Oracle® Cloud

Using Oracle Fusion Data Intelligence



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Preface

Learn how to use Oracle Fusion Data Intelligence.

Topics:

- Audience
- Related Documentation
- Conventions

Audience

This document is intended primarily for Oracle Fusion Data Intelligence business consumers and content authors, as well as those who implement, configure, and manage an Oracle Fusion Data Intelligence instance.

Related Documentation

These related Oracle resources provide more information.

- Oracle Cloud `http://cloud.oracle.com`
- Getting Started with Oracle Cloud
- Managing and Monitoring Oracle Cloud
- Get Started with Oracle Fusion Data Intelligence
- Getting Started with Oracle Analytics Cloud
- Visualizing Data and Building Reports in Oracle Analytics Cloud
- Preparing Data in Oracle Analytics Cloud

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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1

Get Started with Oracle Fusion Data Intelligence

Learn how to get started with workbooks and key metrics.

Topics:

- About Oracle Fusion Data Intelligence
- What can I do in Oracle Fusion Data Intelligence?
- Features of Oracle Fusion Data Intelligence

About Oracle Fusion Data Intelligence

Oracle Fusion Data Intelligence empowers customers with industry-leading, AI-powered, self-service analytics capabilities for data preparation, visualization, enterprise reporting, augmented analysis, and natural language processing.

Oracle Fusion Data Intelligence is a Cloud application that delivers best-practice key metrics and deep analyses to help decision-makers run their business. Packaged analytics applications start with Oracle Fusion Cloud Applications, and can be deployed rapidly, personalized, and extended. Oracle Fusion Data Intelligence is built on top of Oracle Analytics Cloud, and is powered by Oracle Autonomous AI Lakehouse.

Oracle Fusion Data Intelligence spans data pipelining, data warehousing (using Autonomous AI Lakehouse), semantic models, and curated content including prebuilt key metrics, dashboards, and detailed analyses. Oracle Fusion Data Intelligence supports new and extended content by providing a layer of data personalization and extensions using well-defined interfaces. Because Oracle Fusion Data Intelligence is a Cloud offering, Oracle fully manages the service from deployment and performance tuning, to upgrades and maintenance.

Oracle Fusion Data Intelligence is based on the real-world notions of key metrics, visualizations, and workbooks, and provides a collaborative experience optimized for executives and decision-makers. Business analysts can extend Oracle Fusion Data Intelligence using the intuitive key metrics editor, as well as Oracle Analytics Cloud features to author new visualizations, reports, and dashboards. These analytics, whether new or prebuilt, work alongside key metrics, visualizations, and workbooks for a comprehensive data analysis experience.

Learn About the New Oracle Fusion Data Intelligence Experience

To streamline your data analysis, the user experience for Oracle Fusion Data Intelligence has merged with Oracle Analytics Cloud. For example, key performance indicators (KPIs) have transitioned to key metrics, cards have migrated to visualizations, and decks have migrated to workbooks in Oracle Analytics Cloud.
The alignment of consumer- and author-oriented experiences provide these benefits:

- Flexibility for building dashboards.
- A consolidated home page and catalog experience for all the prebuilt and custom application content.

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- An integrated mobile experience through the Oracle Analytics Mobile applications.

The URLs for your service are *servername*/ui/oax/ for the administration console and *servername*/ui/dv/ for Oracle Analytics Cloud business user application content. Depending on the tasks you want to accomplish, you can learn more in these topics:

- Find and Explore Your Content
- Prepare Data
- Filter Your Data
- Get Started with Data Visualization
- Begin to Build a Workbook and Create Visualizations
- Get Started with Analyses and Dashboards
- Build Analytical Applications
- Get Started with Key Metrics
- Publish Data

To learn about building Overview and Detail Dashboards, see Build Analytical Applications .

What can I do in Oracle Fusion Data Intelligence?

There are two features of Oracle Analytics Cloud that work differently in Oracle Fusion Data Intelligence.

- In Oracle Fusion Data Intelligence, you can extend a prebuilt RPD through Semantic Model Extensions or through the External Application Merge process that allows you to merge a custom Oracle Analytics Cloud RPD with the Oracle Fusion Data Intelligence RPD. You can build extensions using features that are unique to Oracle Fusion Data Intelligence.
- HTML code and scripts aren't available in Answers.

Some features only work with datasets, and don't work directly on subject areas. These include:

- Workbook: Auto-Insights
- AI-enhanced Automated Insights
- ML-based Automated Column Explain
- Targeted Segmentation

All other Oracle Analytics Cloud features work as expected in Oracle Fusion Data Intelligence.

Features of Oracle Fusion Data Intelligence

Oracle Fusion Data Intelligence is built on a high-performance platform with flexible data storage, and provides you with a complete set of tools to derive and share data insights.

Video
Oracle Fusion Data Intelligence supports your entire analytics workflow.

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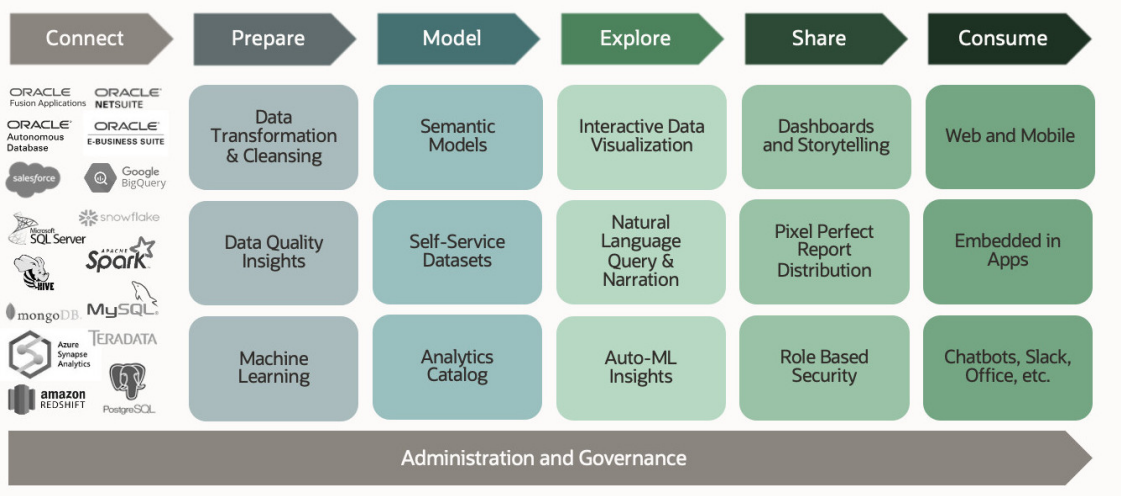

- Data connectivity: Unify your data sources using a wide range of prebuilt data connections. Or use JDBC (Java Database Connectivity) for other sources and legacy systems. Access all your data, including personal data sets like Excel or CSV, wherever they're located. Securely create, manage and share connections with your team or across the organization.
- Data preparation: Ingest, profile, and cleanse your data using a variety of algorithms.
- Data flow: Transform and aggregate your data, and then run machine-learning models at scale.
- Data modeling: Develop trusted and governed semantic models to ensure a consistent view of business-critical data. Use semantic models to ensure trusted numbers across your enterprise, regardless of the which visualization you choose. Business users can directly join tables through self-service, and share self-service data models with their colleagues.
- Data visualization: Visualize and explore your data, on any device, on-premises, and in the cloud. See the signals in your data and make complex ideas engaging, meaningful, and easy to understand.
- Data discovery: Subject matter experts can easily collaborate with other business users, blending intelligent analysis at scale and machine learning insights.
- Data collaboration: Large organizations and small teams can share data more simply, without the need to manage or consolidate multiple versions of spreadsheets, and quickly perform ad hoc analysis of their spreadsheet data. Data-level security, enables fine-grained access to ensure that your team or users can share reports but see only data they have access to.
- Data access: Stay connected with automated delivery of analytics and monitor ongoing business performance from anywhere at any time. Mobile apps learn from your unique patterns and data interests to deliver intelligent recommendations for further analysis or data exploration.
- Data-driven: Application developers can utilize interfaces that enable them to extend, customize, and embed rich analytic experiences in the application flow.

Oracle Fusion Data Intelligence offers analytics capabilities to all roles within your organization including IT, executives, data engineers, citizen data scientists, business analysts. and business users.

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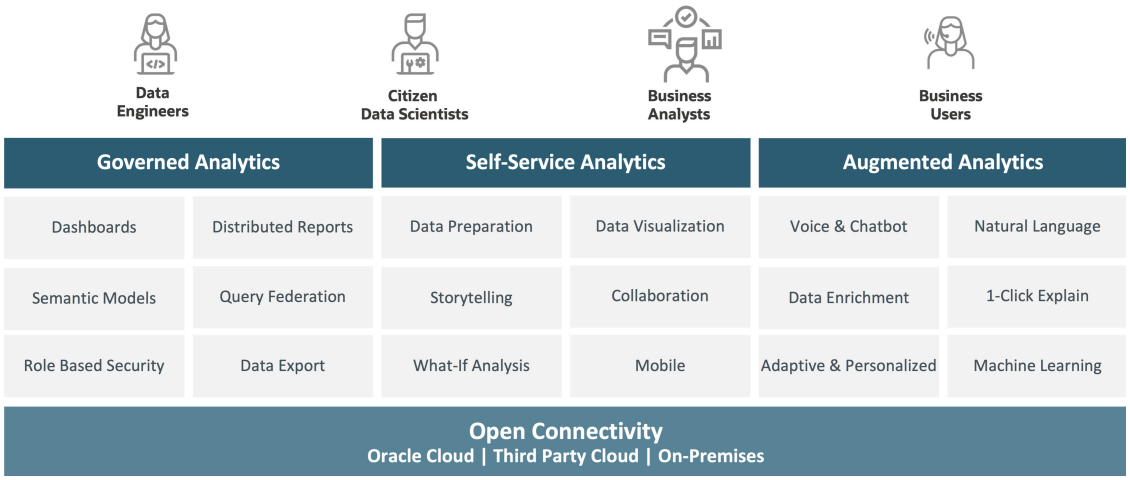

- Centralized, governed reporting and analytics together with business-led self-service analytics, while always ensuring consistent and trusted numbers.
- A semantic model that abstracts physical data sources and query languages from business users.
- Built-in, trackable, and repeatable data preparation and enrichment that removes the need for insecure data exports and Excel.

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2

Get Started with Oracle Analytics AI Assistant

Learn how to get started with Oracle Analytics AI Assistant.

Topics:

- About the Oracle Analytics AI Assistant
- Use the Oracle Analytics AI Assistant as a Consumer User
- Enable and Configure the Oracle Analytics AI Assistant as an Author User
- Enable the Oracle Analytics AI Assistant for Fusion Data Intelligence Users
- Create a Purpose-Built Local Subject Area
- Prepare Data by Creating Indexes and Synonyms
- Prepare Local Subject Area Data
- Refine the Results Returned by the Oracle Analytics AI Assistant
- Guidelines for Optimal Performance – Consumer Users
- Data Preparation and Fine-Tuning Guidelines – Author Users
- Known Limitations and Workarounds

About the Oracle Analytics AI Assistant

The Oracle Analytics AI Assistant for Fusion Data Intelligence is a GenAI-powered conversational interface that enables business users to ask questions in natural language to explore and analyze data without needing to write complex queries or build visualizations manually.

Video

The AI Assistant converts your natural language questions into queries against the data model and returning visualizations, summaries, or narratives as answers. Oracle Analytics AI Assistant is built on the Oracle Analytics Cloud platform.

The AI Assistant understands the subject areas, entities, and key metrics around your query to align with the specific area you're asking about using common terminology in your field of expertise. It can analyze your data using the available agents to help you find trends, recommended plans of action, and areas of improvement.

Your individual permissions determine what data you can access, so if you aren't finding the information you 're looking for, make sure you have the correct security permissions.

This section provides guidelines and recommendations for you to enable and optimize its capabilities, so users derive maximum benefit from it. This is a guide for getting started quickly with the Oracle Analytics AI Assistant. For more technical details, see Use AI Agents and the Oracle Analytics AI Assistant to Interact with Data.

When deploying the Oracle Analytics AI Assistant, an author user typically prepares data so that a consumer user can use the Oracle Analytics AI Assistant to explore the data to gain new business insights. How you use the AI Assistant depends on your role in your organization.

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- Consumer Users seek business insights by issuing questions or commands in plain language. They're not expected to know anything about the underlying data structures powering the Oracle Analytics AI Assistant. They simply need to know the functional context of the workbook they're viewing to derive analytical insights in the form of fully formed visualizations.
- Author Users typically have the role of a functional administrator who has deep knowledge of the functional domain and is responsible for back-end configurations needed in data and metadata preparation. In addition, the author user defines the scope of the dataset where Oracle Analytics AI Assistant is enabled, ensuring its effective functioning for consumer users.

Use the Oracle Analytics AI Assistant as a Consumer User

A consumer user can ask questions within a specific business context of the Oracle Analytics AI Assistant and see the answers in the form of visualizations

1. Log in as a consumer user and go to the Home page.
2. Open a workbook. You can import a sample workbook provided by Oracle or create a workbook based on a subject area enabled for the Oracle Analytics AI Assistant.
3. Click the **Auto Insights** icon in the menu bar and select the **Assistant** tab.

