Oracle Taleo Enterprise Edition

Using Oracle Analytics for Oracle Taleo Enterprise Edition

25A

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Contents

Preface i

1 Administration 1

SmartOrg Administration 1
Oracle BI Administration 5

2 Basic Information to Tell Your Users 9

Exporting Results 9
Sorting Values in Table Views, Pivot Table Views, and Trellis Views 9
Drilling in Results 9
Action Links and Action Link Menus in Analyses and Dashboards 12
Using a Section Slider in a Graph or Gauge 13
Zooming and Scrolling in Graphs 13
Scorecard Objects 15
Order Prompts with Default Values are Applied 15
System Configuration and Governors 16

3 Recruiting Standard Content 17

Sample Dashboard 17
Standard Reports 74

4 Onboarding Standard Content 141

Sample Dashboard 141
Standard Reports 164

5 Creating Analyses 177

Creating Analyses 177
Subject Areas and Columns 178
Understanding the Double Column Feature 179
What is the Analysis Editor 180

What is the Process for Constructing Analyses 181
Creating New Analyses 181
Specifying the Criteria for Analyses 182
Analysis Results 187
Adding Prompts to Analyses 189
Examining the Logical SQL Statements for Analyses 190
Saving Analyses 192
Creating Agents from Analyses 193
Editing an Analysis 193
About Embedding an Analysis in a Dashboard 194
Using Variables 194

6 Adding Views for Display in Dashboards 201

What are Views 201
What Types of Views are Available 203
Adding Views to the Results of Analyses 207
Editing Views 208
Modifying the Layout of Data in Views 221
Interactions in Views 231
Drilling in Views 232
Sorting Data in Views 233
Saving a View 234
Renaming a View or Compound Layout 235
Rearranging a View 235
Printing Views 236
Previewing How a View is Displayed on a Dashboard 237
Removing a View 238
Refreshing the Results in a View 238
Customizing Views for Delivery to Agent Users 239
Master-Detail Linking of Views 239
Linking Views in the Master-Detail Relationships 244

7 Building and Using Dashboards 247

Dashboards 247
Dashboard Builder 247
What Controls the Look of a Dashboard 248
Creating a Dashboard 248

Editing a Dashboard 249
Changing the Properties of a Dashboard and its Pages 252
Deleting Objects on Dashboard Pages 253
Deleting the Current Dashboard Page 253
Deleting One or More Dashboard Pages 254
Saving Dashboards by Other Names and In Other Locations 254
Opening and Using a Dashboard 255
What are Saved Customizations for Dashboard Pages 256
Saving a Customization 257
Applying a Saved Customization 257
Editing Saved Customizations 258
Publishing Dashboard Pages 258
Dashboard Page Links 259
Briefing Book 261

8 Filtering and Selecting Data for Analyses 267

Inline or Named Objects 267
Folder Structure for Named Objects 267
Saving Groups and Calculated Items as Inline or Named 267
Filters and Selection Steps 268
Working with Selections of Data 269
Creating Selection Steps 270
Editing Selection Steps 271
Selection Steps as a Group Object 271
Selection Steps and Double Columns 271
Creating a Column Filter 272
Editing a Column Filter 273
Combining and Grouping Column Filters 274
Creating a Filter Based on the Results of a Saved Analysis 275
Creating and Editing the SQL Statements for a Column Filter in an Analysis 275
Groups and Calculated Items 276
Adding a Group to Other Analyses 279
Examples of Calculated Items 280

9 Prompting in Dashboards and Analyses 281

Inline and Dashboard Prompts 281
Column Prompts 281

Other Prompt Types 282
Types of User Input Options Available for Use With a Column or Variable Prompt 282
Dashboard Prompt and Analysis Prompt Interaction 284
Order Prompts with Default Values are Applied 285
Prompts Auto-Complete 286
Creating a Column Prompt 286
Overriding a Selection Step with a Column Prompt 288
Creating a Variable Prompt 289
Editing a Prompt 290
Adding a Dashboard Prompt to a Dashboard or Dashboard Page 291
Adding a Hidden Dashboard Prompt to a Dashboard Page 291

10 **Formatting Analyses, Views, and Dashboard Pages** **293**

Format 293
Column Format in Analyses 294
Cosmetic Formatting 294
Using a Saved Analysis to Modify the Cosmetic Appearance of Other Analyses 294
Importing Formatting Using a Saved Analysis 296
Applying Conditional Formatting to Tables, Pivot Tables, and Trellises 296
Applying Conditional Formatting 298
Conditional Formatting for Ranking 298
Custom Format Strings For Date and Time Fields 299

11 **Delivering Content** **303**

Agent 303
Accessing and Managing Your Alerts 311

12 **Working with Conditions** **313**

Working with Conditions 313

13 **KPIs and KPI Watchlists** **321**

Key Performance Indicators 321
KPI Watchlists 328

14 **Scorecarding** **331**

Scorecarding 331

15 Managing Objects in the Oracle Analytics Presentation Catalog 367
Presentation Catalog 367

16 BI Composer 375
BI Composer 375

17 Actions 379
Actions 379

18 Appendix 395
Subject Areas 395
Accessibility Mode 395
Syntax and Usage Notes for the Statement 398
Limiting and Offsetting Rows Returned 401
Operators 402
Conditional Expressions 403
Expressing Literals 405
Variables 407
Aggregate Functions 407
String Functions 412
Math Functions 418
Calendar Date/Time Functions 421
Conversion Functions 427
Database Functions 429

Preface

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

Oracle Applications Guides

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we're working to remove insensitive terms from our products and documentation. We're also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Comments and Suggestions

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit *My Oracle Support* or visit *Oracle Accessibility Learning and Support* if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: *talent_acquisition_doc_feedback_ww_grp@oracle.com*.

1 Administration

SmartOrg Administration

Report User Type Permissions

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

Configuration

The following permissions can be assigned to user types.

User Type Permission			
Domain	**Name**	**Description**	**Path**
Oracle Analytics	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 Analytics	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 Analytics	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 Analytics	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 Analytics	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
Oracle Analytics	Access Subject Area - Recruiting (Legacy)	Users with authoring privileges must have the Access Subject Area - Recruiting (Legacy) permission to	Configuration > [SmartOrg] Administration > [Users] User Types > *user type* > Reporting and Analytics >

User Type Permission			
Domain	**Name**	**Description**	**Path**
		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.	[Oracle Business Intelligence] Edit > Access Subject Area - Recruiting (Legacy)
Oracle Analytics	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 Analytics	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 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 Recruiting
Report Data	Access all reportable data for Performance	Allows the user access to all data from the “Performance Management” subject area.	Configuration > [SmartOrg] Administration > [Users] User Types > *user type* > Reporting and Analytics >

User Type Permission			
Domain	**Name**	**Description**	**Path**
		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.	[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:

- 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:

- Author Analyses (Limited)
- Create Prompts
- Edit column formulas
- Create Briefing Books
- Manage folders in the catalog
- 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:

- 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

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.

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

Before you start

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**

Here's what to do

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.
   - Click **Copy** to make a copy of the artifact in the destination folder.
   - 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

Before you start

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**

Here's what to do

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.

Results:

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

Before you start

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**

Here's what to do

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

Exporting Results

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

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.

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.
- 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.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

Results:

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.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Scorecard Objects

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

- Cause effect maps.
- Custom views.
- Strategy maps.
- Strategy trees.
- KPI watchlists.
- 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:
  - Strategy tree diagram. See Strategy Tree Diagram.
  - 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:
  - Control panel, you can specify filter criteria to dynamically change what is shown in the smart watchlist.
  - 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:
  - Views (that is, cause & effect maps, custom views, strategy maps, and strategy trees) are rendered as watchlists. See Watchlists.
  - 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.

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.

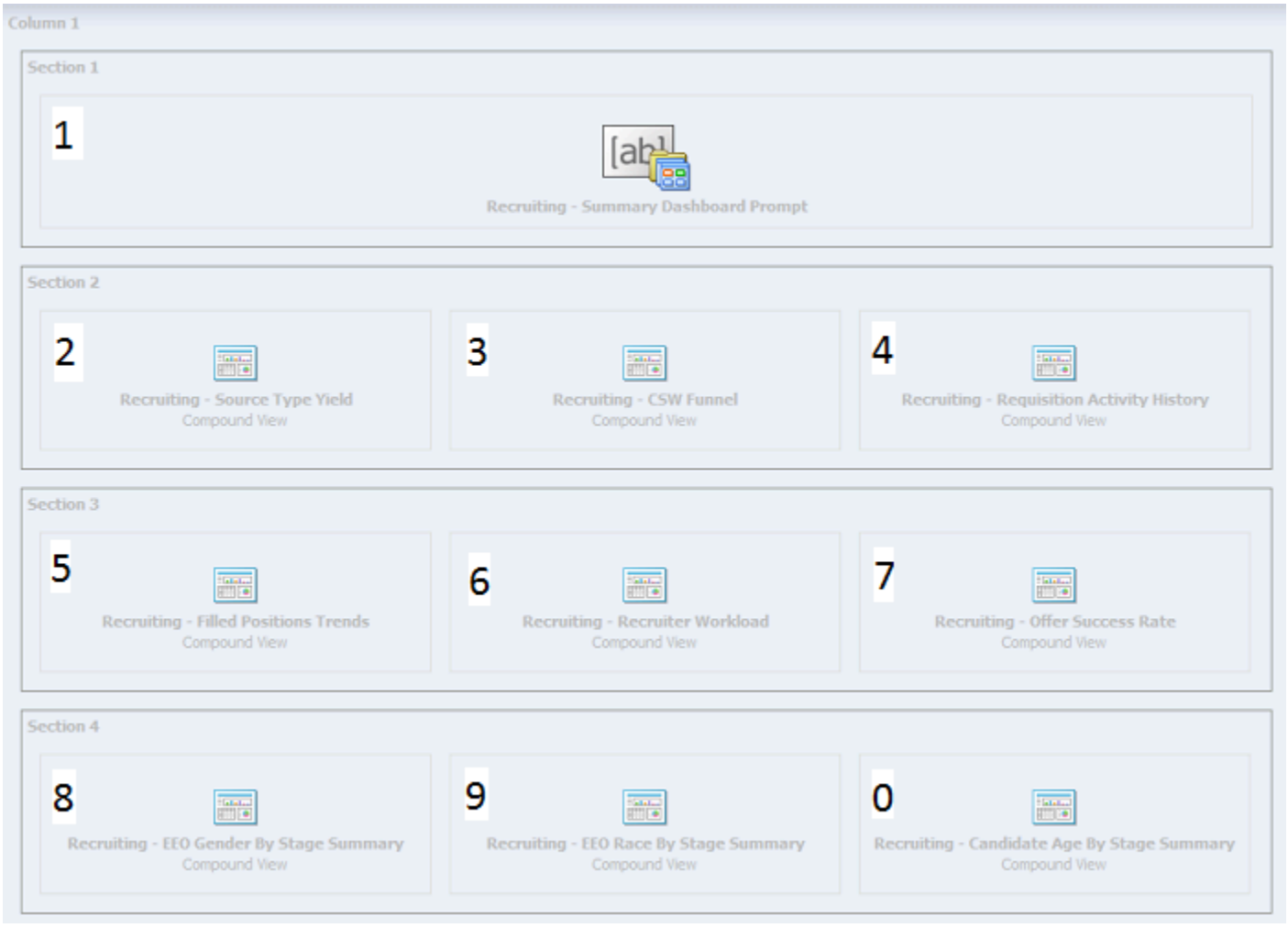
The maximum number of cells that can be exported is 2 millions (rows*columns=cells).

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.

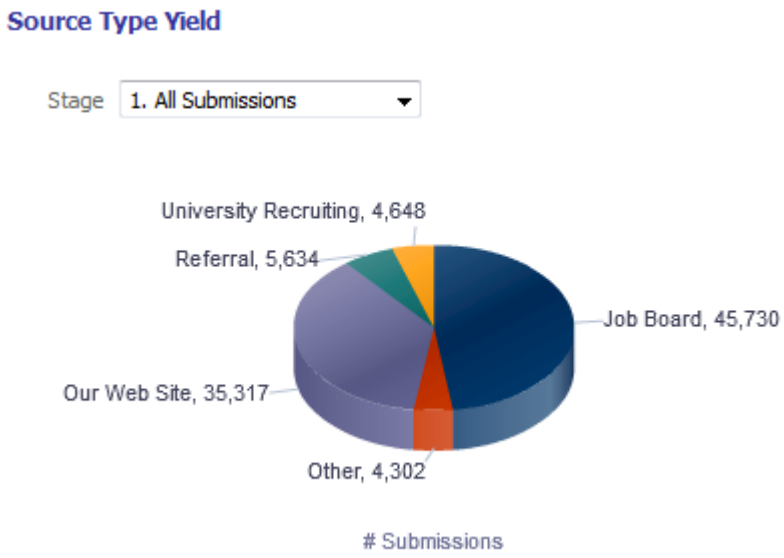


Component	Name
1	*Recruiting - Summary Dashboard Prompt*
2	*Recruiting - Source Type Yield*
3	*Recruiting - CSW Funnel*
4	*Recruiting - Requisition Activity History*
5	*Recruiting - Filled Positions Trends*
6	*Recruiting - Recruiter Workload*
7	*Recruiting - Offer Success Rate*
8	*Recruiting - EEO Gender 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



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

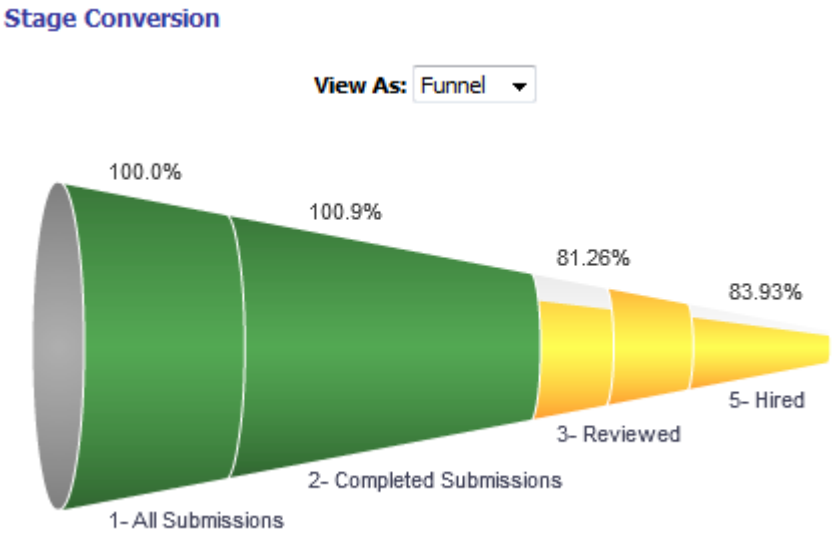
Pie Graph Configuration

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" = 'New - No' THEN 'All Submissions'`

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
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" = 'New - No' THEN 'All Submissions'

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" 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 WHEN "Submission CSW Status - Historical"."Historical Reference Status Name" || ' - ' || "Submission General Info"."Submission Is Completed" = 'New - No' THEN 'All Submissions'

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 /(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' 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"

Name	Syntax
	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.

