a cause & effect map.

Scorecard editor: Custom View tab

Use this tab of the *"Scorecard editor"* to create, view, and edit a custom view.

For more information, see:

- *"Custom Views"*
- *"Creating a Custom View"*

Components

Diagram

Use the *"Custom View tab: Diagram tab"* to create a diagram that shows a personalized view of your business data.

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Details

Use the *"Custom View tab: Details tab"* to specify supporting information for a custom view.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the custom view.
- Save As - Use this button to display the *"Save As dialog"*, where you save the custom view with another name.
- Contact Owner - Use this button to display the *"Contact Owner dialog"*, where you can contact the business owner of the custom view.
- Zoom In - Use this button to enlarge the view of the diagram.
- Zoom Out - Use this button to minimize the view of the diagram.
- Properties - Use this button to display the *"Custom View Properties dialog"*, where you specify a background image, a background color, or both for the diagram.
- Display As - Use the (Full, Simple, and Property) buttons to specify how you want each objective or KPI to be displayed on the diagram. For each objective or KPI, select it on the diagram and then:
    - Click Full to display the full version.
    - Click Simple to display the simple version.
    - Click Property to display it as one of its properties and then select one of these options:
        - Name - Full name.
        - Icon - The icon used to represent an objective or KPI.
        - Status - Current performance status or level (Warning, for example).
        - Trend - An icon indicating if the performance has improved or declined, is good or bad, or has remained the same since the previous comparison period. Only select this if trending is enabled for this node.
        - Value - Current value.
        - Target - The desired value.
        - Variance - Value by which the actual value differs from the target.
        - % Variance - Percent by which the actual value differs from the target.
        - Change - Value by which the actual value differs from that in a previous period.
        - % Change - Percent by which the actual value differs from that in a previous period.

Scorecard editor: Initiative Details tab

Use this tab of the to create, view, and edit an initiative.

For more information, see:

- *"Initatives"*
- *"Creating an Initiative"*

Components

Name

Use this box to enter a new name for the initiative.

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Description

Use this box to enter a description of the initiative.

Status

Displays the current performance status of the initiative, for example, Warning.

Type

Displays the type of object, that is, Initiative.

Analytics

Use this *"Analytics pane"* to specify basic information about the initiative, to identify the KPIs and other objectives that support and measure the performance of the initiative, and to add action links.

Collaboration

Use the *"Collaboration pane"* to identify information helpful for collaborating on the initiative, including the business owner, key resources, and related documents.

Related Items

Use the *"Related Items pane"* to identify the objectives that drive the initiative.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the initiative.
- Contact Owner - Use this button to display the *"Contact Owner dialog"*, where you can contact the business owner of the initiative.

Scorecard editor: KPI Details tab

Use this tab of the to work with KPI details, such as viewing basic KPI settings, pinning dimensions, specifying information helpful for collaborating on the KPI, and identifying related items.

For more information, see:

- *"Working with KPI Details"*

Components

Name

Use this box to enter a new name for this use of the KPI.

Description

Use this box to enter a description of this KPI usage.

Status

Displays the current performance status of this KPI, for example, Warning.

Trend

Displays information that indicates how the performance of the selected KPI has changed since the last reporting period or a date that you specify.

Type

Displays the type of object, that is, KPI.

Analytics

Use the "*Analytics pane*" to view basic KPI settings and a graph that presents actual values and target values, pin dimensions, and run actions.

Collaboration

Use the "*Collaboration pane*" to identify information helpful for collaborating on the KPI, including the business owner, key resources, and related documents.

Related Items

Use the "*Related Items pane*" to identify the objectives that drive the KPI or are driven by the KPI.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the KPI details.
- Open KPI Definition - Use this button to open the KPI in the "*KPI editor*", where you can edit it.
- Contact Owner - Use this button to display the "*Contact Owner dialog*", where you can contact the business owner of the KPI.

Scorecard editor: Mission tab

Use this tab of the "*Scorecard editor*" to define, view, and edit a mission or vision statement for your organization.

For more information, see:

- "*Mission Statement*"
- "*Defining a Mission Statement*"
- "*Vision Statement*"
- "*Defining a Vision Statement*"

The tab is also displayed as:

Scorecard editor: Vision tab

Components

Document

Use the "*Mission tab: Document tab*" or to enter and format your mission statement or vision statement.

Details

Use the or "*Vision tab: Details tab*" to specify supporting information for the mission or vision statement.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the mission or vision statement.
- Save As - Use this button to display the *"Save As dialog"*, where you save the mission or vision statement with another name.
- Contact Owner - Use this button to display the *"Contact Owner dialog"*, where you can contact the business owner of the mission or vision statement.

Scorecard editor: Objective Details tab

Use this tab of the to create, view, and edit an objective.

For more information, see:

- *"Objectives"*
- *Creating an Objective*

Components

Name

Use this box enter a new name for the objective.

Description

Use this box to enter a description of the objective.

Status

Displays the current performance status of the objective, for example, Warning.

Type

Displays the type of object, that is, Objective.

Analytics

Use this *"Analytics pane"* to specify basic information about the objective, to identify the KPIs and other objectives that support and measure the performance of the objective, and to add action links.

Collaboration

Use the *"Collaboration pane"* to identify information helpful for collaborating on the objective, including the business owner and related documents.

Related Items

Use the *"Related Items pane"* to identify other objectives that cause or effect the objective and initiatives that drive the objective.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the objective.
- Contact Owner - Use this button to display the *"Contact Owner dialog"*, where you can contact the business owner of the objective.

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Scorecard editor: Overview tab

Use this tab of the *"Scorecard editor"* to:

- View summary information for an initiative, objective, or KPI.

  The summary information displayed depends on which object you last selected in the *"Initiatives pane"* or the *"Strategy pane"*:

  If you last selected:

  ○ An initiative or objective, then the basic settings for the initiative or objective are displayed (for example, status, business owner, and so on) along with a status summary showing the number of KPIs and initiatives, or KPIs and objectives, that evaluate progress in each performance assessment range.

    If there is at least one child or descendant objective, initiative, or KPI for a particular status, the status name is a hyperlink that displays the *"Scorecard editor: Breakdown tab"*, showing the child or descendant objectives, initiatives, and KPIs.

  ○ A KPI, then the basic settings for the KPI are displayed (for example, status, business owner, and so on) as well as performance data and a performance graph.

- Link to information on how to get started with scorecarding.

- View pie graphs that show how the objectives that compose your scorecard are distributed.

See for additional information.

Components

Overview

Use the to view summary information about the selected initiative, objective, or KPI.

Getting Started

Use the to learn how to use scorecard to drive and assess corporate performance, to link to the Oracle Business Intelligence glossary, and to link to information about how to create scorecards.

Scorecard Breadth

Use the to view pie graphs that show how evenly the objectives (and the KPIs that support them) that compose your scorecard are distributed among the following categories:

- Financial versus non-financial

- Internal versus external

- Leading versus lagging

Scorecard editor: Perspective tab

Use this tab of the to create, view, and edit perspectives.

For more information, see:

- *Perspectives*

- *"Creating a Custom Perspective"*

Components

Perspective Name

Use this field to enter the name of the perspective.

Description

Use this field to enter a description of the perspective.

Business Owner

Displays the user ID of the person responsible for managing the perspective. To specify the business owner, click the Set User button to display the , where you can search for and select the business owner.

Focus

Displays the following options to indicate the focus of the perspective:

- Financial - Use this option to specify that the perspective focuses on objectives, initiatives, and KPIs that relate to or support the monetary or economic health and development of your organization.

- Internal facing - Use this option to specify that the perspective focuses on objectives, initiatives, and KPIs that form internal processes and functions, for example, employee training programs.

Objectives, Initiatives & KPIs

Lists the initiatives, objectives, and KPIs that are associated with this perspective.

Use this watchlist to view and manage these initiatives, objectives, and KPIs. See *"Watchlists"* for additional information.

Related Documents

Use the *"Related Documents area"* to view and manage documents that provide supporting information to the perspective.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the perspective.

- Contact Owner - Use this button to display the *"Contact Owner dialog"*, where you can contact the business owner of the perspective.

Scorecard editor: Smart Watchlist tab

Use this tab of the *"Scorecard editor"* to create a smart watchlist.

For more information, see:

- *"Smart Watchlists"*
- *"Creating a Smart Watchlist"*

Components

Filter Pane

Depending on the setting of the Filter Criteria Display component in the *"Smart Watchlist Properties dialog"*, this pane is displayed as a control panel, as a text summary, or is hidden. If displayed as a:

- Control panel, it displays the following tabs, where you specify the criteria to be used to filter the smart watchlist:

  - *"Filter pane: Relationship tab"* - Use this tab to filter the smart watchlist by scorecard object relationships.
  - *"Filter pane: Type tab"* - Use this tab to filter the smart watchlist by scorecard object types.
  - *"Filter pane: Perspective tab"* - Use this tab to filter the smart watchlist by the perspectives to which scorecard objects are associated.
  - *"Filter pane: Performance tab"* - Use this tab to filter the smart watchlist by the performance criteria (status, score, or ranking) of scorecard objects
  - *"Filter pane: Ownership tab"* - Use this tab to filter the smart watchlist by the business owners to whom scorecard objects are assigned.

  Selections you make in the Filter pane are reflected immediately in the smart watchlist, with the exception of text box entries. For text boxes, you must change the focus off the text box for the entry to take effect.

- Text summary, it displays a read-only summary of the current filter criteria.

Smart Watchlist

Lists the initiatives, objectives, and KPIs within a scorecard that meet the criteria that you specified in the Filter pane.

Use this watchlist to view and manage these initiatives, objectives, and KPIs. See *"Watchlists"* for additional information.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the smart watchlist.
- Save As - Use this button to display the *"Save As dialog"*, where you save the smart watchlist with another name.
- Properties - Use this button to display the *"Smart Watchlist Properties dialog"*, where you can specify how the Filter pane is to be displayed and the amount of indentation for hierarchical objects in the smart watchlist.

Filter pane: Relationship tab

Use this tab of the *"Scorecard editor: Smart Watchlist tab"* to filter a smart watchlist by scorecard object relationships. For example, you might want to include only the Improve Customer Satisfaction objective and its children.

Components

Start With

Use this area to specify which nodes (that is, the representation of an initiative, objective, or KPI in the Strategy pane or Initiatives pane) to start with in the smart watchlist. To do so, click Browse to display the , where you select one or more nodes with which to start.

Include

Use this area to specify:

- Whether to include in the smart watchlist, the starting nodes themselves, if they meet all other filtering criteria. To do so, select the Self option.

- Whether for each starting node to include descendants, children, or no descendants and children. To do so, select one of the following options:

    o All Descendants - Use this option to include all descendents.

    o Children - Use this option to include only children.

    o None - Use this option to exclude descendants and children. If you select this option, you must also select the Self option.

Filter pane: Type tab

Use this tab of the *"Scorecard editor: Smart Watchlist tab"* to filter a smart watchlist by scorecard object types. For example, you might want to include only objectives and KPIs.

Components

Type

Use this area to select which types of scorecard objects to include in the smart watchlist. To do so, select Objectives, Initiatives, KPIs, or any combination of the three.

Note that you can include only KPIs that are associated with objectives and initiatives in the scorecard. You cannot include KPIs from the catalog that are not associated with objectives and initiatives in the scorecard.

Filter pane: Perspective tab

Use this tab of the *"Scorecard editor: Smart Watchlist tab"* to filter a smart watchlist by the perspectives to which objects are associated. For example, you might want to include only objects that are associated with the Financial perspective.

