



CT- STARS

State Analytical Reporting System

OBI- STARS Workforce Deployment

Advanced User Guide

Advanced User Guide Overview

Purpose

The purpose of the advanced user guide is to provide a detailed overview of the STARS tool and provide step-by-step instructions on the functionality of STARS. The user guide includes detailed explanations, best practices, and guided exercises to facilitate STARS training and adoption.

Table of Contents

The advanced user guide is broken into ten different sections, each consisting of specific functionality available in the STARS program. Each of these sections contains subsections that are listed with corresponding page numbers on the Table of Contents.

Note: The Table of Contents contains clickable links on each section and subsection to allow the user to access the section directly without having to manually navigate to the corresponding page number.

Navigation

Each of ten sections includes topic overviews and guided exercises.

Each section and subsection begins with an overview of the topic that will be covered as well as tables and screenshots detailing the different layouts, icons, and items the user will interact with in the section.

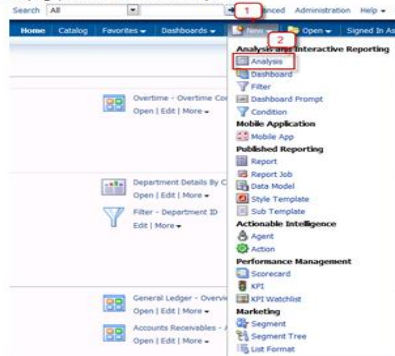
Each section will also include guided exercises with enumerated steps and corresponding screenshots for the user to follow and gain hands-on experience on the topic covered. Each guided exercise will be marked within the user guide by the presence of a blue “Guided Exercise” text box as shown in the screenshot below. The user should start the guided exercise beginning with the first numbered step below the blue “Guided Exercise” text box.

Example:

Guided Exercise

To access the analysis editor view, follow the steps below:

1. From the home page, Click **New** > then **Analysis**.



2. Then Select Subject Area pop-up appears. Then select **Human Resource – Workforce Deployment**.

The Advanced User Guide begins with the Table of Contents and the Course Introduction.

OBI- STARS (State Analytical Reporting System)



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1. Course Introduction

Purpose	<p>This course introduces participants to the State Analytical Reporting System (STARS) using the OBI platform. This application focuses on using the Analysis and Dashboards interface. Participants will also learn how to use help functionality specific to the OBI application.</p> <p>This course will instruct participants on how to create and execute analyses. Additionally, participants will learn how to manage, manipulate, format, and save analyses in order to obtain the desired information and display it on Dashboards</p>
Getting Started	<p>In this section, the following topics are covered:</p> <ul style="list-style-type: none"> • Participant introductions • Course Objectives and materials (classroom guide, job aids, files)
Audience	<p>This course is designed for State Analytical Reporting System (STARS) Analysis and Dashboard users.</p>
	<p>The following topics will be discussed during this course:</p> <ul style="list-style-type: none"> • Course Introduction • Navigate OBI - STARS • Create and Save Analyses • Format Analysis & Columns • Customize Analysis Views • Drill Down Functionality • Search Analysis & Print or Export Results • Work with Dashboard Prompt • Build & Design Dashboard • Agents



Course Objectives

The following processes and objectives will be covered in this course:

Process	Objectives
Overview of Analysis	View an Analysis and Dashboard
Navigate OBI – STARS	Sign into OBI - STARS Understand OBI-STARS Home page Understand the Analysis Editor Criteria tab Understand Filter Editor Understand the Analysis Results tab Understand Analysis Views Editor
Create and Save Analysis	Create a New Analysis Save Filters from Analysis Apply Saved Filters Move and Delete an Analysis
Format Analysis & Columns	Move, Add, Exclude, Hide & Delete Column Sort a Column Add Grand Totals & Sub Totals Edit Column Format Edit Value Format Edit Data Format Apply Conditional Formats
Customize Analysis Views	Type of Views Table Properties Add a Pivot Table Adding a Graph Formatting Graph Edit Graph Properties Add Pivot Table Graph Add a View Selector Add a Column Selector Delete Views
Drill Down Functionality	Copy an Existing Analysis Create Action Link Test Action Link
Print and Export Results	Search for an Analysis Print Results to PDF Export Results to Excel
Work with Dashboard Prompts	Understand a Dashboard Prompt Creating Dashboard Prompt
Build & Design Dashboard	Understanding & Navigating My Dashboard Build My Dashboard Edit My Dashboard Save a Dashboard Customization Set Preference Export My Dashboard to Excel Spreadsheet
Agents	Understand Agent Create Agent Verify the Mail Client for the Agents/Alerts



2. Navigate OBI - STARS

Introduction	<p>Typically, organizations track and store large amounts of data about products, customers, contacts, activities, employees, and other elements. This data is often spread across multiple databases in different locations with different versions of database software.</p> <p>After the data has been organized and analyzed, it can provide an organization with metrics to measure the state of its business. This data can also present key indicators of change in market trends and in employee, customer, and partner behavior. OBI helps you obtain, view, and analyze data.</p> <p>Analysis provide “answers” to business question, allowing you to explore and interact with information, as well as present and visualize data using graphs, pivot tables, and analyses. You can save, organize, and share these results with others.</p> <p>Analyses that you create with the Analysis Editor can be saved in the Presentation Catalog and integrated into the OBI dashboard. Results can be enhanced through graphing, view layout, calculation, and drilldown features.</p> <p>Security and data access for OBI is controlled at the data level, not the application level.</p> <p>Follow the steps below to access the Analysis Editor.</p>
Objectives	<p>At the end of this section, you will be able to complete the following tasks related to Analysis Navigation.</p> <ul style="list-style-type: none"> • Sign into OBI - STARS • Understand OBI-STARS Homepage • Understand the Analysis Editor Criteria tab • Understand Filter Editor • Understand the Analysis Results tab • Understand Analysis View Editor



2.1 Sign into OBI - STARS

Typically, organizations track and store large amounts of data about products, customers, contacts, activities, employees, and other elements. This data is often spread across multiple databases in different locations with different versions of database software.

After the data has been organized and analyzed, it can provide an organization with metrics to measure the state of its business. This data can also present key indicators of change in market trends and in employee, customer, and partner behavior. OBI helps you obtain, view, and analyze data.

Analysis provide “answers” to business question, allowing you to explore and interact with information, as well as present and visualize data using graphs, pivot tables, and analyses. You can save, organize, and share these results with others.

Analyses that you create with the Analysis Editor can be saved in the Presentation Catalog and integrated into the OBI dashboard. Results can be enhanced through graphing, view layout, calculation, and drilldown features.

Security and data access for OBI is controlled at the data level, not the application level.
Follow the steps below to access the Analysis Editor.

Guided Exercise

Exercise Steps

1. Open Internet Explorer and enter the URL: - <https://stars.ct.gov/> for the environment in the **Address** field.

Note: The OBI login window displays.

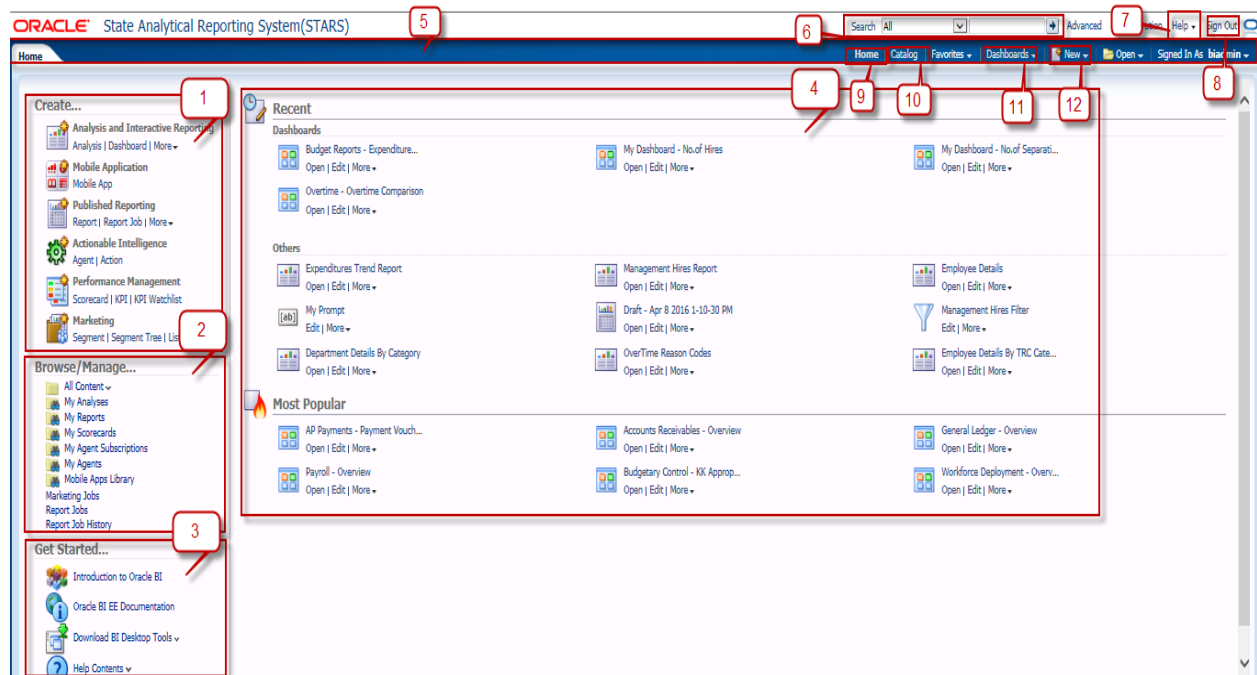
2. Enter your **User ID** and **Password** in the appropriate fields

3. Click.


Note: The application launches and displays the Analysis Editor Home page

2.2 Understand OBI - STARS Homepage






The below is OBI-STARS Homepage.



Examine the content based on the above screenshot.

Introduction	The Home page provides an intuitive, task-based entryway into the functionalities of OBI. The Home page is divided into sections that allow you to quickly begin a specific task, locate, or create a new object, or access technical documentation.
1. Create	The Create section allows you access to editors for OBI objects to create OBI content, including analyses, agents, Key Performance Indicators, and analyses.
2. Browse/Manage	In the Browse/Manage section, you can search content using the Catalog page by clicking the All Content link or apply default searches that return OBI objects that belong to you using the My Analysis, My Agents, and other similar links.
3. Get Started	In the Get Started section, you can access download links for OBI desktop tools, for example, the OBI Office Add-In, as well as access technical documentation and other related content.
4. Recent/Most Popular	The Recent and Most Popular sections contain recently opened objects, and those that are most popular among you and other users of the system.
5. Global Header	Use this section to access links and options to begin a task or locate an object.
6. Search	Use this option to search for an object from the global header. You can search for an object by its name, location, or type only, which is similar to using a Find dialog box in many products. You will find only those objects for which you have the appropriate permissions. When the desired object is located, you can click it to display it for viewing or editing, as your permissions allow.
7. Help button 	Use this link to display the following options: BIEE Home Help dynamically changes to display the Help topic for the current page, editor, or tab. Help Contents displays a cascading menu that provides options that link to the tables of contents for OBI, BI Publisher, and Marketing.