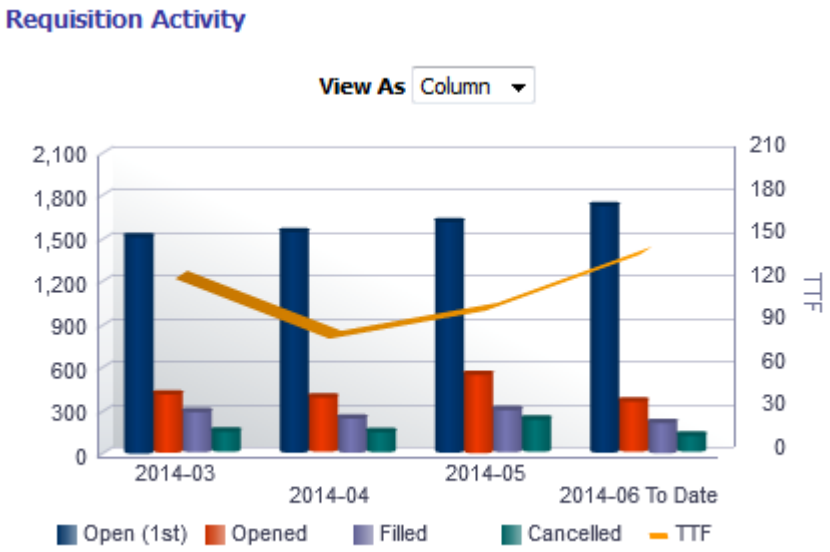
Threshold	Status
115	Exceeded Target

Threshold	Status
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" 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))`

Name	Syntax
	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" 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)

Name	Syntax
	AND ("Requisition Identification"."Has Unlimited Openings"='No') AND ("Requisition Status - Historical"."Historical Status"='Filled')))

Filters

Name
Recruiting - Summary Dashboard Prompt Listener - No Filled Date

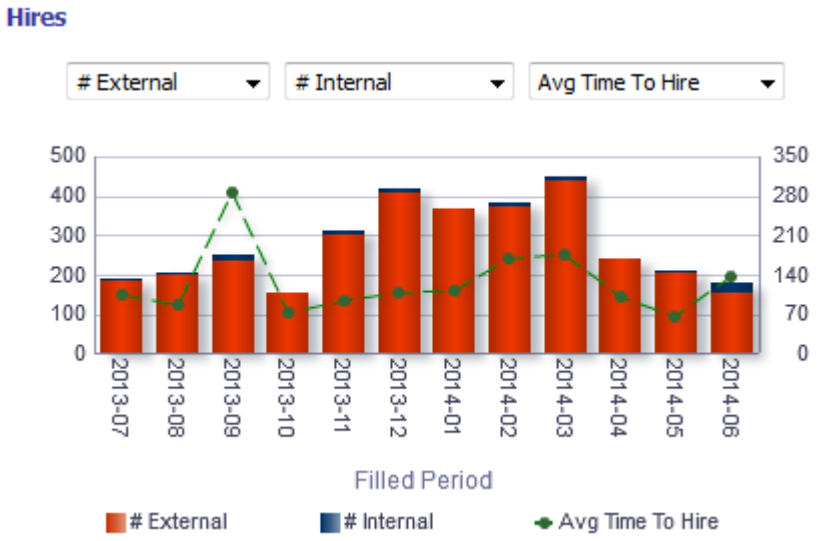
View Configurations

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.

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"
# 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"

Name	Syntax
# 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")`
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"`

Name	Location
	`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")`

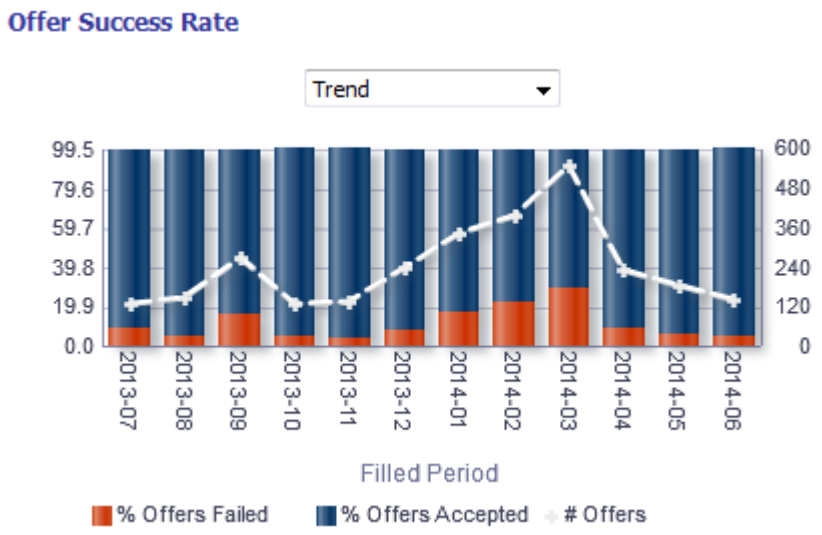
Area Graph View

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

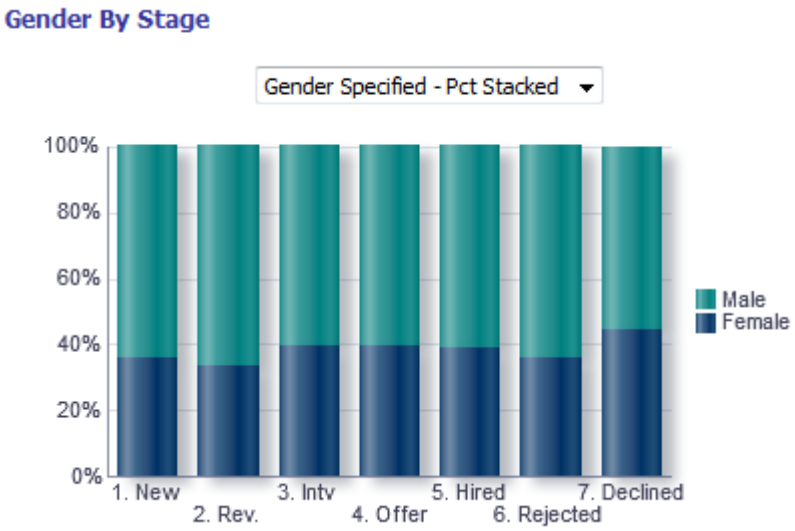
View Configurations

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



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 - ','')`

Name	Syntax
	`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
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

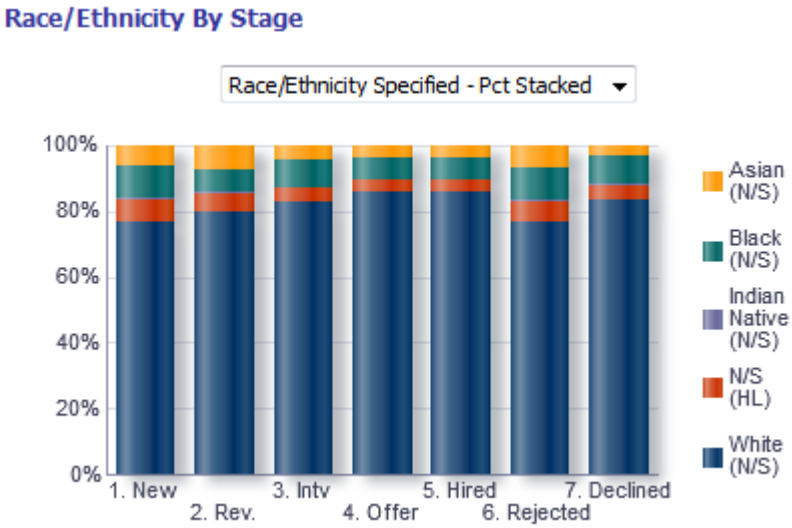
Name	Additional Information
All Values - Pct Stacked	**Bars:** # Submissions **Group By:** Status **Vary Color By:** Gender
Gender Specified - Pct Stacked	**Bars:** # Submissions **Group By:** Status **Vary Color By:** Gender (Specified)
All Values - Nb Log Stacked	**Bars:** # Submissions **Group By:**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

Name	Additional Information
	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



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'`

Name	Syntax
	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
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. 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

Name
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

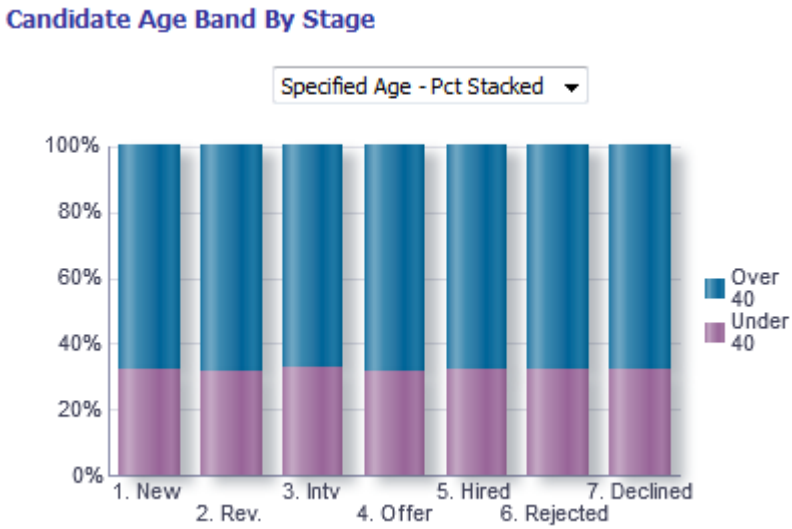
View Configurations

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`
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'`

Name	Syntax
	`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 **Vary Color By:** Age
Pivot Table	**Measures:** # Submissions

Name	Additional Information
	Rows: Status **Columns:** Age

Open Requisitions

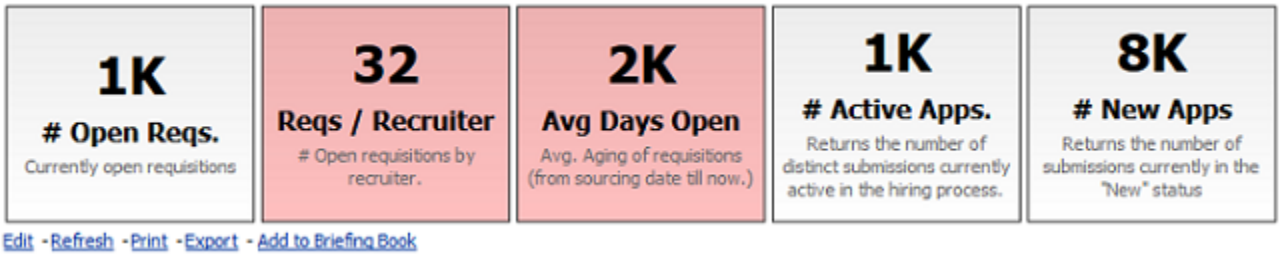
The dashboard displays a series charts and KPIs related to currently open requisitions, enabling users to consume an at a glance view of in process Recruiting activity. The charts/KPIs include open requisition summary tiles, open requisition counts, open requisition aging and candidate pipeline. The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

Component	Name
1	*Recruiting - Open Req. Dashboard Prompt*
2	*Recruiting - Open Reqs Tiles*
3	*Recruiting - Open Reqs By Dim*
4	*Recruiting - Open Req Aging*

Component	Name
5	*Recruiting - Pipeline Summary*

Recruiting - Open Reqs Tiles

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



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 **If** Req. Aging is between 0 and 45 **then** Green background

Name	Syntax
	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

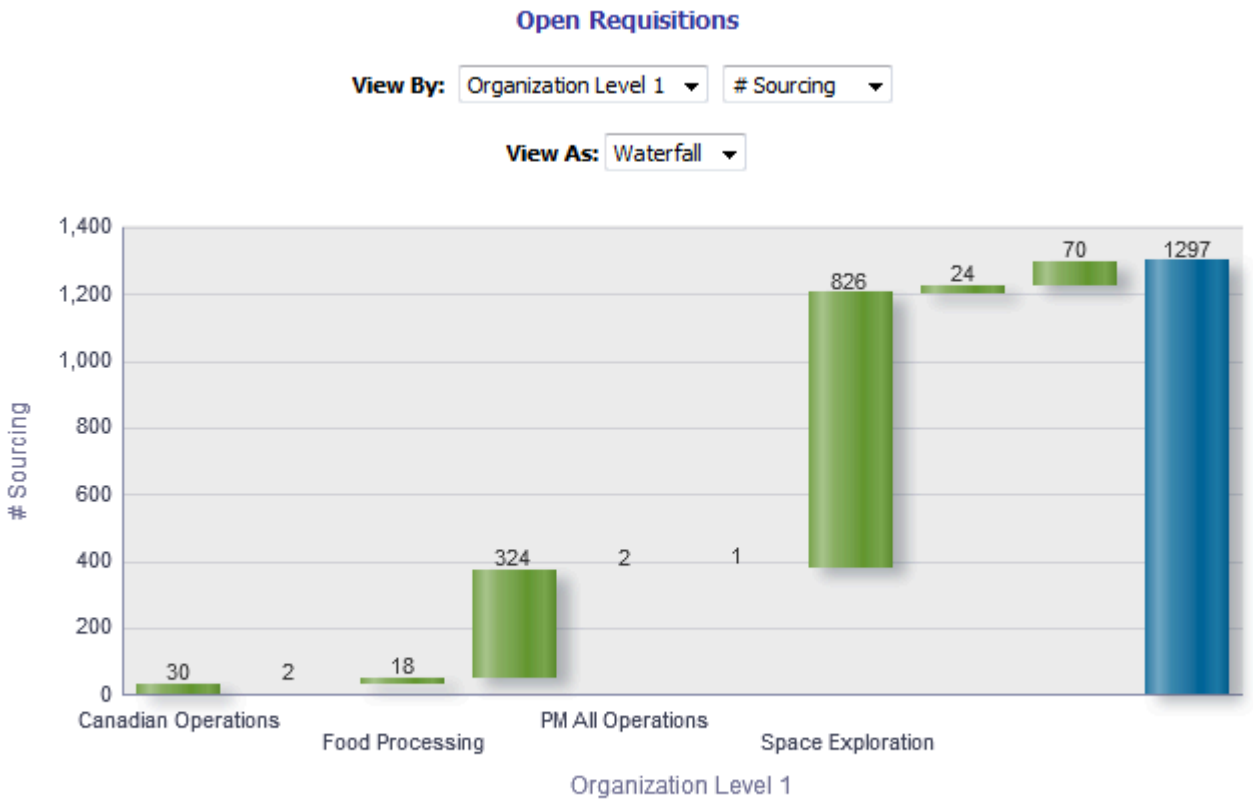
Report Tile Views

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.