Components

Perspectives

Use this area to specify the perspective associations to include in the smart watchlist. To do so, select one of the following options:

- All - Use this option to include all perspective associations.
- Specific - Use this option to include only specific perspective associations. If you select this option, then select one or more perspectives from the list to the right of this option.

"Filter pane: Performance tab"

Use this tab of the *"Scorecard editor: Smart Watchlist tab"* to filter a smart watchlist by the performance criteria (status, score, or ranking) of scorecard objects. For example, you might want to include all scorecard objects that have a status of Warning or you might want to display the top 10 best performing KPIs.

Components

Select

Use this area to specify whether to include All, Top n, or Bottom n objects that meet the based on criteria. If you select Top or Bottom, then enter the number of objects in the text box to the right.

based on

Use this area to specify the criteria on which to base the inclusion of all, top n, or bottom n objects. To do so, select one of the following options:

- Best Performance (% Variance) - Use this option to specify that the inclusion of all, top n, or bottom n objects is to be based on the best performance ranking.

  This option causes a descending row sort on the % Variance value and, due to sorting, objects will not be shown with indentation.

- Worst Performance (% Variance) - Use this option to specify that the inclusion of all, top n, or bottom n objects is to be based on the worst performance ranking.

  This option causes an ascending row sort on the % Variance value and due to sorting, objects will not be shown with indentation.

- Biggest Improvements (% Change) - Use this option to specify that the inclusion of all, top n, or bottom n objects is to be based on the biggest improvement ranking.

  This option causes a descending row sort on the % Change value and, due to sorting, objects will not be shown with indentation

- Biggest Declines (% Change) - Use this option to specify that the inclusion of all, top n, or bottom n objects is to be based on the biggest decline ranking.

  This option causes an ascending row sort on the % Change value and, due to sorting, objects will not be shown with indentation.

- Score - Use this option to specify that the inclusion of all, top n, or bottom n objects is to be based on score. If you select this option, then specify the score range to be used.

  With this option, if you have specified All (and not Top n or Bottom n, objects will be displayed in hierarchical order with indentation, unless a column sort is in effect.

- Status - Use this option to specify that the inclusion of all, top n, or bottom n objects is to be based on status. If you select this option, then specify which statuses by selecting one or more of the status boxes.

  With this option, if you have specified All (and not Top n or Bottom n, objects will be displayed in hierarchical order with indentation, unless a column sort is in effect.

  If you do not select any status boxes, the rows that have no status (often due to missing data for the specific KPI and dimension values in effect) will be displayed.

Filter pane: Ownership tab

Use this tab of the *"Scorecard editor: Smart Watchlist tab"* to filter a smart watchlist by the business owners to whom scorecard objects are assigned.

Components

Business Owners

Use this area to specify the business owners. To do so, click the Add or Remove Business Owners button to display the , where you select business owners.

Scorecard editor: Strategy Map tab

Use this tab of the "*Scorecard editor*" to create, view, and edit a strategy map.

For more information, see:

- "*Strategy Maps*"
- "*Creating a Strategy Map*"

Components

Diagram

Use the to create a diagram that shows how the objectives that have been defined for a scorecard and the KPIs that measure their progress are aligned by perspectives.

Details

Use the "*Strategy Map tab: Details tab*" to specify supporting information for the strategy map.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the strategy map.

- Save As - Use this button to display the "*Save As dialog*", where you save the strategy map with another name.

- Contact Owner - Use this button to display the "*Contact Owner dialog*", where you can contact the business owner of the strategy map.

- Zoom In - Use this button to enlarge the view of the diagram.

- Zoom Out - Use this button to minimize the view of the diagram.

- Draw a Causal Linkage Between Two Objectives - Use this button to add a cause and effect relationship between two objectives, two KPIs, or between an objective and a KPI.

  To do so, click this button, select the objective or KPI that is the cause (that is the objective or KPI that drives the second objective or KPI), and then drag to and select the objective or KPI that is the effect (that is, the objective or KPI that is driven by the first objective or KPI.) Click the button again to turn this functionality off. A line is drawn on the diagram connecting the two objectives, two KPIs, or the objective and KPI. The two objectives, two KPIs, or the objective and KPI are added to the Causes and Effects tables on the "*Scorecard editor: Objective Details tab*" accordingly.

Scorecard editor: Strategy Tree tab

Use this tab of the "*Scorecard editor*" to create, view, and edit a strategy tree.

For more information, see:

- "*Strategy Trees*"
- "*Creating Strategy Trees*"

Components

Diagram

Use the *"Strategy Tree tab: Diagram tab"* to view an objective and its supporting child objectives and KPIs hierarchically in a tree diagram or wheel diagram.

Details

Use the *"Strategy Tree tab: Details tab"* to specify supporting information for the strategy tree.

Toolbar

This toolbar contains the following buttons:

- Save - Use this button to save the strategy tree.
- Save As - Use this button to display the *"Save As dialog"*, where you save the strategy tree with another name.
- Contact Owner - Use this button to display the *"Contact Owner dialog"*, where you can contact the business owner of the strategy tree.
- Zoom In - Use this button to enlarge the view of the diagram.
- Zoom Out - Use this button to minimize the view of the diagram.
- Properties - Use this button to display the , where you set properties that control the appearance of the diagrams for a strategy tree.
- Wheel Diagram Type - Use this button to display the strategy tree in a wheel diagram (called a contribution wheel).
- Tree Diagram Type - Use this button to display the strategy tree in a tree diagram.

Search pane

Use this pane to find objects by name, directory location, and type (agents and scorecards, for example). This pane enables you to quickly locate the objects that you need.

For more information, see:

-
-
-
-

This pane is part of the *"Catalog page"*.

Components

Search

Use this field to enter the full or partial name of the object or folder to find. You can enter an asterisk (*) in your search string to perform a wildcard search where the asterisk (*) specifies zero or more alphanumeric characters within a search value.

> ✏ **Note:** If you are using Oracle BI Enterprise Edition configured to use Oracle Endeca Server, then a search using the wildcard character of an asterisk (*) is not available.

In the Search pane and in the Search field in the global header of Oracle BI EE, you can enter text and you can use "glob matching". "Glob matching" refers to the syntax for searching in an MS-DOS command window. describes strings that you can use with the "glob syntax."

Table E-6 Using glob Syntax in Search Criteria

Search String Entered	Result
a	Adds wildcards before and after your search string (for example, *a*), enabling the search to return results that contain the letter "a".
^a	Adds a wildcard after your search string (for example, a*), enabling the search to return results that begin with the letter "a".
a$	Adds a wildcard before your search string (for example, *a), enabling the search to return results that end with the character "a".
a*	Searches explicitly for strings containing a character followed by an asterisk (*) for example, "a*".
?	Use a question mark (?) with a character and an asterisk (*) to return zero (0) or more occurrences of a character. For example, ?a* returns zero or more occurrences of the character "a".
[] or {}	Not recognized by search.

To match any of the glob special characters themselves ('^$*?'), you must precede the character with a backslash. For example, to match the string "cost*units", enter a search string of "cost*units".

To find an exact match of characters, include the appropriate characters at both ends of the search string. If you want to find the file called "a", then enter a search string of "^a$". Otherwise, you obtain a list of every file that includes the letter "a" anywhere in its name or description.

Location

Use this list to select a folder in which to search for objects:

- My Folders - Search folders that you created or that were automatically generated for you.
- Shared Folders - Search all folders that you can access.

Administrators can search for all user and object folders in the catalog root directory.

Type

Use this list to find only certain kinds of objects. For example, reports, dashboards, or KPIs.

Search Filters area

This area displays if Oracle BI Enterprise Edition is configured to use Oracle Endeca Server.

Use this area to filter your search results by object attributes such as location, object type, author, and so on. When you select an attribute, the refreshes to display the filtered objects. You can apply multiple filters by selecting more than one attribute. For example, you can limit your search results by a specific author and object type.

When you select an attribute, that attribute is removed from the attribute category but displays in the header of the pane. You can remove a selected attribute by clicking the corresponding red "X," or you can click Remove All to remove all of the selected attributes from the search results.

Section Condition dialog

Use this dialog to specify the condition to be used to determine whether a section in a dashboard is to be displayed.

You might want to display a section conditionally, for example, when the results of an analysis show that sales are down by 15 percent or greater in the past week and you want to display a section that contains links to related reports.

This dialog is displayed from the *"Page Layout area"* in the *"Dashboard builder"*.

For more information, see .

Components

Condition

Displays the condition under which the section is to be displayed.

New Condition

Use this button to display the *"New Condition dialog"*, where you create a condition.

Select Condition

Use this button to display the *"Select Condition dialog"*, where you select an existing condition.

More (>>)

Display these options:

- Test Condition - Use this button to test whether the condition evaluates to true or false.
- Edit Condition - Use this button to display the *"Edit Condition dialog"*, where you edit the condition.
- Remove Condition - Use this button to remove the condition.
- Save Condition As - Use this button to display the *"Save As dialog"*, where you save the condition by name to the catalog.

Section Properties dialog

Use this dialog to specify the properties for a section of data in a view using the Layout pane.

For more information, see *"Setting Properties for View Bodies and Drop Targets"*.

Components for Pivot Tables and Tables

Insert Page Break

Use this area to indicate whether to create a page break before the section, so that every time a value changes in the section drop target, the new section for that column is displayed on a new page. Page breaks are visible when you export an analysis to PDF. This is useful for data-driven detail analyses.

You can select from the following:

- No Page Break - Do not break pages.
- Innermost Column - Break at the innermost column, which inserts a page break between every section.
- Outermost Column - Break at the outermost column, which inserts a page break when the section label in the outermost column changes.

  When the value of an outermost column changes, the value of the inner column is also considered changed. Therefore, setting page breaks at the innermost column inserts manual page breaks between every section.

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- Folder.Column - For example, Markets.Region, or Products.Brand. Inserts a page break when the section label in the specified column changes. This option is available only when the Sections drop target contains a column.

Show Blank Rows

Use this box to indicate whether to display rows that have no data in the section. Select the box to display all rows, even if a row is an empty text string and contains no value. Deselect the box to hide rows when there are no results to display. This option might be useful for example, to hide empty address lines.

Display Heading

Use this box to indicate whether to display the heading for the section.

The remaining components of this dialog are described in *"Column Properties dialog: Style tab"*.

Components for Graphs

Maximum number of section slider values

Use this box to enter the maximum number of values to display on a section slider bar, but not to exceed the system maximum. The administrator configures the system maximum. If you enter a number that exceeds the system maximum, then it is ignored.

For more information about section sliders, see *"Defining a Section Slider in a Graph or Gauge"*.

Sections Formatting dialog

Use this dialog to specify how to break pages for PDF printing and to format sections in a trellis.

Components

Display Options

Use the to specify how to break pages for PDF printing.

Sections Format

Use the to format sections in a trellis.

Sections Formatting dialog: Display Options tab

Use this tab of the to specify how to break pages for PDF printing.

Component

PDF Printing Page Break

Use this area to indicate whether to create a page break before the section, so that every time a value changes in the section drop target, the new section for that column is displayed on a new page. Page breaks are visible when you export an analysis to PDF. This is useful for data-driven detail analyses.

You can select from the following:

- No Page Break - Do not break pages.
- Innermost Column - Break at the innermost column, which inserts a page break between every section.
- Outermost Column - Break at the outermost column, which inserts a page break when the section label in the outermost column changes.

When the value of an outermost column changes, the value of the inner column is also considered changed. Therefore, setting page breaks at the innermost column inserts manual page breaks between every section.

- Folder.Column - For example, Markets.Region, or Products.Brand. Inserts a page break when the section label in the specified column changes. This option is available only when the Sections drop target contains a column.