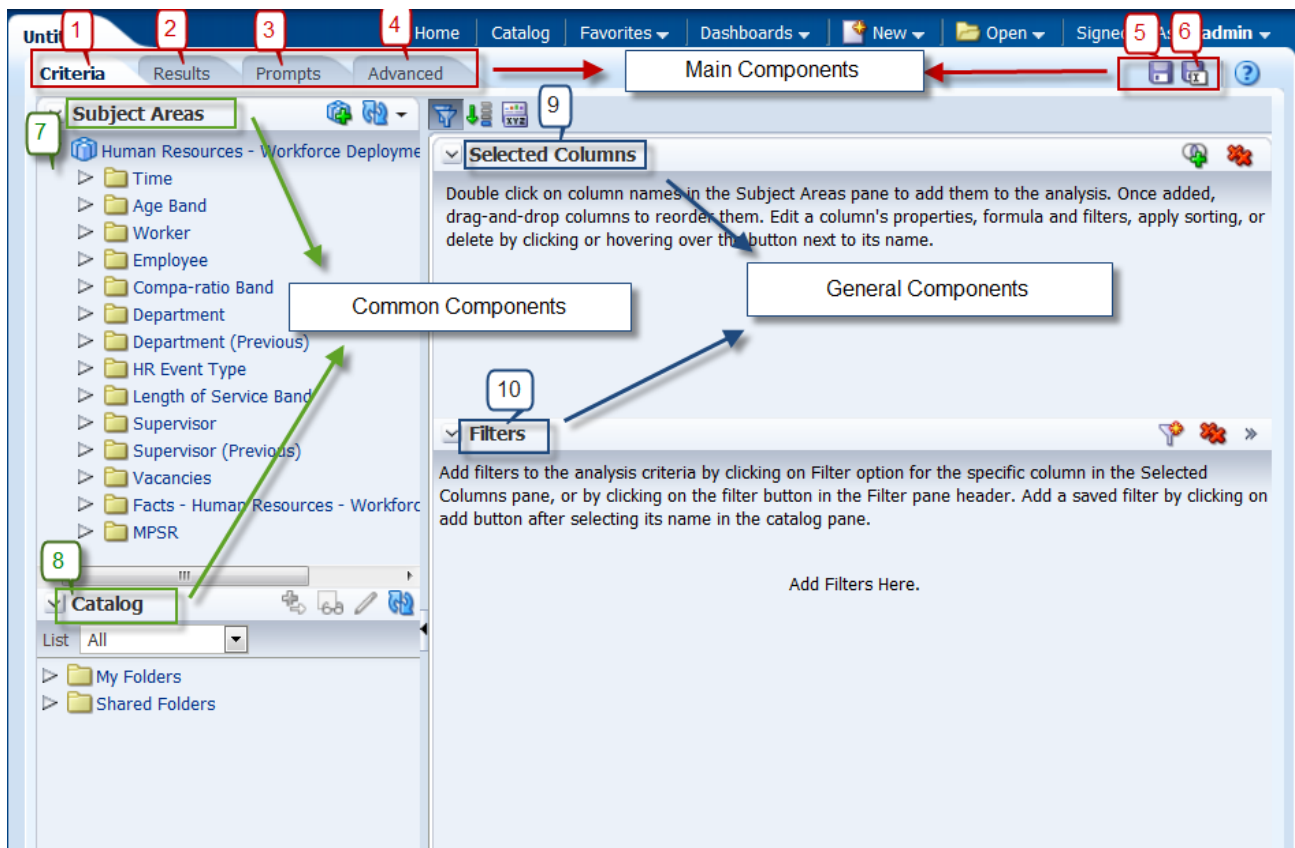
	Documentation displays the documentation library for OBI. OTN... displays the Business Intelligence and Data Warehousing Technology Center page on the Oracle Technology Network (OTN). About OBI displays a dialog identifying the OBI version and copyright information.
8. Sign Out link 	Use this link to log out of the OBI application. Note: Do not close the browser window to exit from OBI.
9. Home link 	Use this link to navigate to the Home page from any other part of the user interface.
10. Catalog link 	Use this link to navigate to the Catalog page, in which you can navigate and work with objects in the Presentation Catalog.
11. Dashboards link 	Use this link to access the customized Dashboards and My Dashboard, used to display analyses created in Analysis Editor.
12. New link 	Use this link to display a list of the objects that you can create. To create an object, select it from the list. The appropriate dialog or editor displays for you to create the object.

2.3 Understand the Analysis Editor Criteria tab


*Note: The Analysis Editor view below is explained in detail in the Introduction course. To get to the Analysis editor view, navigate to **New** > then click **Analysis from the Home** page. Next specify the Subject Area you would be working on it.*


The Analysis Editor is divided into three Components.

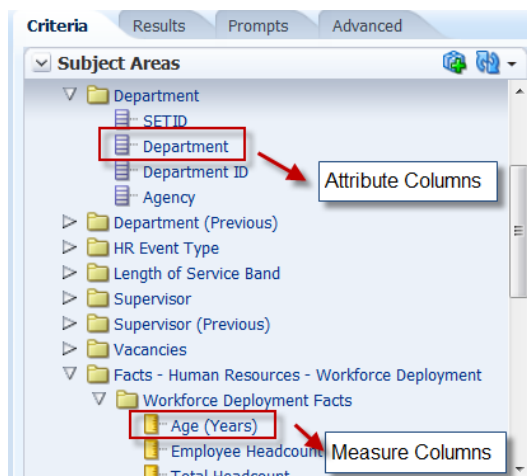
- Main Components
- Common Components
- General Components



The Analysis Editor is composed of tabs and panes, as shown in the screen shot, representing the subject area (columns), available catalog objects, selected columns for the analysis, and filters (which limit the selected data).

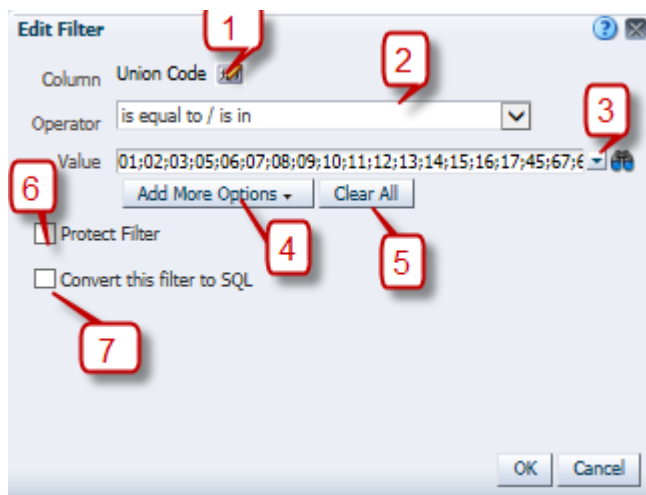
Review the following components on Analysis Editor Page .	
Element	Description
Main Components:	
1. Criteria	It is used to specify the criteria for an analysis, including columns and filters.
2. Results	It is used to create different views of the analysis results such as graphs, tickers, and pivot tables.
3. Prompts	Prompts tab to access the "Prompt editor" to create prompts that allow users to select values that dynamically filter all views within the analysis or all analyses on a dashboard.
4. Advanced	It is used to examine or edit the XML code and logical SQL statement that is generated for an analysis.
5. Save 	Use this button to save an analysis.

6. Save As 	Use this button to save an analysis as another name.						
Common Components:							
7. Subject Areas	<p>In this section we select the columns and hierarchy levels for an analysis and to work with subject areas.</p> <p>There are three column types in a subject area. They are</p> <table border="1"> <tr> <td>Attribute Column</td><td>Presentation Columns are renamed as Attribute Columns. In OBI they are also called as Dimension Columns. Example:- Department (as shown in below fig)</td></tr> <tr> <td>Measure Column</td><td>It holds a simple list of data of values. It is a column in an OBI repository, usually in a Fact Table. Example Age(Years) (shown in below fig)</td></tr> <tr> <td>Hierarchy Column</td><td>Holds a list in which individual members are shown in an outline manner, with lower-level members rolling into higher-level members, and outline totals being shown for the higher-level members. Example: - Not shown here.</td></tr> </table>	Attribute Column	Presentation Columns are renamed as Attribute Columns. In OBI they are also called as Dimension Columns. Example:- Department (as shown in below fig)	Measure Column	It holds a simple list of data of values. It is a column in an OBI repository, usually in a Fact Table. Example Age(Years) (shown in below fig)	Hierarchy Column	Holds a list in which individual members are shown in an outline manner, with lower-level members rolling into higher-level members, and outline totals being shown for the higher-level members. Example: - Not shown here.
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Hierarchy Column	Holds a list in which individual members are shown in an outline manner, with lower-level members rolling into higher-level members, and outline totals being shown for the higher-level members. Example: - Not shown here.						
8. Catalog	This section is used to drag and drop objects from the catalog to add to the analysis like saved filters.						
General Components:							
9. Selected Columns	In this pane we used to modify the columns and hierarchy levels that have been selected for an analysis.						
10. Filters	It is used to create new filters for an analysis.						


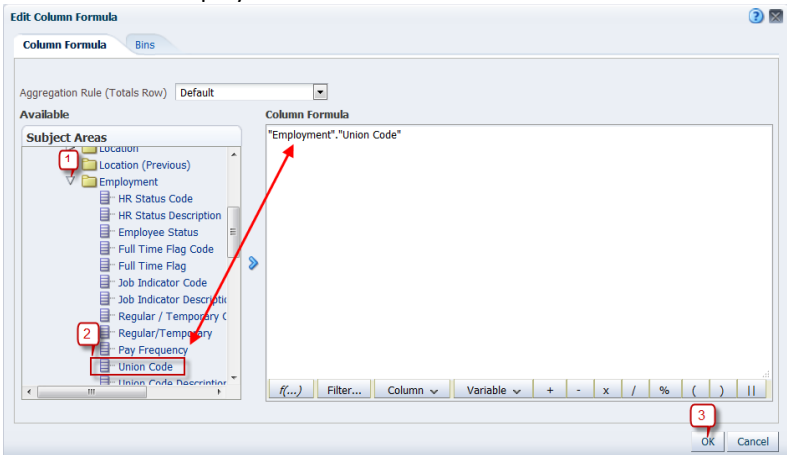


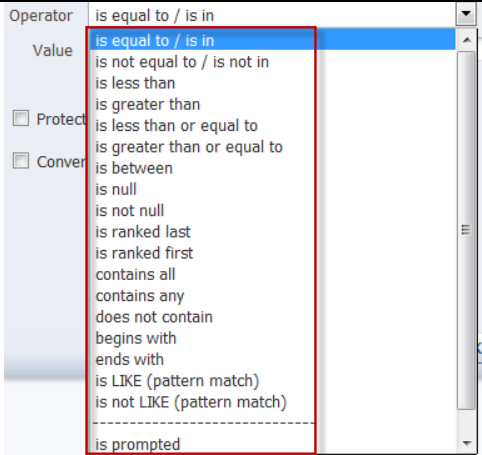
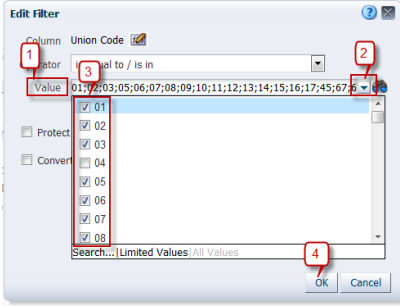

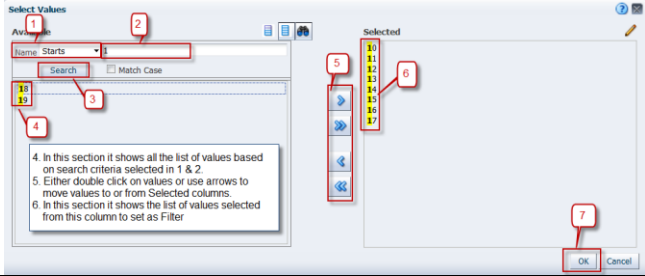
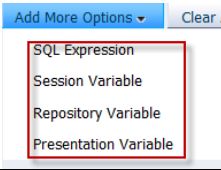
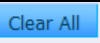
2.4 Understand Filter Editor

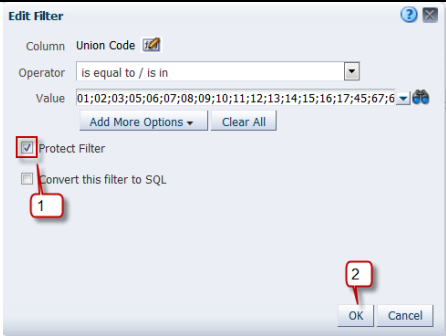
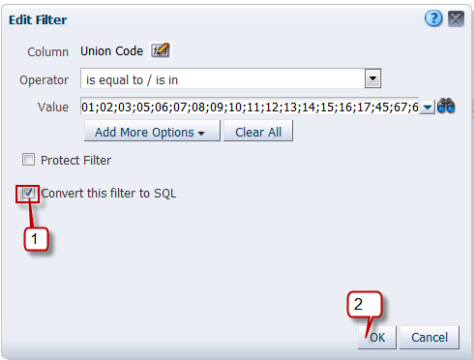
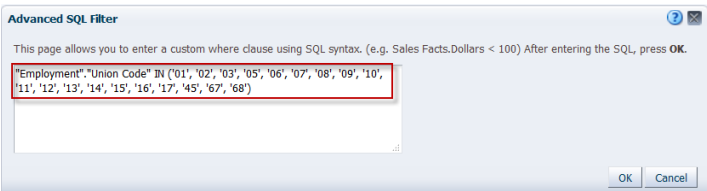
Review the following components on Filter Editor.



Review the following components on Filter Editor **Page**.