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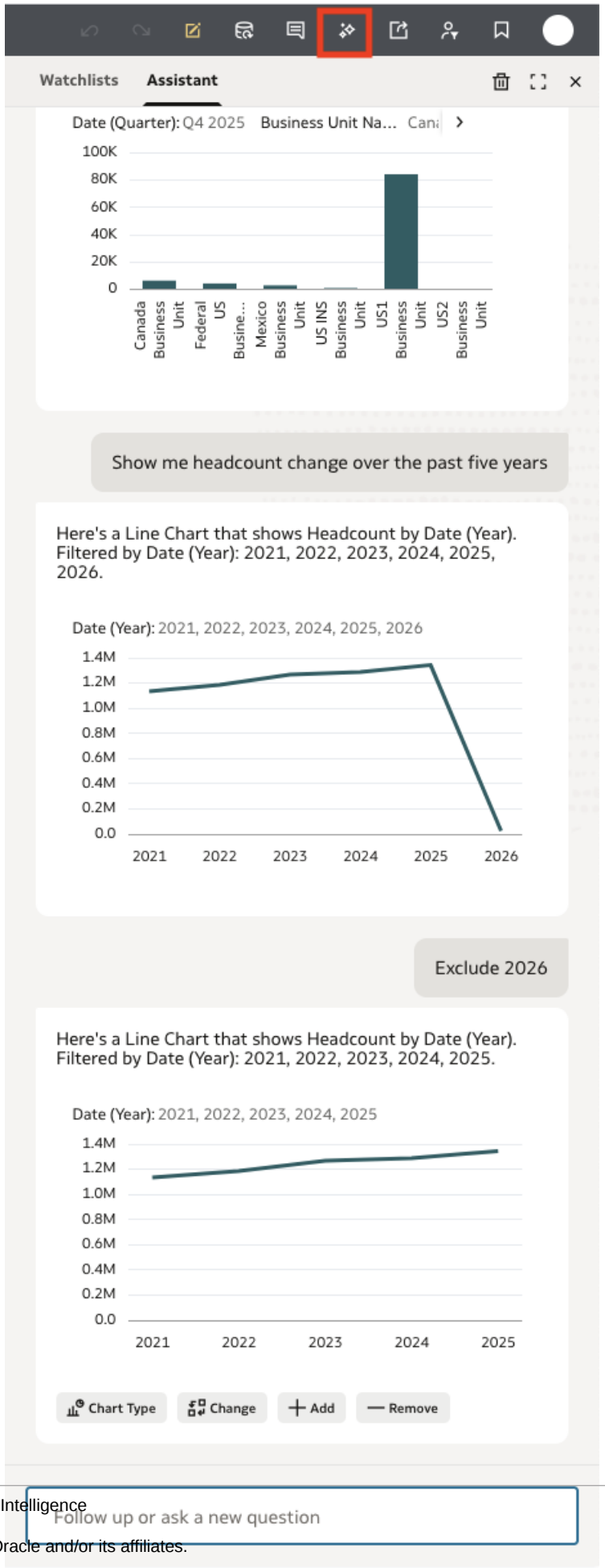

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4. Enter text similar to "Show me headcount change over the past five years" or, leveraging a synonym configured earlier "Show me the workforce size for all business units in the last quarter".

   You'll see a chart as a result. Modify the type of chart as needed or ask additional questions

5. The Oracle Analytics AI Assistant uses context carry-forward. Ask follow-up questions as needed and edit chart types or other parameters. For example, enter text like "Add region" or "Show this as a line chart".

   - Click **Clear Assistant History** to reset the context and begin a new analysis path

6. When you find visualizations you like, add them to the Canvas.

For additional details about using the Oracle Analytics AI Assistant, see Guidelines for Optimal Performance – Consumer Users.

Enable and Configure the Oracle Analytics AI Assistant as an Author User

Most Oracle Fusion Data Intelligence workbooks are based on metadata called subject areas.

A workbook can also be efficiently built against a dataset or a local subject area which is a combination of both subject areas and datasets. The local subject area allows an analyst to effectively carve off a subset of data from the larger subject area. In any of these cases, results obtained from the Oracle Analytics AI Assistant are improved by:

- Indexing the essential columns for these data models and leaving out the rest.
- Adding synonyms to column names for commonly used business terms

Perform the following steps to enable and configure the Oracle Analytics AI Assistant to ensure optimal results for consumer users

1. Enable the Oracle Analytics AI Assistant for Fusion Data Intelligence Users
2. Create a Purpose-Built Local Subject Area
3. Prepare Data by Creating Indexes and Synonyms
4. Prepare Local Subject Area Data
5. Refine the Results Returned by the Oracle Analytics AI Assistant

Enable the Oracle Analytics AI Assistant for Fusion Data Intelligence Users

You can allow consumer users of your workbooks to use the Oracle Analytics AI Assistant and even select which datasets or subject areas the Oracle Analytics AI Assistant can use to respond to their natural language prompts.

Video

You enable consumers to use the Oracle Analytics AI Assistant as part of the presentation flow. See Show or Hide the Insights Panel for Consumers in Present and Specify Datasets and Subject Areas Available to Consumers in Insights Panel.

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First, on the Oracle Analytics Cloud home page associated with your Oracle Fusion Data Intelligence instance, click the Navigation menu and select **Generative AI**. Verify that **AI Assistant in Workbooks** is enabled, and if it's disabled, enable it by selecting **Oracle Analytics** from drop-down menu.

If you don't see the Oracle Analytics AI Assistant option, you might not have the required permissions. Contact your administrator to request the **Use Assistant in Workbooks** permission. See Grant and Revoke Permissions for Application Roles.

Create a Purpose-Built Local Subject Area

Local subject areas can describe the information needed for more intentional Oracle Analytics AI Assistant usage.

Video

This provides an advantage over subject areas by making indexing easier. All columns can be indexed, but there can be a balance to hitting the right size allowing both performance and ad-hoc exploration. For this section, you see the Human Capital Management subject area as an example to build a local subject area. In practice, the author user needs to select a subject area relevant to their business needs.

Create a local subject area from an existing subject area by including a subset of the data elements contained in its folders. These are typically columns and metrics that are used in reports and visualizations. A local subject area is purpose-built for the specific business context of a workbook. By narrowing the scope to only relevant data, it enables the Oracle Analytics AI Assistant to deliver more focused and context aware answers for end users.

Suppose your HR leaders want to understand headcount trends across job families, age bands, workforce gains and losses, and internal mobility to make strategic decisions on organizational health, diversity, and future workforce planning. By creating a local subject area that captures only the essential dimensions and measures, you can provide a clear and unambiguous business context for the workbook, making your leaders self-sufficient while using the Oracle Analytics AI Assistant to gain the required analytical insights

The following procedure demonstrates how to create a local subject area for this purpose.

1. Log in as an author user.
2. On the Oracle Analytics Cloud home page associated with your Oracle Fusion Data Intelligence instance, click **Create**, then **Dataset**, and select **Local Subject Area**.
3. Scroll down to HCM - Workforce Core, then click and drag it to include in the dataset
4. Double-click the **HCM- Workforce Core** icon to add columns.
5. Select the following to add them to the local subject area:
    a. Expand **Time**, then add relevant time dimension attributes such as Year, Quarter, Month, Date, then click **Add Selected**.
    b. Expand Bands, then add relevant band names such as Name from the Age Band table, then click **Add Selected**.
    c. Expand the Worker table, select Basic Information, Manager Information, Employment Information, and Education, and then click **Add Selected**.
    d. Expand the Common table, open Department and select Department Name, open HR Business Unit and select Business Unit Name, open Grade and select Grade Name, open Location and select Country, open Job and select Job Name, and open Position and select Position Name. Click **Add Selected**.

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e. Expand Workforce Headcount Facts, then expand tables such as Facts - Workforce Headcount, Facts - Workforce Person Count, Facts - Workforce Events, Facts - Workforce Length of Service, Facts - Compensation, and Facts – Performance, add only the relevant measures that align with your workbook's business context, then click **Add Selected**.

6. Set Table Name to HCM -Workforce Core: Sample LSA and click **OK**.
7. Click **Save**, then name the dataset Sample LSA, and click **OK**.
8. If you imported one of the sample workbooks provided by Oracle, the local subject area is already available for you.

About Sample Workbooks

The instructions and examples in this section are based on creating a local subject area in Human Capital Management (HCM).

A sample workbook is available for each pillar: Human Capital Management, Enterprise Resource Planning (ERP), Supply Chain Management (SCM), and Customer Experience (CX). If you want to use one of these samples, follow these steps:

1. Click the appropriate link(s) to download a the sample workbooks:
   - Employee Expense Analysis by Type - AI Assistant
   - Sales Pipeline Sales Review - AI Assistant
   - Spend Categories Analysis - AI Assistant
   - Workforce Composition - AI Assistant
2. Extract the .zip file.
3. On your home page, click **Page Menu**(⋮), and then select **Import Workbook/Flow**.
4. In the Import Workbook/Flow dialog, click **Select File**, navigate to the extracted .zip file, select the relevant sample workbook .dva file, and then click **Import**.

The imported workbook is listed on the Home Page.

Prepare Data by Creating Indexes and Synonyms

Indexing provides searchable references within a subject area, enabling the Oracle Analytics AI Assistant to efficiently locate the relevant measures and dimensional attributes needed to answer consumer users' natural language questions.

 Video

Subject areas remain the source of truth for organizational analysis, yet due to their size and complexity, they can be tedious to index and their expansive nature can complicate focused Oracle Analytics AI Assistant usage.

For subject areas provided by Oracle, indexes and synonyms may already be defined. If you want to extend these or create your own, perform these steps.

1. On the Oracle Analytics Cloud home page associated with your Oracle Fusion Data Intelligence instance, click the Navigation menu and select **Console**.
2. Select the **Search Index** tile.
3. Click **Enable Data Model Crawl**.

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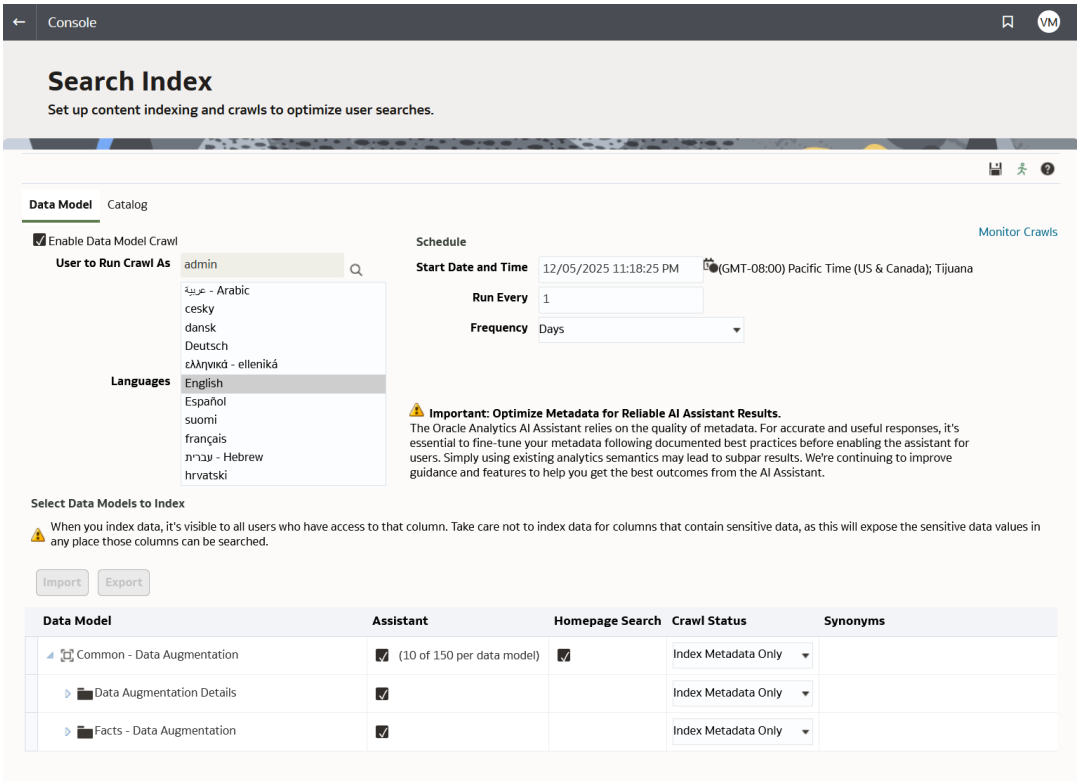
4. Type a name in the **User to Run Crawl As** field.
5. Set the Schedule Start Date and Time and Frequency.
6. In the Select Data Models to Index panel, select or deselect specific subject areas, folders in those subject areas, and then individual columns in those folders. Select the checkbox for those you want to include.



7. Define the Crawl Status for these objects. You can select **Index** or **Index Metadata Only**.

   While Index Metadata Only leaves out the data, the Index selection includes both metadata (dimension names and measure names) and data values. Indexing data improves results but adds data volume. When you index data, it's visible to all users who have access to that column. Take care not to index data for columns that contain sensitive data.
8. You can add other Synonyms as needed to the column level. For example, your users might refer to a column for Headcount also as Employee Count, Employees, Workforce Size, Person Count, etc. Adding familiar synonyms improves results. You can add up to 20 synonyms per attribute.
9. Click **Save**.

Prepare Local Subject Area Data

Indexing provides searchable references within your local subject area, enabling the Oracle Analytics AI Assistant to efficiently locate the relevant measures and dimensional attributes needed to answer consumer users' natural language questions.

Because new local subject areas are not indexed by default, you must manually select and index the columns that the Oracle Analytics AI Assistant should use. This ensures the Oracle Analytics AI Assistant delivers focused, context-aware, and accurate responses aligned with the workbook's business purpose.

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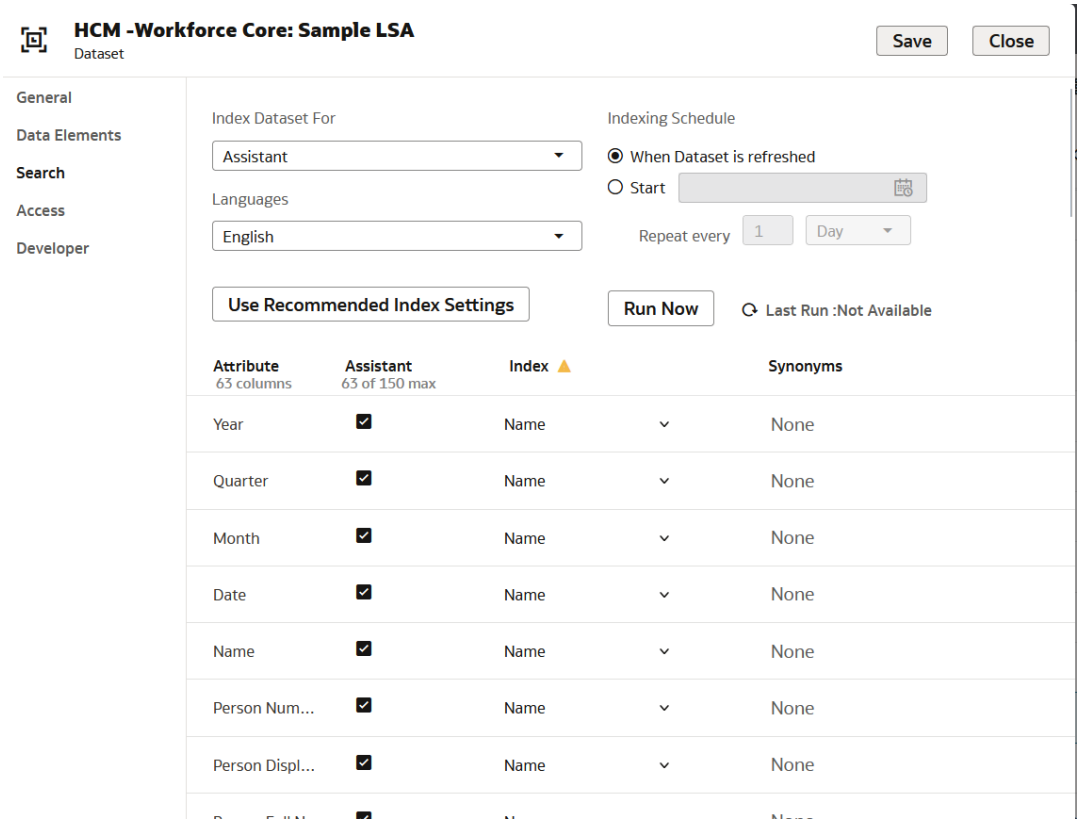
If you have imported one of the sample workbooks provided by Oracle, indexes and synonyms are already defined. If you want to extend these or create your own, do the following.