Select Column dialog

Use this dialog to navigate to and select the columns or members to include in an analysis, prompt, filter, KPI, or when associating columns with layers for maps. In some cases, you can also use this dialog to add additional subject areas to the dialog.

For more information, see:

- "*What Are Subject Areas and Columns?*"
- "*Creating a Column Prompt*"

This dialog is also displayed as:

Add Columns dialog Select BI Key Columns dialog Select Columns dialog Select member in Dimension Hierarchy dialog Components

Add Related Subject Area

This button is available only if one or more related subject areas are available and you have permission to access them.

Use this button to display the "*Add/Remove Subject Areas dialog*", from which you can add or remove related subject areas.

Search

Not available for maps. Click this button to search.

Subject Area

Use this tree to browse for and select the column for which you want to build the prompt, the column to add to the filter, the dimension to add to the KPI, or the column to associate with a layer for a map. For a map, you can select a single column, multiple columns from multiple subject areas, or multiple columns from a single subject area.

Selected Columns

This area is available only for columns to associate with a layer for a map. You can view and modify the columns that you have selected.

Shuttle

These buttons are available only for columns to associate with a layer for a map. You can select columns in one or more subject areas and move them between the two lists in the dialog.

Reorder

These buttons are available only for columns to associate with a layer for a map. You can select columns then click the buttons to modify the order or the columns in the list. If you are trying to duplicate the name of a geographic layer that has multiple parts, then ensure that the columns are in order from top to bottom to match that layer name. For example, if the layer name is Country_State, then ensure that you include the Country column above the State column in the list.

Related Topics

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"*Definition pane*"

Select Java Method dialog

Use this dialog to select one of the following items:

- For an Invoke a Java Method action, the Java method to be invoked

- For a Navigate to EPM Content action, the Hyperion resource to which to navigate

For more information, see:

- "*Actions*"

-

- " *Specifying the Settings for a New Action*"

This dialog is also displayed as:

Select the Hyperion resource you want this action to invoke dialog
Components

EJB or Hyperion Resources

Displays the following:

- For an Invoke a Java Method action, Java methods that you can select

- For a Navigate to EPM Content action, the Hyperion resources that you can select

Use this list to select a Java method or a Hyperion resource.

Selected

Displays the Java method or the Hyperion resource that you have selected in the list.

Select Script Function dialog

Use this dialog to select the function to be executed by an Invoke a Browser Script action.

For more information, see:

- "*Actions*"

-

- " *Specifying the Settings for a New Action*"

Components

Function

Use this list to select the function to be executed.

Name

Displays the name of the function selected in the list.

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Select Values dialog

Use this dialog to search for and select one or more values from a list of available values, for example:

- In a filter or prompt, when performing write back on a table view or pivot table view, or when creating or editing a member step

- In a list of KPI dimensions, when pinning a dimension

Using this search function, you can limit the list of available values (for example, find all those values that start with the letter D) so that you can more easily find the value or values that you want.

This dialog is also displayed as:

Choose Members dialog Edit Hierarchy Selection Step dialog Edit Member Step dialog Edit Select Existing Groups and Calculated Items Member Selection Dialog New Hierarchy Selection Step dialog New Member Step dialog New Select Members dialog New Select Existing Groups and Calculated Items Search Members dialog

Components

> ✎ **Note:** Not all components are available in each version of this dialog.

Relationship

Available only when working with a member step that is based on a hierarchy.

Use this box to select the type of relationship with which to create the member step for the hierarchical column. You can select a family relationship, a specific hierarchy level (for level-based hierarchies only), or a level relationship (for level-based hierarchies only). For parent-child hierarchies, the only option available is family relationship.

Action

Use this box to select the type of action to create. You can select to add the selected members to the selection, keep only the selected members and remove all others, or remove the selected members from the selection. For groups and calculated items, the only action available is Add.

When working with a member step that is based on a hierarchy, use the box beside the Action box to specify a hierarchy level (for level-based hierarchies only) or a family relationship.

For a family relationship, you can select one of the following options:

- Children of - Selects all the children of the selected member.

- Parents of - Selects the parent of the selected member.

- Descendants of - Selects all members that are descended from the selected member.

- Ancestors of - Selects all members from which the selected member is descended.

- Siblings of - This option is not available for columns in a skip-level hierarchy. Selects all members that are on the same level and have the same parent as the selected member.

- Leaves of - Selects all members that are descended from the selected member and that have no lower levels.

When you edit the first step in a list, the choices for actions are Start with All Members, Start with Selected Members, and Start with Groups or Calculated Items.

Search

Use this button to show or hide the Search area that is displayed within the Available List area. See .

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Available List

Use this area to:

- Initiate a search in the Search area.

- Select values to move to the Selected List area.

- Show additional choices, if available, by clicking More.

Items that you have selected are displayed with a green check mark beside them.

Selected List

Use this area to view the values that you have selected from the Available List area and moved to the Selected List area.

Include selected members

Use this box to specify whether to include the selected member in addition to all the members of the family relationship (such as Children of) that you specify.

For example, specifying Keep Only and Children of 2011 and also selecting this box, returns: 2011, 2011 Q1, 2011 Q2, 2011 Q3, and 2011 Q4.

Edit

Use this button to display the , where you can refine the values with which you are working.

This button is not available when you select members for selection steps.

Override with Prompt

Use this box to specify that an analysis prompt or a dashboard prompt can override the member step. In a list of steps for a column, specify that only one step in the list be able to be overridden by a prompt. For information, see

Notes

- To select multiple values, press the Control key, then click the values.

- To select a range of values, click the first value in the range, press the Shift key, then click the last value in the range.

- To move one or more values from the Available List area to the Selected List area, use the Move or Move All button. You also can double-click a single value in the Available List area to move it to the Selected List area.

  For a group, the following options are displayed when you click the arrow beside Move:

    o Add - Use this option to add the group to the analysis. You see an "Add: group-name" step in the Selected List area. You see an outline value for the group in a table or pivot table.
    o Add Members - Use this option to add the members of the group to the analysis. You see an "Add: Members of group-name" step in the Selected List area. You do not see an outline value in a table or pivot table; you see the members of the group.

- To remove one or more values from the Selected List area, use the Remove or Remove All button. You also can double-click a single value in the Selected List area to remove it.

- In the search criteria, you can use % (percent sign) as a wildcard.

Components of Search Area

Use this area to initiate a search for values or members and view the results of the search.

Name

Use these fields to specify text data on which to search. In the Name box, select the appropriate option such as Starts, Contains, Ends, or Is Like (pattern match). Enter the string for which you must search.

Between and

Not available for member search. Use this field to specify a range of numeric or date and time data for which to search.

Children of

Available only when searching for hierarchical members. Use this field to specify the node in whose sub-tree you want to start searching for members. For example, suppose that you have a geography hierarchy with All Countries as the root node and 50 countries below that. You want to search for all cities that start with the letter "A" in the country called USA. Use the Children of field to specify USA.

Select Member to display the Select Member dialog.

Select a Specific Member to Search Within

Available only when searching for hierarchical members. Click this button to display the Select Member dialog in which you specify the member whose children you want to search.

At Level

Available only when searching for members of level-based hierarchies. Use this field to select the level below which you want to search for members. The default of <Any> specifies to search for members below any level. For parent-child hierarchies, no levels exist, so this setting is always <Any>. Certain levels are disabled because they are at or above the level you selected, which does not constitute a valid search.

Limited Values or Constrained

Use this button to limit the values by any other filters that are associated with the analysis.

All Values or Unconstrained

Use this button to list all values, without limiting the values by any other filters that that are associated with the analysis.

Search

Use this button to initiate the search and display the search results. When you search for members, the columns of the subject area are searched.

Notes

If the available list of values for a prompt or write back column is based on a SQL statement, then you cannot search for values.

Related Topics

"*New Prompt dialog*"

Select Variable dialog

Use this dialog to specify a variable to use to set a value of a KPI dimension. You set values of KPI dimensions, for example, when you add a KPI that is dimensioned to a KPI Watchlist or when you add a strategy map that contains one or more KPIs that are dimensioned to a dashboard.

For more information about variables, see "*Using Variables*".

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Components

Variable Type

Use this box to select the type of variable to use to set the value. Depending on the task you are performing, you can select one of these types: Session, Repository, or Presentation.

Variable Name

Use this field to enter the name of the variable to use to set the value, for example USER.

Select Web Service Operation dialog

Use this dialog to select the Web Service operation to be invoked by an Invoke a Web Service action.

For more information, see:

- "*Actions*"

-

- " *Specifying the Settings for a New Action*"

Components

Web Services

Use this list to select the Web Service operation to invoke.

Initially, this list displays the Web Services preconfigured by the administrator. You can display other Web Services by using the WSDL URL component.

WSDL URL

Displays the Web Services Description Language (WSDL) of the Web Service operation selected in the Web Services list.

To list Web Service operations available from a WSDL URL that was not preconfigured, use this field to enter the WSDL URL (for example, `http://<server>:8888/default/10?WSDL`) and then click Open.

Web Service

Displays the Web Service of the selected operation.

Operation

Displays the selected operation.

Restore the list of Web Services pre-configured by your Oracle BI Administrator

Use this button to display the list of Web Services that were initially displayed in the Web Services list, that is, the Web Services preconfigured by the administrator.

Refresh the selected folder

This button is available only when you have a folder selected. Use this button to refresh the selected folder.

Selected Columns pane

Use this pane to view, add, and modify the criteria that are selected for an analysis.

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Selected columns are displayed in boxes in this pane. Each box has two sections. The upper section shows the name of the column's folder, for example, Customers. The lower section shows the name of the column, for example, Customer Name. If columns from the same folder are placed next to each other, then they are grouped in one folder section.

If a column selector view is in use, then you see the phrase "Column Group" instead of the column name. You also cannot edit the properties for the columns. See "*Editing a Column Selector View*" for information.

You can:

- Reorder the columns to arrange them in the way that they are to be displayed in the analysis results

- Combine the results of two or more analyses into a single result

- Remove all columns from the criteria

Other modifications that you can make to columns depend on the type of column:

- For attribute columns and measure columns, you can:

    o Specify the sort order of the column

    o Edit the formula for the column, including customizing the heading

    o Edit column properties to control the formatting and interaction of the column

    o Add new filters

    o Delete column

- For hierarchical columns, you can:

    o Specify the sort order of the column

    o Edit column properties to control the formatting and interaction of the column

    o Delete column

- For hierarchy levels, you can:

    o Edit properties to control the formatting and interaction of the hierarchy level

For more information, see "*Specifying the Criteria for Analyses*".

This pane is part of the "*Analysis editor: Criteria tab*".

Components

Drag Column

Use this button to reorder a single column or multiple columns that are grouped in a folder section. This button is located to the left of the column name or folder name. The following list describes how to use the Drag Column button, but you can reorder by clicking anywhere in the column or folder area and dragging and dropping to the new location. Valid drop locations are indicated by a thick solid line.

To reorder:

- A single column in a folder section that contains only one column, click the Drag Column button in either the column section or the folder section and drag and drop the section to a new location.

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- A single column in a folder section that contains multiple columns, click the Drag Column button in the column section and then drag and drop the section to a new location. A new folder section is created for the reordered column.

- All columns in a folder section, click the Drag Column button in the folder section and drag and drop the section to a new location.

Plus or Minus

This button is available only for hierarchical columns.

Use this button to expand or collapse the display of hierarchy levels in column.

Options

Use this button to select one of the following options:

- Sort - This option is available for attribute, measure, and hierarchical columns. It is not available for hierarchy levels. Displays the *"Sorting Options Menu"*, where you select options for sorting values. For more information on sorting data, see *"Sorting Data in Views"*.