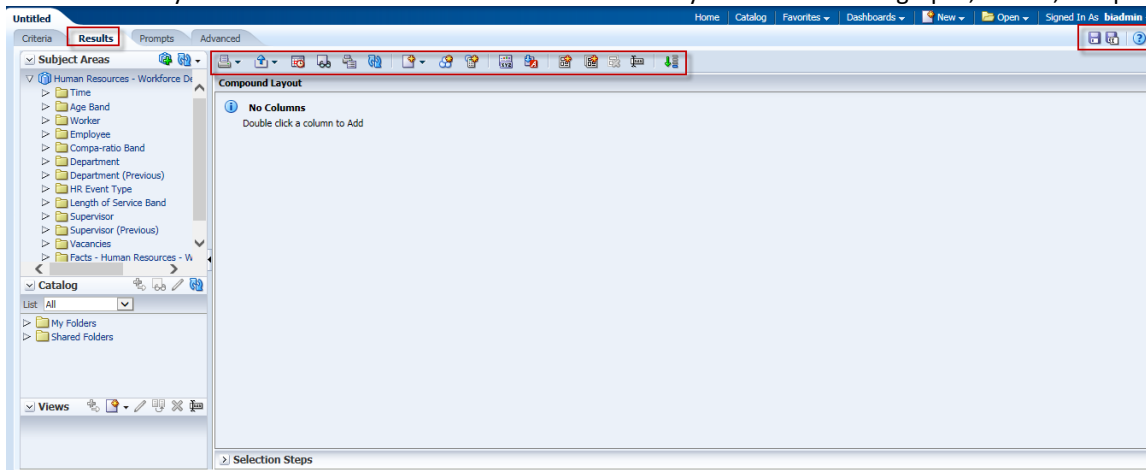
Element	Description
Main Components:	
1.Column	<p>It shows the name of the column on which filter is being created. The name of the column can be changed by click on Edit icon . It will open Edit Column Formula dialog box where you can change or select any column from the Subject Area section by expanding folders Worker > then Employment.</p> 
2.Operator	<p>In the operator drop-down menu, it will display all type of different operators as shown below:</p>




















	
3.Value	<p>Enter value to restrict the data by selecting one or more values by click on drop down menu.</p>  <p>Advanced Search:- Click on Search icon to filter out</p>  <p>Once you click on Search icon a dialog opens. This box will help us in filter out the number of values to a small no, so that it makes easy to select values.</p> 
4.Add More Options	<p>This feature is used when we have to use Variables like session, repository and Presentation.</p> 
5.Clear All	 <p>It will clear all the values selected in Value box.</p>
6.Protect Filter	<p>Enabling this filter will basically “hard-codes” a filter so that it won’t be overwritten.</p>

	
<p>7. Convert this filter to SQL</p>	<p>Enabling this feature will allow you to write logical SQL for the where clause in the query we will have to use the filtering option over the selection steps because we're able to convert filters into SQL which we can customize or we can add a SQL statement straight to the filter without converting it. Once you convert a filter to SQL you will not be able to revert it back to the original dialog box and will only be able to edit it in the Advanced SQL Filter box. A powerful feature of the filters is that it allows you to write SQL statements and that will affect the where clause of an analysis. This allows you to potentially write more complex statements for your filtering needs.</p>  <p>Once you select "Convert this filter to SQL" the next box will allow you to write your own SQL code for the filter, if there are more options selected before you convert your SQL, it will convert that as well.</p> 

2.5 Understand the Analysis Results tab

Use this tab of the "Analysis editor" to create different views of the analysis results such as graphs, tickers, and pivot tables.

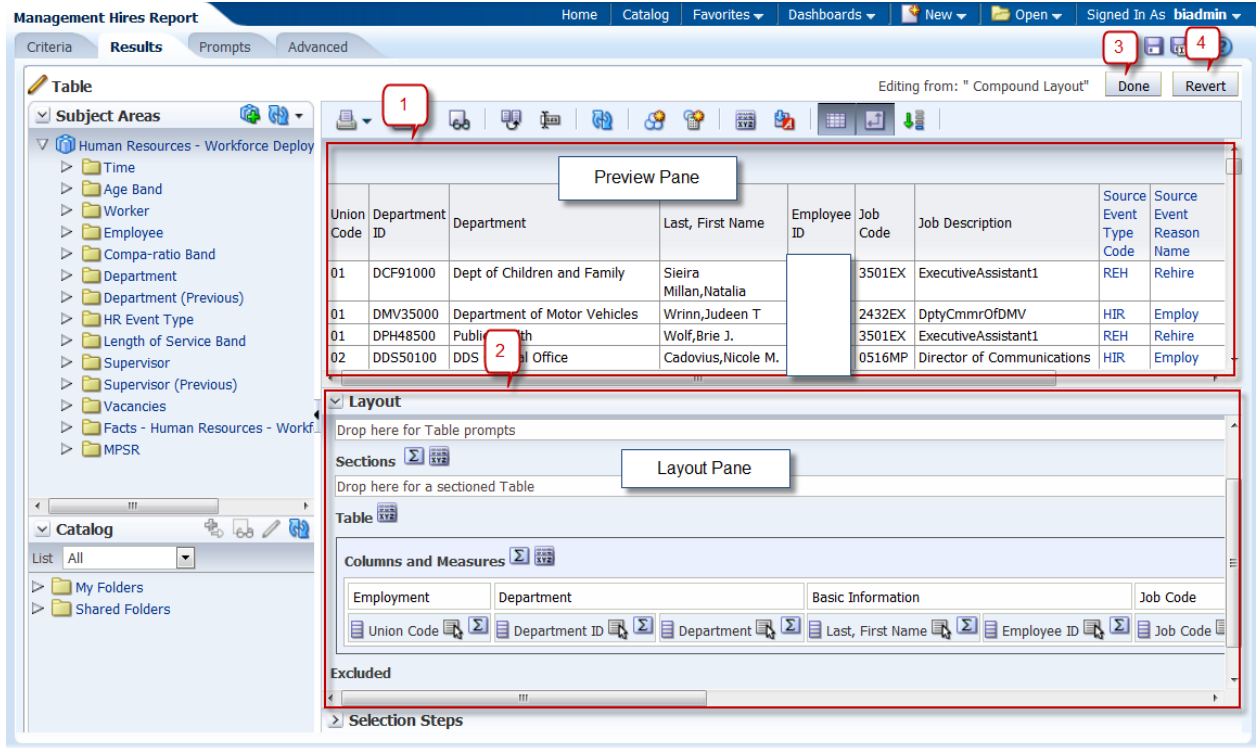


Review the following components on Analysis Results Tab.	
Elements	Description
Print this analysis 	Use this button to print in PDF or HTML formats.
Export this analysis 	Use this button to export analysis or data in different formats.
Schedule 	Use this button to run agents.
Show how results will look on a Dashboard 	Use this button to preview the current view.
Print Options 	Use this button to specify areas for printing.
Refresh the results of the current analysis 	Use this button to refresh the results of the current analysis Deletes the view Caution: There is no confirmation.
New View 	Use this button to display a list of views from which you can select the view that you want to create. The view is added to the current compound layout.
New Group 	Use this button to add a group.
New Calculated Item 	Use this button to build calculated items.
Edit Analysis Properties 	Use this button to specify properties for the entire analysis.
Import formatting from another analysis 	Use this button to select an analysis from which to import formatting for columns and views.
Create Compound Layout 	Use this button to create a new instance of the compound layout.
Duplicate Compound Layout 	Use this button to create a copy of the current compound layout. When you copy, you do not actually create additional copies of the analysis or its views. The analysis and views exist only once. Any changes that you make to the analysis or its views are reflected in the multiple instances of the compound layout.
Delete Compound Layout 	Use this button to delete the current compound layout. The views in the layout are not deleted from the analysis. This button is not available if you attempt to delete the last compound layout in the analysis.
Rename the Analysis 	Use this to rename the analysis
Show/Hide Selection Steps pane 	Use this button to show or hide the display of the Selection Steps pane in the Results tab.
Save Analysis button 	Use this button to save an analysis to a folder.
Save As button 	Use this button to save an existing analysis as another name.
Help 	Use this button to open the first level of help documentation for the Analysis Editor

2.6 Understand Analysis Views Editor

We can change the layouts of views by editing the views through View Editor.

Below explained with sample analysis



Management Hires Report

Home Catalog Favorites Dashboards New Open Signed In As biadmin

Criteria Results Prompts Advanced

Editing from: "Compound Layout" Done Revert

Table

Subject Areas

- Human Resources - Workforce Deploy
 - Time
 - Age Band
 - Worker
 - Employee
 - Compa-ratio Band
 - Department
 - Department (Previous)
 - HR Event Type
 - Length of Service Band
 - Supervisor
 - Supervisor (Previous)
 - Vacancies
 - Facts - Human Resources - Workforce
 - MPSR

Catalog

- List All
- My Folders
- Shared Folders

Preview Pane

Union Code	Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Source Event Reason Name
01	DCF91000	Dept of Children and Family	Sieira Millan, Natalia		3501EX	ExecutiveAssistant1	REH	Rehire
01	DMV35000	Department of Motor Vehicles	Wrin, Judeen T		2432EX	DptyCmmrOfdMV	HJR	Employ
01	DPH48500	Public Health	Wolf, Brie J.		3501EX	ExecutiveAssistant1	REH	Rehire
02	DDS50100	DDS Office	Cadovius, Nicole M.		0516MP	Director of Communications	HJR	Employ

Layout Pane

Drop here for Table prompts

Sections

Drop here for a sectioned Table

Table

Columns and Measures

Employment	Department	Basic Information	Job Code
Union Code	Department ID	Department	Last, First Name
Employee ID	Job Code		

Excluded

Selection Steps

Pane	Description
1. Preview Pane	In this pane we can preview the results based on Layout Pane.
2. Layout Pane	In this pane we can change the structure of the report by moving columns, adding subtotals and grand totals, by changing the format of the table values and column headings.
3. Done	Once the changes are made. Click Done to go to Compound Layout.
4. Revert	If you want to go back to initially layout structure or format then click Revert.



3. Create and Save Analysis

Introduction	<p>The Analysis Editor interface is part of the State Analytical Reporting System (STARS) application used to query information across all the different agencies within the State of CT system. The Analysis Editor function allows you to explore and interact with information, and present and visualize information using drillable tables, graphs, pivot tables, and other reporting formats. You can save, organize, and share the results through Dashboards, alerts, or exporting to another format.</p> <p>Analyses are user-defined reports that pull data from a consolidated data warehouse. Analyses that you create with the Analysis Editor can be saved in the OBI Presentation Catalog and integrated into a dashboard. Results can be enhanced through graphing, compound layout, calculation, and drilldown features.</p> <p>Analyses can be tailored and altered to meet the needs of each individual user. Analyses created in the Analysis Editor must be saved in order to use and display on Dashboards. You can save analyses to private folders for quick execution and modification. You can also save analyses to a common shared folder to grant other users access to analyses that you create. In this module, you will learn how to save analyses and modify previously saved analyses.</p>
Objectives	<p>At the end of this section, you will be able to complete the following tasks related to Analysis.</p> <ul style="list-style-type: none"> • Create a New Analysis • Save Filters from Analysis • Apply Saved Filters • Move or Delete an Analysis



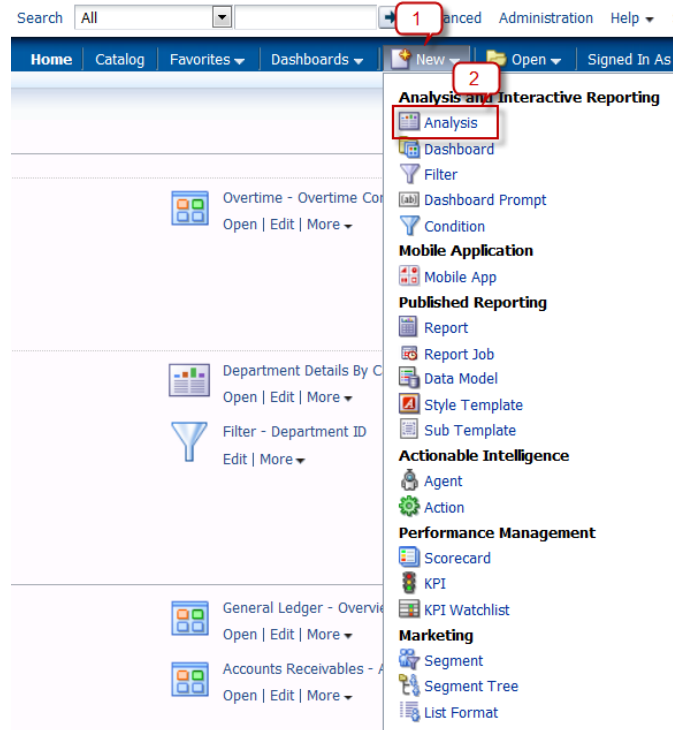
3.1 Create a New Analysis

The Analysis Editor interface allows you to make analytical analyses based on data that is stored in the data warehouse. You can select specific tables and columns that are stored within the data warehouse to execute specific analytical analysis.