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"
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

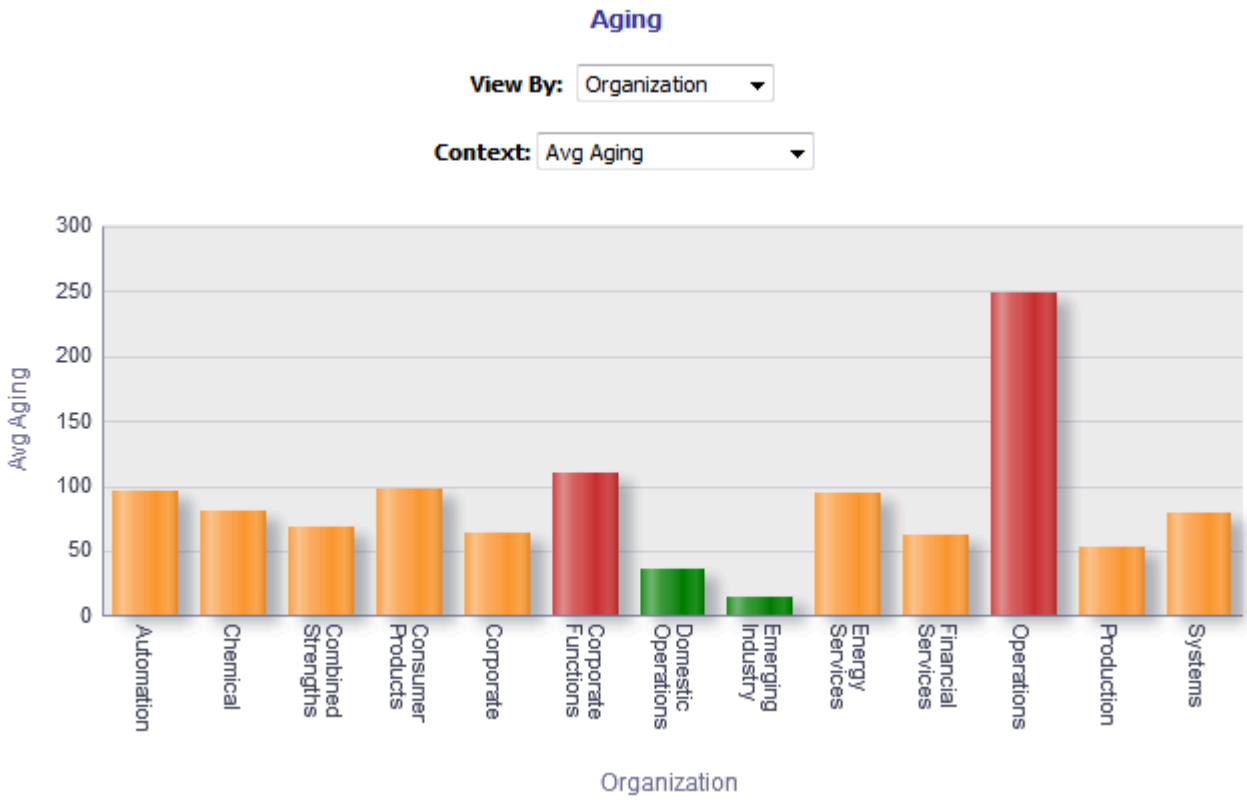
Short sentence or paragraph to describe the configuration table.

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.

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)`
# 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)`

Type Permission	
Name	**Location**
# 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
Job Type	"Requisition Profile"."Req. Job Type"

Name	Syntax
	***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

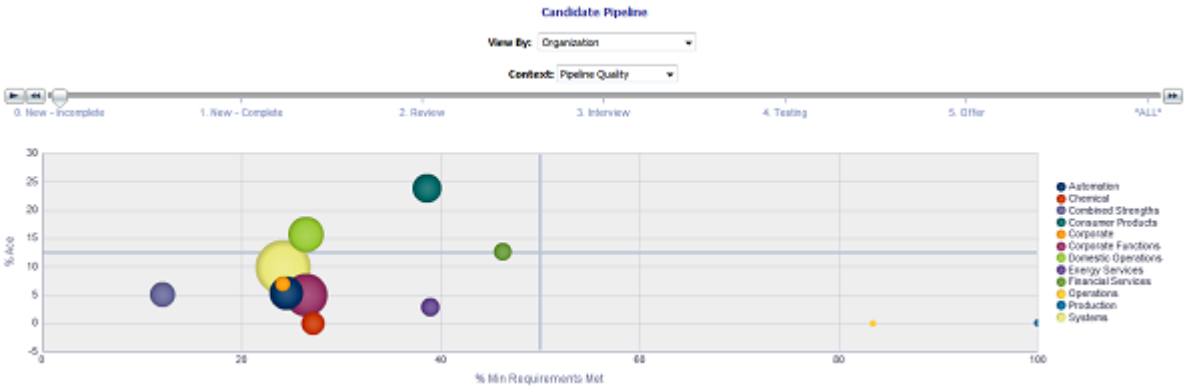
Context	Additional Information
Avg Aging	**Group By:** Dimension **Bars:** Avg Aging This view has conditional formatting based on average aging. When average aging is between 0 and 45 the bars will be green. When average aging is between 45 and 100 the bars will be orange. When average aging is between 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.



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"`

Name	Syntax
	`USING (("Submission General Info"."Submission Is Completed"='Yes') AND ("Submission Prescreening Results"."Minimum Requirements Met"='Yes')))`
# 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"

Name	Syntax
Gender	"Candidate Regulations"."Gender"
Race	"Candidate Regulations"."Race"

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.

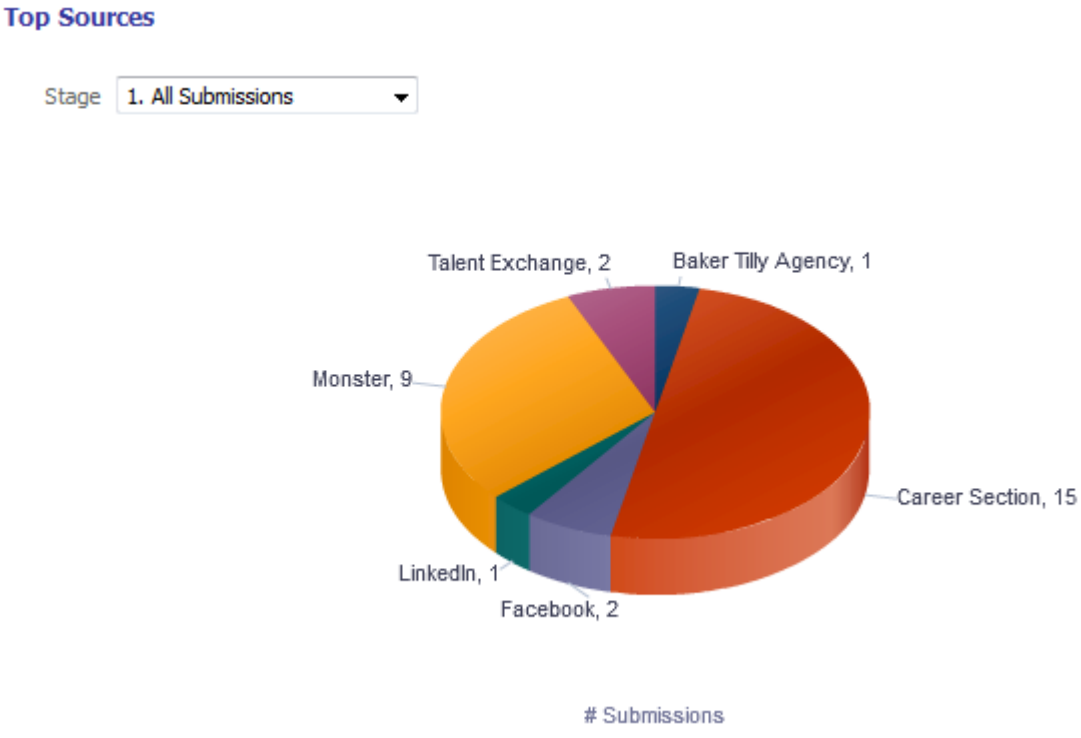
Column 1
Section 1
1
Recruiting - Summary Dashboard Prompt
2
Recruiting - Source Type And Source Dashboard Prompt
Section 2
3
Recruiting - Source Yield
Compound View
4
Recruiting - CSW Funnel (Source Dashboard)
Compound View
Section 3
5
Recruiting - Source Efficiency Analysis
Compound View
Section 4
6
Recruiting - Source Yield Top Sources Trend (Pie Trellis)
Compound View
7
Recruiting - Source Yield Stats (Line Trellis)
Compound View

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)"

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

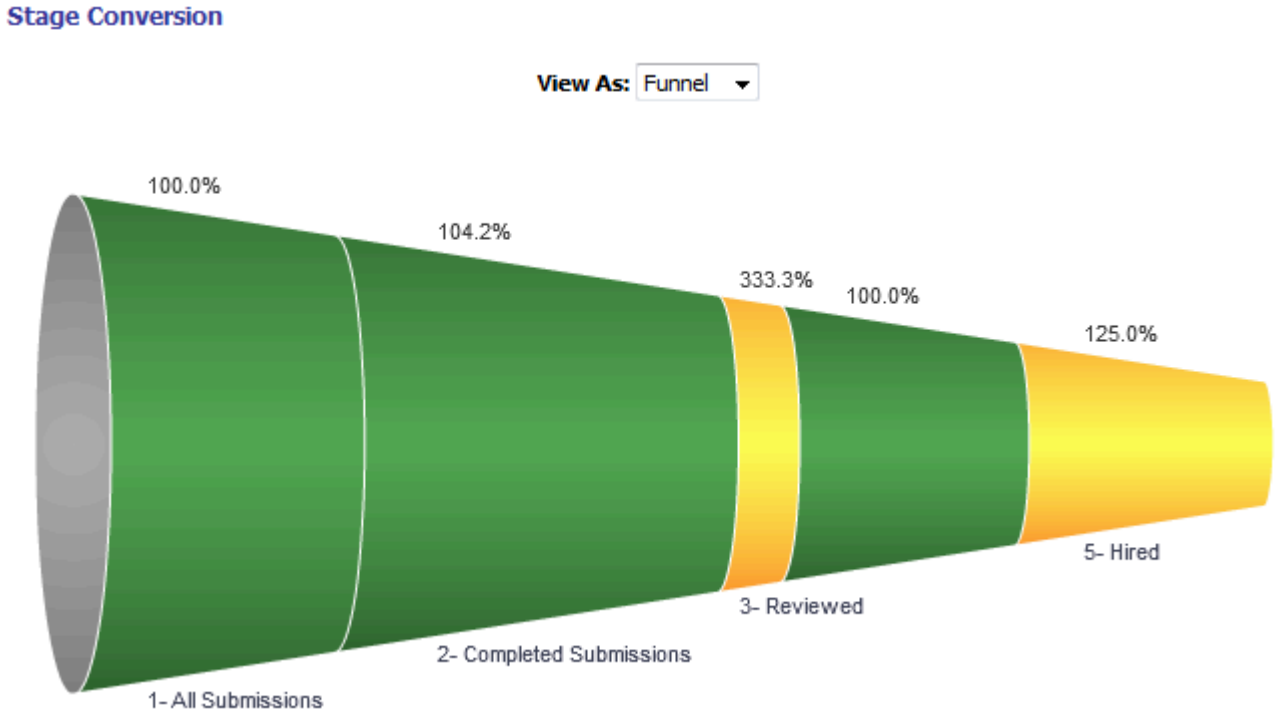
Pie Graph Configuration

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



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'

Name	Syntax
	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" = '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

Name	Syntax
	<> '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' 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)

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) - CASE when

Name	Syntax
	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

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

Funnel Settings

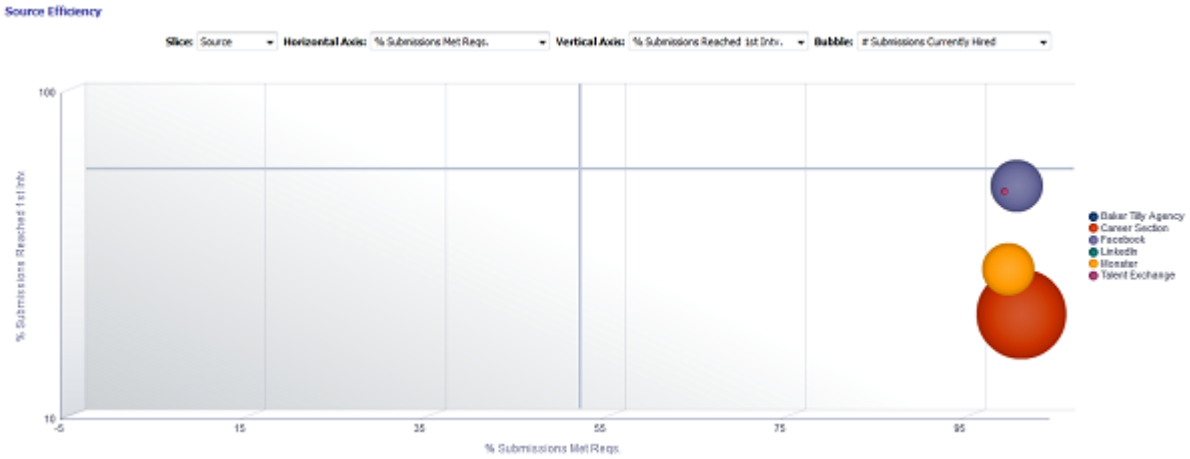
For this funnel, high values are desirable.