- Edit Formula - This option is available only for attribute columns and measure columns. Use this option to display the *"Edit Column Formula dialog"*, where you can customize headings and edit the formula for the column, such as adding a Rank or Percentile function. For more information, see *"Editing the Formula for a Column"*.

- Column Properties or Hierarchy Level Properties - Use this option to display the *"Column Properties dialog"*, where you can edit various format properties for the column or hierarchy level. For more information, see *"Formatting Analyses, Views, and Dashboard Pages"*

- Filter - This option is available only for attribute columns and measure columns. Use this option to display the *"New Filter dialog"*, where you can create a filter for the attribute or measure column. For more information on filters, see *"Filtering and Selecting Data for Analyses."*

- Delete - This option is available for attribute, measure, and hierarchical columns. It is not available for hierarchy levels. Use this option to delete the column.

Toolbar

The toolbar contains the following buttons:

- Combine results based on union, intersection, and difference operations - Use this button to combine columns from one or more subject areas using Set operations. The columns must have commonality to be combined.

  Click the button to display the Select Subject Area menu, where you select a subject area that contains the data to combine with the columns that you have previously added. (The subject area can be the same as that from which you have previously selected columns, or a different subject area.) The Set Operations area is displayed, where you can use the following components:

  o Result Columns and Criteria "subject area" links - Click these links to display the appropriate columns in this pane. For example, suppose that you have selected the D1Office and D2Department columns in the A-Sample Sales subject area. If you click Criteria "subject area", then the D1Office and D2Department columns are shown so that you can perform tasks such as formatting those columns. If you have combined columns using Set operations, then click Result Columns to show those columns and perform tasks such as formatting them.

    The result columns are those that are displayed in views after applying the set operation of the derived columns.

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    ○ Union button - Displays the following options:

- Union - Use this option to specify that only nonduplicate rows from all columns are to be returned.
- Union All - Use this option to specify that rows from all columns, including duplicate rows, are to be returned.
- Intersect - Use this option to specify that only rows common to all columns are to be returned.
- Minus - Use this option to specify that only rows from the first column that are not in the second column are to be returned.

    ○ More options button - Click to cut, copy, or paste that subject area in the list of criteria.

    ○ Edit button - Click to display additional options for working with the subject areas:

- Create New Criteria - Displays the Select Subject Area menu, where you select a subject area to add to the criteria.
- Copy and Paste - Creates a duplicate set of criteria on which you can perform set operations.
- Cut - Removes the current set of criteria from the pane.
- Ungroup - If you have created a duplicate set of criteria, then this option is available to move the set of criteria to the next highest level.

For more information, see *"Combining Columns Using Set Operations"*.

- Remove all columns from criteria - Use this button to remove all columns that have been included in the Selected Columns pane. Be aware that there is no confirmation message and no undo available for this operation.

Selection Steps pane

Use this pane to create and modify steps for selecting data. The steps in this pane apply to all views for the analysis. You do not have to display the editor for a particular view to edit its selection steps.

For more information, see *"Working with Selections of Data"*.

This pane is part of the *"Analysis editor: Criteria tab"*, the *"Analysis editor: Results tab"*, and certain view editors.
This pane is not visible on the Criteria tab until you click the toolbar button to display it. The contents of this pane are displayed slightly differently on the Criteria tab if a column selector view is in use. See *"Editing a Column Selector View"* for information.

Components

List

Use to select the columns or measures to view in the pane. You can view all columns and measures, just measures, or specific columns.

Column Area

Use to indicate the start of the list of steps for each column. For hierarchical columns, the name of the hierarchy is included with the column name. This area includes the following types of steps:

- Start With - Serves as the starting selection for a column. This step is populated automatically when you select columns or hierarchy levels from a subject area.

    ○ For every column that you select, an implicit "Start with All Members" step is added for that column, where "All" implies all the members for the column after filters are applied.

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- For every hierarchy level that you select, an implicit "Start with all level-name" step is added for that level, where "All" implies all the members for the level after filters are applied. For example, if you select the Fiscal Quarter hierarchy level, then a step is created with a name such as "Start with All Fiscal Quarter".

- Add - Adds the selected members to the selection.

- Keep only - Keeps only the selected members and remove all others.

- Remove - Removes the selected members from the selection.

Save Selection Steps

Click this button to display the "Save Selection Steps dialog" where you save the steps for the column or hierarchy level as a group. This button is available only when you have more than a single Start With step in the list for a column. This button is not available if you try to save a set of steps as a group and one of the steps includes a calculated item.

Then, New Step

Click this link to display the following options:

- Select Members - Displays the where you create a step of the specified members.

- Add Groups or Calculated Items - Displays a submenu with the following options:
  - Select Existing Groups and Calculated Items - Displays the where you select an existing group or calculated item.
  - New Group - Displays the where you add a new group.
  - New Calculated Item - Displays the "New Calculated Item dialog" where you add a new calculated item.

- Apply a Condition - Displays the "New Condition Step dialog", where you create a condition step.

- Select Members Based on Hierarchy - Displays the , which is available for hierarchical columns only.

Name of Group or Calculated Item

Click the link for a group or calculated item to display one of the following dialogs: or .

Selection Step Toolbar

The selection step toolbar is the collection of buttons that displays when you hover over a selection step within the list of steps. It can include the following buttons:

- Edit - Displays the dialog where you can edit the step. For a "Start with" step, this is the only button available.

- Move Up - Moves this step one level up in the list of steps.

- Move Down - Moves this step one level down in the list of steps.

- Delete - Deletes this step from the list of steps.

Set User dialog

Use this dialog to search for and select a user. For example, in a Scorecard, you use this dialog to select the user to assign as a business owner to Scorecard objects such as KPIs, initiatives, and strategy objectives. In an agent, you use this dialog to select the user whose credentials you want to use to send the delivery content.

For more information, see:

- "Agent editor: General tab"
- "Creating an Initiative"

- *Creating an Objective*

- "*KPI Watchlist editor: Details tab*"

This dialog is also displayed as:

Business Owner dialog
Select Business Owner dialog

Select User dialog Select Key Resource User dialog
Components

Name

Use this field to enter your search criteria. For example, enter the user's first name to display a list of users with that first name.

Search

Use this button to display the accounts that satisfy the name search criteria that you entered.

Accounts

Displays the list of accounts that satisfy the name search criteria that you entered. You can then select the name that you want.

Settings dialog

Use this dialog to:

- Define the score thresholds and assessment ranges to be used for scoring scorecard objects

- Set up the controls for dimensions in the point of view area of a scorecard

For more information, see:

- "*Understanding Initiative or Objective Performance Assessment*"

- "*Assessment Mappings*"

- "*Point of View Area*"

Components

Assessment Mappings

Use the "*Settings dialog: Assessment Mappings tab*" to define the score thresholds and assessment ranges to be used for scoring scorecard objects.

Dimension Settings

Use the "*Settings dialog: Dimension Settings tab*" to set up the controls for dimensions in the point of view area of a scorecard.

Settings dialog: Assessment Mappings tab

Use this tab of the to define the score thresholds and assessment ranges to be used for scoring scorecard objects.

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For more information, see:

- "*Understanding Initiative or Objective Performance Assessment*"
- "*Assessment Mappings*"

Components

Score Threshold

Use this field to enter the numeric values that set the boundaries for the assessment ranges.

For example, you might enter 33 and 66 to set the boundaries for three assessment ranges - Critical, Warning, and OK. Any KPI score from 0 to 33 would fall in the Critical assessment range, any KPI score from 34 to 66 would fall in the Warning assessment range, and any KPI score from 66 to 100 would fall in the OK assessment range.

Assessment Range

Use this field to enter the name of each assessment range (for example, Acceptable).

Icon

Use this button to display the , where you select the icon to represent each assessment range.

Color

Use this button to display the color dialog, where you select the color to represent each assessment range.

Threshold Menu

Displays the following options:

- Remove Range - Use this option to remove a score threshold and its corresponding assessment range.
- Add Above - Use this option to add a score threshold and its corresponding assessment range above the current score threshold.
- Add Below - Use this option to add a score threshold and its corresponding assessment range below the current score threshold.

Add Threshold

Use this button to add a score threshold and assessment range below the last score threshold.

Settings dialog: Dimension Settings tab

Use this tab of the to set up the controls for dimensions in the point of view area of a scorecard.

For more information, see:

- "*Point of View Area*"
- "*Setting Up the Point of View Controls*"

Components

Dimensions Settings

Displays all the dimensions that are referenced by KPIs in a scorecard and shows their current settings. Use this area to set up the controls for the dimensions.

To set up the control for a dimension, select the dimension and then click the Edit Row button to display the .

Settings pane

Use this pane to set the thresholds that are to be displayed in a funnel graph or gauge.

Each threshold has a high and a low and is associated with a color in which the range identified by the threshold is displayed in the gauge, such as green for acceptable, yellow for warning, and red for critical.

For more information, see:

- "*Results tab: Funnel editor*"
- "*Results tab: Gauge editor*"

This pane is part of the "*Results tab: Funnel editor*" and the "*Results tab: Gauge editor*".

Components

High values are desirable

Use this box to specify whether the high values are the desirable goal. Selecting this box lists the statuses in order from the most desirable indicator (for example, Excellent) at the top to the least desirable indicator (for example, Warning) at the bottom.

Low values are desirable

Use this box to specify whether the low values are the desirable goal. Selecting this box lists the statuses in order from the least desirable indicator (for example, Warning) at the top to the most desirable indicator (for example, Excellent) at the bottom.

Threshold

Use this list to specify the data values in a gauge that highlight a particular range of values. The values must be between the minimum and the maximum values set for the gauge limits. The range identified by a threshold is filled with a color that is different from the color of other ranges.

To specify a data value, you can either:

- Enter a static value directly in a Threshold field.
- Click the Threshold Options button to set the value based on a measure column, a variable expression, or the results of a SQL query.

Threshold Options

Displays these options to set a threshold:

- Measure column - Use this option to use the measure column.
- Dynamic - Use this option to let the system determine the threshold value.
- Custom Value - Use this option to enter a specific value.

  If you select this option and then:
    o Click elsewhere on the pane without entering a value, the value of the Threshold field reverts to the previous value
    o Enter an invalid value in Threshold field, the value is cleared so that you can enter a new value

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- Variable Expression - Use this option to display the *"Enter Expression dialog"*, where you specify a variable expression.

- SQL Query - Use this option to display the *"Enter Expression dialog"*, where you specify a SQL query.

- Remove - Use this option to remove the threshold.

- Add Above - Use this option to add a threshold row above the current row.

- Add Below - Use this option to add a threshold row below the current row.

Status

Use this list to specify the label for each range identified by a threshold and the color in which the range is to be displayed in the gauge. Use the Status Options button to specify a label and the Color button to specify a color for each range.

Status Options

Displays the following options:

- Threshold Values - Use this option to use the current threshold values as the label for the range. The Status box is disabled when you select this option.

- Specify Label - Use this option use text that you specify as the label for the range, for example Excellent. After selecting this option, enter the text in the Status box.

Color

Displays the Color Selector dialog, where you select the color for the range that is identified by the threshold.

First Stage x final stage target value

This field is available only for last-stage only funnel graphs.

Use this box to enter the factor required to meet the target. In a last-stage only funnel graph, the target value of all the stages before the last are calculated based on the last stage target value and this target factor.

Add Threshold

Use this button to add a new threshold row.

Delete Threshold

Use this button to delete a threshold row.

Show More Columns dialog

Use this dialog to add or remove columns that display data such as the status, trend, target, and variance of KPIs on a KPI Watchlist, perspective, initiative, or objective. This enables you to customize the KPI data displayed by specifying visible columns.