1. On the Oracle Analytics Cloud home page associated with your Oracle Fusion Data Intelligence instance, click the Navigation menu and select **Data**.
2. Find the recently created or imported local subject area in the Datasets tab. Click the **Actions** menu (⋮), then click **Inspect**.
3. Click **Search**.



4. Under Index Dataset For select **Assistant**.
5. `Optional – Click Use Recommended Index Settings.`
6. Define a time for when the index runs or click **Run Now**.
7. To include it in the index, inspect the list of Attributes and click the **Index** checkbox in each row.
8. Define the Index Type. Set measures to Name and attributes to Name & Values.
9. Add synonyms. Click the **Synonyms** field next to specific attributes and type the values. For example, users might refer to a column for Headcount as Employee Count, Employee Number, Employees, Workforce Size, Person Count, etc. Adding synonyms improves results.

   Add other synonyms as needed. Some rows say Suggestions Available. Explore the suggestions and use them if they apply to your needs. Add the suggested synonyms or manually type up to 20 synonyms per attribute.
10. Click **Save**.

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Refine the Results Returned by the Oracle Analytics AI Assistant

As you learn your users' behaviors and data changes over time, you can refine the results for the Oracle Analytics AI Assistant.

To refine results for a local subject area or a dataset, follow these steps:

1. On the Oracle Analytics Cloud home page associated with your Oracle Fusion Data Intelligence instance, click the Navigation menu bar and select **Data**.
2. Find your local subject area in the **Datasets** tab. Click **Actions** (⋮), and then click **Inspect**.
3. Click **Search**.
4. Modify indexing and synonyms as needed and click **Save**. You may need to run the index by clicking **Run Now** if it's not running on a schedule.

To refine results for a subject area, follow these steps:

1. On the Oracle Analytics Cloud home page associated with your Oracle Fusion Data Intelligence instance, click the Navigation menu bar and select **Console**.
2. Click **Search Index**.
3. Modify indexing and synonyms as needed and click **Save**. You may need to run the index by clicking **Run Now** ( ) if it's not running on a schedule.

Guidelines for Optimal Performance – Consumer Users

To maximize the effectiveness of your interactions with the Oracle Analytics AI Assistant, follow these guidelines:

1. Functional focus of queries.
   a. Consumer users are expected to ask functional, goal-oriented questions relevant to business operations, such as:
      - "Who are the top performing Sales Reps this month?"
      - "Which department has the highest attrition in last 6 months?"
   b. Don't ask about:
      - The structure, schema, or internal logic of the dataset.
      - Technical metadata or data lineage.
2. Be aware of structure and paraphrasing.
   a. If the Oracle Analytics AI Assistant doesn't return a satisfactory or relevant answer:
      - Try rephrasing the question using simpler or more explicit language.
      - Avoid overly complex or nested queries. Break them into multiple smaller questions if needed.
   b. For example, instead of:

      "Which top 3 regions had declining profit last quarter but improved this quarter in electronics?"

      Try:

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"What was the profit trend last quarter for electronics by region?"

Followed by:

"How did it change this quarter?"

3. When referring to column names or field values, pause briefly (1–2 seconds) while typing.
   a. The Oracle Analytics AI Assistant displays auto-suggestions based on the active dataset fields.
   b. Selecting from the suggestions ensures alignment with the actual metadata, improving result accuracy.
   c. Start typing "customer" and wait for customer_segment, customer_region to appear, then select the appropriate one.
4. Understand contextual carry-forward behavior.
   a. The Oracle Analytics AI Assistant remembers the context of previous questions and answers within the same conversation.
   b. Applied filters (e.g., for region, product line, time period) persist across follow-up questions, unless explicitly changed.
   c. A consumer user may use the following prompts, and the context is carried forward for prior quarter data. For example:
      - Q1: "Show sales trend for last 5 years."
      - Q2: "Show only trend for Technology Products."
      - Q3: "Break it down by product subcategory."
      - If you want to start a new set of prompts, click **Clear Assistant History** at the top of the Oracle Analytics AI Assistant chat window to reset the context and begin a new analysis path.

Data Preparation and Fine-Tuning Guidelines – Author Users

To maximize the effectiveness of your interactions with the Oracle Analytics AI Assistant, follow these guidelines.

1. Limit the number of columns in a local subject area. Only include columns used or needed for the functional context of the workbook(s) in the local subject area. Even if it isn't explicitly used in the workbook, a data column close to the context of the workbook can be a candidate for the local subject area, if the following conditions are met:
   a. Consumer users are expected to potentially ask a question or prompt involving these.
   b. Adding it to the local subject area won't introduce potential ambiguity with other existing columns already in the local subject area.
2. Avoid high-cardinality columns in a local subject area. Don't bring Order_id, or Customer name, which potentially carry more than 1000 distinct members. High cardinality columns typically increase the indexing time and may eventually not be of a critical need in answering many of the "high-level" consumer user prompts.
3. Avoid multiple functional dates in a single local subject area.
   a. When possible, only include one functional date (set of date hierarchy) in the local subject area, as opposed to multiple functional date hierarchies. For example, order-date, shipped-date, and billed-date are all distinct date hierarchies part of a subject area about sales. Ideally, only include one of these hierarchies in your local subject

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area. Having multiple date hierarchies could result in ambiguity with Oracle Analytics AI Assistant responses.

   b. If you must give consumer user access to multiple dates in a single local subject area, require they always specify which functional date type they refer to when they ask time-related questions. Otherwise, this may not always be intuitive for consumer users, for example, when order date and ship date objects are both included in local subject area.

4. Properly set metrics aggregation rules. Metric type columns default with a Sum aggregation rule. If a metric isn't additive, such as Age, manually override the aggregation rule that defaults in the local subject area to Avg. At a high level, typical objects that need aggregation-rules override are Count, Count Distinct, and Averages. You need to override metrics that are ratio calculations with a numerator and a denominator with an Average aggregation rule in the local subject area.
5. Be aware of column names and descriptions. If necessary, change column names to more meaningful values. Better column names are more effective than adding synonyms. While adding synonyms helps, good column names have a higher impact on the LLM resolution.
6. Set local subject areas to live data access mode. That allows user data security criteria to pass into the query.
7. Avoid subject area columns with complex aggregation rules in your local subject areas. As much as possible, try to use simple additive metrics in your local subject areas.

Known Limitations and Workarounds

Review the following guidelines to ensure you don't encounter known issues with your configuration.

1. Filters aren't passed automatically into prompts.
   Because canvas and dashboard filters aren't automatically transposed into the prompt, consumer users must explicitly include these in the question or prompt. Auto transposing is under development for the Oracle Analytics AI Assistant, but not yet part of the product.

   For example, if a consumer user is watching a dashboard with sales data and the top filters for the canvas provide a default for visualizations to a given organization "XYZ" and a given region "ABC" he is responsible for.

   As this user asks questions of Oracle Analytics AI Assistant, the dashboard or canvas filters won't automatically be sent to their prompts. They may have to explicitly specify the value of the filters in the prompt, such as: "For organization XYZ and for region ABC".
2. Custom calendar behavior is based on calendar type.
   If your workbook source is leveraging custom calendars where a fiscal year doesn't match the Gregorian calendar (January through December), then you need to cautiously include time level objects in your local subject area for indexing. To do this, remove the date datatype column from your local subject area and add only the time hierarchy level columns (month, quarter, year) that are calculated for your custom calendar. For example, in the case of the Oracle Fiscal Calendar (June – May), quarter Q1 includes the months of June, July, and August.
3. Portability of AI Assistant metadata is limited.
   Moving indexes and synonyms across workbooks and subject areas is planned but may not be present in the release you're using.

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3

Get Started with Visualizing Data and Building Reports (For Content Creators)

This topic describes how to get started with visualizing data and building reports.

Topics:

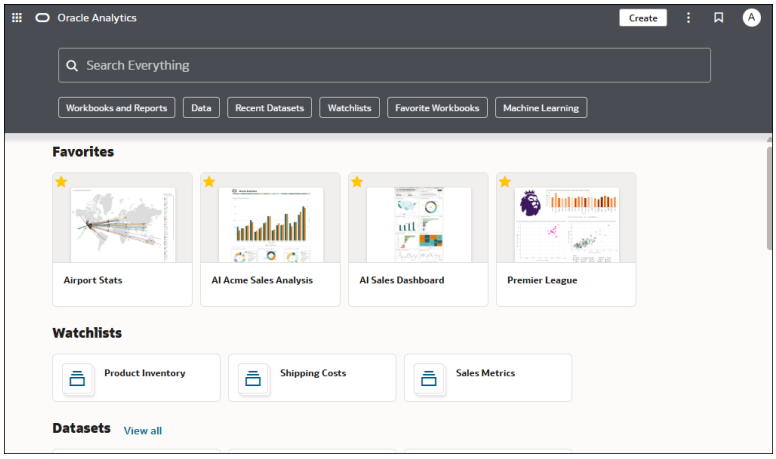
Tutorial

- Access Your Content
- Customize Your Oracle Fusion Data Intelligence Home Page
- About Visualizations and Analyses
- How to Begin Visualizing Data and Building Reports
- Find and Explore Your Content
- About Watchlists
- Providing Custom Groups of Content
- Use Template Workbooks for Performance Improvements
- Analyze a Workbook for Performance Improvements
- Explore Oracle Fusion Data Intelligence Content
- View Content on Mobile Devices

Access Your Content

Your " Welcome" email contains a direct link to the service. Simply click this link and sign in. The URL for your service is *servername*`/ui/dv/` for business user application content.

You see your Home page, which has links to all of the features available to you.



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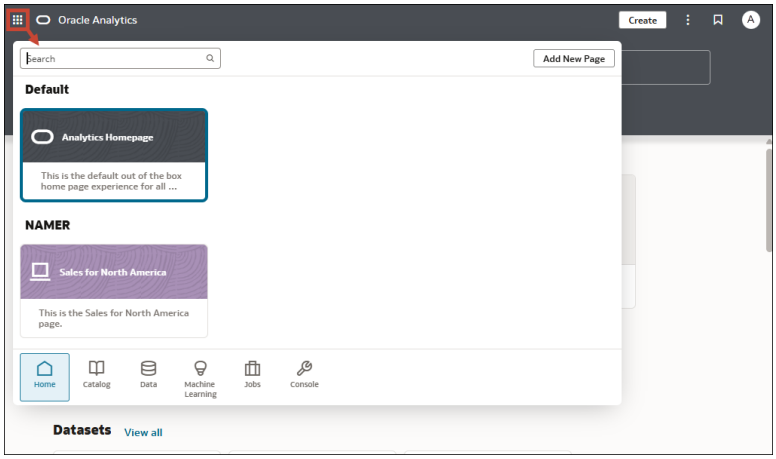
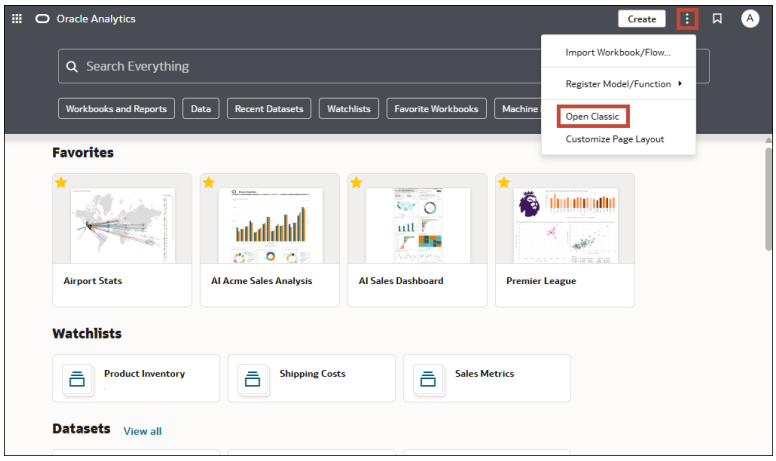
To access your content, click the **Page Menu**(⋮), select **Catalog** and navigate to `Shared Folders/Oracle/PillarName`. Then select the `/Detail Dashboards` or `/Overview Dashboards` folder.

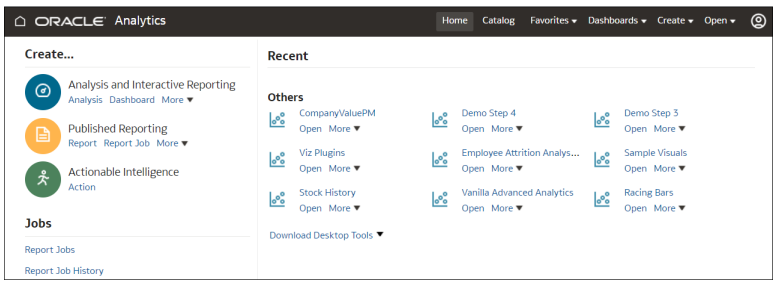
Use the **Navigator** bar to quickly access your content, such as the Home page, Catalog, or Machine Learning.



To work with content for reporting, mobile, actionable intelligence, or pixel-perfect reporting, click the **Page Menu**(⋮) and select **Open Classic Home**. Browse the thumbnails that display on the Home page or use the search bar to locate analytics content.



The Classic Home page opens in a new browser tab or page.