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"`

Type Permission	
Name	**Syntax**
	as float)*100
% Submissions Complete	cast("Candidate Counts"."# Submissions Complete"/"Candidate Counts"."# Submissions" as float)*100
% 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 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

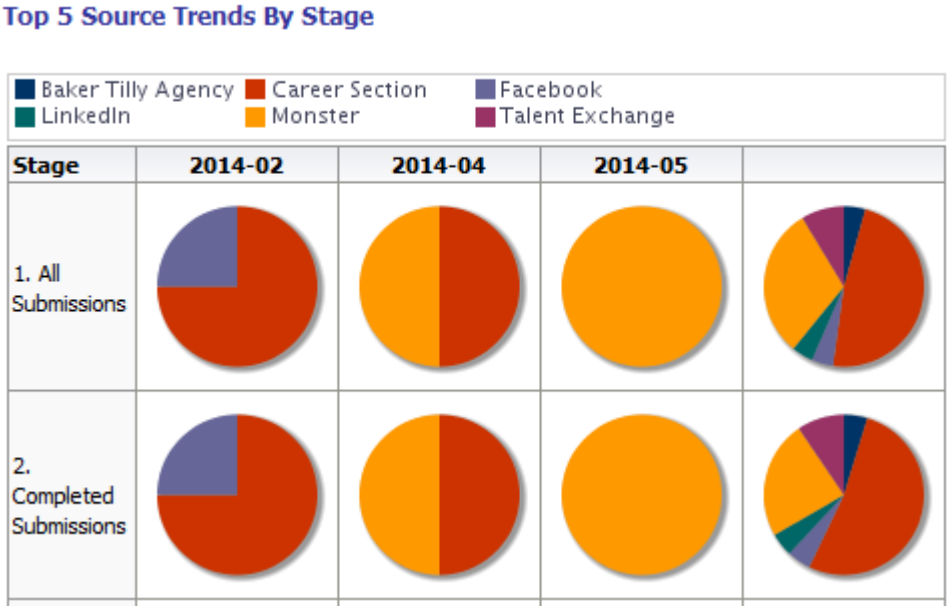
Name	Location
Horizontal Axis	Horizontal Axis
Vertical Axis	Vertical Axis
Bubble Size	Bubble

Name	Location
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.

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"	

Data Identifier	# Submissions	Additional Filter(s)
'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
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

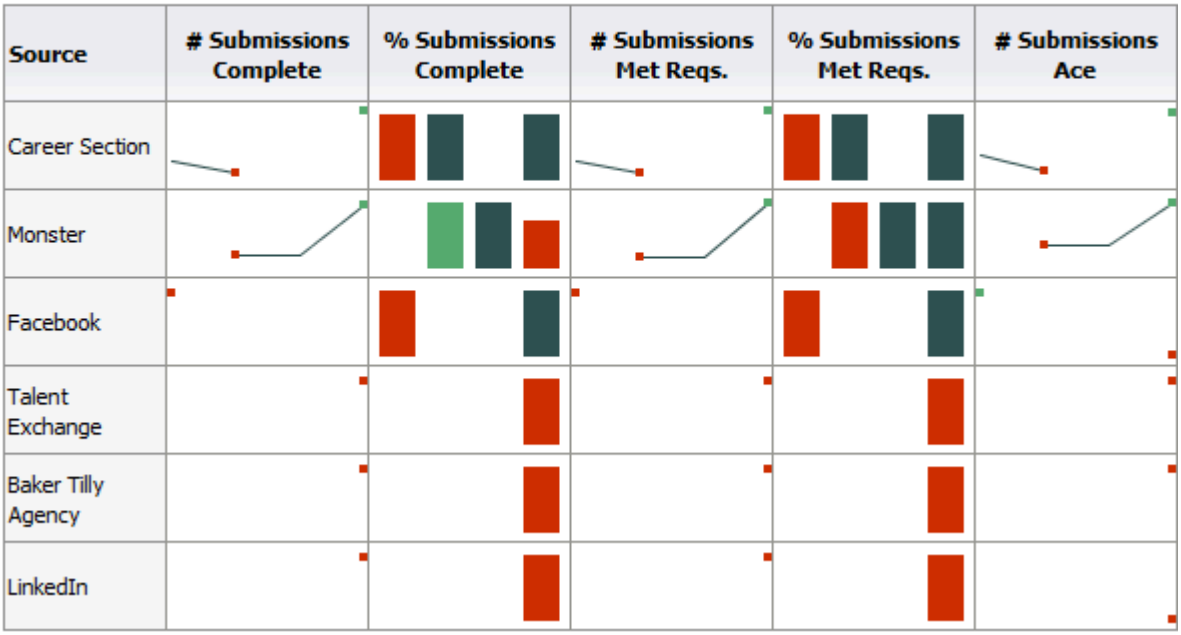
Name	Location
Columns	Latest Filled Date
Rows	Stage
View as	Pie
Slices	Submission Source (BL) # Submissions

Recruiting - Source Yield Stats (Line Trellis)

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

Source Volume and Conversion Rate Trends

Source Volume And Conversion Rate Trends



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

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

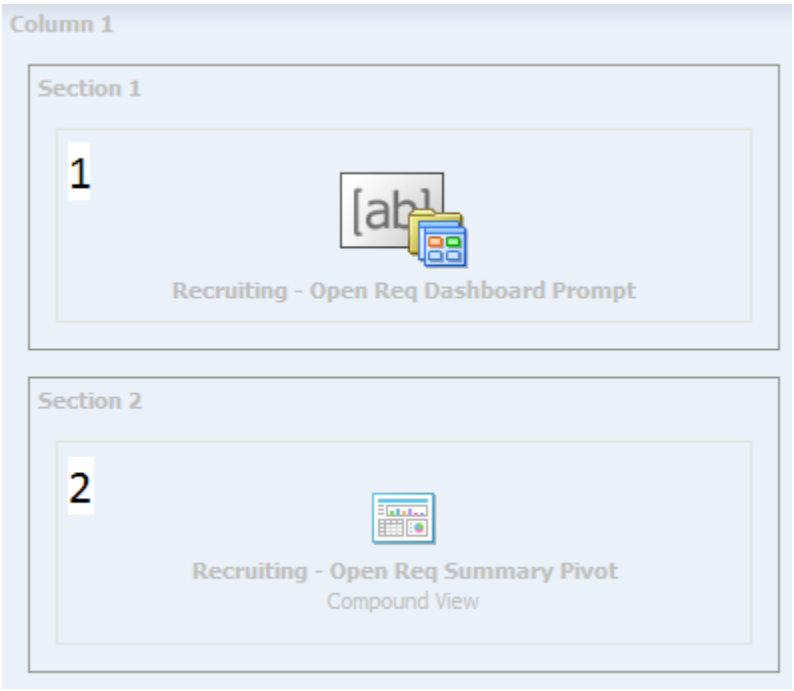
Name
Submission Source Type (Display As) is not null
Submission Source Type (Display As) is prompted
Submission Source (BL) is prompted
Recruiting - Summary Dashboard Prompt Listener

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

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

Name	Syntax
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"
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"

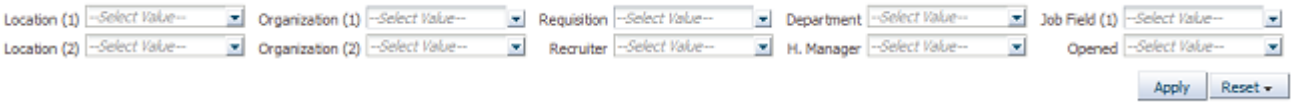
Pivot Table Configuration

Name	Location
Sections (Totals Enabled)	Section
Rows (Totals Enabled)	Row

Name	Location
Columns	Column
Measures	Open On Hold # Openings Left to Hire Avg. Days Open New Apps 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')

Name	Location
	By default the last year rolling is selected.

Recruiting - Summary 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"
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

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.

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

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.

Name	Description
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.
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.

Name	Description
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.

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.

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.
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.

Filter	Description
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.
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.
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.

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.

Name	Description
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.
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.

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.
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.

Filter	Description
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.
Job Field4 Name is prompted	This is a listener for a prompt.

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.
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.

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.

Name	Description
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 whether 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.
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.

Name	Description
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.
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.

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.
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.

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.
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.

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
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.
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.

Name	Description
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.

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.

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.

Name	Description
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 whether 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.

Name	Description
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.
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.

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.
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.
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.

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.

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.
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.

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.
Last Position Accepted Date is prompted	This is a listener for a prompt.
Hired Date is prompted	This is a listener for a prompt.

Filter	Description
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 whether the submission met minimum requirement.
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.

Name	Details
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.

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.

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.
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.

Filter	Explanation
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.
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.

Filter	Explanation
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.
Career Site Last Page Reached Name (BL)	Returns the name of the submission flow of the career site 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	*100 # 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.
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.

Name	Description
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.
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.

Filter	Explanation
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.
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.
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.

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.

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.
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.

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.
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*}'

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

Exception	Detail	Filters
		AND 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.
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.

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.
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.

Name	Description
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.
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.

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.
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.
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 complete.

Name	Description
# 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.
# 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 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.

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.
# 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.

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.
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 hierarchical column based on requisition primary job location names
Requisition Job Field Name	A hierarchical column based on requisition job field names.
# Requisitions	Returns the number of requisitions.
# Openings	Returns the number of openings on the requisition(s).

Name	Description
# 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.
# 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.
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.

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.
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 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 onrequisition 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	# Submissionsfiltered 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.
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.

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
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.
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.

Filter	Description
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.

Name	Description
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	Returns the requisition 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.

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.

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.

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.
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.

Name	Description
# 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.
# 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 =HiredCurrent Reference Status Name.
# 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.

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.
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.
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.
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.

Filter	Description
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.
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	Returns the requisition 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.

Name	Description
# 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 # Submission filtered by Submission Medium ='Matched to Job'.
# 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 Metfiltered 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.

Name	Description
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.
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.

Name	Description
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.
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.

Filter	Description
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.
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	`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 '(' ||`

Name	Description
	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
Approver 2	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
Approver 3	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 '(' || 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) || '/' ||

Name	Description
	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(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.
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	Filters the report to requisitions with the following transaction event types.

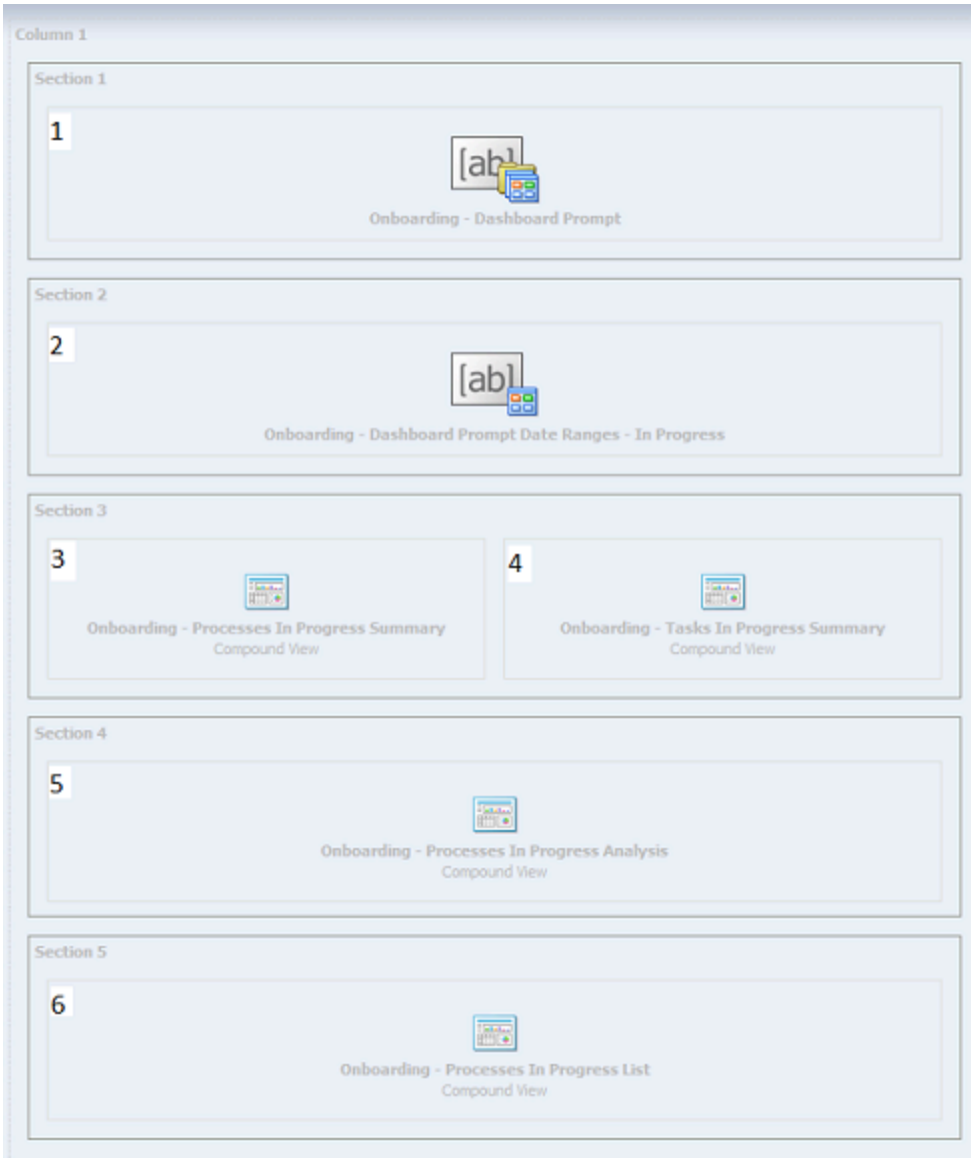
Filter	Description
Passed on Behalf; Requisition Approval Requested; Requisition approval request	
Historical Status is equal to / is in To Be Approved	Filters the report to requisitions with a historical status of To Be Approved.
Req. Historical Status End Date is null	Filters the report to requisitions 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.
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.