For information about KPIs, see:

- *"KPI Watchlist editor: Performance tab"*
- *"Analytics pane"*
- *"Scorecard editor: Perspective tab"*

Components

Available Columns

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Displays all of the columns that you can select to present a wide variety of data for the KPIs that evaluate the initiative. describes some of the commonly used columns.

To display additional columns to present more KPI data on the initiative, select the columns individually or as groups by pressing Shift or Ctrl, and then click Move. To display all KPI data available, click Move All.

Visible Columns

Displays the columns that are currently visible. To remove columns, select them individually or in groups by pressing Shift or Ctrl, and click Remove. To remove all KPI data displayed, click Remove All.

Move

Use this button to display a column that you select in the Available Columns pane.

Move All

Use this button to display all available columns.

Remove

Use this button to hide a column that you select in the Visible Columns pane.

Remove All

Use this button to not display any KPI data on the initiative.

Notes

lists and describes the some of the commonly used KPI data columns.

Table E-7 Commonly Used KPI Data Columns

Column	Description
Change	If you enabled trending, displays the amount by which the KPI's current actual value differs from the actual value of the previous period.
	For example, if the actual value of KPI for "Annual Number of Sales" is 2000 and was 1850 last year, the change is 150.
% Change	If you enabled trending, displays the percent by which the KPI's current actual value differs from the actual value of the previous period.
	For example, if the actual value of KPI for "Annual Number of Sales" is 2000 and was 1850 last year, the change percent is 7.5%.
Data Type	Displays the data type of the KPI values that are stored in the database, for example, integer or percentage.
Formatting	Displays the KPI's raw actual and target values in the formatting for the unit that quantifies the values, such as dollars or days.
Label of Node	Displays the KPI's descriptive name that was specified in the *"Add KPI dialog"*.
Last Run	Displays the date on which KPI value calculations were performed by the backup server.

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Column	Description
Normalized	Displays the KPI value after it was converted from its original scale (a value between 1 and 50, for example) to a standard scale (values between 1 and 100) so that you can compare it with other KPI values.
	For example, assume that you want to use a scale of 0-100 to assess two KPIs. The first KPI is expected to have a value between 0 and 10. It collects a value of 3. The second KPI is expected to have a value between 0 and 1000. It collects a value of 800. To evaluate this data as x% or 100, the Normalize feature converts the KPI values to one between 1 and 100. Accordingly, the first KPI is multiplied by 10 (30) and that of the second KPI is divided by 10 (80).
Owner	Displays the user ID of the person responsible for managing the KPI.
Status	Indicates the performance level of the KPI determined by comparing its actual value with its target.
	If you own the KPI, you can right-click to override its status.
Target	Displays the KPI's desired value.
Target (Unformatted)	Displays the KPI's raw target value. For example a target value of 134500 dollars would be formatted as $134,500.00.
Trend	Indicates whether KPI performance has improved or declined, is good or bad, or has remained the same. Trend is a separate calculation that involves both the point of view and the Compare to Prior time grain setting (for example quarter, month, or year). The actual value is determined by the point of view. The trend calculation looks at the actual value for point of view time and compares it with the previous time period at the Compare to Prior time grain defined in the "KPI editor: General Properties page". For example, if the Compare to Prior time grain is set to quarter and if you choose 4Q2011 (fourth quarter of 2011) in the point of view, then that KPI's trend would look at the difference between 4Q2011 and 3Q2011, to determine the appropriate symbol (for example, a green up arrow or a red down arrow) to display for trend. See for trend symbols and their descriptions.
Value	Displays the KPI's current value.
Value (Unformatted)	Displays the raw KPI value. For example a value of 450019 dollars would be formatted as $4,500.19.
Variance	Displays the value by which the KPI's actual value differs from its target value. For example if the actual value for a Net Profit KPI is 600,000 and its target is 650,000, then the variance is -50,000.
% Variance	Displays the percent by which the KPI's actual value differs from its target value. For example if the actual value for a Net Profit KPI is 600,000 and its target is 650,000, then the variance as a percent is -7.7%
Weight	If you evaluate initiative performance by assigning weights to individual KPIs, then this displays these individual weights.
	If you do not enter weights that add to 100% Oracle Scorecard and Strategy Management does it for you. The weight for each KPI is used with its normalized assessment value to determine the performance of the objective or initiative.The normalized assessment value is compared against the assessment ranges in the "Settings dialog: Assessment Mappings tab". The range that contains the normalized assessment value is found and that determines the objective's status.

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Sign In page

Use this page to sign in to Oracle Business Intelligence. You might not be prompted to enter values in all fields of this page, if you have already signed on using single sign-on (SSO).

For more information, see:

-
-
-

Components

User ID

Use this field to enter your user ID.

Password

Use this field to enter your password.

Sign In

Use this button to sign in to Oracle Business Intelligence with the credentials you have entered.

Accessibility Mode

Use this box to specify whether content for Oracle BI EE is rendered in a browser in a way that facilitates the use of a screen reader.

If you select this box, then:

- The *"BI Composer"* in accessibility mode will be used as the analysis editor (rather than the *"Analysis editor"*). For more information on BI Composer, see *"BI Composer"*. For more information on the Analysis editor, see

- This setting overrides the setting for accessibility mode in the *"My Account dialog: Preferences tab"* for the current session, only.

For information, see

Language

Use this box to select the language in which you want to display the user interface. The language that you choose overrides the language preference that you specified in the *"My Account dialog: Preferences tab"* for the current session, only. Note that changing the language for the current session does not change the locale for the session.

Smart Watchlist Properties dialog

Use this dialog to specify:

- How the Filter pane in a smart watchlist is to be displayed

- The amount of indentation, in pixels, for hierarchical objects that are listed in a smart watchlist

  Indentation is used in the Label column of a smart watchlist to indicate hierarchies where it makes sense based on the filter criteria. Indentation does not make sense and is not used if, for example, the filter criteria is to show the top 10 KPIs based on best performance (% variance).

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Objects in the smart watchlist are shown in hierarchical order with indentation only if there is no sort column in effect and if, on the *"Filter pane: Performance tab"*, you have selected All based on Status or Score.

Indentation does not show the exact levels of descendants because some levels may be excluded, depending on the filter criteria. For example, you may see something like this:

```
Patriarch
    Son
        Great-great-grandson
Matriarch
    Great-great-granddaughter
```

For more information, see:

- *"Scorecard editor: Smart Watchlist tab"*
- *"Smart Watchlists"*

Components

Filter Criteria Display

Displays the following options that allow you to specify how the Filter pane on the smart watchlist is to be displayed:

- Control Panel - Use this option to display the Filter pane as a tabbed control that includes the Relationship, Type, Perspective, Performance, and Ownership tabs.

- Text Summary - Use this option to display the Filter pane as a read-only summary of the current filter criteria.

- None - Use this option to hide the Filter pane.

Hierarchical Node Indent

Use this field to specify the amount of indentation, in pixels, for hierarchical objects that are listed in the smart watchlist.

Status Override dialog

Use this dialog to:

- Override the status of an initiative, objective, or KPI for the current point of view. (See *"Point of View Area"* for additional information on the point of view.)
- Cancel an override

For more information, see:

"Status Overrides"
"Status Overrides"

Components

New Status

Use this box to select the new status to apply or to select Cancel Override to cancel an override.

Reason

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Use this box to enter the reason for the override or the cancellation of the override.

History

Displays any overrides that previously have been applied to the initiative, objective, or KPI for the current point of view as well as any cancellations.

To expand or collapse the History area, click the Expand All or Collapse All button.

Strategy Map tab: Details tab

Use this tab of the *"Scorecard editor: Strategy Map tab"* to specify supporting information for the strategy map.

For more information, see:

- *"Strategy Maps"*
- *"Creating a Strategy Map"*

Components

Name

Displays the name of the strategy map.

Description

Use this field to enter a description of the strategy map.

Business Owner

Displays the user ID of the person responsible for managing the strategy map. To specify the business owner, click the Set User button to display the , where you can search for and select the business owner.

Objectives and KPIs

Use this watchlist to view and manage the objectives and KPIs that are displayed in the strategy map.

See *"Watchlists"* fro additional information.

Related Documents

Use the *"Related Documents area"* to view and manage documents that provide supporting information to the strategy map.

Strategy Map tab: Diagram tab

Use this tab of the *"Scorecard editor: Strategy Map tab"* to create a diagram that shows how objectives that have been defined for a scorecard and the KPIs that measure their progress are aligned by perspectives. It also shows cause and effect relationships between objectives.

For more information, see:

- *"Strategy Maps"*
- *"Creating a Strategy Map"*

Components

Diagram

Use this area to drag and drop objectives and KPIs to show how they are aligned by perspectives.

Each node (that is, the representation of an objective or KPI) on the diagram shows the status of the objective or KPI by displaying the icon and color that represents the assessment range. A KPI node also displays the actual value of the KPI and the percent variance from the target.

If a cause and effect relationship exists between two objectives, a line connects the two objectives to indicate the relationship.

To:

- Display options that allow you to work with a node, click the Options button (on the right side of the node) to display the *"Node Options Menu"*.

- Edit a causal linkage, right-click the linkage line and select Edit Causal Linkage. The *"Causal Linkage dialog"* is displayed.

- Delete a causal linkage, right-click the linkage line and select Delete Causal Linkage.

- Display additional performance data for the KPI, such as target value or variance, click the down arrow at the bottom center of the representation. To collapse this data, click the up arrow.

- Zoom in and out of the diagram or to add a cause and effect relationship between two objectives, use the toolbar buttons on the *"Scorecard editor: Strategy Map tab"*.

- Work with comments (if any), click the Comment button in the upper-right corner of a node to display the *"Status window"*, where you can read the comments that previously have been added, add another comment, or reply to a comment. See *"Comments"* for additional information.

- Work with status overrides (if any), click the red asterisk in a node to display the *"Status window"*, where you can view the overrides that previously have been applied or apply another override. See *"Status Overrides"*or additional information.

Legend

Use the to view the legend for the strategy map.

Strategy pane

Use this pane to create and manage the objectives that form your corporate strategy

For more information, see:

- *"Objectives"*
- *Creating an Objective*
- *"Strategy Trees"*
- *"Cause & Effect Maps"*

This pane is part of the *"Scorecard editor"*.

Components

Strategy Tree

Displays the objectives that have been defined for the scorecard and the KPIs that measure their progress and performance hierarchically. It also shows the statuses of objectives and KPIs using the appropriate colors and symbols that you specified for assessment mappings. See *"Assessment Mappings"* for additional information on assessment mappings.

Toolbar

This toolbar contains the following buttons:

- Create Objective - Use this button to display the *"Scorecard editor: Objective Details tab"*, where you create an objective as a child of the selected objective.
- Open - Use this button to open the selected object for editing or viewing, depending on the current mode.
- Delete - Use this button to delete the selected object and all of its descendants (if any), if you have the appropriate permission.
- View Strategy Tree - Use this button to display the strategy tree for the selected object.
- View Cause & Effect Map - Use this button to display the cause & effect map for the selected object.

Right-Click Menu for an Object

Displays options for working with an object. See for additional information.

Strategy Tree tab: Details tab

Use this tab of the *"Scorecard editor: Strategy Tree tab"* to specify supporting information for the strategy tree.

For more information, see:

- *"Strategy Trees"*
- *"Creating Strategy Trees"*

Components

Name

Displays the name of the strategy tree.

Description

Use this field to enter a description of the strategy tree.

Business Owner

Displays the user ID of the person responsible for managing the strategy tree. To specify the business owner, click the Set User button to display the , where you can search for and select the business owner.