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Where Is My Oracle Fusion Data Intelligence Content?

Oracle Fusion Data Intelligence content is located in the Catalog in the `/Shared Folders/Oracle` directory .

Depending on which product(s) you can access, you'll see some combination of directories for `/Fusion CX`, `/Fusion ERP`, `/Fusion HCM`, or `/Fusion SCM`. In each of these pillar folders you'll see the following:

- **Overview Dashboards** contain overview content based on curated key metrics and oriented on composite visualizations showing high-level business status.

> **Note**
>
> Key metrics are the next generation of legacy key performance indicators (KPIs) and represent an encapsulated, reusable business metric. Key metrics contain a primary metric, other associated metrics and dimensions, calculations, targets, conditional formatting, and filters. Visualizations on the Overview Dashboards are based on these reusable business objects. See Get Started with Key Metrics.

- **Detail Dashboards** contain drill-down content from the Overview Dashboards that provides more granular insights, investigation, and analyses.
- Other folders at this level show topical groupings of content with drill-down workbooks from legacy decks. As such, these are no longer being maintained and will be removed in a future release. You can now find this content in the Detail Dashboards folders.

Customize Your Oracle Fusion Data Intelligence Home Page

You can configure your Oracle Fusion Data Intelligence Home Page to display only the information that is most useful to you.

Video

Video

Sections of content are organized as you edit and create each type of content. The Customize Home Page dialog shows you what you can see by default.

Home Page Configuration Tips

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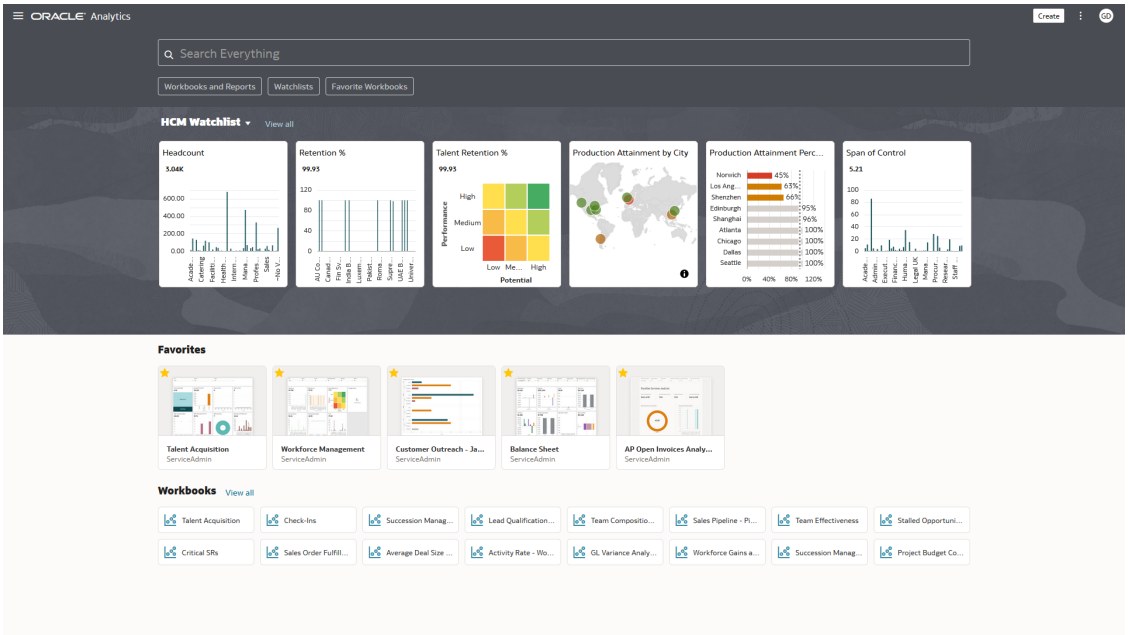

Showing all Oracle Fusion Data Intelligence content on the Home Page can be a lot of information. To simplify your Home Page experience, consider implementing the following suggestions that you can access from the Home Page menu.

Configuration

- In Customize Home Page, hide all content categories except Featured Watchlists, Favorites, and Workbooks.
  - Set Featured Watchlists to 1 Column
  - Set Favorites to Large view and 1 Row
  - Set Workbooks to Small view and 1 Row

Next

- **Featured Watchlists:** Add Visualizations for which you want a thumbnail representation and a link to its parent Workbook to show on the Watchlists. See About Watchlists.
- **Favorites:**Click Favorite for the core dashboards you consistently access. See Where Is My Oracle Fusion Data Intelligence Content?.
- **Workbooks:**Use the Workbooks category to find your most-recently updated workbooks.
- **Navigation Menu:**Add your top-level Workbooks to the Navigation Menu. which can also be used to bookmark core application content. See Begin to Build a Workbook and Create Visualizations.

About Visualizations and Analyses

You use visualizations and analyses to find the answers that you need from key business and analytic data displayed in graphical formats.

Visualizations

Visualizations enable you to dynamically explore multiple datasets in a graphical way, all within a single interface. You can visualize data from many commonly used data sources. Workbooks enable you to organize and share your visualizations.

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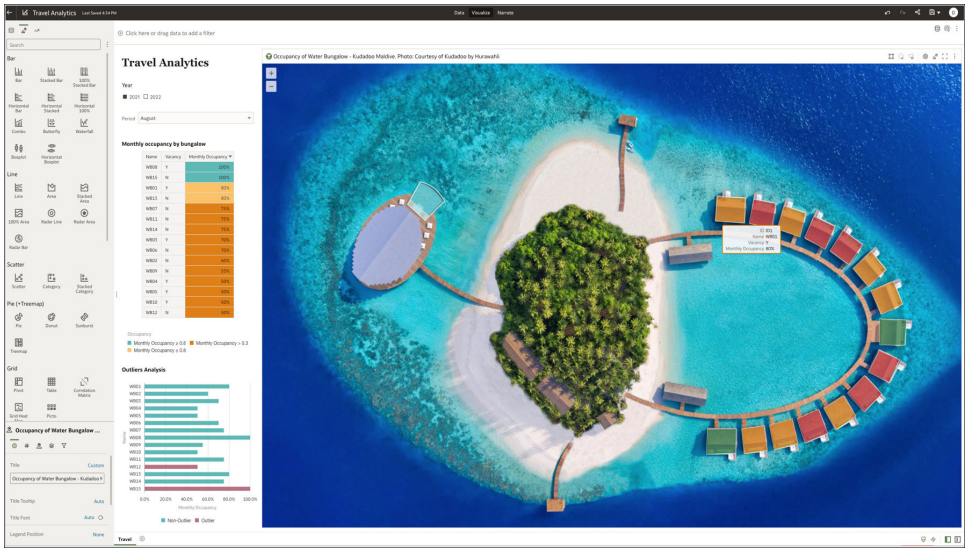
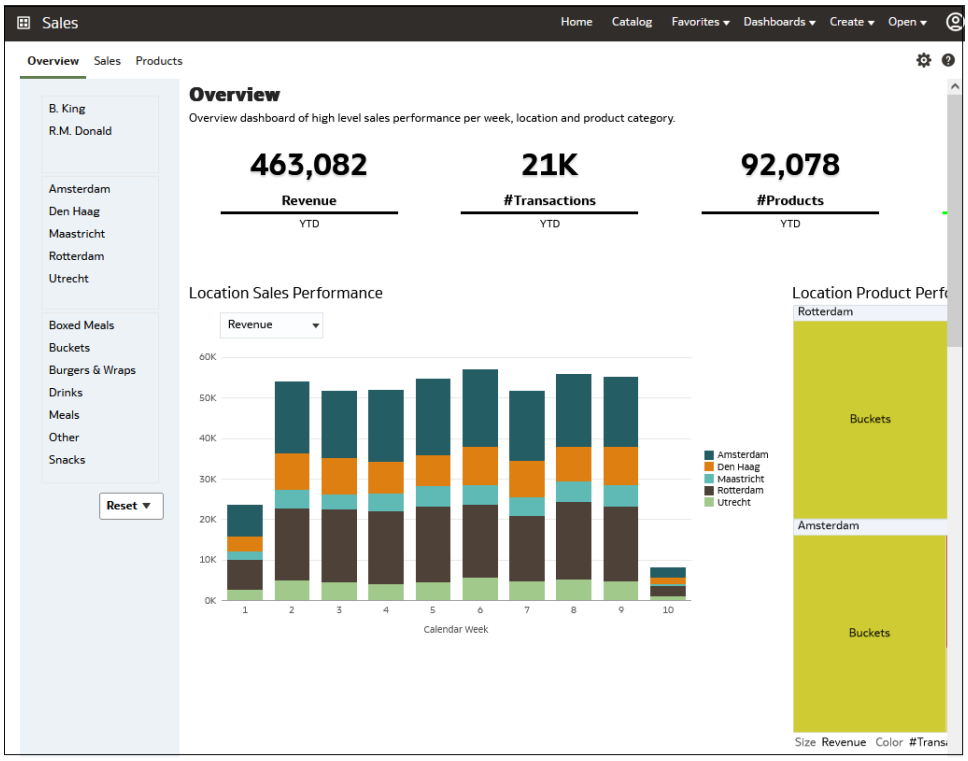


Analyses

Analyses are queries against your organization's data that provides you with answers to your analytical questions. Analyses enable you to explore and interact with information visually in tables, graphs, pivot tables, and other data views. You can also save, organize, and share the results of analyses with others.



Dashboards can include multiple analyses to give you a complete and consistent view of your company's information across all departments and operational data sources. Dashboards provide you with personalized views of information in the form of one or more pages, with each page identified with a tab at the top. Dashboard pages display anything that you have access

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to or that you can open with a web browser including analyses results, images, text, links to websites and documents, and embedded content such as web pages or documents.

When you embed an analysis in a dashboard, the analysis automatically displays the most current data every time you access the dashboard. For example, if you need to see weekly sales performance over a range of products and locations you can run the dashboard to view the most up to date information.

How to Begin Visualizing Data and Building Reports

Users develop or consume content, such as visualizations, analyses and dashboards, to help them glean important information about their business.

Tutorial

Before users can sign in, administrators must have configured the user population and set up any database connections that their users require. After they sign in, users can begin visualizing data right away.

Analyses and dashboards are based on subject area data models. To get started with these, loaders must have loaded data in to connected databases and modelers must have modeled the data. When data is modeled, users can create analyses and dashboards that allow them to glean important information about their business.

Typical Workflow for Visualizing Data

Task	User	More Information
Blend data	Content developers	Blend Datasets Video
Select data sources	Content developers	Begin to Build a Workbook Video
Add data elements	Content developers	Create a Visualization Video Video
Adjust the canvas layout	Content developers	Update Canvas Properties Video Video
Filter content	Content developers and content consumers	Filter Data Video Video
Set visualization interaction properties	Content developers	How Datasets Interact with Filters
Build stories	Content developers and content consumers	Build a Story

Typical Workflow for Analyses and Dashboards

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Task	User	More Information
Create analyses that show the data in views on dashboards. Share these analyses with co-workers, clients, and business partners.	Content developers	Create Your First Analysis
Filter the data in the analyses	Content developers	Create Filters for Columns
Add views to the analysis	Content developers	Add Views
Add interactivity to the analysis.	Content developers	Adding Interactivity to Analyses
Create prompts to drive the display of data in the analyses on dashboard pages	Content developers	Create Prompts
Build interactive dashboards for users to analyze data	Content developers	Create Your First Dashboard
Find and explore content	Content developers and content consumers	Use the Search Bar to Find Your Content

Find and Explore Your Content

On your home page, or any page you have access to, you can use the search bar and Navigator to find and explore your analytics content, such as workbooks, datasets, connections, and data flows.

Video

Topics:

- Use the Search Bar to Find Your Content
- Search Options
- Search Tips
- Access Pages

Use the Search Bar to Find Your Content

Use the search bar to search for the content you're interested in using search terms, content types, and search tags.

> **Note**
>
> You can use advanced search commands in combination with search terms to refine your search results for exact matches, multi-term matches, and field-level matches. See Search Options.

1. On the home page in the search bar, type in a search term and either press **Enter** to search for content or **Shift + Enter** to visualize data.
   a. Specify the full or partial name of what you're looking for. The search is case-insensitive.

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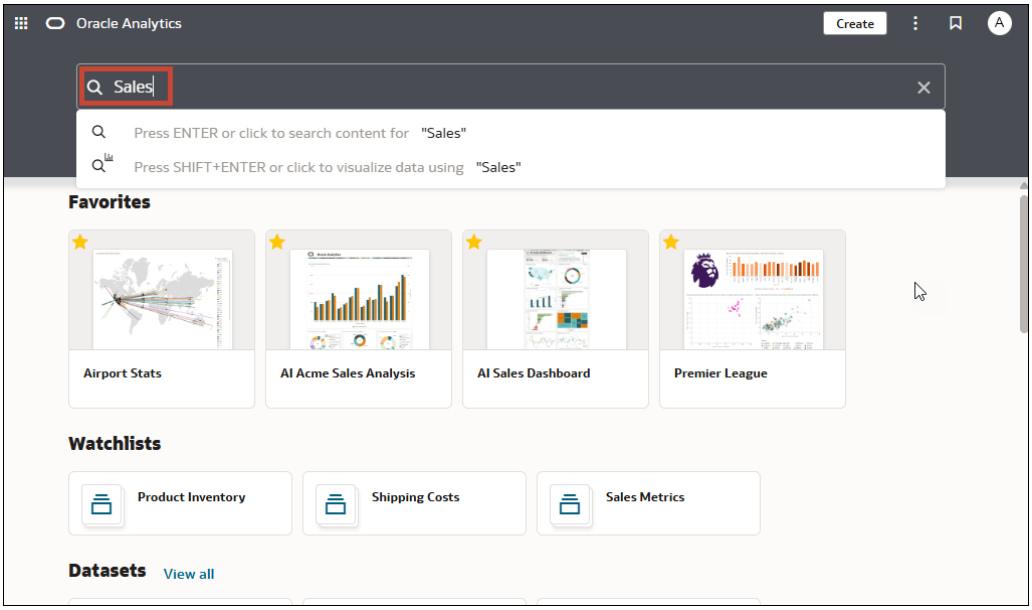

b. (Browser dependent) Click **Dictate** (if displayed) and speak your search term.