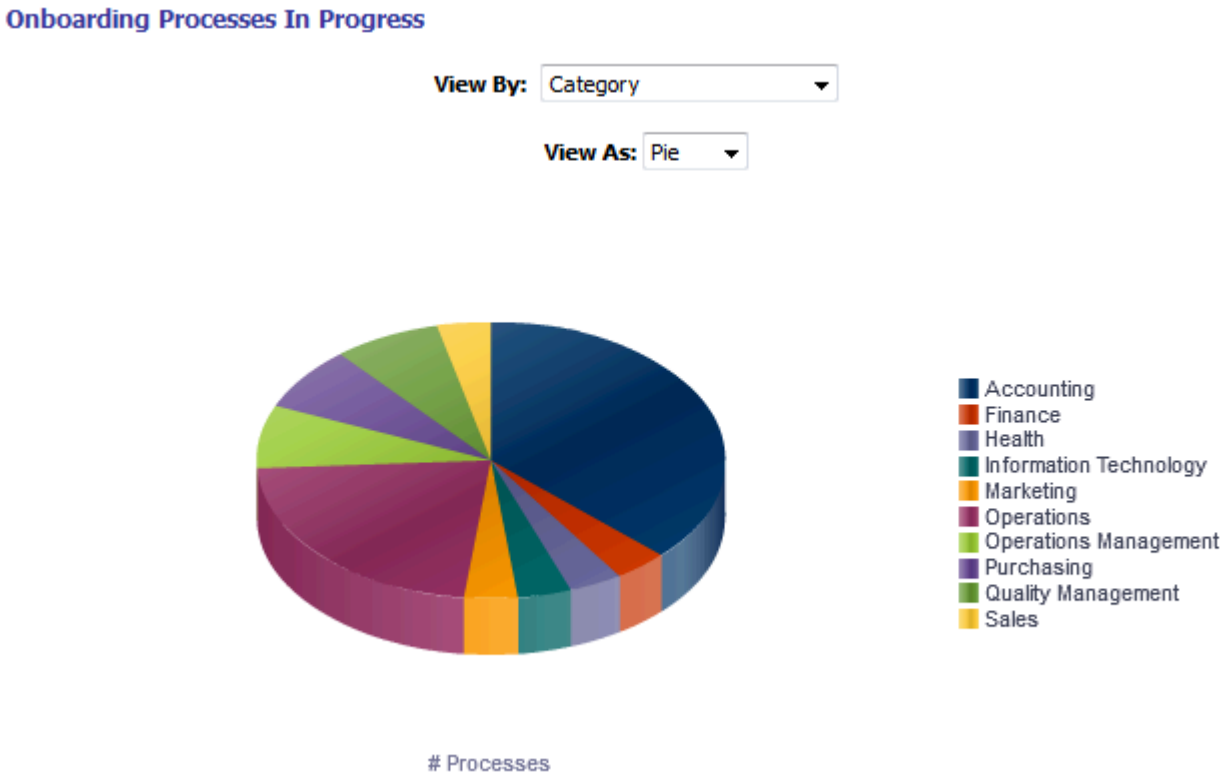
Component

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*

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"
Hiring Manager	"Requisition Hiring Manager"."Hiring Manager Name"

Name	Syntax
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

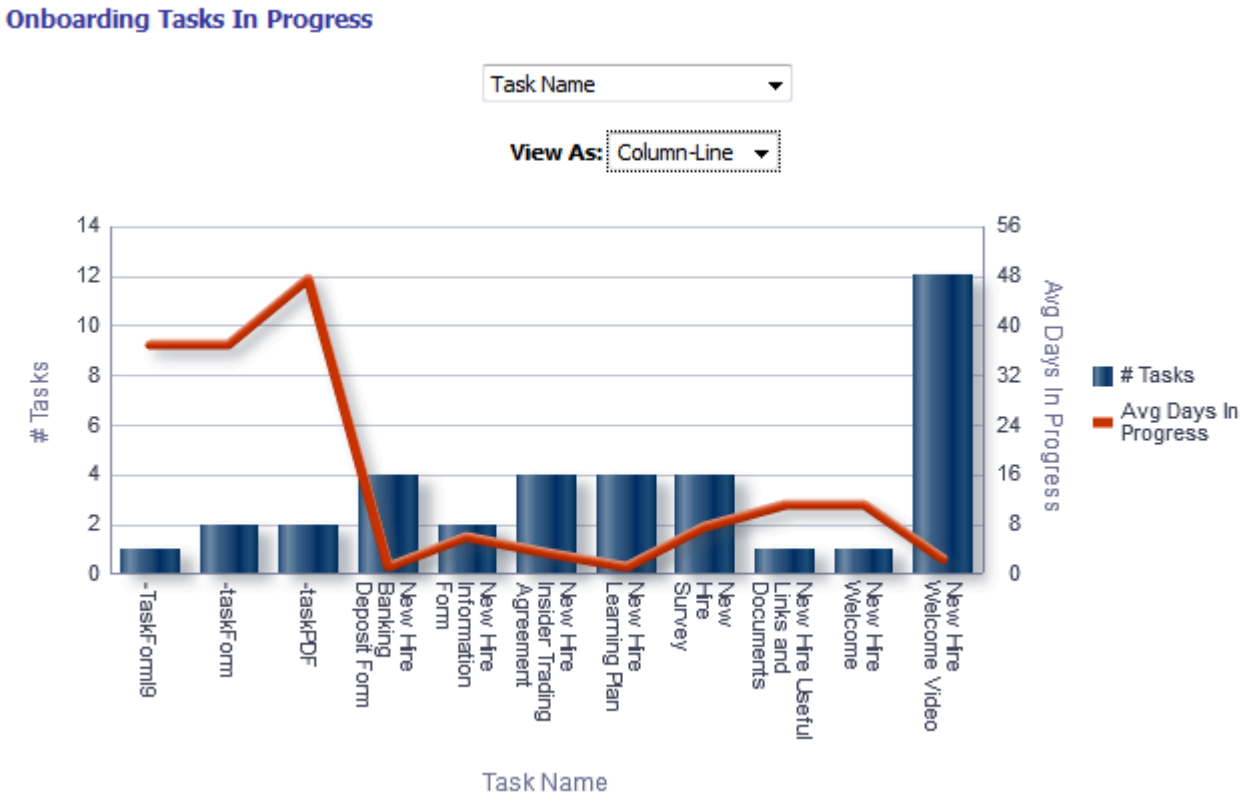
Report Filters

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

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"
Country	"Requisition Primary Location"."Location Level1 Name"

Name	Syntax
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",'')`

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

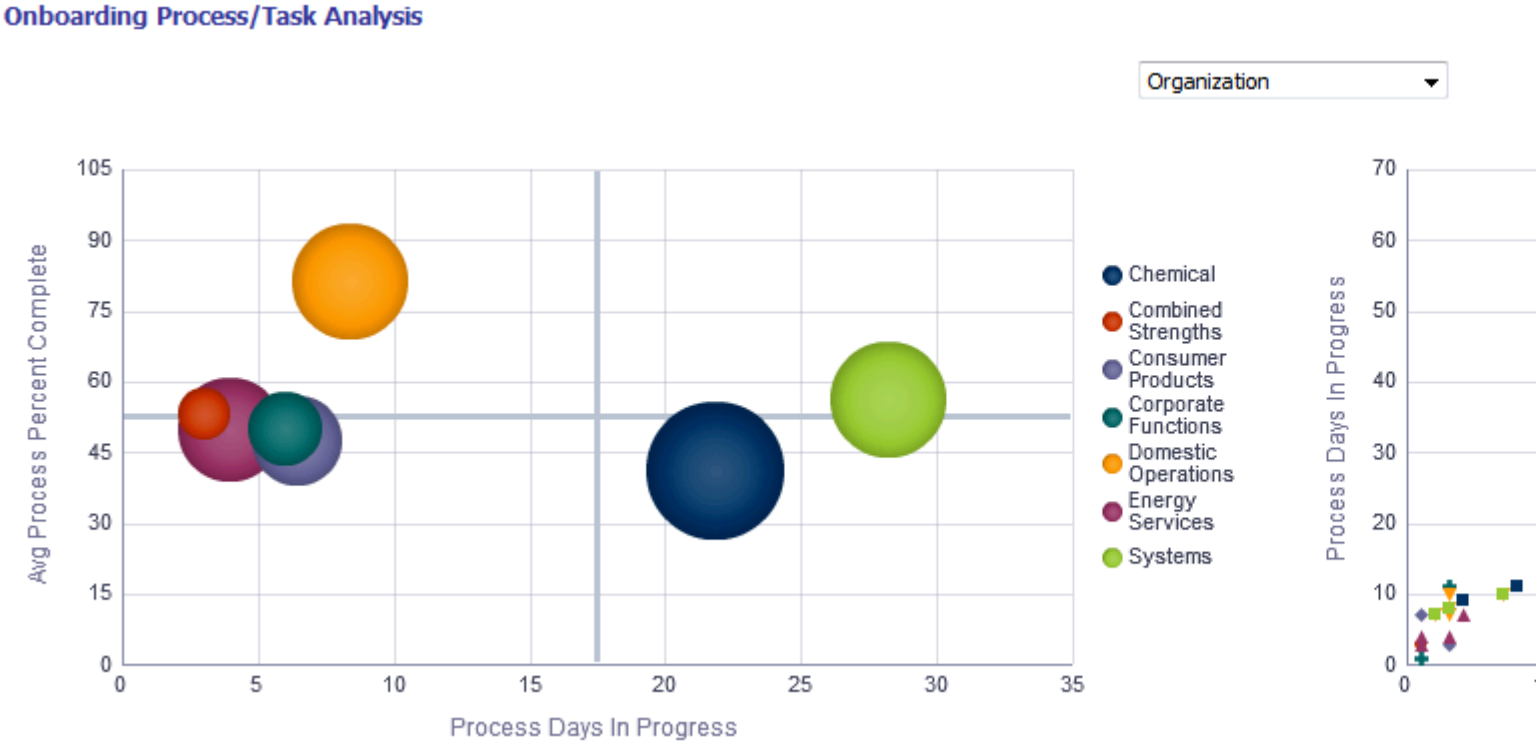
The analysis consists of two charts.

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.

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"

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",'')`

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"

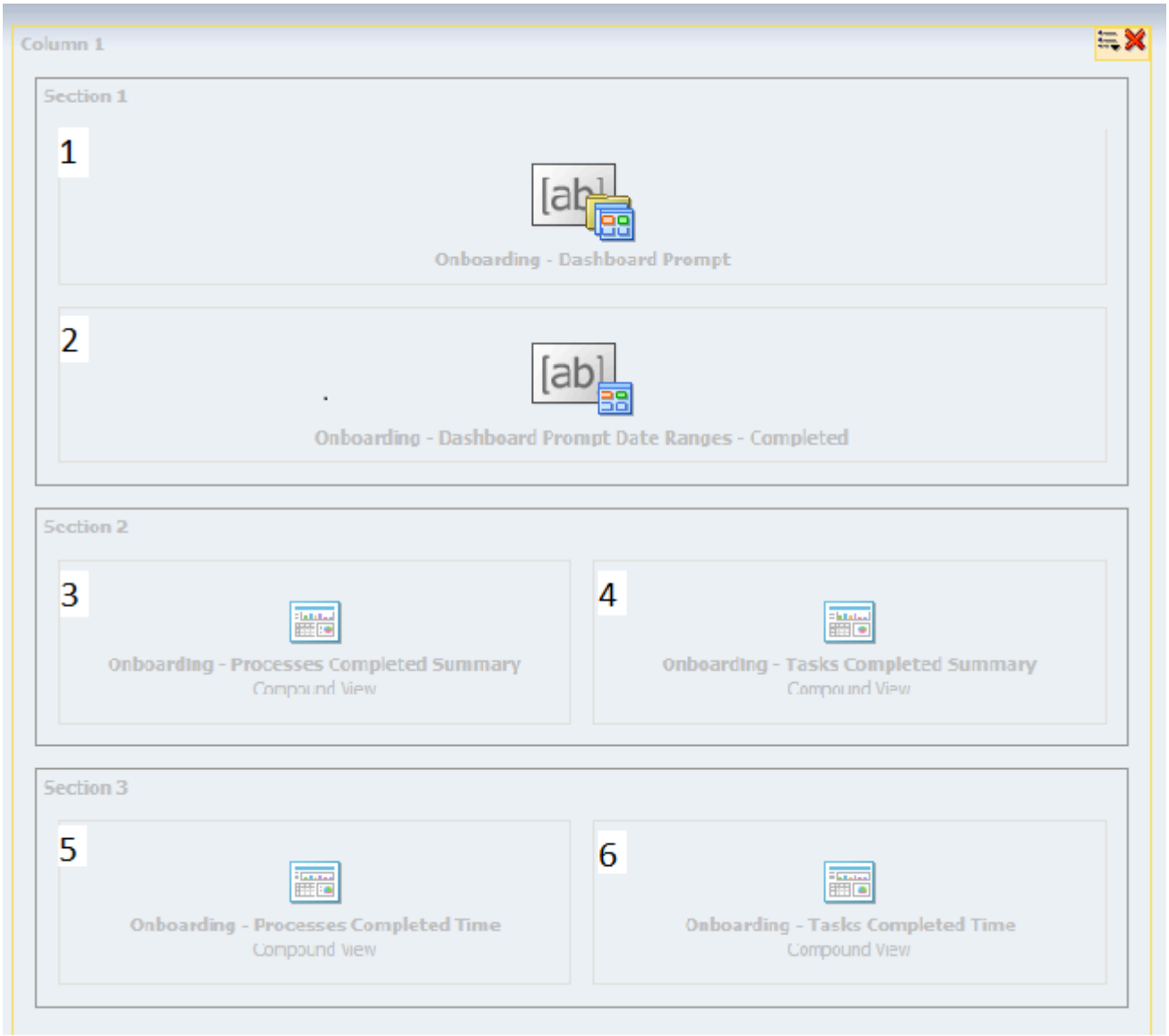
Name	Syntax
	Note: A conditiontal format is set on this field. If process is red a red flag is displayed, if process is not red a green flag is displayed.
Submission Transitions Task Name (BL)	"Submission Transitions Process"."Submission Transitions Task Name (BL)"
Task Overdue Days	`TIMESTAMPDIFF(SQL_TSI_DAY, "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.