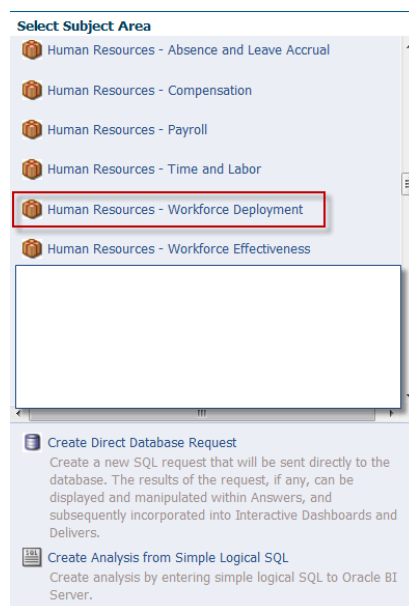
Guided Exercise

To access the analysis editor view, follow the steps below:

1. From the home page, Click **New > then Analysis**.



2. Then Select Subject Area pop-up appears. Then select **Human Resource – Workforce Deployment**.



3. The Analysis Editor will be displayed.



Guided Exercise

In this exercise we will be creating **Management Hire Report** so we can view the number of hires for a specific Union Code in a particular time period.

The columns and Filters that we will use in this report are as follows:

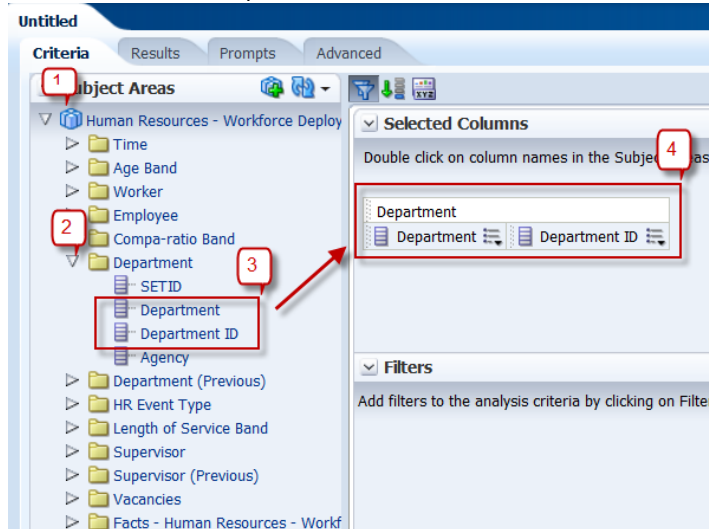
Columns:-

Folder	Columns
Department	1. Department ID 2. Department
Worker > Job Code	3. Job Code 4. Job Description
Worker > Basic Information	5. Employee ID 6. Last, First Name
HR Event Type	7. Source Event Type Code 8. Action Reason Description
Worker > Employment	9. Union Code
Time > Calendar	10. Date
Facts – Human Resources – Workforce Deployment > Workforce Event Facts	11. Employee Hire Count

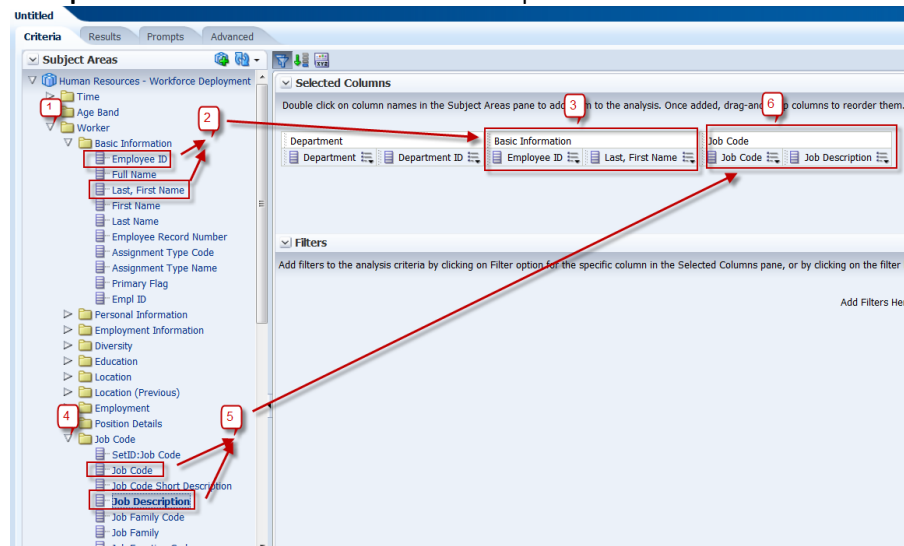
Filters:-

Column	Operator	Value
Year	Is equal to / is in	2016
Month Name	Is equal to / is in	March
SETID	Is equal to / is in	AGNCY
Action	Is equal to / is in	HIRE, Z_HIRE
Union Code	Is equal to / is in	01;02;03;05;06;07;08;09;10;11;12;13;14;15;16;17; 45;67;68

1. Make sure the Criteria tab is selected.
Now, we will drag and drop or double click the following columns from the **Subject Areas** pane into **Selected Columns** pane as shown in the screenshot below.
2. Navigate to the **Department** folder and expand it. Drag and drop the **Department** and **Department ID** columns into the Selected Columns pane as shown in the screenshot below:



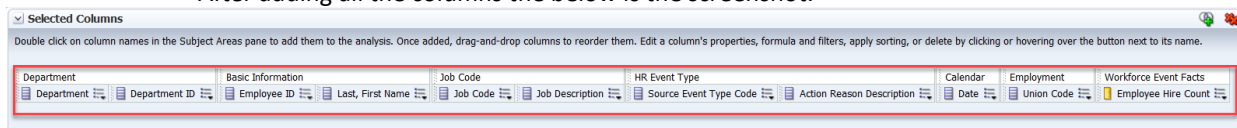
3. Navigate to the **Worker > then Basic Information** folder and expand it. Drag and drop the **Employee ID**, **Last**, **First Name** columns into the Selected Columns pane as shown in the screenshot below:
4. Navigate to the **Worker > then Job Code** folder and expand it. Drag and drop the **Job Code** and **Job Description** columns into the Selected Columns pane as shown in the screenshot below:



5. In similar way, drag and drop the below columns from respective folders:-

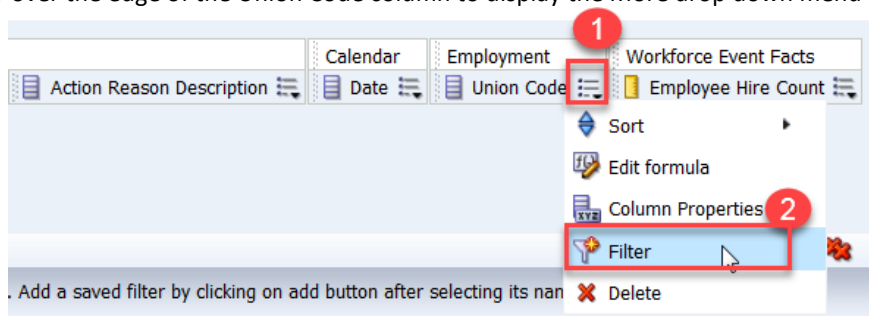
Folder Name	Column Name
HR Event Type	Source Event Type Code
HR Event Type	Action Reason Description
Time > Calendar	Date
Worker > Employment	Union Code
Facts – Human Resources – Workforce Deployment > Workforce Event Facts	Employee Hire Count

After adding all the columns the below is the screenshot.

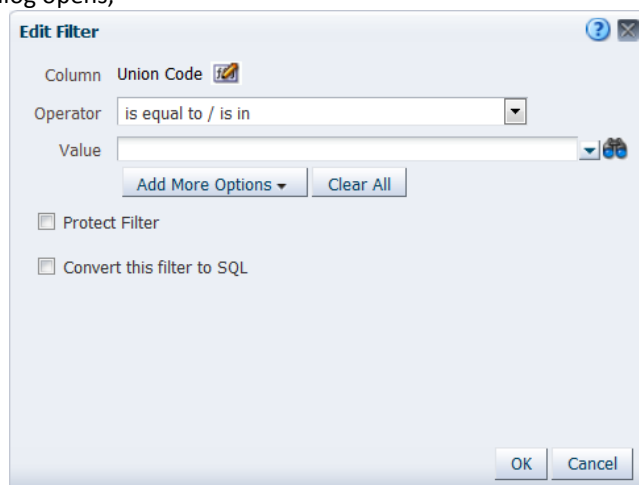


Note:- In the Selected Columns section, you can reorder the columns in your analysis by clicking and dragging them.

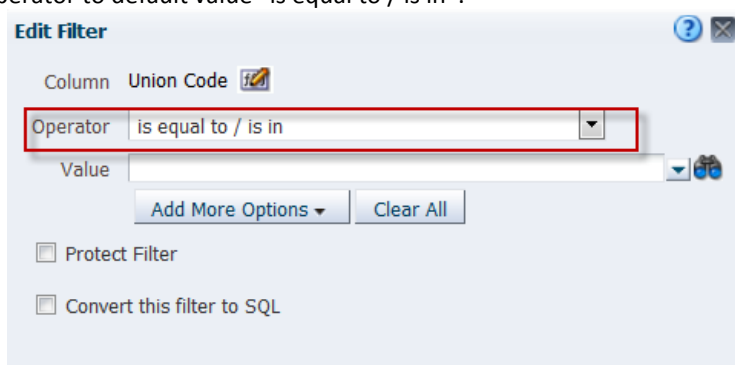
6. Hover over the edge of the Union Code column to display the More drop down menu to create a Filter.



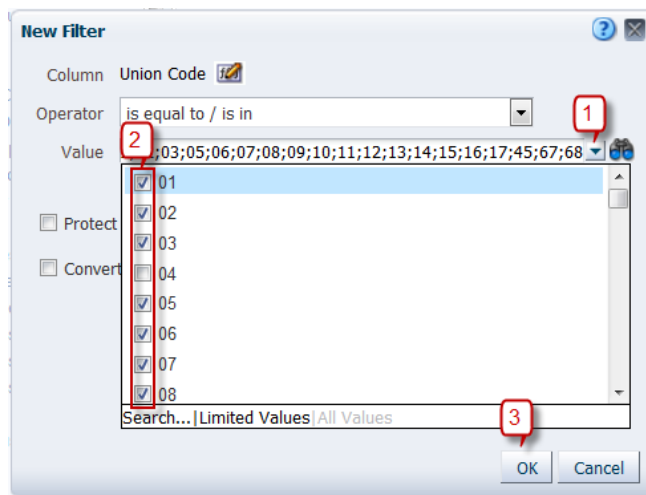
Editor dialog opens,



7. Set the operator to default value "is equal to / is in".

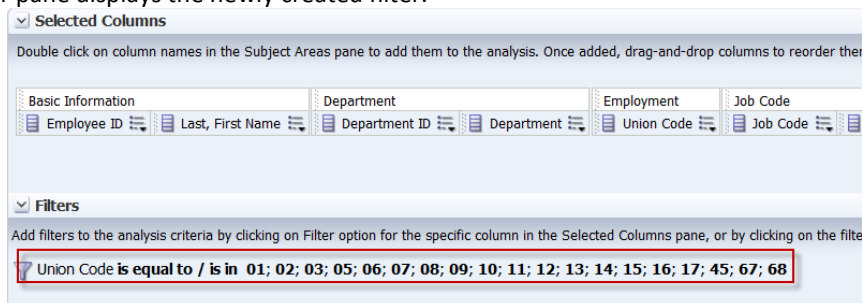


8. Click on drop down menu of Values to select 01;02;03;05;06;07;08;09;10;11;12;13;14;15;16;17;45;67;68



Click **OK**.

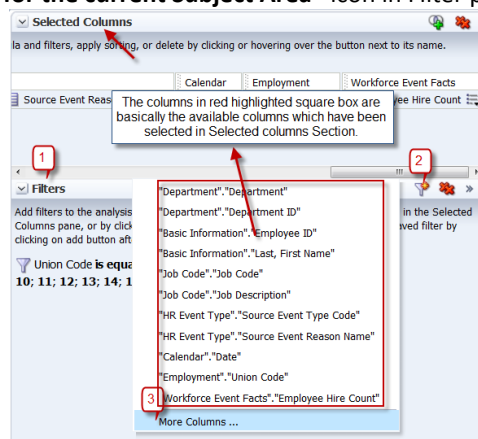
9. Filter pane displays the newly created filter.