2. Click in the search bar for a drop-down list of all content types, such as workbook, dashboard, report, watchlist connection, or model. Click a content type to add it to the search bar. For example:
   - Click **Workbook** to display visualization content
   - Click **Dashboard** or **Analysis** to display reporting content
   - Click **Report** to display pixel-perfect reporting content
   - Click **Watchlist** to display visualization cards grouped in watchlists
   - Click an option in the **Data** category to display connections, datasets, data flows, machine learning models, and other data-related content.
   - To narrow your search, add a free text search term to the search bar. For example, if you've searched on Workbooks, enter `'My Web Analysis'` to display a workbook named My Web Analysis.
3. Add or remove search tags to your search term.
   - Enter `'type:'` or `'filter:'` to display a list of search tags that you can select from.
   - Paste in `'type:'` or `'filter:'` followed by one search term (not case-sensitive). For example:
     - Paste `type:connection` to find your connections. Or, paste `type:workbook` to find your workbooks.
     - Paste `filter:recent` to display your recently accessed content. Paste `filter:favorites` to find content that you've marked as a favorite.
       You can combine the `filter` command with the `type` command. For example, paste in `type:workbook filter:recent`.
4. To clear your search terms, in the search bar click X or select search tags and press delete.

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Search Options

You can enter advanced search commands in the search bar to tailor your search results for exact matches, multi-term matches, and field-level matches.

You can combine multiple search terms with commands to narrow or widen your search. For example, `name:(revenue AND Analysis)`. Search commands and search terms are case-insensitive.

Search Command	Description	Example
`AND`	Enter `AND` between search terms to only display content which contains all the search terms. All forms of `AND`, such as, `and`, `&&`, or entering two search terms together, will return the same results.	Revenue `AND` Forecast Revenue `and` Forecast Revenue `&&` Forecast Revenue Forecast
`OR`	Enter `OR` between search terms to display content that contains any of the search terms.	Revenue `OR` Profit Revenue `or` Profit Revenue `||` Profit
`NOT`	After entering a search term, enter `NOT` followed by more search terms to exclude any content from the results which match the search terms entered after the `NOT` command.	Revenue `NOT` Product Revenue `not` Product
?	Enter the question mark (?) character in a search term as a wildcard to signify a single unknown character. This ensures that the search results include content with words matching the known characters from the search term. For example, searching for st?r would include results containing star and stir.	st?r
*	Enter the asterisk (*) character at the end of a partial search term or root word as a wildcard to find all content that contains the partial search term as well as content that contain variations of the root word. For example, searching for employ* would include results for employee, employment, or employer.	Employ*
`name:`	Enter `name:` followed by a search term to search for content where the search term is part of the Name field.	`name:`Revenue Analysis
`description:`	Enter `description:` followed by a search term to search for content where the search term is contained in the Description field of the content.	`description:`template `desc:`template
`owner:`	Enter `owner:` followed by a search term to search for content where the search term is contained in the Owner field of the content.	`owner:`Admin
`columns:`	Enter `columns:` followed by a search term to search for objects that reference columns matching the search term.	`columns:`product
`text:`	Enter `text:` at the beginning of a search followed by a search term to search for content where the search term is contained in any of the content's fields.	`text:`Revenue

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Search Command	Description	Example
""	Enclose a search term with double quotation marks to search for content that includes phrases or stop words which match the search term.	"Balance Letter" "Research by analysis"
\	Enter the escape character backward slash (\) before each special character (+ - & | ! ( ) { } [ ] ^ " ~ * ? : \) in a search. For example, to search for revenue+city enter `revenue\+city`.	`revenue\+city`

Search Tips

Use these tips to help you find your content.

- **Searching in Non-English Locales** - When you enter criteria in the search field, what displays in the drop-down list of suggestions can differ depending upon your locale setting. For example, if you're using an English locale and enter *sales*, then the drop-down list of suggestions contains items named *sale* and *sales*. However, if you're using a non-English locale such as Korean and type sales, then the drop-down list of suggestions contains only items that are named *sales* and items such as *sale* aren't included in the drop-down list of suggestions.
- **Searching for New Objects and Data** - If you create or save a workbook or create a dataset and then immediately try to search for it, then it's likely that your search results won't contain matches. If this happens, refresh your browser. If you still can't find the new object or data, then wait a few minutes for the indexing process to run, and retry your search. Users can access only the data they've been given permission to access.

Access Pages

Use Navigator to access all pages that have been shared with you, or that you've created.

For information about creating, sharing, and modifying pages, see Create and Share Pages.

1. On your home page, click **Navigator** .
2. Type the page name into the search bar to find a page, or scroll through the pages that are shared with you.
3. Click a page tile to open the page.

About Watchlists

Watchlists provide quick access to visualizations that you access most frequently. When you create watchlists, they're displayed in the Featured Watchlists area and the Watchlists section on the home page.

Video

A watchlist enables you to quickly view the visualizations that matter, without having to search through multiple workbooks to locate those visualizations. Each watchlist displays visualization cards that represent data in a workbook visualization, and you can open a visualization directly from the watchlist.

If you don't have any watchlists on your pages, you can create one. See Create a Watchlist.

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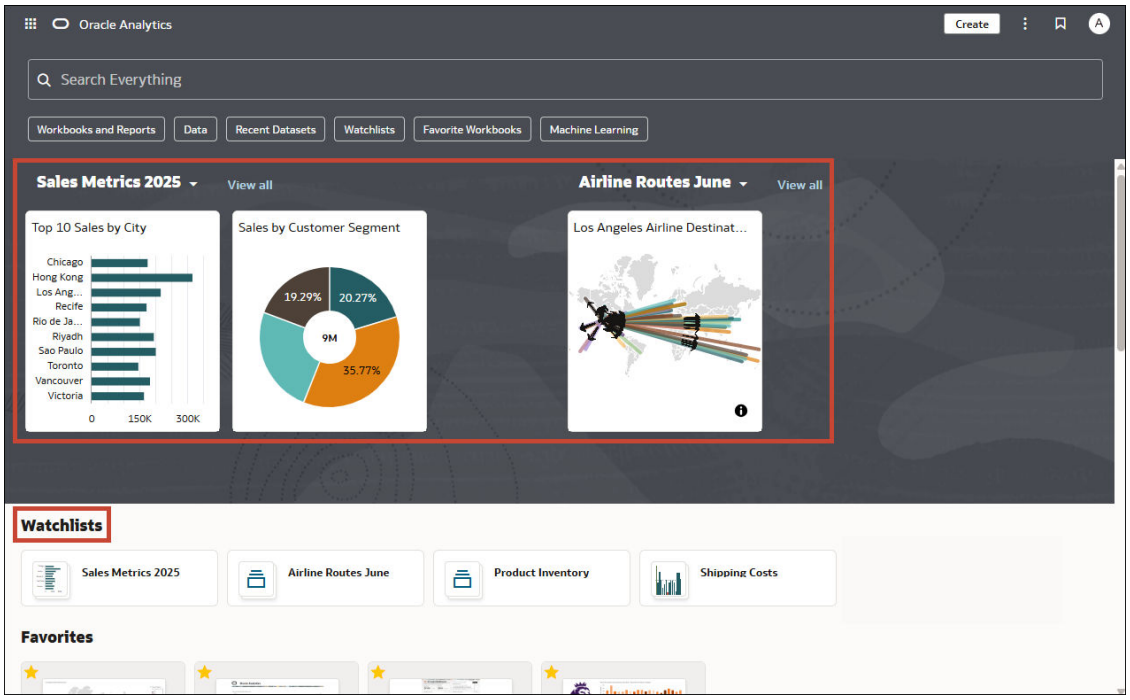
You can share any watchlist you've created with other users and roles. See Share a Watchlist.



Create a Watchlist

You can create a watchlist by adding visualizations from one or more workbooks.

You create watchlists to group together the most popular visualizations and display them as visualization cards. The visualization cards enable users to view and access the data that matters without having to search each time in multiple workbooks.

1. On the Home page, hover over a workbook, click **Actions**, then select **Open**.
2. Click **Edit** to enter author mode.
3. Hover over a visualization and click **Add to Watchlist**.



4. Click **New Watchlist**, enter a new watchlist name, and click **Add**.

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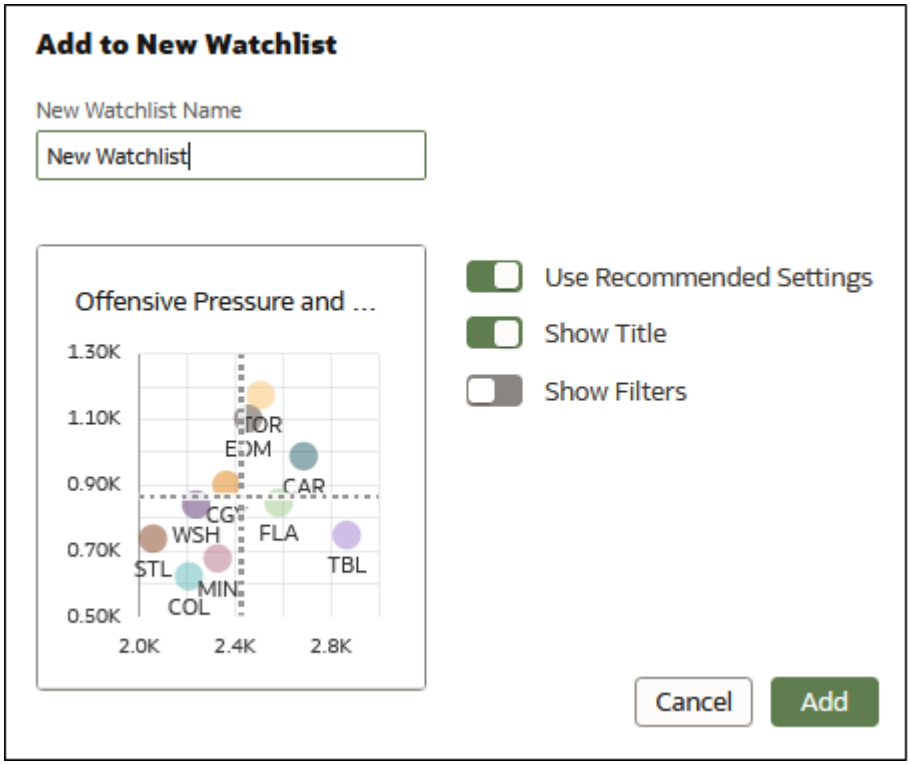

Delete a Visualization Card from a Watchlist

You can remove visualization cards from a watchlist.

1. On the Home page, click a watchlist to open it.



2. Click **Actions** for the visualization card that you want to remove from the watchlist and select **Delete**.

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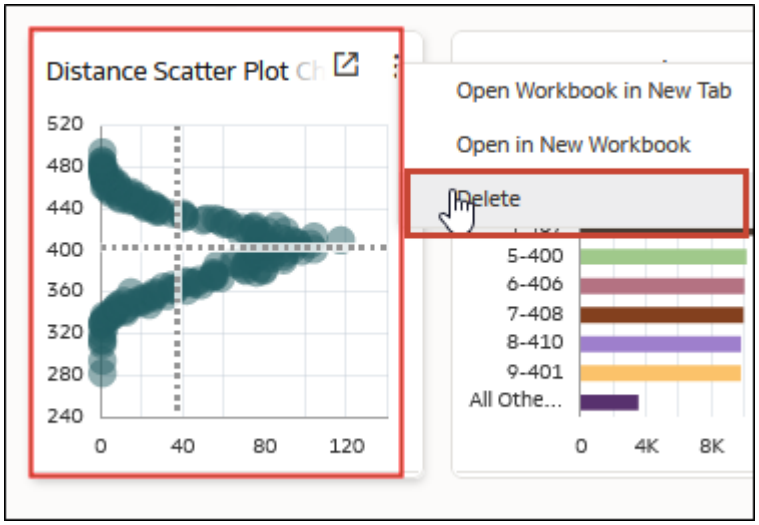
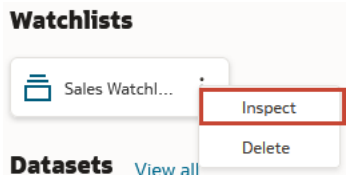


3. Click **Yes** to remove the selected visualization card from the watchlist.

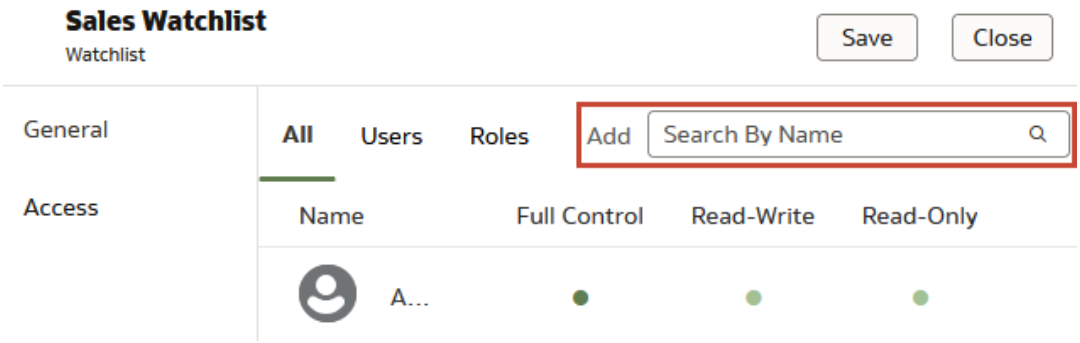
Share a Watchlist

As the owner of a watchlist, you can share the list with others.

1. On the Home page, select your watchlist and click **Actions** then **Inspect**.



2. Click **Access**.
3. In **Add**, enter a user name or role and click Search. Click a name or role from the results to share your watchlist.



4. Click the access control level for the user or role. Click **Save**.
5. Review the listed artifacts you're required to share for a user to view the watchlist. Select whether or not to share these artifacts, then click **Apply**.
6. Click **Close**.

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Providing Custom Groups of Content

Custom Groups enable you to provide quick access to content that you can share with other users.

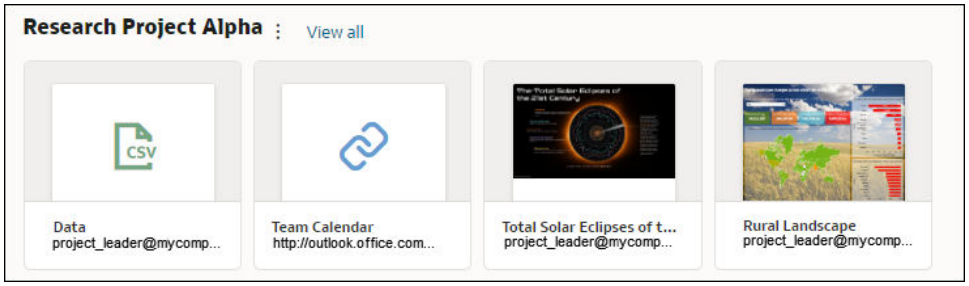
Topics:

- What Are Custom Groups?
- Create and Share Custom Groups of Content

What Are Custom Groups?