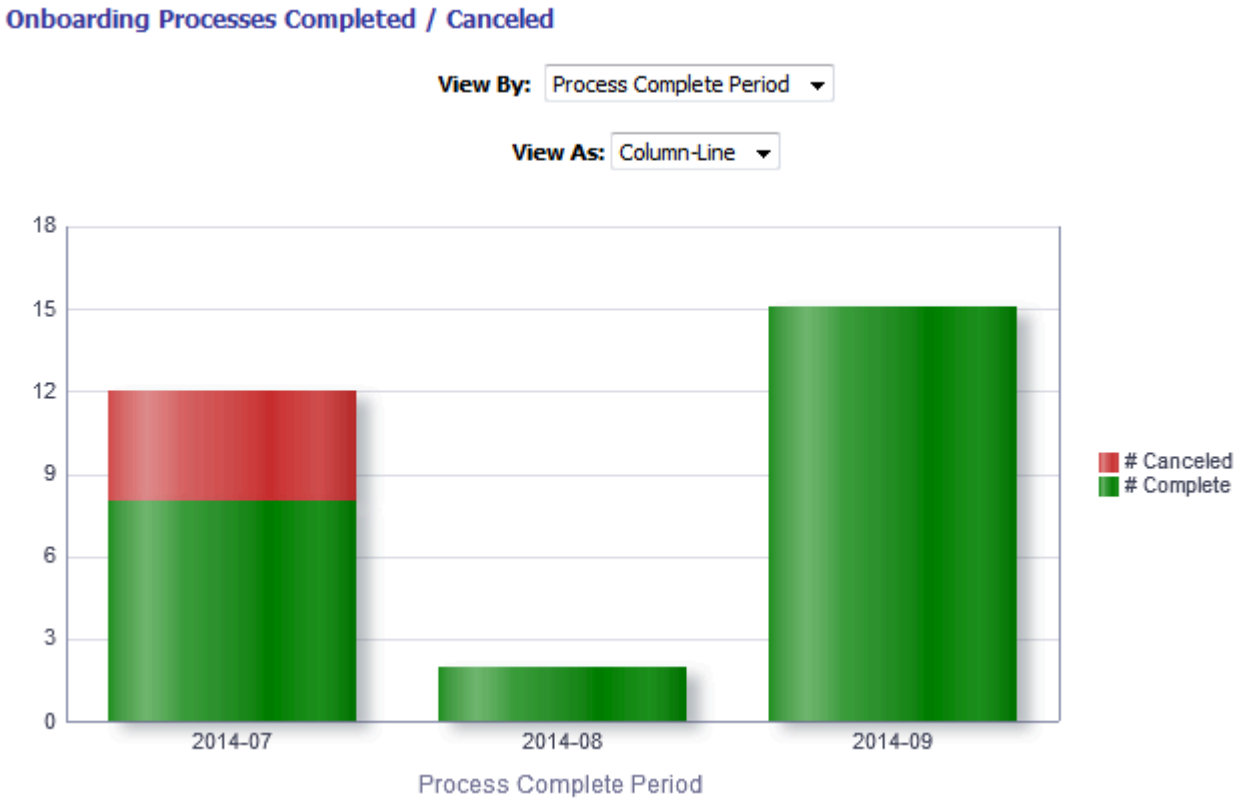
Component

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'))`

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

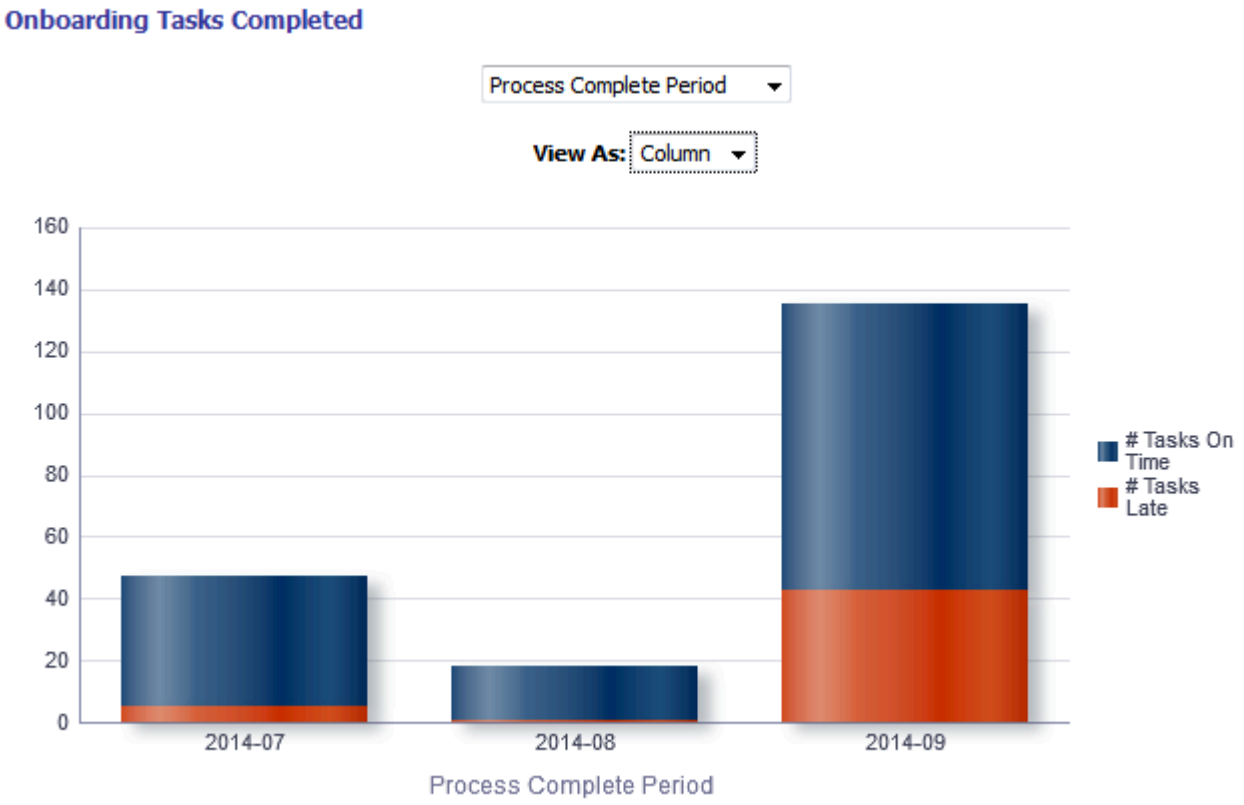
Report Filters

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.

Onboarding Tasks Completed



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"

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",'')`
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

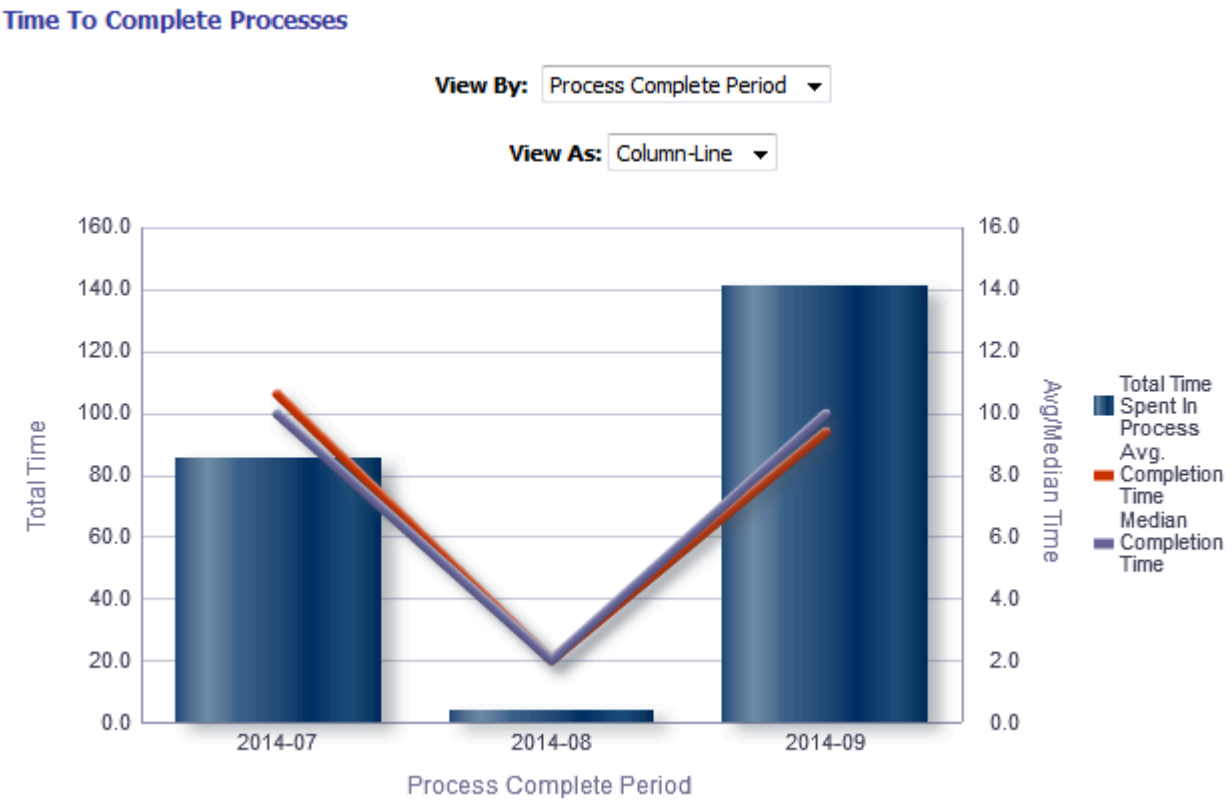
Report Filters

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

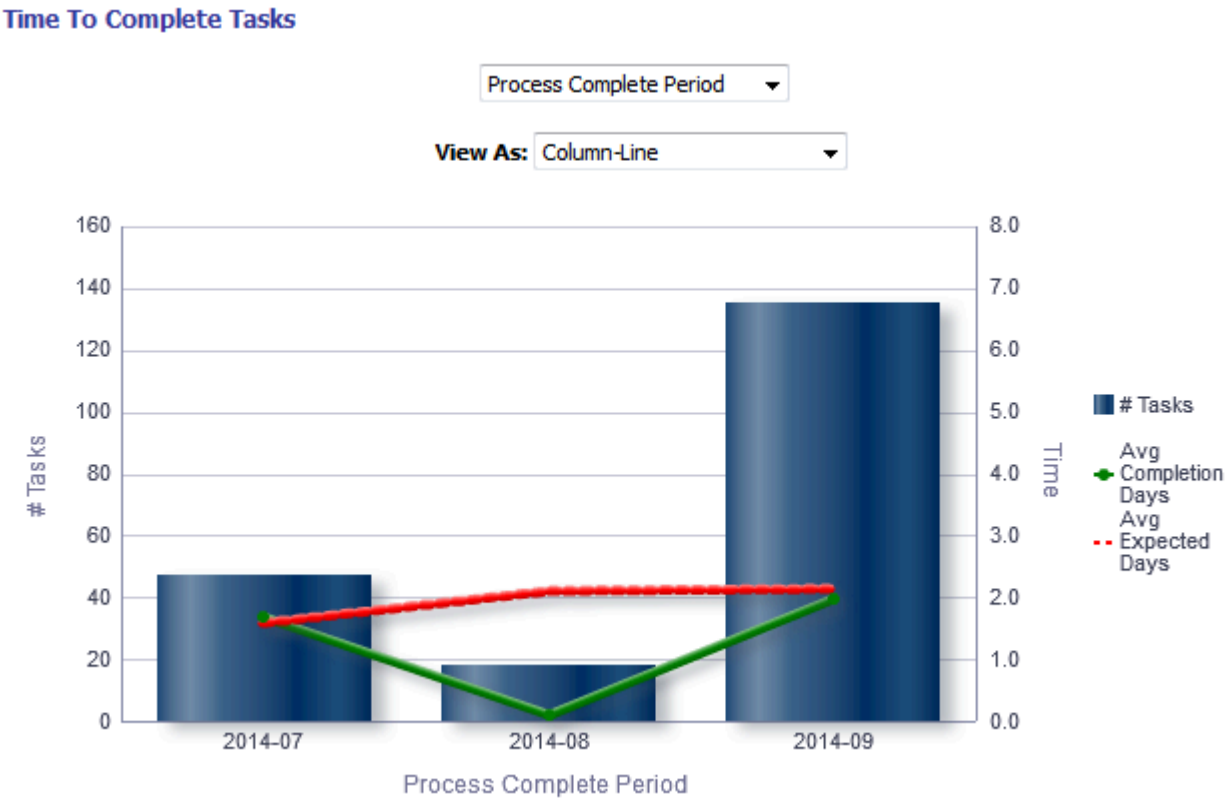
Report Filters

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
Submission Transitions Task Name (BL)	"Submission Transitions Process"."Submission Transitions Task Name (BL)"

Name	Syntax
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",'')`

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"

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

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

Name
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 numbe 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.

Name	Description
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.
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.

Name	Description
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.
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.

Name	Description
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.
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.

Name	Description
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.
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.

Filter	Description
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.
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.
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.

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.
Hired Candidate Start Date	Returns the hire start date/time as entered when the candidate is moved to the Hired reference statu 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.
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.
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.

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.
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.
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.

Filter	Description
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.

Filter	Description
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

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.

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".*

> **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

Before you start

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.

Home > **Oracle Analytics** > **Create** > **Analysis**

Here's what to do

Select a subject area.

What to do next

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

Specifying the Criteria for Analyses

Before you start

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 Analytics** > **Catalog**

Here's what to do

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.

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:

- 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.
- 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:
   - 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, Oracle Analytics 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.

- Click the **Remove all columns from criteria** toolbar button in the Selected Columns pane to remove all columns from the analysis.
- 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.
- 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.

   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.

Results:

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%.

Editing the Formula of a Column

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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.

Results:

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

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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 pan, 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

Before you start

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 Analytics** > **Catalog**

Here's what to do

1. Click the Results tab.
2. (Optional) Edit the table or pivot table or add additional views.

Results:

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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

Before you start

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 Analytics** > **Catalog**

Here's what to do

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".

Editing XML Code or SQL Generated for an Analysis

Before you start

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*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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:
  - Saving the analysis to a Web archive file (file extension .mht), and then uploading the file to the Lotus Notes database.
  - 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

Before you start

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 Analytics** > **Catalog**

Here's what to do

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.

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.

Creating an Agent from an Analysis

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Here's what to do

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.
   - For Oracle Analytics, open the Agent editor by navigating to **OAS Agent Management**.
2. Complete the tabs in the Agent editor.

   Remember that in OAS, there aren't any tabs in the the Agent editor; the information is displayed on a single page.
3. Save the agent.