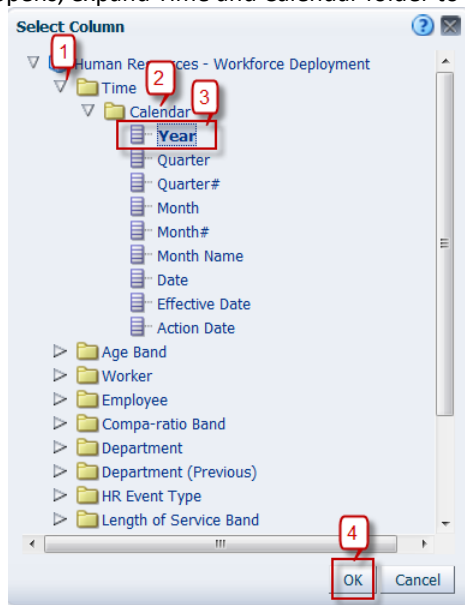
Next, let's add **Year** filter.

Since Year column is not available selected columns, we have to create this from Filter Pane.

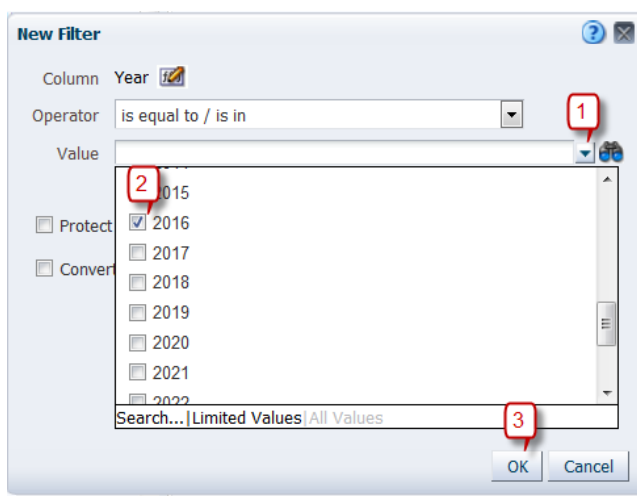
10. Go to **"Create a filter for the current Subject Area"** icon in Filter pane, and then click on **More Columns**.



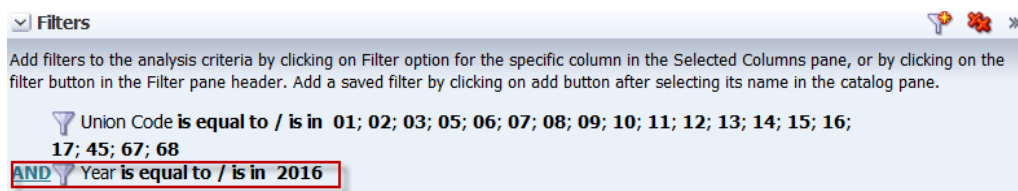
A subject area dialog opens, expand Time and Calendar folder to select **Year**.



11. Set the Operator as default value. And select Year value as “2016”. Click **OK**.



The filter pane now will look as below:-



12. Repeat the same steps for the following column filters.

Column	Operator	Value
Time > Calendar > Month Name	Is equal to / is in	March
Department > SETID	Is equal to / is in	AGNCY
HR Event Type > Action	Is equal to / is in	HIRE, Z_HIRE

Once all the filters are applied, the filter pane will look as below:-

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting catalog pane.

Union Code is equal to / is in 01; 02; 03; 05; 06; 07; 08; 09; 10; 11; 12; 13; 14; 15; 16; 17; 45; 67; 68

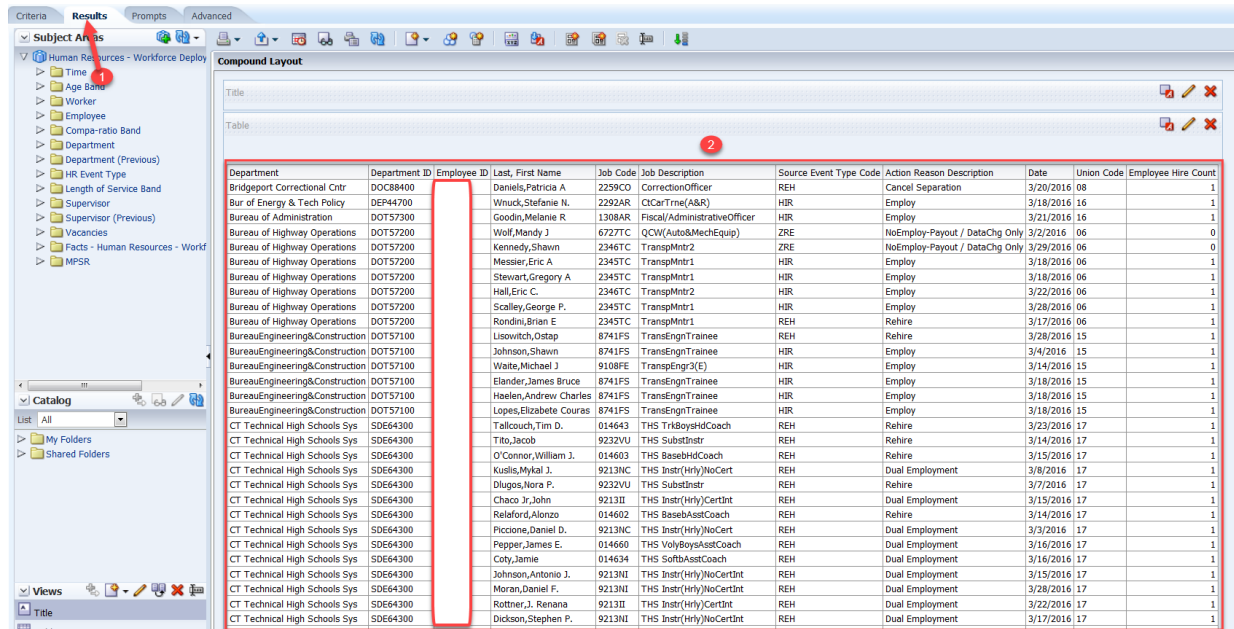
AND Year is equal to / is in 2016

AND Month Name is equal to / is in March

AND SETID is equal to / is in AGENCY

AND Action is equal to / is in HIRE; Z_HIRE

13. Click **Results** tab to view the data.




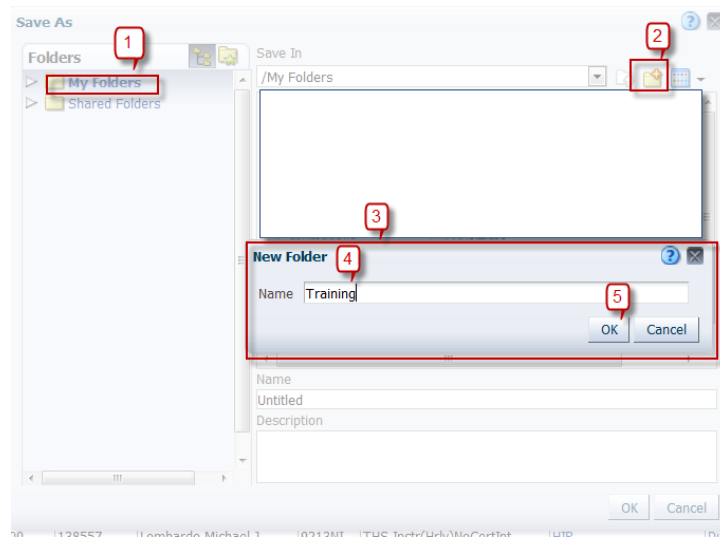
Department	Department ID	Employee ID	Last, First Name	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Union Code	Employee Hire Count
Bridgeport Correctional Cntr	DOC88400		Daniels, Patricia A.	2259CO	Correction Officer	REH	Cancel Separation	3/20/2016	08	1
Bur of Energy & Tech Policy	DEP44700		Wnuck, Stefanie N.	2292AR	ClCarTrnee(A&R)	HIR	Employ	3/18/2016	16	1
Bureau of Administration	DOT57300		Goodin, Melanie R.	1308AR	Fiscal/Administrative Officer	HIR	Employ	3/21/2016	16	1
Bureau of Highway Operations	DOT57200		Wolf, Mandy J.	6727TC	QCW(Auto&MechEquip)	ZRE	NoEmploy-Payout / DataChg Only	3/2/2016	06	0
Bureau of Highway Operations	DOT57200		Kennedy, Shawn	2346TC	TranspMntr2	ZRE	NoEmploy-Payout / DataChg Only	3/29/2016	06	0
Bureau of Highway Operations	DOT57200		Messer, Eric A.	2345TC	TranspMntr1	HIR	Employ	3/18/2016	06	1
Bureau of Highway Operations	DOT57200		Stewart, Gregory A.	2345TC	TranspMntr1	HIR	Employ	3/18/2016	06	1
Bureau of Highway Operations	DOT57200		Hall, Eric C.	2346TC	TranspMntr2	HIR	Employ	3/22/2016	06	1
Bureau of Highway Operations	DOT57200		Scalley, George P.	2345TC	TranspMntr1	HIR	Employ	3/28/2016	06	1
Bureau of Highway Operations	DOT57200		Rondini, Brian E.	2345TC	TranspMntr1	REH	Rehire	3/17/2016	06	1
BureauEngineering&Construction	DOT57100		Lisovitch, Ostap	8741FS	TransEngnTrainee	REH	Rehire	3/28/2016	15	1
BureauEngineering&Construction	DOT57100		Johnson, Shawn	8741FS	TransEngnTrainee	HIR	Employ	3/4/2016	15	1
BureauEngineering&Construction	DOT57100		Waite, Michael J.	9108FE	TranspEngr3(E)	HIR	Employ	3/14/2016	15	1
BureauEngineering&Construction	DOT57100		Elander, James Bruce	8741FS	TransEngnTrainee	HIR	Employ	3/18/2016	15	1
BureauEngineering&Construction	DOT57100		Haelen, Andrew Charles	8741FS	TransEngnTrainee	HIR	Employ	3/18/2016	15	1
BureauEngineering&Construction	DOT57100		Lopes, Elizabeth Couras	8741FS	TransEngnTrainee	HIR	Employ	3/18/2016	15	1
CT Technical High Schools Sys	SDE64300		Tallcouch, Tim D.	014643	THS TrkBoysHdCoach	REH	Rehire	3/23/2016	17	1
CT Technical High Schools Sys	SDE64300		Tito, Jacob	9232VU	THS SubstInstr	REH	Rehire	3/14/2016	17	1
CT Technical High Schools Sys	SDE64300		O'Connor, William J.	014603	THS BaseBdCoach	REH	Rehire	3/15/2016	17	1
CT Technical High Schools Sys	SDE64300		Kusile, Mykal J.	9213UC	THS Instr(Hrly)/NoCert	REH	Dual Employment	3/8/2016	17	1
CT Technical High Schools Sys	SDE64300		Olugbo, Kore P.	9232VU	THS SubstInstr	REH	Rehire	3/7/2016	17	1
CT Technical High Schools Sys	SDE64300		Chaco Jr, John	9213II	THS Instr(Hrly)/CertInt	REH	Dual Employment	3/15/2016	17	1
CT Technical High Schools Sys	SDE64300		Relaford, Alonzo	014602	THS BaseBdAsstCoach	REH	Rehire	3/14/2016	17	1
CT Technical High Schools Sys	SDE64300		Piccone, Daniel D.	9213NC	THS Instr(Hrly)/NoCert	REH	Dual Employment	3/3/2016	17	1
CT Technical High Schools Sys	SDE64300		Pepper, James E.	014660	THS VolBoysAsstCoach	REH	Dual Employment	3/16/2016	17	1
CT Technical High Schools Sys	SDE64300		Coty, Jamie	014634	THS SoftbAsstCoach	REH	Dual Employment	3/16/2016	17	1
CT Technical High Schools Sys	SDE64300		Johnson, Antonio J.	9213NI	THS Instr(Hrly)/NoCertInt	REH	Dual Employment	3/15/2016	17	1
CT Technical High Schools Sys	SDE64300		Moran, Daniel F.	9213NI	THS Instr(Hrly)/NoCertInt	REH	Dual Employment	3/18/2016	17	1
CT Technical High Schools Sys	SDE64300		Rottnier, J. Renana	9213II	THS Instr(Hrly)/CertInt	REH	Dual Employment	3/22/2016	17	1
CT Technical High Schools Sys	SDE64300		Dickson, Stephen P.	9213NI	THS Instr(Hrly)/NoCertInt	REH	Dual Employment	3/17/2016	17	1

Note: Notice how the default views in the results are Title view and Table view

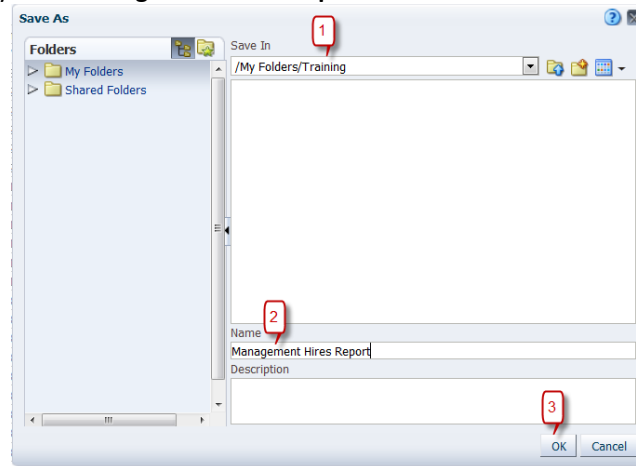
Save Analysis to a Personal Folder

Next we will save the Analysis in the web catalog, so that the analysis can be accessible whenever needed.