Custom groups enable you to display your own choice of items grouped together under a custom heading on a page.

For example, you might display a custom group named Research Project Alpha, containing links to data files, workbooks, and a team web calendar.



See Create and Share Groups of Content.

After you've created a custom group, click the Page Menu (⋮) next to the custom group name to access these options:

- **Add Items** - Add links to analytics content such as workbooks, reports, and datasets. You can add multiple items at the same time.
- **Add URL Item** - Add links to useful web pages. For example, you might share a team calendar by specifying `http://example.com/myteamcalendar`. To display the link as an image, click **Thumbnail** and choose a graphic file.
- **Inspect** - Rename the group and review the group owner using the **General** panel, and share it with other users using the **Access** panel.
- **Delete Custom Group** - Remove the custom group.

You can also click **View All** to drill into the group. Here, you can edit the group name and add content links.

Create and Share Custom Groups of Content

As a content author, you create custom groups to provide quick access to content that you can share with other users. For example, if you're collaborating with co-workers you can create and

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share a custom group containing specific workbooks, watchlists, dashboards, or web pages that you're all interested in.

You can configure how custom groups display on a page . See Customize the Layout of a Page.

1. On your home page, hover over a workbook, dataset, dashboard, or visualization, click **Actions**, select **Add to Custom Group**, and then select **New Custom Group**.
2. Enter a name, and click **Add** to create a custom group.
3. Add another item to your group by hovering over the item on the page, click **Actions**, select **Add to Custom Group**, and select the name of the group to which you want to add the new item, then click **Add**.

   Repeat this step for each item that you want to add to the custom group.
4. To configure access for users and roles to view, use, or share the group with others, click **Page Menu** (⋮) next to the group name , select **Inspect**, then **Access**, select who has access, then click **Save**.

Use Template Workbooks for Performance Improvements

When you're filtering data in workbooks using subject areas, you can use template workbooks as a starting point to incorporate the most useful filters for a particular subject area.

Including essential filters is one of the best ways of improving workbook performance.

The templates are organized by pillar and content category, and are precisely named based on the primary subject area that the workbook references.

1. From the Catalog, navigate to `/Shared/Oracle/pillar_name/Template Workbooks`.
2. Open the template workbook that uses the subject area you're analyzing.

   For example, navigate to `Shared Folders/Oracle/Fusion HCM/Template Workbooks/Performance Management and Check-Ins` and open `HCM - Performance Management`.
3. Click **Edit**, then click **Save As**, and enter a descriptive file name to work with an independent copy of the template.
4. Delete the text and images, and any filters you don't need.

   Both workbook filters and dashboard filters are included in the template examples. You'll likely only need to keep one type.
5. Use the new workbook based on the template to build your analysis.

Analyze a Workbook for Performance Improvements

You can automatically analyze a workbook's structure, queries, and configurations to gain insight into how you can optimize the workbook's performance.

1. On the Home page, hover over a workbook, click **Actions**, then select **Open**.
2. Click **Edit** to enter author mode.
3. Click **Custom Workbook Extension**  and then click **Workbook Check-up**.

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The Workbook Check-up dialog shows you a list of suggestions to improve the performance of the workbook.

4. To download the Workbook Check-up Report, click **Download Report.**

   The workbook report is saved to your default download directory as a .csv file.

Explore Oracle Fusion Data Intelligence Content

Use natural language to explore business content across Oracle Fusion Data Intelligence analytics applications, including subject areas, metrics, and workbooks.

1. While authoring a workbook, click **Custom Workbook Extension**  and then select **Content Explorer**.

   A new browser tab opens, where you can ask questions about the available prebuilt content.

   > **Note**
   >
   > Content Explorer subject areas aren't available for ad hoc reporting.

2. Type your question in the text box at the bottom of the page. For example:
   - What content is available with AP Aging?
   - What metrics are available for Inventory?
   - What subject areas relate to Opportunity?
   - Show workbooks related to absence

   > **Note**
   >
   > You can also use the **Content Explorer - Fusion Data Intelligence** workbook to explore and understand business content.

View Content on Mobile Devices

You can access your analytics content with a mobile device.

To access your content (dashboards and analyses, workbooks and visualizations), use the browser on your mobile device.

Access and Interact with Your Oracle Analytics Content On the Go

You can access and interact with your Oracle Analytics content on the go using the Oracle Analytics for Android and iOS mobile applications.

These applications enable you to:

- Search, open, and interact with your Oracle Analytics content.
- Use the Workbooks section to:
  - View and interact with your data visualization workbooks from Oracle Analytics.

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  - Create workbooks directly from your mobile device.
  - Share workbooks with your colleagues.
- Use the Datasets section to:
  - Upload a data file, such as a spreadsheet, directly from your mobile device.
  - Create a new workbook from the existing Oracle Analytics datasets.
  - Start a dataset and workbook from your favorite apps, including email attachments.
- Find all your classic content and open it in a web browser directly from the app.

The Oracle Analytics for Android and iOS apps are available from the Google Play Store and Apple App Store.

To log into the apps, see:

- Oracle Analytics for Android
- Oracle Analytics for iOS

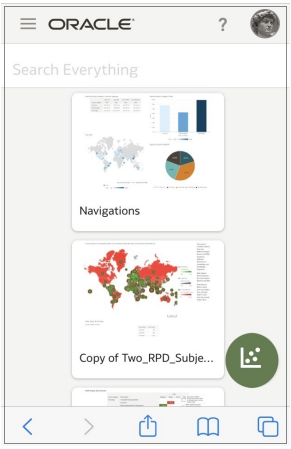
To use the Oracle Analytics for Android and iOS apps, see the Help system available within the mobile applications.

Explore Data on Mobile Devices Using A Built-in Browser

Explore your data at your desk and on the move using the browser in mobile devices on Android, Windows, or Apple operating systems.

Using the browser in mobile devices, you can view analytics content (dashboards and analyses, workbooks and visualizations). You can also create workbooks and visualizations using a simplified editor.

- Log into Oracle Analytics to get to the Home page.



- Tap a workbook or visualization to display the content.

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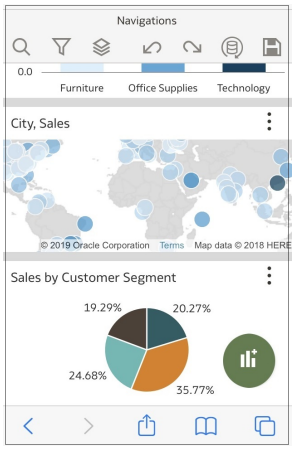
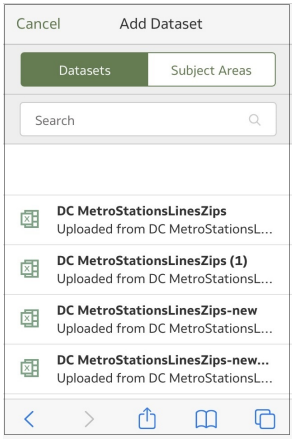


- Tap the add icon  to create a visualization. You see the simplified visualization designer.



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4

Get Started with Visualizing Data (For Consumers)

This topic describes how to get started with accessing analytics content that's been shared with you.

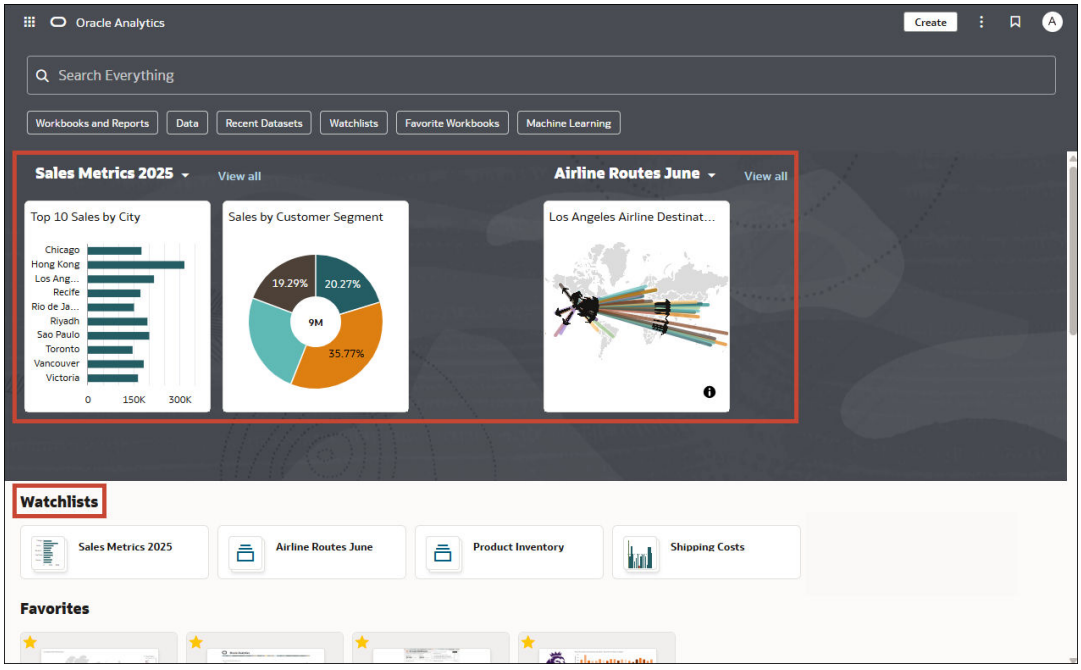
Topics:

- Find and Explore Analytics Content That's Been Shared With You
- Sort, Drill, and Select Data in Visualizations
- Create a Watchlist
- Add a Filter to a Workbook (as a Consumer)
- FAQs for Analytics Consumers

Find and Explore Analytics Content That's Been Shared With You

As a consumer, you have access to pages, workbooks, visualizations, and other analytics content that content authors have shared with you. The home page is where you start in accessing your analytics content.

- Workbooks - These are collections of visualizations that've been shared with you.
- Watchlists - These are named areas in your home page that display cards for visualizations that've been shared with you.



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- Datasets - These are data stores that've been shared with you.

See the following topics for more information about finding and accessing content:

- Use the Search Bar to Find Your Content
- Explore Your Content with Navigator

Sort, Drill, and Select Data in Visualizations

You can narrow your focus to explore certain aspects of your data by sorting, drilling, and selecting data.

1. On the Home page, hover over a workbook, click **Actions**, then select **Open**.
2. Select a visualization and click **Menu**.
3. Select one of the following:
   - Click **Sort By** and then select **Custom**, or click **Sort** in the visualization tool bar to display the Sort Order dialog where you can sort one or more attributes in a visualization. You can create and view sorts, define sort attributes, arrange the sort order for multiple sorts, and view and resolve sort conflicts. You can also sort an attribute by a measure column that isn't used in the visualization.
     If the table includes subtotals or contains a dimension, then all column sorts on columns after the subtotal or dimension, are sorted in the subtotal group.

     If you're working with a table view with multiple sorts, then the system always sorts the last column that you sorted first. In some cases where specific values display in the left column, you can't sort the center column. For example, if the left column is Product and the center column is Product Type, then you can't sort the Product Type column. To work around this issue, swap the positions of the columns and try to sort again.
   - Click **Drill** to create a drill to a data element, and to create a drill through hierarchies in data elements, for example you can create a drill to weeks within a quarter. You can also create drills using multiple data elements. For example, you can select two separate year members that are columns in a pivot table, and drill into those members to see the details.
   - Click **Drill to [*Attribute Name*]** to directly drill to a specific attribute within a visualization.
   - Click **Keep Selected** to keep only the selected members and remove all others from the visualization and its linked visualizations. For example, you can keep only the sales that are generated by a specific sales associate.
   - Click **Remove Selected** to remove selected members from the visualization and its linked visualizations. For example, you can remove the Eastern and Western regions from the selection.

Create a Watchlist

You can create a watchlist by adding visualizations from one or more workbooks.

You create watchlists to group together the most popular visualizations and display them as visualization cards. The visualization cards enable users to view and access the data that matters without having to search each time in multiple workbooks.

1. On the Home page, hover over a workbook, click **Actions**, then select **Open**.
2. Click **Edit** to enter author mode.

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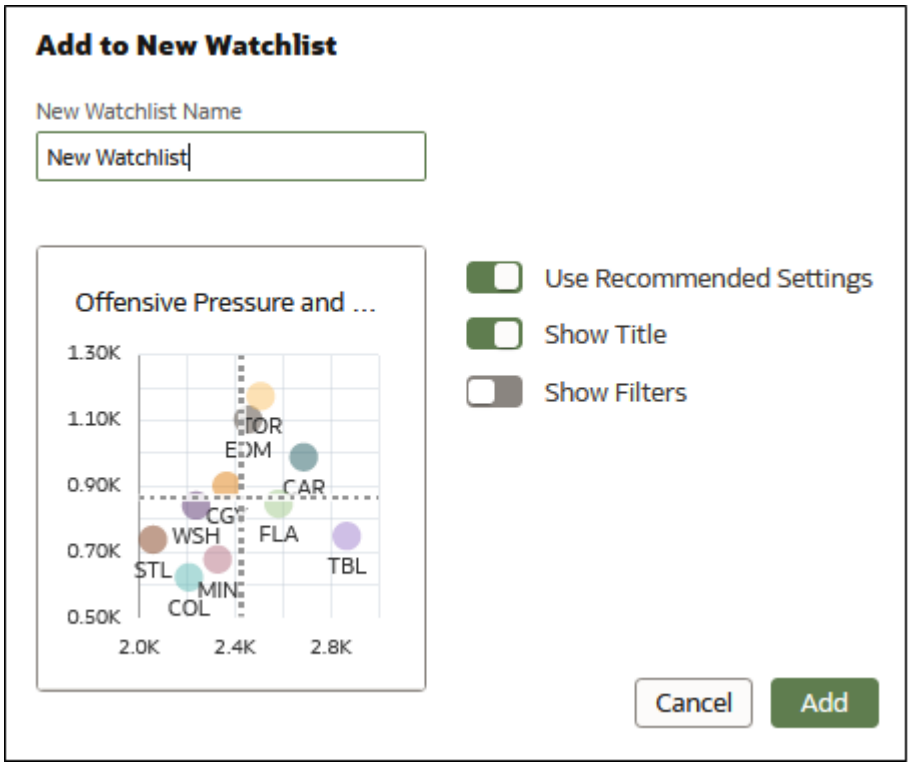
3. Hover over a visualization and click **Add to Watchlist**.