Objectives and KPIs

Use this watchlist to view and manage the objectives and KPIs that are displayed in the strategy tree.

See *"Watchlists"* for additional information.

Related Documents

Use the *"Related Documents area"* to view and manage documents that provide supporting information to the strategy tree.

Strategy Tree tab: Diagram tab

Use this tab of the *"Scorecard editor: Strategy Tree tab"* to view an objective and its supporting child objectives and KPIs hierarchically in one of the following types of diagram:

- Strategy tree diagram

- Contribution wheel diagram

For more information, see:

- *"Strategy Trees"*
- *"Strategy Tree Diagram"*
- *"Contribution Wheel Diagram"*
- *"Creating Strategy Trees"*

Components for the Strategy Tree Diagram

Diagram

Displays a tree diagram for the objective.

To:

- Display options that allow you to work with a node, click the Options button (on the right side of the node) to display the *"Node Options Menu"*.

- Display additional performance data for a KPI, such as target value or variance, click the down arrow at the bottom center of the node. To collapse this data, click the up arrow.

- Expand or collapse a node, click the plus (+) or minus (-) icon beneath the node.

- Zoom in and out of the diagram, use the toolbar buttons on the *"Scorecard editor: Strategy Tree tab"*.

- Work with comments (if any), click the Comment button in the upper-right corner of a node to display the *"Status window"*, where you can read the comments that previously have been added, add another comment, or reply to a comment. See *"Comments"* for additional information.

- Work with status overrides (if any), click the red asterisk in a node to display the *"Status window"*, where you can view the overrides that previously have been applied or apply another override. See *"Status Overrides"* for additional information.

- Change the type of diagram to a contribution wheel diagram, right-click in the background outside the tree and select View as Wheel Diagram or click the Wheel Diagram Type toolbar button in the *"Scorecard editor: Strategy Tree tab"*.

Bird's-eye View

Displays an overhead view of the tree diagram. The white box focuses on the nodes that are currently in view in the diagram area.

If (and only if) all of the nodes do not fit in the content pane, then you can drag the white box to scroll the diagram.

Components for a Contribution Wheel Diagram

Information Pane

Displays information about the current node (that is, the node over which the mouse pointer is hovered or, if the mouse pointer is not hovering over a node, the selected node, which has a dark outline).

To change the location of the Information Pane, drag it to the desired location. This location is only temporary and will not be saved.

Diagram

Displays a contribution wheel diagram for the objective.

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To:

- Display information specific to a node (such as the weight assigned to it in its parent's assessment rule), hover the mouse pointer over the node.

- Display options that allow you to work with a node, right-click the node to display the *"Node Options Menu"*. For example, you can change the focus of the wheel using the Focus on Node and Focus up to Node options.

- Change the focus of the wheel down to a descendant, double-click the descendant node.

- Zoom in and out of the diagram or set properties for the strategy tree, use the toolbar buttons on the *"Scorecard editor: Strategy Tree tab"*.

- Drill to the next level or collapse a level, hover the mouse pointer over the concentric rings on the outer border of the wheel and click the Drill to next level or Collapse Level triangle.

- Expand or collapse a node or group of nodes that appear as slivers (that is, appear very thin) in the diagram, click the Expand Section triangle or the Collapse Section triangle that displays when you hover over it.

- Work with comments (if any), click the Comment button in a node to display the *"Status window"*, where you can read the comments that previously have been added, add another comment, or reply to a comment. See *"Comments"* for additional information.

- Work with status overrides (if any), click the white dashed line around the border of a node to display the *"Status window"*, where you can view the overrides that previously have been applied or apply another override. See *"Status Overrides"* for additional information.

- Change the type of diagram to a strategy tree diagram, right-click in the background outside the wheel and select View as Tree Diagram or click the Tree Diagram Type toolbar button in the *"Scorecard editor: Strategy Tree tab"*.

Breadcrumbs

Displays a group of small circles that represent the node in the center of the contribution wheel and any of its ancestors that are included in the diagram.

Use the breadcrumbs to change the focus of the contribution wheel up to an ancestor by double clicking the circle that represents the desired ancestor.

Node Options Menu

The Node Options menu is displayed from the Options button on a node (that is, a representation of an objective or KPI) in a view diagram. The options that are available depend on the type of view and can include the following:

- Action Links - Displays the action links that are available for the current status of the objective or KPI. Click a link to execute the action.

- Add Comment - Use this option to display the *"New Comment dialog"*, where you add a comment to the objective or KPI.

- Add Related Strategy Nodes - Use this option to add to the diagram objectives that are related to this objective (that is, are linked by cause or effect).

- Analyze - This option is available only for a KPI. Use this option to create an analysis based on the KPI. The analysis is automatically saved in the catalog in the My Folders/Drills folder.

    🖉 **Note:** Because the My Folders/Drills folder is used for temporary storage, the analysis might not persist after the Oracle Business Intelligence session ends. To preserve the analysis, copy it to another directory. For example, to preserve an analysis that you plan to use in a shared dashboard, copy it to a folder in / Shared Folders.

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- Contact Owner - Use this option to display the *"Contact Owner dialog"*, where you can contact the business owner of the objective or KPI.

- Drill Down - This option is available only in strategy tree diagrams. Use this option to move the focus on this node and expand the node to show its children.

- Drill Up - This option is available only in strategy tree diagrams. Use this option to collapse the node and move the focus to the parent node.

- Focus on Node - This option is available in contribution wheel diagrams and strategy trees. Use this option to change the focus (that is, the center node) of the contribution wheel or the strategy tree to the Node identified in the option. For example, right-clicking a node that represents the Broaden Sales Channels objective and selecting Focus on Broaden Sales Channels changes the center node to the Broaden Sales Channels objective.

- Focus up to Node - This option is available in contribution wheel diagrams and strategy trees. Use this option to change the focus of the contribution wheel or strategy tree up to the Node identified in the option (that is, to an ancestor of the current node). For example, if the center node represents the Broaden Sales Channels objective, right-clicking the center node and selecting Focus up to Expand Market Share changes the center node to the Expand Market Share objective (an ancestor of the Broaden Sales Channels objective).

- Hide - This option is available only for cause & effect maps. Use this option to hide the node on the diagram.

  You might, for example, want to hide some nodes so that you can view only the nodes for which you are the business owner.

  To hide multiple nodes at one time, click the Cause and Effect Map Preferences button on the cause & effect map toolbar to display the .

- Open - Use this option to display the objective or KPI for editing or viewing, depending on the current mode.

- Override Status - Use this option to display the *"Status Override dialog"*, where you override the status of the objective or KPI.

- Remove From Diagram - Use this option to remove the objective or KPI from the diagram.

- Show Hidden Causes - This option is available only for cause & effect maps. Use this option to show any causes that were hidden on the diagram.

  To show multiple hidden nodes at one time, click the Cause and Effect Map Preferences button on the cause & effect map toolbar to display the .

The right-click menu of an objective or KPI also contains these options.

Strategy Tree View Properties dialog

Use this dialog to set properties that control the appearance of the diagrams for a strategy tree.

For more information, see:

- *"Strategy Tree tab: Diagram tab"*
- *"Strategy Trees"*
- *"Creating Strategy Trees"*

Components

Size Diagram to Fit

Use this box to specify whether to resize the strategy tree diagram automatically to fit the available space (for example, when the window is resized).

Use Drop Shadows on Node Labels

Use this box to specify whether to use drop shadows on node labels. Drop shadows are dark shadows around the label text that help to distinguish the text from its background.

Use Gradient for Background Color

Use this box to specify whether the background color is to gradually fade (starting at the top of the diagram) to the specified gradient color.

Background Color

Use this box to specify the background color of the diagram.

Gradient Color

This box is available only if Use Gradient for Background Color is selected.

Use this box to specify the color to which the specified background color is to fade.

Node Label Color

Use this box to specify the color to be used for the node labels.

Fill Sectors with Status Color

Use this box to specify whether sectors in a contribution wheel diagram are to be filled with the status color or whether only the outer sector edge is to be filled with the status color.

Show Information Pane

Use this box to specify whether the Information pane in a contribution wheel diagram is to be displayed.

Show Breadcrumbs

Use this box to specify when breadcrumbs are to be displayed in a contribution wheel diagram. The options are:

- Always - Select this option to always show the breadcrumbs.
- If Focus Down - Select this option to specify that breadcrumbs are to be shown only when the focus of the contribution wheel is moved down to a descendant.
- Never - Select this option to never show the breadcrumbs.

Behind the Wheel Color

Use this box to specify the color for the area of the contribution wheel behind the sectors.

Style and Conditional Formatting dialog

Use this dialog to format the elements of a graph, such as bars and lines.

Components

Positional

Use the *"Style and Conditional Formatting dialog: Style Formatting tab"* to format a graph based on the position of graph elements.

Conditional

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Use the "*Style and Conditional Formatting dialog: Conditional Formatting tab*" to format a graph based on conditions applied to columns.

Style and Conditional Formatting dialog: Conditional Formatting tab

Use this tab of the to format a graph based on conditions applied to columns.

Components

Column tabs

Displays tabs for each column to which you can add conditions. Click a column tab to display the conditions that are currently defined for the column. You can modify a condition using its Condition toolbar.

Add Condition Format

Use this button to add a condition. This button first displays a list of the columns to which you can apply conditional formatting and then, when you select a column, the "*New Condition dialog*", where you define the condition to add.

Clear All

Use this button to delete all conditions on the current column tab.

Condition Toolbar

The condition toolbar is the collection of components that displays to the right of a condition. It includes the following components:

- Edit- Use this button to display the New Condition dialog, where you edit the condition.
- Color - Use this box to display the Color Selector dialog, where you select the color to be applied to the column values that meet the condition.
- Delete- Use this button to delete the condition.

Style and Conditional Formatting dialog: Style Formatting tab

Use this tab of the to format a graph based on the position of graph elements.

Components

Graph Element Tabs

Displays tabs for each graph element to which you can apply formatting. Click a column tab to display the positions that are currently formatted.

Custom Formatted Positions

Displays the positions that have been formatted for the element.

To specify a color for a position, click the down arrow in color box to display the Color Selector dialog.

> ✏️ **Note:** If you specify 0 for the width of a line, then the legend marker changes from the default line marker to symbol markers for the line and for other lines in the graph (for example, the symbol markers are shown as the legend markers for all the lines in the graph).

Add new position

Use this button to add a new position entry to the Custom Formatted Positions table.

Remove selected position

Use this button to remove the selected position entry in the Custom Formatted Positions table. To select an entry, click the first column in the entry row.

Styles pane

Use this pane to:

- Select the size of a performance tile.
- Select a theme.

For more information, see:

-

Components

Tile Size Options

- Small - Use this option button to specify a small size performance tile.
- Medium - Use this option button to specify a medium size performance tile.
- Large - Use this option button to specify a large size performance tile.
- Custom - This option button is selected if you have explicitly entered a size by using the .

> ✏️ **Note:** You can further customize the tile by defining a background or border color by using the . Only one custom style can exist for each discrete tile.

Themed Tile

Select a themed tile to apply that style to your performance tile.

Subject Areas pane

Use this pane to:

- Select the columns and members to add to an analysis.
- Select the column to use when you create or edit a named filter.
- Add or remove subject areas that are related to the primary subject area that you have selected. You select a primary subject area when you create an analysis or a new named filter. (Only related subject areas that you have permission to access are available for you to add.)
- Refresh the columns that display in the subject area or refresh the subject area's metadata after the administrator made changes to the columns in the repository.
- View the metadata dictionary information for a selected subject area, folder, column, or hierarchy level.