Editing an Analysis

Before you start

Note: If you are using Oracle BI in accessibility mode, then you use the BI Composer rather than the Analysis editor to edit analyses.

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

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.

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.

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.
- Narrative views.
- Static text views.
- Filters.
- Column formulas.
- Conditional formatting conditions.
- Table and column headings in analyses.
- Dashboard prompts and inline prompts.
- Headers and footers for PDF output.
- Link or image objects in a dashboard.
- Text objects in a dashboard.
- Graphs to specify conditional formatting of graph data.
- Gauge thresholds.

- Gauge limits.
- Agents.
- Actions to specify parameters.
- Conditions to specify parameters.
- Selection steps.
- KPIs to define thresholds.
- KPIs included in a KPI watchlist.
- URL fields in dialogs.

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 following 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	@{variables.MyFavoriteRegion}{EASTERN REGION} or @{dashboard.variables['MyFavoriteRegion']}

Type of Variable	Syntax	Example
	• *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.)	

You also can reference variables in expressions. The guidelines for referenceing vairables in expressions are described in the following 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 Predefined Presentation Variables table 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
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.c urrentPage	dashboard.currentPage.name	dashboard.currentPage.name=Sales page 1
dashboard.c urrentPage	dashboard.currentPage.path	dashboard.currentPage.path = /users/administrator/_portal/Sales/page 1
dashboard. current Page	dashboard.currentPage.currency.name	dashboard.currentpage.currency. name=USD
dashboard.c urrent Page	dashboard.currentPage.currency.symbol	dashboard.currentPage.currency. symbol=USD
dashboard. current Page	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=$

Scope	Presentation Variable	Example
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.

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.
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.

View Name	Description
	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. 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.

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

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

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.
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

Before you start

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.

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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

Before you start

> **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 Analytics** > **Catalog**

Here's what to do

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).
4. Using the editor for the view, make the appropriate edits.

   For additional guidance, see:

   - *"Editing Table and Pivot Table Views"*
   - *"Editing Graph Views"*
   - *"Editing Trellis Views"*
   - *"Editing a Gauge View"*
   - *"Editing a Narrative View"*
   - *"Editing a Column Selector View"*
   - *"Editing a View Selector View"*
   - *"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:
  - **Table** — If the analysis contains only attribute columns, only measure columns, or a combination of both, then a table is the default view.
  - **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.
  - **Table** — Tables have columns and measures in the same drop target, and they do not have rows.
  - **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.
  - **Table** — In tables, you can drag and drop measure columns in the middle of the table and they act as columns.
  - **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:
  - **Table** — In tables, you always see the names of columns.
  - **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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
5. To affect the contents of the view, use the following panes:
    - The Subject Areas pane.
    - The Catalog pane.
    - The Layout pane.
    - 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.

Adding Cosmetic Formatting to a Table or Pivot Table

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

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).
- Conditions applied to 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.

Formatting the Visual Appearance of Graphs

Before you start

You must have one of the following user type permissions:

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

Here's what to do

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

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.
   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
- 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 Line-Bar Radar	Only symbol formatting is allowed for the line.

Graph Type	Exception
Time Series Line	
Pareto	Formatting is applied only to the bars, not to the Pareto line.

Editing Graph Views

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Display the Results tab: Graph editor.
2. To set the properties of the graph, click the **Edit Graph Properties** button on the toolbar. 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.
4. Go to the different panes to affect the contents of the view.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Display the Results tab: Trellis editor.
2. To set the properties of the trellis, click the Trellis Properties button on the toolbar. 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.
4. Go to the different panes to affect the contents of the view.
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.

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.

Term	Definition
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.

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.
  - 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:
  - 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.
  - Ideally, place no dimensions in the column headers, just place the measures here.
  - 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.
  - 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Display the Results tab: Gauge editor.
2. To set the properties of the gauge view, click the **Edit Gauge Properties** on the toolbar. Set properties:
    - Related to the gauge canvas, such as, legend location.
    - That control the appearance of the gauge, such as the width and height of the gauge.
    - For gauge limits and tick marks.
    - 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.
4. Go to the different panes to affect the contents of the view.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*

- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Display the Results tab: Narrative editor.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Display the Results tab: Column Selector editor.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Display the Results tab: View Selector editor.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Display the Results tab: Legend editor.
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.
- *<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:

  - 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.

- 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. • **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:

View	Drop Target or Targets
	• **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.

- 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.

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.
  - 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.
  - 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"*.
- 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

The analysis you are creating or editing must include a hierarchical column.

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

1. Edit or create an analysis that contains a hierarchical 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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.
- **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.

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.

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.

- **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.

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.
- 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.
- 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

Before you start

You must have one of the following user type permissions:

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

Here's what to do

> **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

Before you start

You must have one of the following user type permissions:

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

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
   A view can be rearranged as follows:
   - 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.
   - 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Create or edit an analysis.
2. If you want to print:
    - A single view, on the toolbar of the view's editor, click the **Print this analysis** button.
    - The assemblage of views displayed in the Compound Layout, in the Analysis editor: Results tab toolbar, click the **Print this analysis** button.
3. Select Printable HTML or Printable PDF.
    - For HTML, a new window shows the view or views to print.

      From the File menu, select **Print**.
    - 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Create or edit an analysis.
2. In the Analysis editor: Results tab toolbar, click the **Print & Export Options** button.
   The "Print & Export Options dialog" is displayed.
3. Specify the appropriate options in the dialog, and click **OK**.

Previewing How a View is Displayed on a Dashboard

Before you start

You must have one of the following user type permissions:

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

Here's what to do

If you want to preview:

- A single view, on the toolbar of the view's editor, click the **Show how results will look on a Dashboard** button.

- 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.

Results:

The dashboard preview is displayed in a new window. Any prompts are displayed and applied in the preview.

Removing a View

Before you start

You must have one of the following user type permissions:

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

Here's what to do

If you want to remove a view from:

- 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.
- 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

Before you start

You must have one of the following user type permissions:

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

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Here's what to do

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.
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.

> **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
		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

Before you start

You must have one of the following user type permissions:

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

Here's what to do

1. Create or edit the analysis whose view (or views) you want to define as the master view.
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**.
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

Before you start

You must have one of the following user type permissions:

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

Here's what to do

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.
5. In the "Graph Properties dialog: General tab" (for graph or funnel graph), 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:
   - If the detail view is a pivot table or table, then drag the column or columns to the Prompts drop target.
   - 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.
- 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.

Creating a Dashboard

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

1. In the global header, click **Create**, then select **Dashboard**.
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**.

Results:

If you specified to add content:

- 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Navigate to the dashboard to edit and click the Edit link.
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"*.
3. Perform one of the following steps at any time:

- To preview the dashboard page, click the **Preview** toolbar button.
- 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the dashboard.
2. Click the **Add Dashboard Page** toolbar button in the Dashboard builder.
3. In the dialog, enter a name and description for the page, and click **OK**.
4. Click the **Save** toolbar button.

What to do next

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.
- 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the dashboard.
2. Add the objects to include on the page.

   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.
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.
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.
- 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the dashboard. For information, see *"Editing a Dashboard"*.
2. Click the **Tools** toolbar button and select **Dashboard Properties**.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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.

Deleting an Object on a Dashboard Page

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

Deleting One or More Dashboard Pages

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the dashboard. For information, see *"Editing a Dashboard"*.
2. Click the **Tools** toolbar button and select **Dashboard Properties**.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

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** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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"*.
    - Edit saved customizations.

      For information, see *"What Are Saved Customizations for Dashboard Pages"* and *"Editing a Saved Customization"*.
    - Save the current customizations.

      For information, see *"What Are Saved Customizations for Dashboard Pages"* and *"Saving a Customization"*"Saving Customizations".
    - 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
   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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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**.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Here's what to do

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.
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.**

Results:

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

   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.

Results:

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 *"Delivering 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.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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".

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**.

Results:

The content is added to the briefing book.

Editing a Briefing Book

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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**.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Here's what to do

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.
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.

Results:

The folder is added to the dashboard.

Delivering Briefing Books via Agent

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **OAS Agent Management**

Here's what to do

1. Create or edit the agent to be used to deliver the briefing book.
2. In the Agent editor: Delivery Content tab, click **Browse** to select the briefing book.

Results:

When the agent runs, the briefing book is delivered.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

Creating Selection Steps

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

Results:

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.

What to do next

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

Creating a Column Filter

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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.

   To create a named filter, use the following sub-procedure:
   a. From the Oracle Analytics Home page, locate the global header and click the dropdown menu for **Create** and select **Filter** under **Analysis and Interactive Reporting**. 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.
   c. From the Subject Areas pan, double-click the column for which you want to create the filter.
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.

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.

   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.
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.

   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:
    - From the Analysis Editor, you can select **Save Analysis** to save the filter as an inline filter.
    - 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

Before you start

You must have one of the following user type permissions:

- *BI Author Limited*
- *BI Author Developer*

- *BI Tenant Administrator*

or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

1. To open a named filter, use the following sub-procedure:
    a. In the global header, click **Catalog**.
    b. Navigate to the filter to edit and click the **Edit** link.
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.
3. Make the desired changes.
4. Save the filter.

Combining and Grouping Column Filters

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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:
    - 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.
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:
    - From the Analysis Editor, you can select **Save Analysis** to save the filter as an inline filter.
    - From the Filter Editor, you can select **Save Filter** to save the filter as a named filter.

   For more information, see *"Inlined or Named Objects."*

   .

Creating a Filter Based on the Results of a Saved Analysis

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

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 Analytics** > **Catalog**

Here's what to do

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**.
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.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the analysis.
2. From the Results tab, perform one of the following actions:
    - 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**.
    - Click the **Then, New Step** link in the Selection Steps pane.
    - 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**.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

Results:

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

Methods of Combining and Wiring Oracle BI EE Analysis and Dashboard Prompts	
Name	**Location**
	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.
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.
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.

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.
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

Before you start

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 Analytics** > **Catalog**

Here's what to do

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.
    b. 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.

       If you want to create the prompt for a column that is not displayed in the column list, then select the **More Columns...** option.

       If your repository is configured for double columns, then ensure that you select the correct display column. For information on double columns, 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.
    b. Click the **New** toolbar button in the Definition Pane to access the prompt type selection list. From the list, select **Column Prompt**.
    c. Select a column and click **OK**.

       If your repository is configured for double columns, then ensure that you select the correct display column. For information on double columns, 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.

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.
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:
    - 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.
    - 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

Before you start

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*

Here's what to do

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.

2. After you have specified the columns for the analysis, navigate to the Selection Steps pane and specify the selection steps for the analysis.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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.
3. Click the New button in the Definition Pane. From the list, select Variable Prompt.
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".
12. Save the prompt. Note the following options:
    - 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.
    - 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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**.
   b. Navigate to the prompt to edit and click the **Edit** link.
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.
3. Make the desired changes.
4. Save the prompt.

Adding a Dashboard Prompt to a Dashboard or Dashboard Page

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

1. Create a new dashboard or open an existing dashboard and click the Edit Dashboard button.

   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:
   - 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.
   - 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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**.
4. 4. If you want to add the hidden prompt to the whole dashboard, then click the **Filters and variables Edit** button.

   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.

Results:

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.

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.

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.

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 below.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

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 below 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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**.
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.

General Format String	Result
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.
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

ODBC Format String	Result
	(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 (').
[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.
- In the Alerts dialog displayed from the Alerts! button in the global header.
- In specified delivery devices, such as a phone.

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 information:

- 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.

Agent Editor in Oracle Analytics

The Agent Editor is a dedicated space in Oracle Analytics that's accessed using a separate link from the Home page named, **OAS Agent Management**. You'll find all things Agent-related here.

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > OAS Agent Management

Here's what to do

1. Click **Create Agent.**.
2. General: 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. Schedule: 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. Condition: specify whether the agent always delivers its content and executes its actions, or conditionally delivers its content and executes its actions.
5. Delivery Content: specify the content to deliver with the agent, such as a dashboard page or a saved analysis.
6. Recipients: specify who is to receive the delivery content of the agent and who is allowed to subscribe to the agent.
7. Destinations: specify where the content is to be delivered.
8. Save the agent.

   After you have saved the agent, you can run the agent by clicking the **Run** 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*

- *BI Tenant Administrator*

Home > **OAS Agent Management**

Here's what to do

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** button.
    - To save an existing agent with another name or in another folder, click the **Save As** button.
2. Complete the Save Agent dialog, if displayed, and click OK.

Subscribing to an Agent

Before you start

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: 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 Analytics**

Here's what to do

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

Before you start

Home > **OAS Agent Management**

Here's what to do

Search through your folders in Agent Management to see which agents you subscribe to or own.

Unsubscribing from an Agent

Before you start

Oracle Analytics > **OAS Agent Management**

> **Note:** These steps only applies to OBI. To see see a list of agents that you subscribe to or own in OAS, you can select them within your folders.

Here's what to do

1. Search through your folders in Agent Management to see which agents you subscribe to or own.
2. Navigate to the agent from which you want to unsubscribe.
3. 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

Before you start

The agent creator must have allowed subscribers to customize agents.

Home > **Oracle Business Intelligence**

Here's what to do

1. In the global header, click **Home**.
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**.
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.
   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

Before you start

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**

Here's what to do

1. Edit the analysis that is being customized.
2. Display the Analysis editor: Results tab.
3. Add the Filters view to the analysis.

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **OAS Agent Management**

Here's what to do

1. In the global header, click **Catalog** and navigate to the agent whose schedule you want to disable or enable. This step is for OBI only.

2. Click the **More** link for the agent and select one of the following options: (OBI only)
    - **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. For Oracle Analytics, you use this method, however, remember that the Schedule information is not contained within a tab.

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

Before you start

Home > **Oracle Business Intelligence**

Here's what to do

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.

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.
   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.
   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.
   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.

Accessing or Managing Alerts

Before you start

Home > **Oracle Business Intelligence**

Here's what to do

1. In the global header, click **Alerts!**.
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.

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*.
- Add an action link to a dashboard page and specify that the action link is to be displayed conditionally. See *"Using a Condition to Determine Whether Action Links are Displayed 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"*.

Creating a Named Condition

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence**

Here's what to do

1. In the global header, click **New** and then select **Condition**.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **OAS Agent Management**

Here's what to do

1. Edit the agent.
2. Click the Agent editor: Condition tab. Remember that in Oracle Analytics, there aren't tabs.
3. Select the **Use a condition** box.
4. If you want to:
    - 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"*.
    - Select an existing condition, click **Browse** to display the Select Condition dialog and then complete the dialog.
    - Save the agent.