- To do so, click the **Save** icon  to save your analysis.
- Save as** dialog displays, navigate to My Folders in the left hand pane and then click the New Folder icon. The New Folder dialog box appears.
- Name the folder as **Training** and click **OK**.



4. Name the analysis as **Management Hires Report** and click **OK**.



*Note: Now the analysis will be saved under **My Folders/Training** in the Web Catalog.*

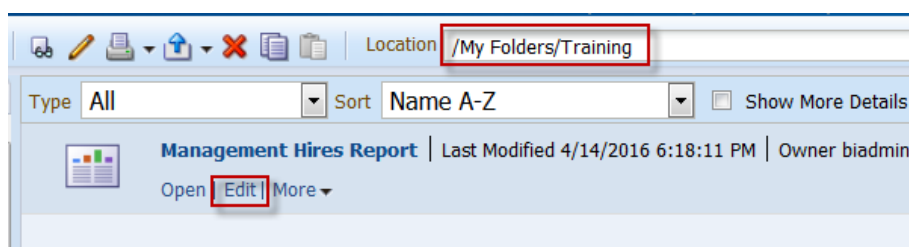
3.2 Save Filters from Analysis

Users may find it useful to save complicated filters that could apply to many different queries, so that you don't have to keep **recreating** them.

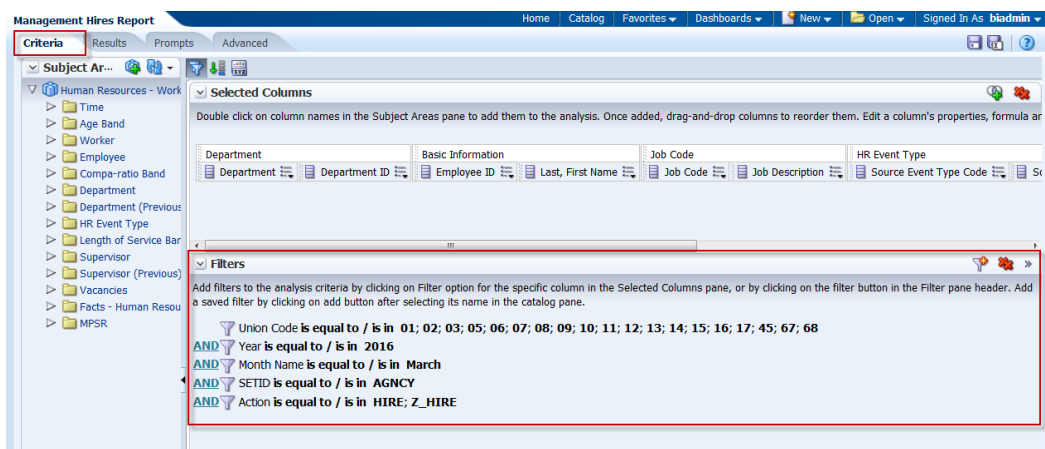
Guided Exercise

To save filter from analysis, follow the below steps:

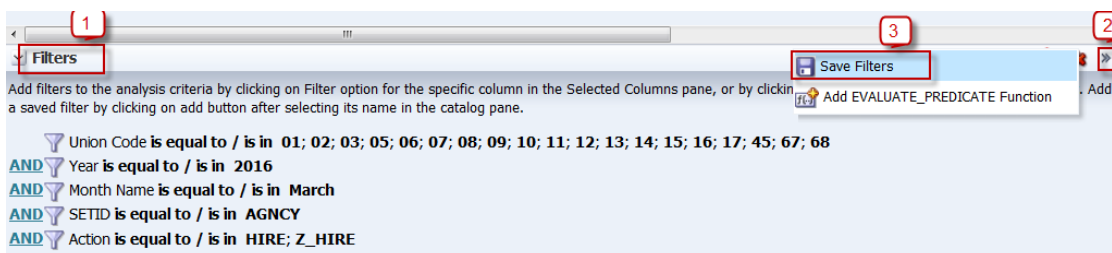
1. Select Catalog from the global header and navigate to **My Folders/Training** folder and select **Management Hires Report**. Click **Edit**.



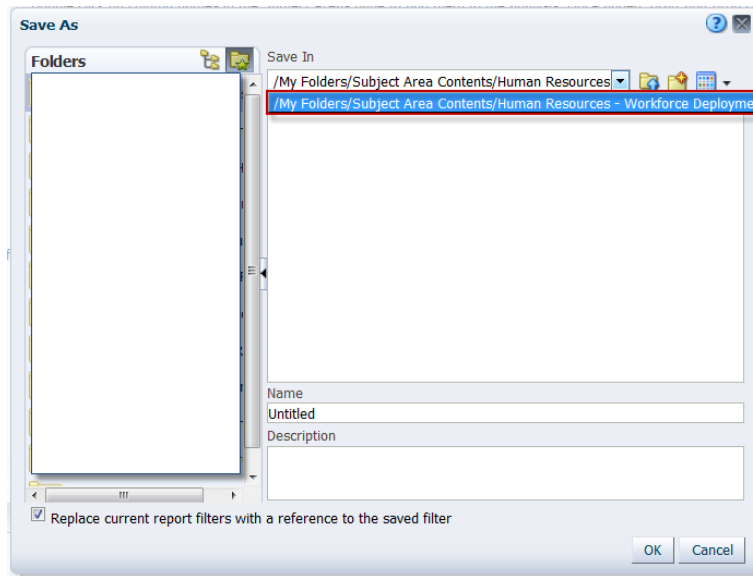
2. Click on Criteria Tab of the Analysis.



3. Click the **More Options** icon in the filters pane and select **Save Filters** from the drop-down list.

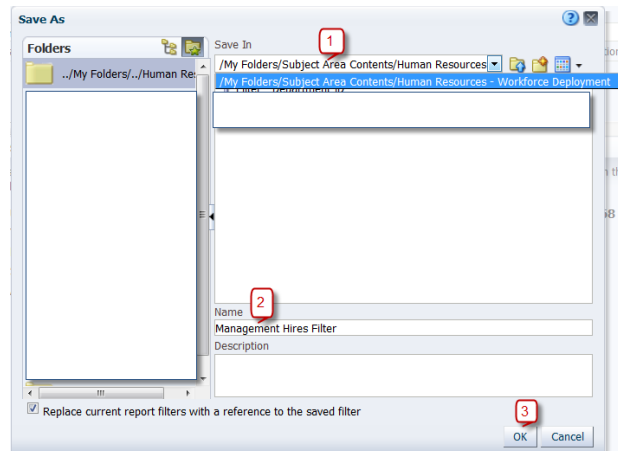


The **Save As** dialog box should look like this:



Note: A filter must be saved to a subject area folder so that it is available when you create an analysis using the same subject area.

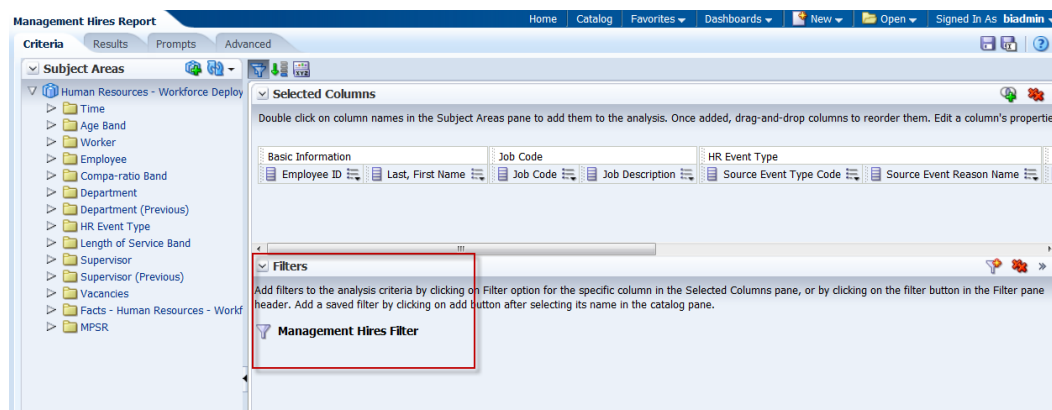
4. Name the filter **Management Hires filter** and accept the default location which is “**My Folders/Subject Area Contents/Human Resources – Workforce Deployment**”



Note: OBI allows you to save any type of business intelligence object to any location within the Catalog. However, for some object types such as filters, OBI suggests the best Catalog location.

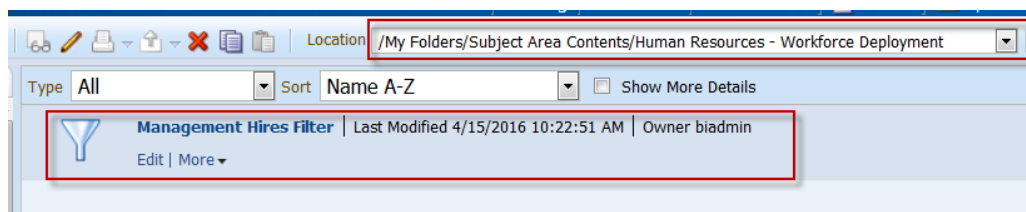
Click **OK**.

5. The filters pane appears as follows with the saved filter name



Note: Don't save the analysis.

6. Navigate to Catalog and go to My Folder to check the filter which we just saved. It should be under the following path:-
/My Folders/Subject Area Contents/Human Resources – Workforce Deployment



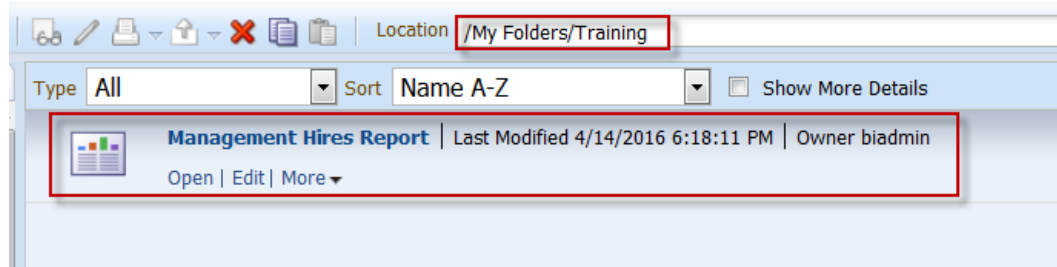
3.3 Apply Saved Filters

We can apply saved filters to the analysis if we need to reuse the filters we have created in other analysis, this way we will save time and effort when creating new analyses.

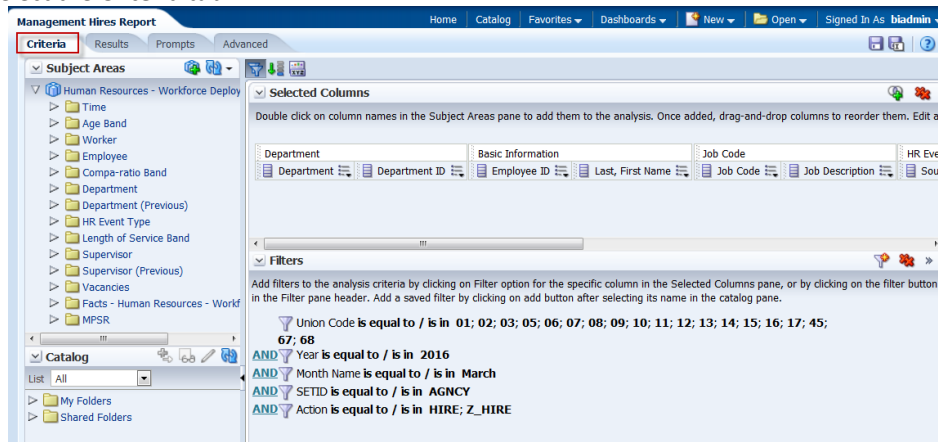
Guided Exercise

To show how to apply a saved filter, we will delete the Filter from an Analysis and apply the Filter we just saved in Section 3.2.