For more information, see:

- *"What Are Subject Areas and Columns?"*
- *"Specifying the Criteria for Analyses"*

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- *"Creating a Column Filter"*

This pane is part of all the tabs of the *"Analysis editor"* and part of the *"Filter editor"*.

Components

Subject Area Tree

Displays the primary subject area and any related subject areas that you have added.

Use this tree to:

- Expand and collapse a folder to show the folder's columns.

  In addition, when the Subject Areas pane is displayed in the:

  - *"Analysis editor: Criteria tab"*, you can expand a hierarchical column to show its levels.
  - *"Analysis editor: Results tab"*, you can expand a column to show its members. (You cannot show its members in the Criteria tab.)

  If tooltips have been configured in the Oracle BI Presentation Services Administration page, then you can hover over a column name and see its description.

- Select the columns and members to add to an analysis. You can add a column or a member to an analysis in one of two ways:

  - Double-click the column to display it in the *"Selected Columns pane"* or the Results tab.
  - Drag and drop the column to the Selected Columns pane. You can press Ctrl+Click to select multiple values and drag and drop those values together.

  You cannot select levels of a hierarchical column; you can select only the entire column.

- Select the column to use when you create or edit a named filter. To do so, double-click the column to display the *"New Filter dialog"*, where you create the filter based on the selected column.

Toolbar

The toolbar contains the following buttons:

- Add/Remove Subject Areas - This button is available only if one or more related subject areas are available and you have permission to access them. Use this button to display the *"Add/Remove Subject Areas dialog"*, from which you can add or remove related subject areas.

- Refresh - Clicking this button executes the default behavior of Refresh Display. Clicking the arrow beside the button enables you to select one of the following options:

  - Refresh Display - Use this option to refresh the subject area view without refreshing the Oracle BI EE server cache. Use this option when the subject area does not contain the columns that you expect to see. If you use this option and the expected columns still do not display, then use the Reload Server Metadata option.
  - Reload Server Metadata - Use this option to reload the subject area's metadata when you know that the administrator has built new metadata in the repository or if after you use the Refresh Display option and the subject area display still does not contain the columns that you expect to see in the subject area. For example, if the administrator added a new measure column to the repository metadata, then you would not see it in the subject area until after you reloaded the metadata. The administrator cannot force a reload of the subject area's metadata. Reloading the metadata also refreshes the subject area's display.

Reloading metadata clears the metadata cache that is used by all users within the server instance, and after the metadata is reloaded, the metadata cache is re-built as user queries are run. This process of re-building the cache can slow system performance slightly.

- View Metadata Dictionary - This button is available only when the Subject Areas pane is displayed in the Criteria tab or the Results tab of the Analysis editor and only if the administrator has configured for the display of metadata dictionary information. This button is not available if you select column values or members. Click this button to display the metadata dictionary page for the selected subject area, folder, column, or hierarchy level.

  For more information, see .

Notes

See for information on how adding columns to a view using the Subject Areas pane can place them in the Excluded drop target.

Table Properties dialog

Use this dialog to edit the properties of a table or pivot table.

For more information, see *"Editing Table and Pivot Table Views"*.

Components

Style

Use the *"Table Properties dialog: Style tab"* to specify formatting preferences for tables and pivot tables.

Writeback

Use the to set up for users to modify values in columns in tables.

Table Properties dialog: Style tab

Use this tab of the to specify formatting preferences for tables and pivot tables.

For more information, see *"Editing Table and Pivot Table Views"*.

This dialog is also displayed as:

Pivot Table Properties dialog
Components

Data Viewing

Use this area to specify the method to use to browse data:

- Fixed headers with scrolling content - Use this option to use scrolling as the method to browse data.

  When you select this option, the Maximum Width and Maximum Height fields are displayed in this dialog.

  A table or pivot table that uses this method:

  - Keeps headers of rows and columns visible at all times.
  - Includes horizontal and vertical scroll bars.

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> o May include Get more rows and Get more columns links to fetch more rows and columns of data, when the
>   table or pivot table has a large amount of data and the user scrolls to the bottom of the table or pivot table.

> ✎ **Note:** Tables and pivot tables that use the scrolling method to browse data do not render properly
>   in Microsoft's Internet Explorer browser version 7 or 8. As a result, when Microsoft's Internet Explorer
>   browser version 7 or 8 is detected, the table or pivot table will be rendered using paging controls instead,
>   unless your administrator specifically allows the scrolling method to be used with these browser versions.
>   For information on allowing the scrolling method, see "Manually Configuring to Allow the Scrolling Method
>   to Be Used in Microsoft's Internet Explorer Browser Version 7 or 8" in

- Content paging - Use this option to use paging controls as the method to browse data.

  When you select this option, the Paging Controls box and the Rows per Page field are displayed in this dialog.

Maximum Width

This field is available only if Fixed headers with scrolling content is selected.

Use this field to specify the maximum width of the table or pivot table in pixels. The default is 600 pixels.

Maximum Height

This field is available only if Fixed headers with scrolling content is selected.

Use this field to specify the maximum height of the table or pivot table in pixels. The default is 700 pixels.

Paging Controls

This box is available only if Content paging is selected.

Use this box to specify where the paging controls are displayed for the view. The paging controls include First 25 Rows and
Next 25 Rows. You can select either the top or bottom of the view or you can select to hide the controls. For information on
the paging control buttons, see .

Rows per Page

This field is available only if Content paging is selected.

Use this field to enter the number of rows to display per page for the view. This setting affects the number of rows that are
displayed with the First, Next, and Previous paging control buttons.

Display Column & Folder Headings

Use this box to specify whether to display headings for the columns and the view. You can select from the following:

- Only column headings - Displays only the column headings, not the view headings.

- As separate rows - Displays the column and view headings as individual rows in the view.

- As Folder.Column - Displays the column names with the lowest-level folder name from the Subject Area. For
  example, suppose that you have a column called Color in the Products folder. With this option, the column heading
  displays as Products.Color, rather than simply Color.

- As Folder.Column (where needed) - Displays the column names with the folder name from the Subject Area but only
  when the column names are not unique. This option is available only for tables.

Enable alternate styling

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Use this box to specify whether to add "green bar" styling to the view. Green bar styling shows alternating rows or columns in a light green color. (Light green is the default color, which you can change. For how, see *"Adding Cosmetic Formatting to a Table or Pivot Table"*.) Select this box to add green bar styling. Deselect it to omit green bar styling.

Alternate

This field is enabled only if you select the Enable alternate styling box and you are applying formatting to a pivot table.

Use this box to select one of the following options for green bar styling for pivot tables:

- Innermost Column - Applies green bar styling only to the column that is closest to the data.
- All Columns - Applies green bar styling to all columns.

Repeat Cell Values

Use this box to indicate that all cells that span rows are repeated. For example, suppose that you have a table that has Year and Month values. When this box is not selected, Year is displayed once for Month values. When this box is selected, Year is repeated for all Month values. This box is available only for tables.

Set Alternate Format

Use this button to display the *"Edit Format dialog"*, where you add cosmetic formatting for the green bar styling of the view. See *"Adding Cosmetic Formatting to a Table or Pivot Table"*.

Listen to Master-Detail Events

Use this box to specify whether a table or pivot table is to act as a detail view in a master-detail relationship and listen for master-detail events. If you select this box, then complete the Event Channels field.

For information on master-detail relationships, see *"Master-Detail Linking of Views"*

Event Channels

This field is enabled only if you select the Listen to Master-Detail Events box.

Use this field to enter one or more channels on which the table or pivot table is to listen for master-detail events raised by one or more master views. The channel name is case sensitive and must match exactly the channel name specified in the master view. Separate channels with commas, for example, channel a, channel b.

The remaining components of this dialog are described in *"Column Properties dialog: Style tab"*.

Null Values

Use these check boxes to override null suppression set at the analysis level.

Include rows with only Null Values - Use this check box to include null values in your table or pivot table view when the entire row contains all nulls. When selected, null values will not be suppressed for rows for the table or pivot table.

Include columns with only Null Values - This check box is available only for pivot table views. Use this check box to include null values in your pivot table view when the entire column contains all nulls. When selected, null values will not be suppressed for columns in the pivot table.

See for additional information.

Table Properties dialog: Write Back tab

Use this tab of the to configure the view for users to modify values in columns.

For more information, see and .

Components

Enable Write Back

Use this box to allow users to modify values in the view, if one or more columns in the analysis has been enabled for write back. Deselect the box to prevent write back on the view, even if one or more columns have been enabled for write back.

Template Name

Use this field to enter the name of the template to employ for writing back values. The template includes SQL statements that write values back to the data source.

Toggle Table Mode

Use this box to enable the toggling of modes for writing to the view. Click the box to allow the view to be toggled from View mode to Edit mode so that users can write back values. Deselect the box to prevent the view from being toggled from View mode to Edit mode; rather, the view is always in Edit mode.

Apply Button

Use this field to enter the text to be displayed on the button that users click to apply the values that they have entered; that is, to write the values back to the data source. The default value for this button is Apply.

Revert Button

Use this field to enter the text to be displayed on the button that users click to clear the values that have just entered for write back. The default value for this button is Revert.

Done Button

Use this field to enter the text to be displayed on the button that users click to indicate that they have finished entering values for write back. Any values that have not yet been written back to the data source are written back. The default value for this button is Done.

Button Position

Use this list to select the position of the buttons on the view, such as Right or Left.

Tasks pane

Use this pane to perform object-specific tasks. The tasks that you can perform depend on the object's type, the object's permissions, and your privileges.

For more information, see:

This pane is part of the *"Catalog page"*.

Tasks Options

- Add to Briefing Book - Use to add the selected object to a briefing book. After you select this option, the *"Save Briefing Book Content dialog"* displays. For more information about briefing books, see *"Briefing Book"*.

- Add to Favorites - Use to add the selected object to your Favorites list. A favorite object's icon appears with a gold star overlay. For more information about Favorites, see .

- Archive - Use to pack or bundle the contents of a a folder or multi-component object (a scorecard, for example) that you unpack in another directory. This enables you to transfer data between environments (development to test, for example).

- Copy - Use to duplicate a folder or object and paste it in another directory.

- Create Agent - (This option is available only when you select a KPI.) Use this option to display the *"Create New Agent dialog"*, where you create an agent from the KPI.

- Create Link - Use to display a folder or object if the directory in which it resides is very large, requiring scrolling. For example, to quickly access the components of a Sales and Marketing scorecard in a corporate directory that contains thirty scorecards, create a link to the Sales and Marketing scorecard.

- Create Shortcut- Use to create a shortcut to the object or folder. When you create a shortcut, Oracle BI EE adds the shortcut to the current folder. You can then move this shortcut to another location within the catalog.

- Delete - Use this button to remove a folder or object from the catalog. If you delete shared folders or objects, then other users who have added those objects to their personal dashboards lose access.

- Disable - Use this option to temporarily disable an agent. See .

- Edit - Use this button to modify objects using the associated Editor or Builder. For example, select a KPI and click this button to modify the KPI in the KPI Builder.

- Enable - Use this option to cause an agent to run on schedule again. See .

- Expand - Use this button to display the contents of a selected folder. For example, select a Dashboards folder and click this button to display all available dashboards. If you select a scorecard, all associated objects such as (mission statements, perspectives, objectives, and so on) are displayed.

- Execute - Use to run a script, URL, or web service action. See *"Actions"*.

- Export - Use to save a report in PDF, Microsoft Excel, or MHTML format.

- Open - Use to view an object or expand folder contents.

- Permissions - Use to enable users to view folders and objects. To grant specific privileges that determine the tasks that users can perform with these objects, see "" in .

- Print - Use to print the current dashboard page or analysis. You can print using a standard print layout (Printable HTML or Printable PDF). For a dashboard page, you can also print using a custom print layout, if one or more custom print layouts are available for the dashboard page. For information on custom print layouts, see .