4. Click **New Watchlist**, enter a new watchlist name, and click **Add**.



Add a Filter to a Workbook (as a Consumer)

Add your own filter to focus on a particular area in your data. You can apply filters to all visualizations on a workbook canvas.

1. Hover over the visualization that you'd like to filter.
2. Click + above the visualization (top left).
3. Select a data point (for example, Month) and add the areas you'd like to focus on to the **Selections** list (for example, January, February, and March).

FAQs for Analytics Consumers

This topic provides answers to frequently asked questions for workbook consumers.

I can't access the workbook options that I need - what should I do?

Contact the workbook owner and ask them to provide you with the options that you need. For example, you might need options to refresh data, print, and share to Slack.

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How do I forward my workbook in an email?

Hover over a visualization, click **Menu** ⋮, then click **Export** , and select **Email**.

How do I filter my workbook data?

Click one of the filters along the top of a visualization and use the filter dialog to specify the areas you want to focus on. For example, you might click a Month filter and select January, February, and March.

You can also create your own filter by clicking **Add Filter** (**+**) top left above a visualization.

How do I print a workbook?

Click **Export** at the top of the workbook in the right-hand corner, then click **Print**.

How do I print a visualization?

Hover over a visualization, click **Menu** ⋮, then click **Export** , and select **Print**.

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5

Get Started with Key Metrics

Key metrics help you analyze your data to create better performance against your business goals.

Key metrics are associated with datasets and subject areas to allow you to study business performance consistently across multiple sets of analyses.

Topics:

- About Key Metrics
- Create a Key Metric
- Add a Related Column to a Key Metric
- Add Conditional Formatting to a Key Metric

About Key Metrics

Key metrics are a logical relationship of a measure and the semantics of that measure to create a key performance indicator (KPI) in a dataset or subject area.

Key metrics are associated with and follow the dataset or subject area so they're available to all users of that data. You can apply key metric expressions to the reference columns in a dataset or single subject area. You can drag and drop measures from the Data Panel to the calculation area to build the key metric, and add related columns of measures, dimensions, or attributes based on the key metric to glean details about the key metric itself. When you apply a key metric, it behaves just like any other measure.

Key metrics provide useful insights to your data that dynamically update as the data changes. By using key metrics, you can study details around KPIs to more definitively determine how to adjust business practices and achieve your business goals.

When you add conditional formatting to key metrics, you can visually highlight the changes in your measures in your analytic visualizations. You can apply conditional formatting to any columns within the key metric, or you can apply conditional formatting to the dataset or subject area the key metric is attached to. If you have a group of related subject areas, each subject area can have its own set of key metrics. Because the conditional formatting is applied to the key metric itself, you always see consistent and up-to-date visualizations of your business goals.

You can search for key metrics just like subject area measures or columns, however you can't search for the related columns key metrics.

Key Metrics Limitations

- Key metrics can include other key metrics in expressions when they're within the same top-level key metric. For example, a related column can refer to the top-level key metric, and the top-level key metric can refer to the child metric, but they can't rely on each other to provide the data.
- Key metrics are secured at the dataset level. For subject areas, key metrics are secured at the same level as the column level as defined in the RPD.

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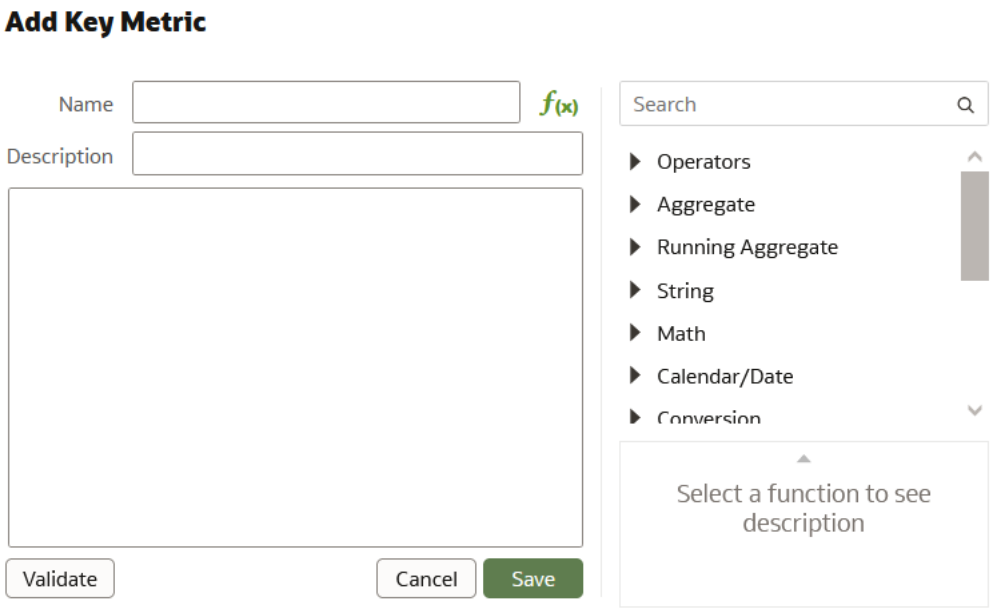
- Key metrics aren't attached to a workbook and can't use workbook calculations.
- Key metrics converted from existing KPIs don't have the following attributes:
  - Owner
  - Tags
  - Target goals
  - Trend goals
  - Data blending
  - Diff view
  - Site-level personalization of KPIs

Create a Key Metric

You create a key metric within a dataset, then add measures and columns to enhance the analysis.

Video

1. From the Data page, open a dataset.
2. In the Data Panel, right-click **Key Metrics** and select **Add Key Metric**.



3. Enter a **Name** and **Description** for the key metric.
4. Drag and drop measures and dimensions to create a calculation representing the key metric you're building. See Get Started with Calculations.
5. To check your calculations for errors, click **Validate**.
6. When you're done, click **Save**.

   A green dot on the name of the key metric means it's not saved.

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Add a Related Column to a Key Metric

You can add related columns of dimensions and measures to a key metric to expand the attributes around your analysis.

You need to create a key metric so that you can add a related column to it.

1. Right-click the key metric in the data area and select **Add Related Column**.

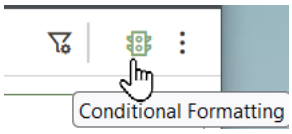
   The Add Related Column dialog opens.

2. Drag and drop the dimensions and measures to the calculation area to create the related column.
3. When you're done, click **Save**.

Add Conditional Formatting to a Key Metric

You can add conditional formatting to a key metric so the visualization automatically highlights the areas of interest.

1. In the Visualizations Panel, drag and drop the type of visualization you want to use to the canvas.
2. Drag and drop the key metric to the area of the Grammar Panel that makes sense for your visualization. Drag and drop other dimensions and measures to the areas that make sense for them too.
3. Click **Conditional Formatting** then click the tab representing the area you want to format - **Dataset**, **Workbook**, or **Visualization**.



4. Enter a name for the formatting rule and select the measure you want to use from the Key Metrics folder.
5. Select a preset, or select the parameters you want to compare from the drop down lists.
6. To add a new formatting rule, click **Add New Rule**.
7. Save the workbook.
8. Right-click the visualization, select **Conditional Formatting**, and select the rule you want to apply.

   You can apply multiple rules to the same visualization.

9. When you're done click **Save**.

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6

Build Analytical Applications

The Oracle Fusion Data Intelligence applications currently leverage a smaller number of Overview Dashboards that provide high-level summary information. These can drill down to a larger number of Detail Dashboards. Each of the Detail Dashboards provide more in-depth analysis on facets of the business.

This section describes details of how you can construct Oracle applications and will be useful for building new content that looks similar and can extend the prebuilt content.

Topics:

Overview Dashboards

- About Overview Dashboards
- Use Filters in Overview Dashboards
- Use Parameters in Overview Dashboards

Detail Dashboards

- About Detail Dashboards
- Create a Detail Dashboard
- Use Parameters in Detail Dashboards
- Add Filters to Detail Dashboard

Tracking Status with Key Metrics

- Add Targets to Key Metrics
- Add Conditional Formatting for Metric Status

About Overview Dashboards

The Overview Dashboards typically present a limited number of metrics centered on a business topic that show the state of the business.

Composite visualizations on these depict an aggregate number for a specific business metric alongside a more detailed visualization that further illuminates that metric usually over time. These metrics are underpinned by their respective key metrics contained in a subject area or dataset. Key metrics are reusable across content and provide an opportunity for a common, shared business understanding.

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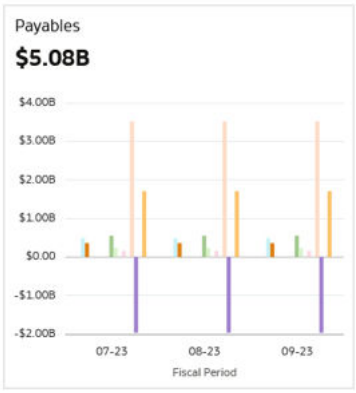
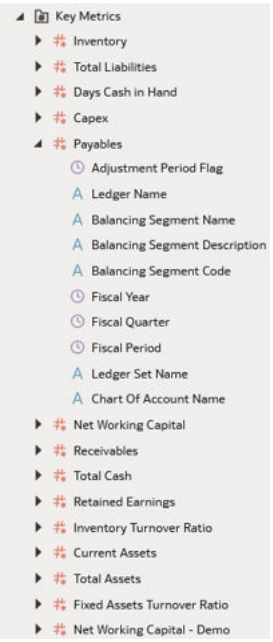
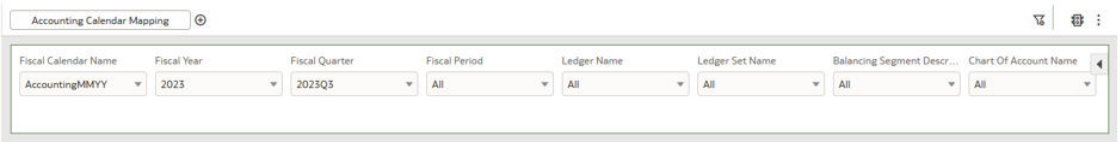




Use Filters in Overview Dashboards

In the Overview Dashboards, you can create the filters that are meant to be seen and used by end users as Dashboard Filters.

The Overview Dashboards use Workbook Filters (seen in the top Filter Bar) behind the scenes.



To simplify consumption of business content, you can hide the Workbook Filters by turning the Filter Bar off in the Present Mode for the end user.

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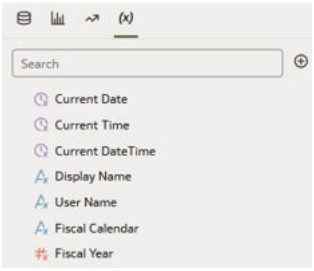
The Dashboard Filters may use their default behavior to show the values of the subject area column or may be populated by parameters.

Use Parameters in Overview Dashboards

The Overview Dashboards use parameters to populate variables using data referenced in the subject areas.

Beyond the default set of parameters provided, specific parameters in the prebuilt content have been built to dynamically request values for columns like “Fiscal Calendar” or “Fiscal Year.” This allows the Overview Dashboards to avoid defaults and retrieve appropriate values for users.



Dynamic custom parameters on the Overview Dashboards are populated with logical SQL code. For example:

- Fiscal Calendar

```
SELECT  "Financials - GL Balance Sheet"."Time"."Fiscal Calendar Name" from
"Financials - GL Balance Sheet" FETCH FIRST 1
      ROWS ONLY
```

- Fiscal Year

```
SELECT  "Financials - GL Balance Sheet"."Time"."Fiscal Year"  FROM
"Financials -
      GL Balance Sheet"  WHERE ("Financials - GL Balance
Sheet"."Time"."Trailing Year Number" = 0 AND "Financials - GL Balance
      Sheet"."Time"."Fiscal Calendar Name" IN (@parameter("Fiscal
Calendar")(''))  )
```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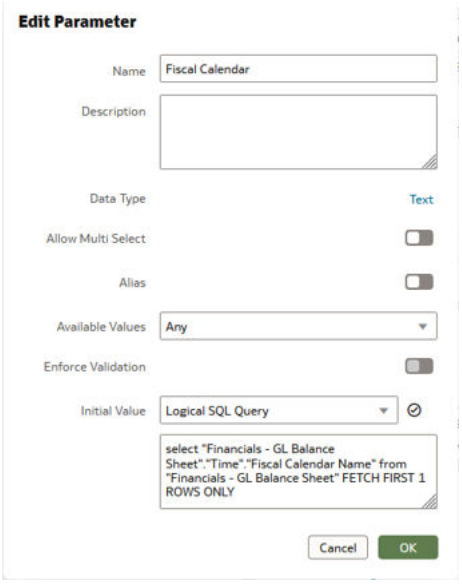
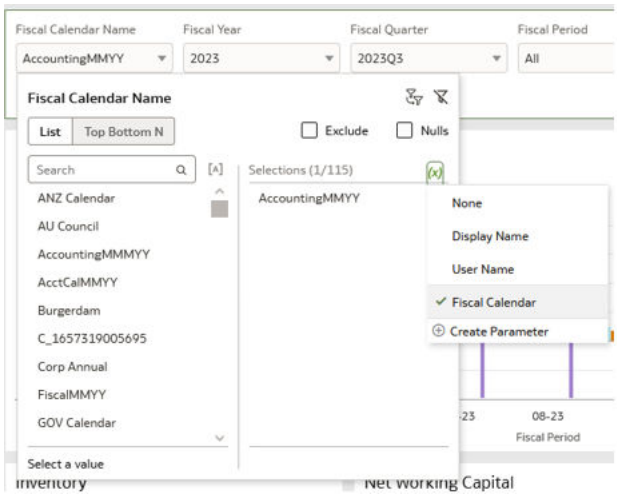


These parameters are then used to populate filters and default values on the Overview Dashboards.

Parameter Binding

A dashboard filter can be bound to a parameter. In this case, the “Fiscal Calendar Name” dashboard filter is then populated by the “Fiscal Calendar” parameter.