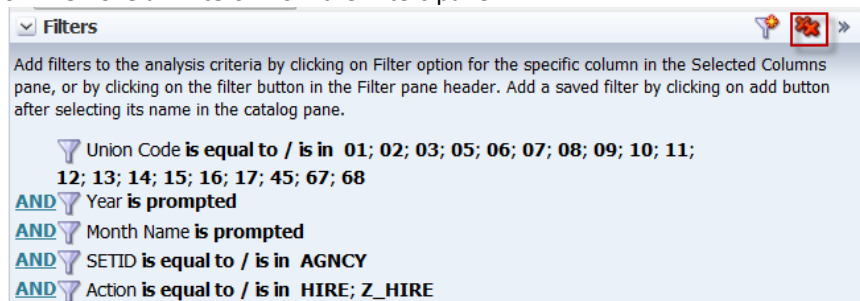
1. Navigate to **My Folders/Training** and select **Management Hires Report** then click **“Edit”**.



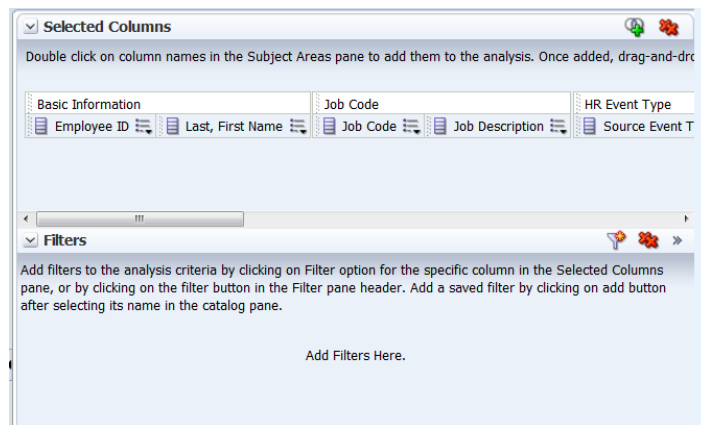
2. Select the **Criteria** tab.



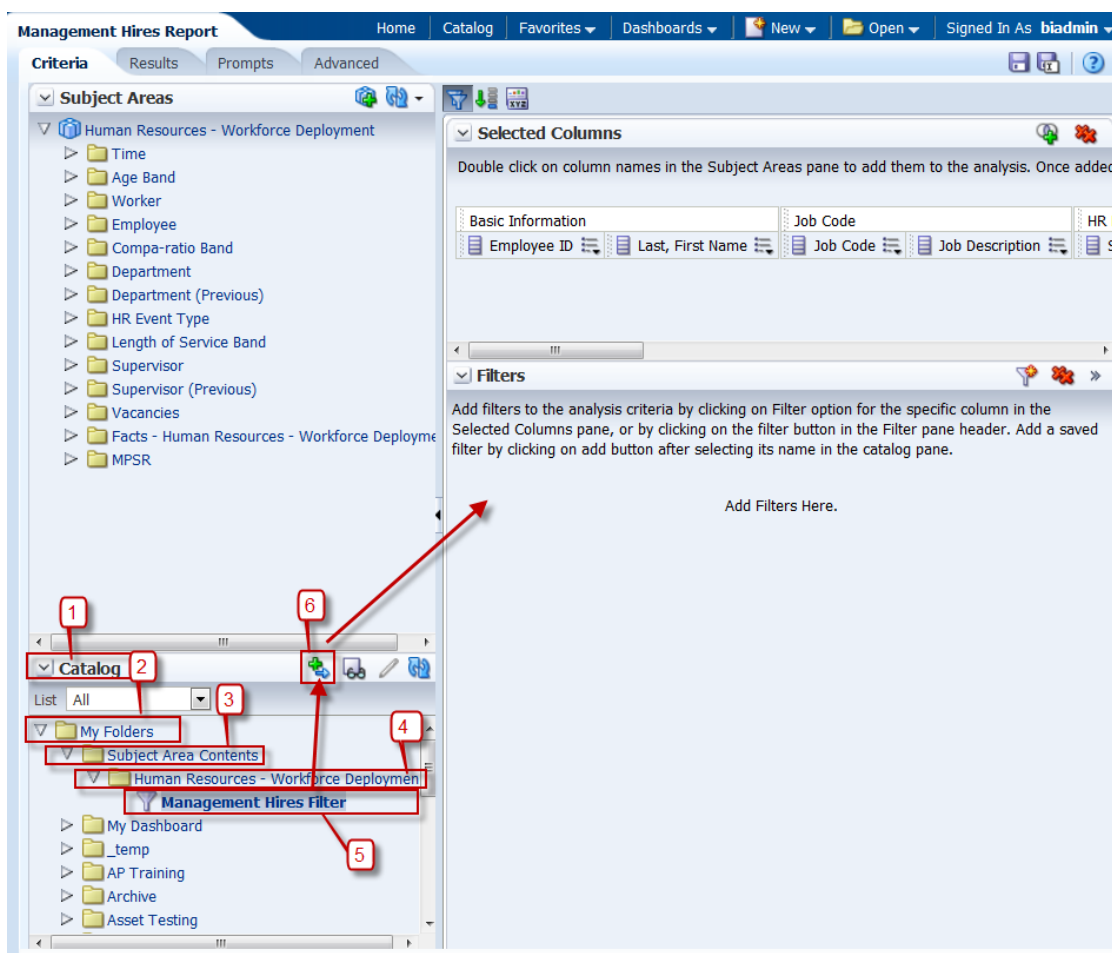
3. Click on **“Remove all Filters”** from the Filters pane.



4. Filters will be deleted and filter pane will appear as shown below:

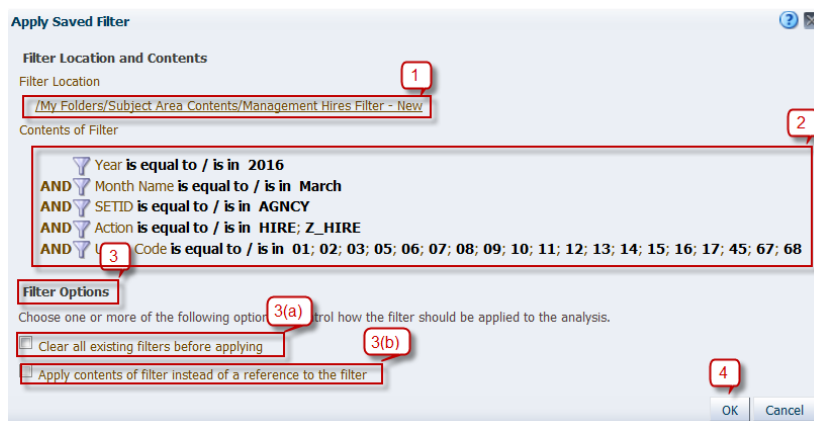


5. Go to Catalog section under Subject Areas then go to **My Folders/Subject Area Contents/Human Resources – Workforce Deployment** to select **Management Hires Filter**.



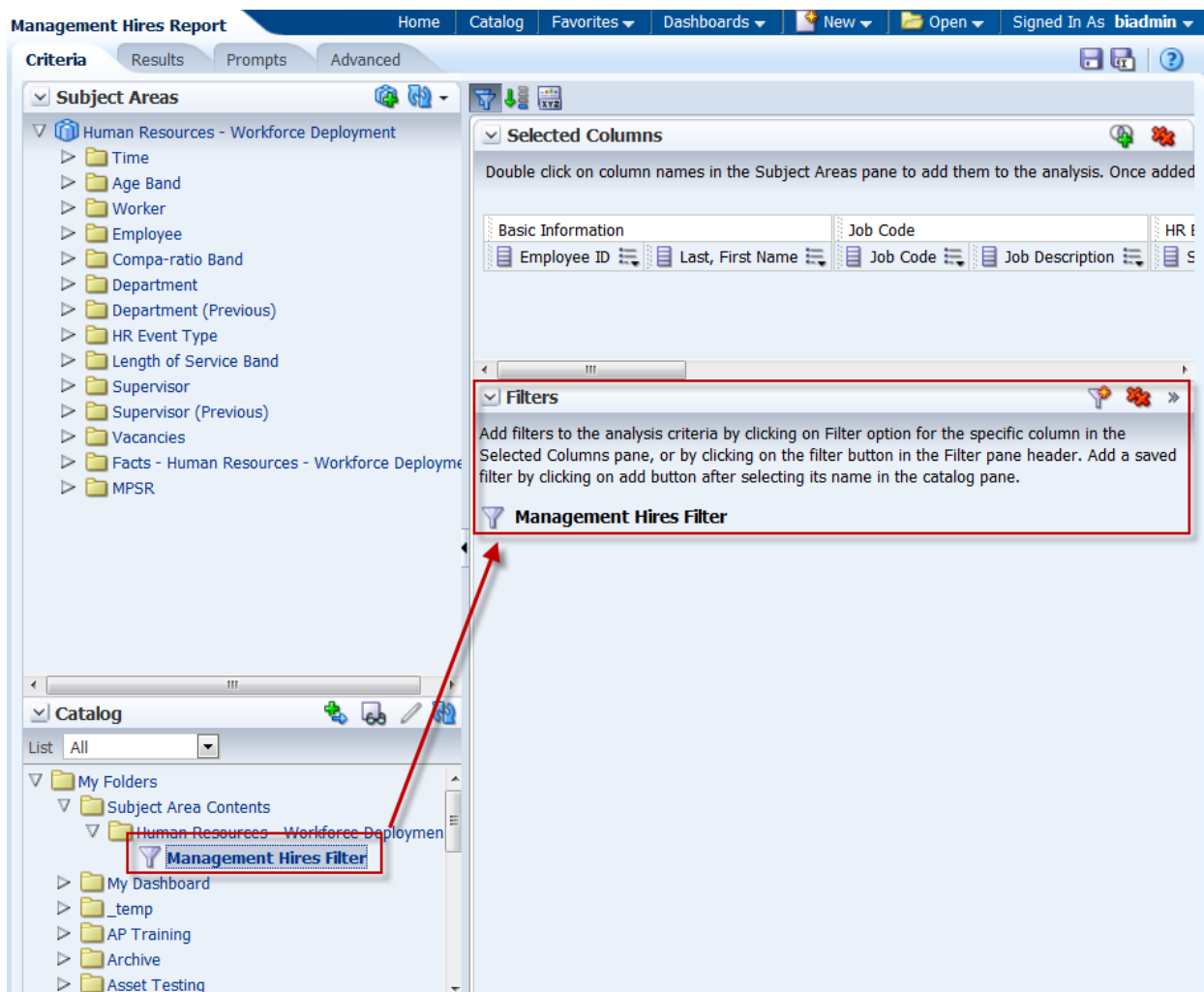
6. Click on the green plus sign and blue arrow (step No. 6 above) to move that filter to the Filters pane.

7. Apply Save Filter dialog opens:-

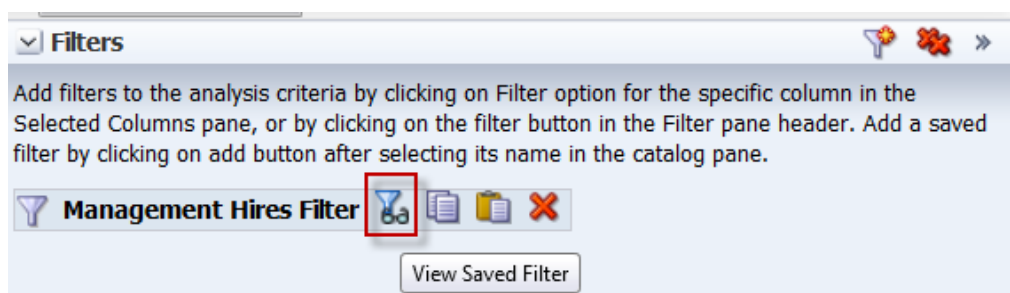


Elements	Description
1. Filter Location	It will show the path where this filter is saved.
2. Contents of Filter	It will display all the conditions used in the saved filter.
3. Filter Options	<ol style="list-style-type: none"> Clear all existing filters before applying:- It will clear all the filters which are being used in the current analysis and will apply this saved filter. Apply contents of filter instead of a reference to the filter: - It will display all the condition instead of filter name in the filter pane.