- Properties - Use to view or modify the selected object's properties. When you select this option, the *"Properties dialog"* displays.

- Remove from Favorites - Use to remove the item from your Favorites list. Selecting this option removes the object from every Favorites category that contains the object. After you remove an object from your favorites list, the object's icon changes from an icon with a gold star to the object's standard icon. For more information about Favorites, see .

- Rename - Use to change the name of a folder or object.

- Subscribe - Use this option to subscribe to an agent that the owner has made available to you for subscription. See *"Subscribing to an Agent"*.

- Unsubscribe - Use this option to unsubscribe from an agent to which you are currently subscribed. See .

Text Properties dialog

Use this dialog to specify properties for a text object that you are adding to a dashboard page. If you have the appropriate privileges, then you can enter HTML tags into the object.

For more information, see *"Dashboard Content"*.

Components

Bold, Italic, Underline

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Use these buttons to apply Bold, Italic, or Underline to characters in the text object.

Line Break

Use this button to insert a line break between characters in the text object.

Contains HTML Markup

Use this option to work with HTML codes, as described in .

Text

Use this field to enter the text to include on the dashboard.

The name that you assign in the Dashboard editor is the name that is used for the text object in the Oracle BI Presentation Catalog.

You can reference variables in this field. For the syntax to use, see *"What Is the Syntax for Referencing Variables?"* For more information on variables, see *"Using Variables"*.

Preview

Use this button to view how the text is formatted on the dashboard in the Preview area box. If you make any changes, then you can click Preview again to see the results.

Trellis Properties dialog

Use this dialog to edit the properties of a trellis.

For more information, see:

- *"Editing Trellis Views"*

Components

General

Use the to set properties related to the grid canvas, such as legend location and visualization size.

Style

Use the to set properties that control the appearance of the trellis, such as the style.

Scale

Use the to set properties for axis limits and tick marks.

Titles and Labels

Use the to set properties that control the display of titles and labels for the trellis.

Trellis Properties dialog: General tab

Use this tab of the to set properties related to the trellis canvas, such as legend location.

For more information, see:

- *"Editing Trellis Views"*

Components

> ✏️ **Note:** The components available in this tab depend on the type of trellis (simple or advanced) and the type of visualization with which you are working.

Data Viewing

This area is available only for an advanced trellis.

Use this area to specify the method to use to browse data:

- Fixed headers with scrolling content - Use this option to use scrolling as the method to browse data.

  When you select this option, the Maximum Width and Maximum Height fields are displayed in this dialog.

  An advanced trellis that uses this method:

  - Keeps headers of rows and columns visible at all times.

  - Includes horizontal and vertical scroll bars.

  - May include Get more rows and Get more columns links to fetch more rows and columns of data, when the trellis has a large amount of data and the user scrolls to the bottom of the trellis.

  > ✏️ **Note:** Advanced trellises that use the scrolling method to browse data do not render properly in Microsoft's Internet Explorer browser version 7 or 8. As a result, when Microsoft's Internet Explorer browser version 7 or 8 is detected, the advanced trellis will be rendered using paging controls instead, unless your administrator specifically allows the scrolling method to be used with these browser versions. For information on allowing the scrolling method, see "Manually Configuring to Allow the Scrolling Method to Be Used in Microsoft's Internet Explorer Browser Version 7 or 8" in

- Content paging - Use this option to use paging controls as the method to browse data.

  When you select this option, the Paging Controls box and the Rows per Page field are displayed in this dialog.

Maximum Width

This field is available only for an advanced trellis and only if Fixed headers with scrolling content is selected.

Use this field to specify the maximum width of the advanced trellis in pixels. The default is 600 pixels.

Maximum Height

This field is available only for an advanced trellis and only if Fixed headers with scrolling content is selected.

Use this field to specify the maximum height of the advanced trellis in pixels. The default is 700 pixels.

Legend Location

Use this box to specify whether a legend is to be displayed and its location. Select one of the following options:

- None - Use this option to specify that no legend is to be displayed.
- Top - Use this option to display the legend at the top of the trellis canvas.
- Right - Use this option to display the legend to the right of the trellis canvas.
- Bottom - Use this option to display the legend at the bottom of the trellis canvas.

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- Left - Use this option to display the legend to the left of the trellis canvas.

- Based on number of values - Use this option to specify that the legend is to be placed in the best position (left, right, top, or bottom) based on the number of values in the column and the space available.

Rows per Page

For an advanced trellis, this field is available only if Content paging is selected.

Use this field to enter the number of rows to display per page for the trellis. This setting affects the number of rows that are displayed with the First, Next, and Previous paging control buttons.

Listen to Master-Detail Events

Use this box to specify whether the trellis is to act as a detail view in a master-detail relationship and listen for master-detail events. If you select this box, then complete the Event Channels field.

For more information on master-detail relationships, see "*Master-Detail Linking of Views*"

Event Channels

This field is enabled only if you select the Listen to Master-Detail Events box.

Use this field to enter one or more channels on which the trellis is to listen for master-detail events raised by one or more master views. The channel name is case sensitive and must match exactly the channel name specified in the master view. Separate channels with commas, for example, channel a, channel b.

Visualization: Measure Tabs

Displays tabs that correspond to the measures (for example, Revenue and Billed Quantity) used in an advanced trellis. Click the tab of the measure for which you want to set visualization properties.

Graph Size

Use this box to set the size of the graph. Select one of the following options:

- Default (available for an advanced trellis only)

- Small (available for a simple trellis only)

- Medium (available for a simple trellis only)

- Large (available for a simple trellis only)

- Custom

    If you select this options, specify the size using the Width and Height fields.

Width

Use this field to enter the width of the graph in pixels.

Height

Use this field to enter the height of the graph in pixels.

NullValues

Use these check boxes to override null suppression set at the analysis level.

Include rows with only Null Values - Use this check box to include null values in your trellis when the entire row contains all nulls. When selected, null values will not be suppressed for rows in the trellis.

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Include columns with only Null Values - Use this check box to include null values in your trellis when the entire column contains all nulls. When selected, null values will not be suppressed for columns in the trellis.

See for additional information.

Trellis Properties dialog: Style tab

Use this tab of the to set properties that control the appearance of the visualization, such as the style.

Components

> ✎ **Note:** The components available in this tab depend on the type of trellis (simple or advanced) and the type of visualization with which you are working.

Sections Formatting

Use this button to display the , where you specify how to break pages for PDF printing and how to format sections in a trellis.

Style

Use this box to select the style for the visualization. The options depend on the type of graph chosen for the visualization. For more information on available graph styles, see " *Graph Types*"

Style and Conditional Formatting

Use this button to display the , where you specify formatting.

3D

Use this check box to specify whether the graph is to be three-dimensional

Visualization: Measure Tabs

Displays tabs that correspond to the measures (for example, Revenue and Billed Quantity) used in an advanced trellis. Click the tab of the measure for which you want to set visualization properties.

Bars

Use this box to display the Color Selector dialog, where you select the color for all the data points in a spark graph for which no other specific color is selected (for example, in the Start box).

Start

Use this box to display the Color Selector dialog, where you select the color for the first data point in a spark graph.

Max

Use this box to display the Color Selector dialog, where you select the color for the largest data point in a spark graph.

End

Use this box to display the Color Selector dialog, where you select the color for the last data point in a spark graph.

Min

Use this box to display the Color Selector dialog, where you select the color for the smallest data point in a spark graph.

Plot Area

Use this box to display the Color Selector dialog, where you select the color for the plot area background.

Gridlines

Use these boxes to specify whether to display the default gridlines or gridlines that you specify.

If you select the Specify option, then, for the major grid and for the minor grid, specify the gridlines that you want and their color using the following boxes:

- Horizontal Line - Use this box to display a horizontal gridline.

- Vertical Line - Use this box to display a vertical gridline.

- Color - Displays the Color Selector dialog, where you select the color for the horizontal and vertical gridlines. This color also is applied to the major and minor tick marks, which you specify on the .

If you select the Specify option only and do not select any check boxes for the major and minor grid, no gridlines (not even the ones shown by default) are displayed.

Value Formatting

Use this button to display the , where you specify formatting for the values in a visualization whose type is Numbers.

Background

Use this button to display the Color Selector dialog, where you select the color for the legend background.

Transparent

Use this check box to specify whether the legend is transparent (that is, has no background color).

Legend: Border

Use this button to display the Color Selector dialog, where you select the color for the border around the legend.

Unarchive dialog

Use this dialog to find and specify how you want to upload the archive file to the Presentation Catalog. For more information, see

Components

Archive File

Use this field to enter or browse for the name and location of the archive file. Archive files are named according to the following convention: <name of the presentation services folder>.catalog. For example, sales_dashboards.catalog.

Replace

Use to specify if and how to replace an existing folder or object with the same name. Note the following options:

- All - Select this option to replace any existing folders or objects with the same names as folders or objects included in the archive file that you are uploading.

- Old - Select this option to replace folders or objects except those folders or objects that exist, unless they are older than the source.

- None - Select this option to add any new folders or objects, but preserve any existing folders or objects.

- Force - Select this option to add and replace all folders or objects.

ACL

Use to specify how the folders or objects are assigned permissions using Access Control Lists (ACLs) when unarchived. Note the following options:

- Inherit - Inherits the folder or object's permissions (ACL) from its new parent folder.

- Preserve - Preserves the folder or object's permissions (ACL) as it was in the original, mapping accounts as necessary.

- Create - Preserves the folder or object's permissions (ACL) as it was in the original, creating and mapping accounts as necessary.

See "" in for information on ACL entries.

View Group: Group dialog: Selection Steps tab

Use this tab of the "View Group: Group dialog" to view the group's selection steps.

For more information, see " *Selection Steps as a Group Object*".

Components

Selection Steps Area

Displays the components of the selection steps saved as a group. Note that if the selection steps contain a group or calculated item that no hyperlinks are provided for them.

You cannot modify the selection steps displayed in this dialog. To modify the selection steps, you must close the Selection Steps View editor and within the Analysis editor: Results tab, go to the *"Selection Steps pane"*.

Views pane

Use this pane to:

- Add new views to an analysis
- Add views that have been added to the analysis to compound layouts
- Edit views added to an analysis
- Remove views from the analysis

For more information, see:

- *"Displaying the Results of Analyses"*

This pane is part of the *"Analysis editor: Results tab"*.

Components

Views List

Displays the views that have been added to the analysis. For a list of available view types, see *"What Types of Views Are Available?"*

Toolbar

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This toolbar contains the following buttons:

- Add View - Use this button to add a view to a compound layout. First make the compound layout to which you want to add the view the current layout. Next, in the Views List, select the view to add, then click Add View.

- New View - Use this button to add a new view to the analysis and to access the recommended visualizations feature. Click New View and then select the type of view to add. You can select the Recommended Visualization for option to see a sub-menu of visualization specialties, such as Analyzing Trends or Comparing Percentages. Click on a visualization specialty to access the Select Visualization list, where you then choose from a ranking of recommended view types.

  You can edit and save the view, which is added to the Views List. You can then add it to a compound layout using the Add View button.

- Edit View - Use this button to edit a view. In the Views List select the view to edit, then click Edit View. The view's editor is displayed.

- Duplicate View - Use this button to create a copy of the view that you have selected.

- Remove View from Analysis - Use this button to remove a view from the analysis. In the Views List, select the view to remove, then click Remove View from Analysis. The view is removed from the analysis and from any compound layout to which it had been added.

- Rename View - Use this button to display the "*Rename View dialog*", where you specify a new name for the view that you have selected.

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