Role-playing Parameters

Usually a filter affects only one column, but in the case of role-playing parameters the filter effectively "impersonates" multiple columns. In some cases an Overview Dashboard is built so that the values selected in a single dashboard filter can be propagated to more than one subject area column. This works best if each of these columns has the same set of values. For this use case, a Workbook Filter is used to map multiple columns to a parameter. For example, in this case the “Accounting Calendar Name” columns will be populated by the “Fiscal Calendar” parameter. As mentioned in the "Parameter Binding" section, the “Fiscal Calendar” parameter also populates “Fiscal Calendar Name.” Using this dashboard filter would update both columns. Here's the Workbook Filter where the mapping is specified:

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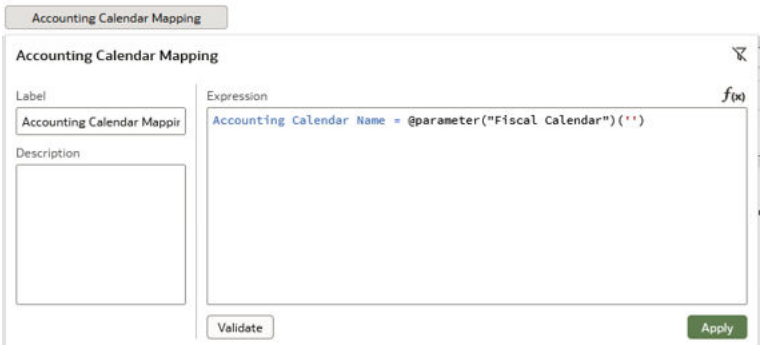

About Detail Dashboards

The Detail Dashboards are targeted from the Overview Dashboards.

They typically extend workflows that begin as high-level analysis in the Overview Dashboards and provide more analytical detail on a particular topic. For example a “Payables” tile might drill down to a “Payables Analysis,” or a “Headcount” tile might drill to a “Workforce Composition” or “Turnover” Analysis.

Create a Detail Dashboard

Data Actions describe the linkages between Overview and Detail Dashboards and they are built to designate the desired context to be shared between workbooks.

You can also create links that ignore any context from the parent Overview Dashboard.

Use Parameters in Detail Dashboards

You can duplicate the parameters from an Overview Dashboard and use them as a channel to pass context between the workbooks.

Ensure that you use the same parameter name and data type while duplicating. Also, ensure that the data action specifies the parameters that should be included in the context.

Pinning Parameters to Dashboard Filters

To maintain the value of a dashboard filter across canvases within a workbook, you can use the parameters to replicate a “pinning” behavior seen in Workbook Filters. In essence, the “pinning” behavior creates an empty parameter and then each of the dashboard filters use "Parameter Binding" to shuttle that value across the dashboard filters on multiple canvases.

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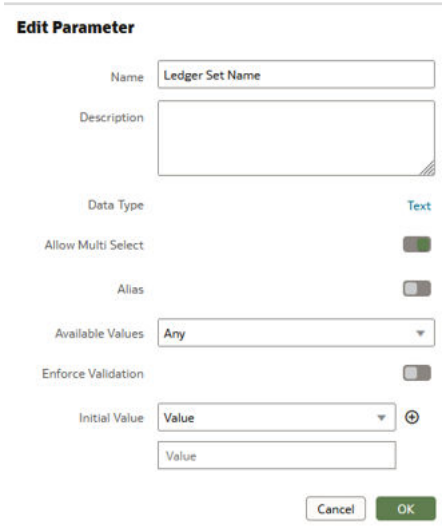


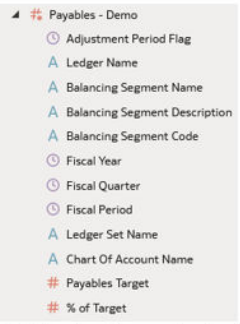
Add Filters to Detail Dashboard

Like the Overview Dashboards, you can create end-user-oriented filters on the Detail Dashboard as Dashboard Filters and hide the Workbook Filters at run-time.

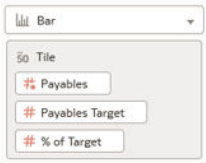
Add Targets to Key Metrics

The Migration Utility might populate targets in key metrics and you can add them manually.

All users will see a shared target that exists as a column in a key metric; and it will abide by user and data-level security rules. Typically, this target metadata references a column directly or a calculation based on data.



*Related columns/calculations for **Target** and **% of Target***



***Target** and **% of Target** as referenced in the Grammar Pane*



As seen in the Composite Viz.

Add Conditional Formatting for Metric Status

Conditional formatting set on the key metric column and persisted at the dataset level is portable with the key metric. This means it can be shown whenever you use the key metric.

In this example, three statuses are described for Payables that are saved with the dataset.

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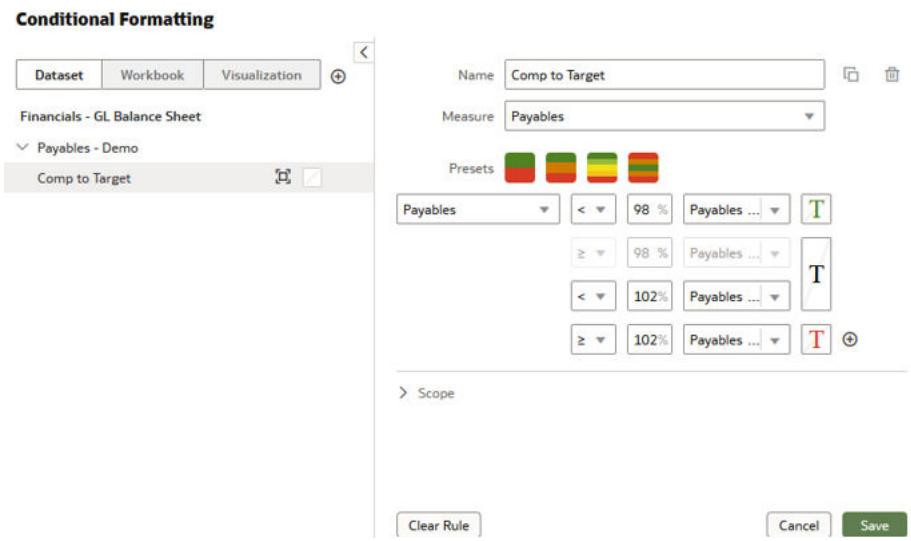

The prebuilt tiles use these hexadecimal colors to show status:

- #d63b25 = Critical
- #ac630c = Warning
- #508223 = Good

You may adopt these for consistency with the prebuilt content. You can extend this scheme or create your own.

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7

Where Do I Go for More Information?

There are plenty of books, videos, and other resources available. Watch short videos and explore the documentation to learn more.

Topics:

- How Do I Visualize Data?
- How Do I Share Analytics Content?

How Do I Visualize Data?

Refer to the following documentation to help you visualize data.

Learn how to...	Audience	Edition	More Information
Upload data	Content authors	All	Upload and Share Data
Connect to online data sources	Content authors	All	Connect to Data
Visualize the data in different ways	Content authors	All	Find and Explore Your Content Video Video
Use workbook canvases to create presentation flows as dashboards for users	Content authors	All	Build Presentation Flows and Dashboards Video
Curate data from multiple sources	Content authors	All	Blend Data
Use machine learning to analyze data	Content authors	All	Analyze Data with Machine Learning
Use data flows to curate datasets	Content authors	All	Create Datasets Using Data Flows
Import, export, and convert visualizations	Content authors	All	Import, Export, and Convert Workbooks
Optimize workbook performance	Content authors	All	Analyze a Workbook for Performance Improvements

How Do I Share Analytics Content?

Refer to the following documentation to help you share the content you create in Oracle Analytics Cloud.

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Learn how to...	Audience	Edition	More Information
Share content	Content authors	Professional and Enterprise	Share Your Content with Others Video Video
Email reports	Content authors	Enterprise	Email Reports and Tracking Deliveries
Move data visualizations	Content authors	Professional and Enterprise	Migrate Content to Other Catalogs
Move reports and dashboards between catalogs	Content authors	Enterprise	Migrate Content to Other Catalogs
Embed content	Content authors	Professional and Enterprise	Embed Content in Other Applications

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A

Frequently Asked Questions

- How do I check which release of Oracle Fusion Data Intelligence I'm using?
- Why are my Oracle Fusion Data Intelligence bookmarks different?
- How do I know if a visualization has links?
- Can I customize the axis name on a visualization?
- Can I change the number representation format on a visualization?
- Can I add data labels in a bar graph?

Oracle Fusion Data Intelligence

How do I check which release of Oracle Fusion Data Intelligence I'm using?

From the Console page, select **Release Updates**. On the Release Updates page, you'll see the version number for the application release. For example, 24.R1.P1.

Why are my Oracle Fusion Data Intelligence bookmarks different?

The URLs for various parts of Oracle Fusion Data Intelligence change from time to time. Refresh your bookmarks if they appear to be out of synchronization with the interface.

How do I know if a visualization has links?

When you click **Actions** on the visualization, look for a linked report at the bottom of the menu.

Can I customize the axis name on a visualization?

Yes. From **Actions**, click **Customize**, then in visualization Settings, click **More Options** and change the **Subtitle**.

Can I change the number representation format on a visualization?

Yes. You can edit the business metric to change the **Measure** property to Number and disable **Abbreviate**.

Can I add data labels in a bar graph?

Yes. From **Actions**, click **Customize**, then in visualization Settings, change the **Plot Area** values.

Oracle Analytics Cloud

Why do some users have read permissions that I didn't assign?

If you save or move a report, dashboard, or project containing an artifact (for example, a dataset) to a shared folder, and when prompted you share the related artifacts, then Oracle

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Analytics assigns the artifacts read permissions for the users who can access the report, dashboard, or project in the shared folder.

Without the read permission, users won't be able to access the correct content when they open the report, dashboard, or project.

Can I delete data files that I uploaded to my Cloud service?

Yes. You can delete data files from the Data Sources page. See Delete a Data Source Connection. You can also delete data files in projects and analyses. See Delete a Dataset.

Can I delete data files uploaded by a deleted user from my Cloud service?

Yes. Reinstate the deleted user, then delete the dataset files.

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Troubleshooting

- I see a performance decrease when using Mozilla Firefox
- I can’t access a particular analysis, dashboard, or project
- The analysis or project is running very slowly
- I can’t access certain options from the Home page
- I see a performance decrease when using Mozilla Firefox
- My analysis or project times out
- I can’t see data in an analysis or project
- I can’t access a particular analysis, dashboard, or project
- I can’t find an analysis, dashboard, or project
- The analysis or project is running very slowly

When I log in, Oracle Fusion Data Intelligence doesn't load properly.

When you log out, be sure to close all Oracle Fusion Data Intelligence sessions and close your browser before logging in as another user. You can have one session of Oracle Fusion Data Intelligence open at a time within the same browser.

I see a performance decrease when using Mozilla Firefox.

If you use Mozilla Firefox and notice a decrease in the performance of the cloud service, then ensure that the Remember History option is enabled. When Firefox is set to not remember the history of visited pages, then web content caching is also disabled, which greatly affects the performance of the service. See Firefox documentation for details on setting this option.

I can’t access a particular analysis, dashboard, or project.

You attempt to display an analysis, dashboard, or project and find that you don’t have access.

Typically you can’t access an analysis, dashboard, or project if you lack the appropriate permissions or application role for accessing it. Contact the owner of the analysis, dashboard, or project or your administrator for assistance in obtaining the proper permissions or application role.

The analysis or project is running very slowly.

You attempt to run an analysis or project and find that it takes a long time.

Various underlying circumstances can cause an analysis or project to run slowly. Contact your administrator and ask that he review log files associated with the analysis or project. After reviewing the log files with the administrator, make the appropriate adjustments in the analysis or project.

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I can’t access certain options from the Home page.

Check with your administrator to ensure that you have the correct permissions to access the options that you need.

I see a performance decrease when using Mozilla Firefox.

If you use Mozilla Firefox and notice a decrease in the performance of the cloud service, then ensure that the Remember History option is enabled. When Firefox is set to not remember the history of visited pages, then web content caching is also disabled, which greatly affects the performance of the service. See Firefox documentation for details on setting this option.

My analysis or project times out.

You attempt to run an analysis or project and find that it times out. You see a message similar to this:

```
[nQSError: 60009] The user request exceeded the maximum query governing
execution time.
```

This message is displayed when an Oracle Analytics query spends more than the allotted time communicating with the data source. For performance reasons, the limit for a single query to run is 10 minutes.

Try running the query again. To prevent this error, avoid long running queries.

> **Note**
>
> Note: For direct connections to Oracle Database, the query limit automatically extends to 60 minutes to accommodate occasional, longer running queries. To avoid excessive loads on the database, Oracle Analytics restricts the number of queries that are allowed to automatically extend at any one time. If your analysis or project connects to any other data source or connects to an Oracle Database indirectly through Data Gateway, the query limit is always 10 minutes; the limit doesn't extend beyond 10 minutes.

I can’t see data in an analysis or project.

You open an analysis or project, but you don’t see any data in it.

There might be some temporary issue with the database. Contact your administrator for assistance.

You might not have the permissions needed to access the data. Contact the object's owner or administer and ask them to check your access permissions. You'll need read permissions to the analysis or project and any artifacts included in the analysis or project (for example, a dataset).

I can’t access a particular analysis, dashboard, or project.

You attempt to display an analysis, dashboard, or project and find that you don’t have access.

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Typically you can’t access an analysis, dashboard, or project if you lack the appropriate permissions or application role for accessing it. Contact the owner of the analysis, dashboard, or project or your administrator for assistance in obtaining the proper permissions or application role.

I can’t find an analysis, dashboard, or project.

Try searching the catalog. You can search for analyses, dashboards, or projects by name (full or partial) and by folder location. The search isn’t case-sensitive. Searches of the catalog return only those objects that you have permission to see.

Contact your administrator if you still can’t find an analysis, dashboard, or project and you suspect that it was deleted by mistake. Your administrator can restore earlier versions of the catalog from recent snapshots, if required.

The analysis or project is running very slowly.

You attempt to run an analysis or project and find that it takes a long time.

Various underlying circumstances can cause an analysis or project to run slowly. Contact your administrator and ask that he review log files associated with the analysis or project. After reviewing the log files with the administrator, make the appropriate adjustments in the analysis or project.

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