Using a Condition to Determine Whether Action Links are Displayed in Dashboard Pages

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the 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.
    b. Select the action link to conditionalize and click the **Edit** button.
4. In the Show component, click the **Conditionally** box.

   The **Condition** component is displayed.
5. If you want to:
    - Create a new condition, click the **New Condition** button. 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the 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**.
4. If you want to:
    - 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"*.
    - 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

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:
   - (optional) An analysis, edit any prompted filters, as desired.
   - A KPI, specify the values for any KPI dimensions.

   > **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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **OAS Agent Management**

Here's what to do

1. Edit the agent.
2. Click the Agent editor: Condition tab. Remember that in Oracle Analytics, there aren't tabs.
3. To:
    - Edit an inline condition, click **Edit Condition** and make the desired changes. For more information on completing the Edit Condition dialog, see *"Specifying the Settings for a Condition"*.
    - To customize the prompted filters of a named condition, click **Customize** and make the desired customizations.
    - To test a condition, click **Test**. The evaluation results are displayed.
    - To save an inline condition to the catalog as a named condition, click **Save To Catalog**.
    - 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
    b. Select the action link that contains the condition and click the **Edit** button.
3. Click the **More** button to the right of the **Condition** field and then:
    - To edit a condition, select Edit Condition and make the desired changes. For more information on completing the Edit Condition dialog, see *"Specifying the Settings for a Condition"*.
    - To test a condition, select **Test Condition**. The evaluation results are displayed.
    - To save an inline condition to the catalog as a named condition, select **Save Condition As**.
    - 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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**.
3. Click the **More** button to the right of the **Condition** field and then:
    - To edit a condition, select **Edit Condition** and make the desired changes. For more information on completing the Edit Condition dialog, see *"Specifying the Settings for a Condition"*.
    - To test a condition, select **Test Condition**. The evaluation results are displayed.
    - To save an inline condition to the catalog as a named condition, select **Save Condition As** .
    - To remove a condition, select **Remove Condition**.
4. Save the dashboard.

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 Score Carding.

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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

Evaluation Range Rule	Threshold	Name	Status Icon
Values between 50 and 80 (50 < x <=80) indicate a warning of poor performance	50	Warning	Light Red Square
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.
- 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

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.
    - 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.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

1. In the global header, click **Catalog**.
2. Navigate to the KPI to edit and click the Edit link for the object.
3. Make the desired changes.
4. Save the KPI.

Editing a KPI from a KPI Watchlist

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit a KPI watchlist.
2. Right-click the KPI that you want to open.
3. Select Open KPI Definition.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Locate and open the KPI watchlist from the catalog, scorecard, or dashboard 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 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

Creating an Agent from a KPI

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

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

Here's what to do

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.
2. In the **Name** field, enter a name for the agent and complete the Create New Agent dialog. Click **OK**.
3. Complete and save the agent.

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*

- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

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**.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

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**.
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.

Creating a KPI Watchlist

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

1. To create a new KPI watchlist, do one of the following:
    - From the Home page, locate the global header, hover the mouse pointer over the **New** menu, and select **KPI Watchlist**.
    - From a scorecard, go to the Scorecard Documents pane, click the **New Object** icon list, and select **KPI Watchlist**.
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.
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.
5. To add or remove columns from the watchlist table, click **View** and select **Show More Columns...**.
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.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

1. In the global header, click **Catalog**.
2. Navigate to the KPI watchlist to edit and click the **Edit** link for the object.

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*.
  - KPIs: For information, see KPIs and KPI Watchlists.
- Present and analyze corporate strategy, including:
  - Vision statements: For information, see *"Vision Statement"*
  - Mission statements: For information, see *"Mission Statement"*
  - Strategy trees: For information, see *"Strategy Trees"*
  - Strategy maps: For information, see *"Strategy Maps"*
  - Cause and effect maps: For information, see *"Cause Effect Maps"*
  - Custom views: For information, see *"Custom Views"*
  - KPI watchlists: For information, see *"KPI Watchlists"*
  - Smart watchlists: For more information, see *"Smart Watchlists"*
  - Agents: For information, see Creating Agents From KPIs.

Creating Scorecards

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

1. In the global header, click New and then select Scorecard.
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.

What to do next

Perform the remaining tasks for creating a scorecard, as described in *"Creating Scorecards"*

Opening or Editing a Scorecard

Before you start

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** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

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*
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
6. Click Save. 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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**.
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.
6. Click Save. 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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.
8. Click **Save**.

What to do next

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"*.

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.

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

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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:
    - If the objective that you want to create can be independently achieved, then select the root objective.
    - 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**.
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.
    b. Specify the business owner that users can contact by clicking the **Set User** button. (By default, the business owner is the creator of the scorecard.)
    c. (optional) Add related documents by clicking the **New Row** button.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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.

    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.

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**.

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.

When you create an initiative, you assign it KPIs that are to be used to measure its progress.

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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**.
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. See *"Comments"*.
    b. Specify the business owner that users can contact by clicking the **Set User** button. By default, the business owner is the creator of the scorecard.
    c. (optional) Add related documents by clicking the **New Row** button.
    d. (optional) Add the key resources by clicking the **New Row** button.
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**.

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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. .

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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.
- 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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**
    - 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:
    - 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 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
    - Zoom in and out of the diagram, use the toolbar buttons on the Scorecard editor: Strategy Tree 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"*.
    - 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:
    - 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.
    - 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 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. You can expand only slivers in the second concentric circle around the center and farther out.
    - 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"*
    - 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"*
    - 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**. 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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:
   - 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*
     - 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.
   - (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**
   - 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:
    - 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.
    - 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, use the toolbar buttons on the Scorecard editor: Strategy 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 "About Comments" and *"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"*
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
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** . 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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. In the Save As dialog, you can rename the cause & effect map rather than use the default name.

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
5. Manage the smart watchlist, as appropriate. For more information on managing a watchlist, see *"Watchlists"*.
6. Click **Save**. 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."

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.
- 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the scorecard that contains the KPI. For information, see *"Opening or Editing a Scorecard"*.
2. If the KPI is assigned to an:
    - Initiative, double-click the KPI in the Initiatives pane.
    - Objective, double-click the KPI in the Strategy pane.

   The Scorecard editor: KPI Details tab is displayed.
3. Perform any of the following tasks:
    - 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

- Pin dimensions using the **Dimensionality** area in the Analytics pane
- Run actions that are associated with the KPI, using the action links in the **Actions** area of the Analytics pane.
- Associate the KPI with a perspective, using the **Perspective** field in the Analytics pane.
- Specify the indicator type, using the **Indicator Type** field in the Analytics pane.
- View, add, or reply to comments, using the Collaboration pane. For more information on comments, see *"Comments"*
- View documents that provide supporting information to the KPI, using the **Related Documents** area in the Collaboration pane.
- 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Open or edit the scorecard that contains the object. For information, see *"Opening or Editing a Scorecard"*.
2. To open:
   - An objective, double-click it in the Strategy pane.
   - An initiative, double-click it in the Initiatives pane.
   - 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.
   - A perspective, double-click it in the Perspectives pane.
   - A KPI, double-click it in the:
     - Strategy pane or the Initiatives pane.
     - Catalog pane for Scorecard or the Catalog pane for Scorecard.

   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

Before you start

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** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Open or edit the scorecard. For information, see *"Opening or Editing a Scorecard"*.
2. To show summary information for:
    - A KPI, in the Initiatives pane or in the Strategy pane, click the KPI.
    - An initiative, in the Initiatives pane, click the initiative.
    - An objective, in the Strategy pane, click the objective.

Editing a Scorecard Object

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the scorecard that contains the scorecard object that you want to edit.

   You also can edit scorecard objects from the Catalog page.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*

- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **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.

Here's what to do

1. Edit the scorecard that contains the scorecard object that you want to delete.

   You also can delete scorecard objects from the Catalog page.
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"*

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.

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

Before you start

You must have one of the following user type permissions:

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

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

or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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**.
    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

Before you start

You must have one of the following user type permissions:

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

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

or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
    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.

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** > **Catalog** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Open or edit the scorecard.
2. Click the Contact Owner button or menu option.
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

Before you start

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** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

     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.

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

Before you start

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** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Open or edit the scorecard. See *"Opening or Editing a Scorecard"*.
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**.
   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:

   - Read the comments that were previously added.
   - Display the New Comment dialog to add a new comment by clicking New Comment.
   - Display the Reply dialog to reply to a comment by clicking the Reply link.
   - Pin the window so that it stays open by clicking the Pin button.

Working with Comments in the Diagram Tab of a View

Before you start

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** or, for Oracle Analytics,
Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.
   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:

   - Read the comments that were previously added.
   - Display the New Comment dialog to add a new comment by clicking New Comment.
   - Display the Reply dialog to reply to a comment by clicking the Reply link.
   - Pin the window so that it stays open by clicking the Pin button.

15 Managing Objects in the Oracle Analytics Presentation Catalog

Presentation Catalog

Presentation Catalog

The Oracle Analytics 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.
3. Click **OK**.

Creating a Folder or Sub-folder

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

1. Go to the 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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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.

Organizing your Favorites List

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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**.
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

Before you start

You must have one of the following user type permissions:

- *BI Consumer*
- *BI Author Limited*

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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**.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

1. In the global header, click Catalog.
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:
    - Below the document, select **More** and then **Export**
    - 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

Before you start

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 Analytics**

Here's what to do

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:
    - Below the document, select More and then Properties.
    - Click the Properties button in the Tasks pane.
5. Review or change the settings displayed in the Properties dialog.

Levels of Oracle Analytics Security

Oracle Analytics 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.

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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

1. In the global header, click **Catalog**.
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.
5. Specify to maintain or omit the permissions and timestamps for the folder or object.
6. Click **OK**.

Unarchiving Objects

Before you start

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 Analytics**

Here's what to do

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**.
4. Enter the name of the archive file or browse for the archive file. Select the archive file.
5. Click **OK**.

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 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
    - 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:
    - Create new folders in which to save the analyses
    - Rename folders and analyses
    - Delete folders and analyses
    - Expand and collapse folders

Creating an Analysis Using BI Composer

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. In Oracle BI:
    a. In the global header, click **New**, or for Oracle Analytics, click **Create**, then **Analysis**.
    b. Select a subject area.
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:

- 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".
- 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.
- Hide the column in the view, select the **Hidden** box for the column.
- Remove the column from the list, select the column and click **Remove**.
- 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.
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.
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.
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.
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.
12. (optional) Use the Highlight panel to apply conditional formatting to the tabular view.
13. Click the **Save** button in the BI Composer train.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

1. Edit the analysis in one of the following ways:
   - From the Catalog page, navigate to the analysis and click **Edit**. The BI Composer wizard is displayed.
   - 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.
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.

Viewing an Analysis in BI Composer

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics** > **Catalog**

Here's what to do

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
- 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.

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.)

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.

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.

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

1. Click **Create**, select **Action** under **Actionable Intelligence**, and then select the type of action to create.
2. Complete the New Action dialog. For information, see *Specifying the Settings for a New Action*.

Specifying the Settings for a New Action

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

1. Click **Action** from Actionable Intelligence or from Create and select which action you want 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

Before you start

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 Analytics**

Here's what to do

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:
   - **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.
    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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

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.

Completing the Action Link Properties Dialog

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Business Intelligence** or, for Oracle Analytics,
Home > **Oracle Analytics**

Here's what to do

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.
    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.
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.
    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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

1. Edit the dashboard page to which you want to add one or more actions.
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:
    - 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.
    - 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 "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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **OAS Agent Management**

Here's what to do

1. Edit the agent to which you want to add an action.
2. Click the "Agent editor: Actions tab". Remember there aren't tabs in Oracle Analytics.

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:
    - 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
    - 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.
    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, 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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.
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.
    b. Complete the Open dialog.

       If there are parameters associated with the action, 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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.
    - 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 "Initiatives pane, click the **New Row** button.
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.
    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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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**.
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 Column Properties dialog: Interaction tab.
5. Make the appropriate changes to the action link.

6. Click the **More** button and select **Edit Action**.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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.
    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.
3. If the action and action link are standalone, click the **Properties** button for the Action Link object to which the action is associated.
4. Make the appropriate changes to the action link.
5. Click the **More** button and select **Edit Action**.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **OAS Agent Management**

Here's what to do

1. Open the agent.
2. Click the Agent editor: Actions tab. Remember that Oracle Analytics doesn't have tabs.

3. Select the action and click the **Edit Parameters** button.
4. Edit the action and click **OK**.

Editing Actions or Action Links Added to a KPI

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

1. Edit the KPI to which the action and action link has been added.
2. Click the Analytics pane.
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**.
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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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 pan, 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.
5. Save the objective or initiative.

Saving an Inline Action in an Analysis to the Catalog

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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**.
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.
5. Click the More button and select Save Action As 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

Before you start

You must have one of the following user type permissions:

- *BI Author Developer*
- *BI Tenant Administrator*

Home > **Oracle Analytics**

Here's what to do

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.
    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.
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.
4. Click the **More** button and select **Save Action As**.
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.
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

Before you start

You must have one of the following user type permissions:

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

Home > **Oracle Analytics**

Here's what to do

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.

18 Appendix

Subject Areas

The standard content was delivered using the Recruiting subject area.

For a complete list of fields, refer to the document entitled **Reporting with Oracle Business Intelligence – Data Dictionary – Subject Area** available on My Oracle Support (Doc ID 1496352.1)

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:
  - Attribute columns of the inner graph are not included in the pivot table views.
  - Measure values are aggregated to the new grain of the pivot table views.

By default, Oracle BI EE does not use accessibility mode.

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."
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, Oracle Analytics 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 Oracle Analytics

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.

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.

`FROM from_clause` is the list of tables in the request. Optionally includes certain join information for the request.

`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.

`GROUP BY column {, column}` specifies a column (or alias) belonging to a table defined in the data source.

`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.

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.

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`.

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

Employeeid	FirstName	Revenue
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.

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.

Operator	Description
/	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.

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 Analytics. 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, Oracle Analytics 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.

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.

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.

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")

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")

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:

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.

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.

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.

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:
  - The recommended syntax is:

    ```
    CAST(expr|NULL AS CHAR(n))
    ```

    For example:

    ```
    CAST(companyname AS CHAR(35))
    ```

  - 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.

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-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:

`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.