8. Leave the default values and click **OK**.



Note: Hover over the saved filter to click on  and the saved filter conditions.



Thus the saved filter will be applied when we click on **Results**.

Note: - Don't save the report, as this is an example for the class.

3.4 Move or Delete Analysis

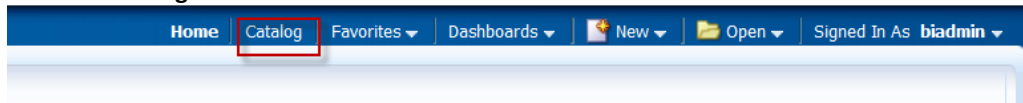
NOTE: The Copy feature is covered in section 6.1

An Analysis can be moved from one folder to another folder as needed. The following are the steps for it.

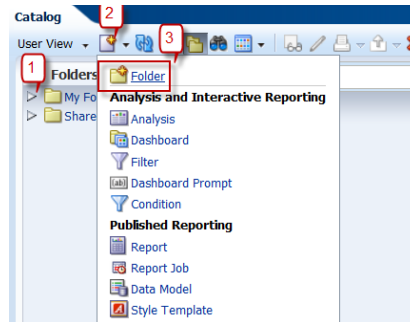
We will create a new folder under “My Folders” and name it as “**Temp**” in the following way:-

Guided Exercise

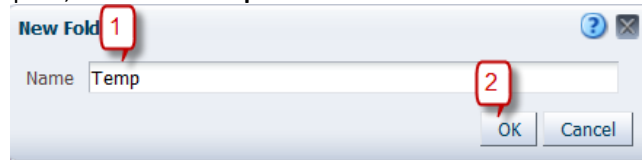
1. Click **catalog** from Global header.



2. Select “My Folders” and then click **New** to select “Folder”



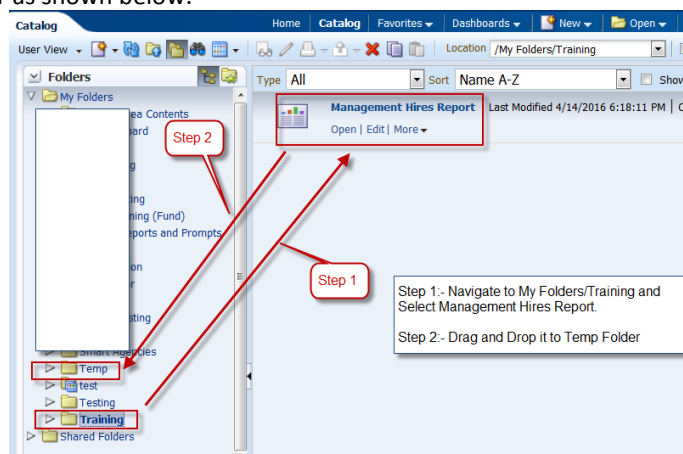
3. A new dialog opens, name it as **Temp** and click **OK**.



A Folder gets created under My Folders.

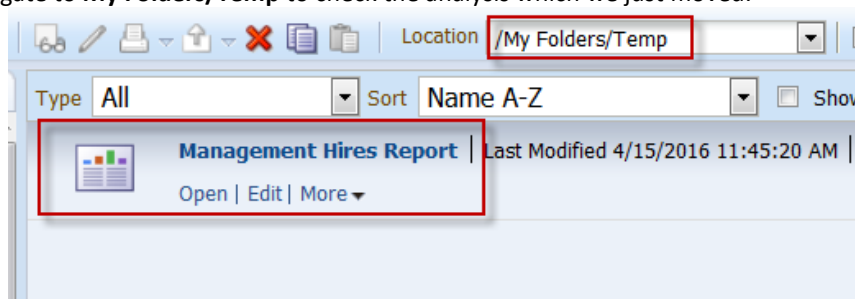
Next, we will move **Management Hires Report** from **Training** Folder to **Temp** Folder.

4. Go to **Training** folder and select **Management Hire Report**. Click and hold to drag and drop the analysis in **Temp** folder as shown below.



Now the Analysis will be moved from Training Folder to Temp folder

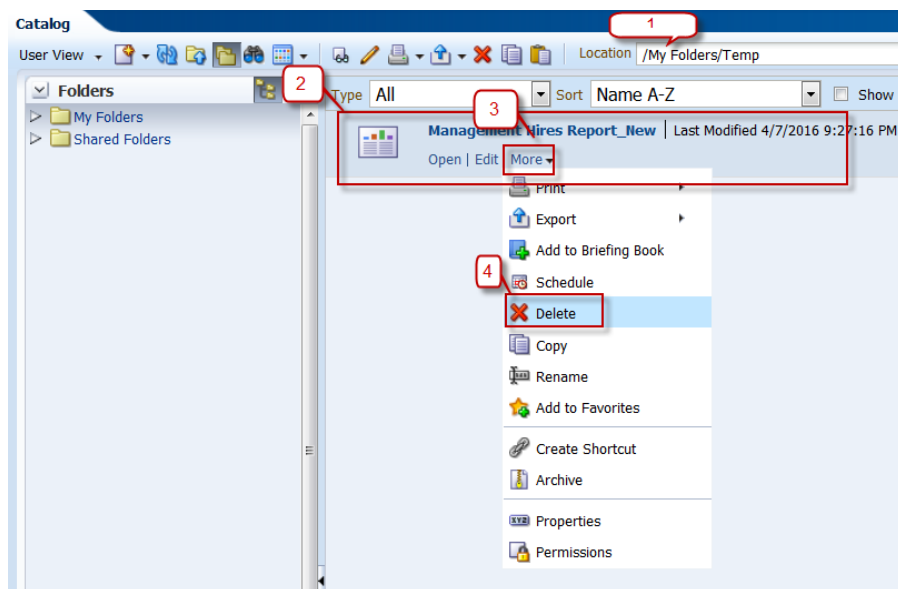
5. Navigate to **My Folders/Temp** to check the analysis which we just moved.



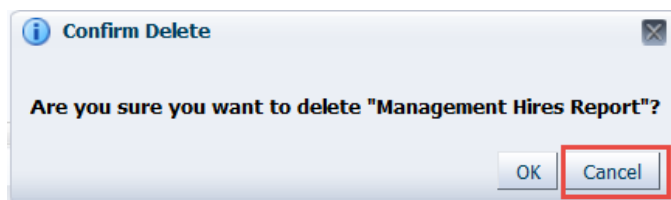
Delete an Analysis

Note: We won't be deleting the analysis.

6. To Delete the Analysis, click on **More** drop down menu for **Management Hires Report** to select **Delete** option.



7. **Do not actually delete the analysis.** Click cancel to cancel the Delete function.



Note: It will premanently delete that analysis from the Folder.

8. Now move back the analysis to Training Folder.



4. Format Analysis & Columns

Introduction	<p>After you run an analysis, the results are formatted using default formatting rules. By adding additional formatting to the results, you can draw focus to blocks of related information and call attention to specific data elements.</p> <p>You can edit properties for a column to control the appearance and layout of a column and its contents. You can also specify formatting to apply only if the contents of the column meet certain conditions. By default, your selections for a column apply only to the current analysis.</p> <p>You can create or modify the formula or aggregation rule behind a column through use of the formula function within the Analysis Editor. This modification is completed in the user interface for an individual analysis; it does not affect the column rule for other analyses. This functionality requires a basic knowledge of SQL syntax and expression writing.</p>
Objectives	<p>At the end of this section, you will be able to complete the following tasks related to results on Analyses tab.</p> <ul style="list-style-type: none"> • Move, Add, Exclude, Hide/Delete Column • Sort a Column • Add Grand Totals & Subtotals • Edit Column Format • Edit Value Format • Edit Data Format • Apply Conditional Format

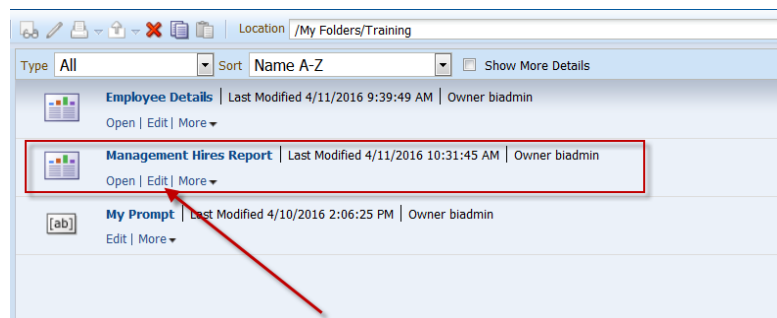
4.1 Move, Add, Exclude, Hide & Delete Column

Move a column

In the **Compound Layout** under **Results** tab, we have the ability to change the presentation of data based on the desired outcome.

By default the results tab of the analysis is **grouped** based on what has been selected first in the **Criteria** tab when we first created the analysis. This can be changed by moving or reorganizing the columns displayed in the report by following the below steps.

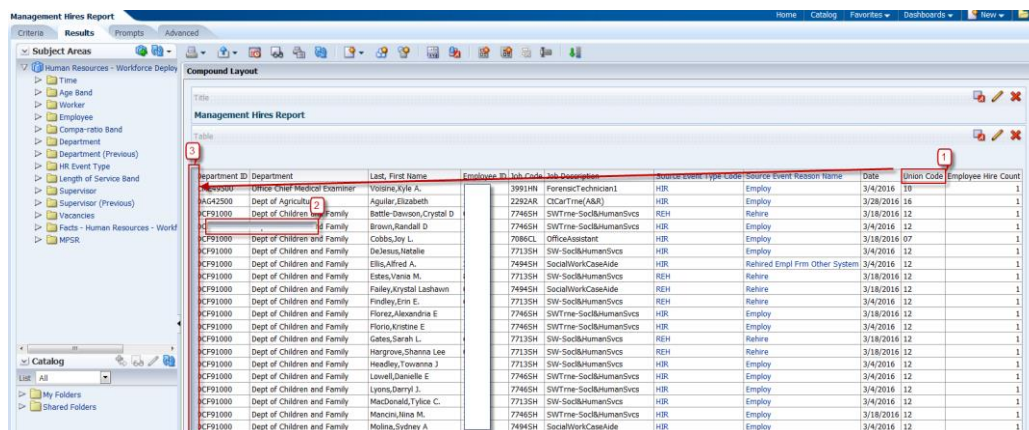
Edit the “**Management Hires Report**” analysis under My Folders/Training and select the Results tab as shown below.



Guided Exercise

a. By Drag and Drop:-

1. Hover over the column header of Union Code, cursor will change to drag symbol then left click and drag and drop at the first column (before Department ID).



Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source	Event Type	Union Code	Event Position Name	Date	Employee Hire Count
3991HN	Office Chief Medical Examiner	Voisra, Kyle A.	2292AR	ForensicTechnician1	HR	Employ	3/4/2016	10			1
2292AR	Dept of Agriculture	Aguilar, Elizabeth	7746SH	CCarTime(ABU)	HR	Employ	3/28/2016	16			1
7746SH	Dept of Children and Family	Battle-Devon, Crystal D	7746SH	SWTime-SocialHumanSvc	REH	Rehire	3/18/2016	12			1
7746SH	Dept of Children and Family	Brown, Randall D	7746SH	SWTime-SocialHumanSvc	HR	Employ	3/4/2016	12			1
7746SH	Dept of Children and Family	Cobbs, Joy L	7746SH	OfficeAssistant	HR	Employ	3/18/2016	07			1
7713SH	Dept of Children and Family	DeJesus, Natalie	7713SH	SW-SocialHumanSvc	HR	Employ	3/4/2016	12			1
7746SH	Dept of Children and Family	Ellis, Alfred A.	7746SH	SocialWorkCaseAide	HR	Rehired Empl Pm Other System	3/4/2016	12			1
7713SH	Dept of Children and Family	Estes, Vienna M.	7713SH	SW-SocialHumanSvc	REH	Rehire	3/18/2016	12			1
7746SH	Dept of Children and Family	Falvey, Krystal Lashawn	7746SH	SocialWorkCaseAide	REH	Rehire	3/18/2016	12			1
7713SH	Dept of Children and Family	Findley, Erin E.	7713SH	SW-SocialHumanSvc	REH	Rehire	3/4/2016	12			1
7746SH	Dept of Children and Family	Floner, Alexandra E	7746SH	SWTime-SocialHumanSvc	HR	Employ	3/18/2016	12			1
7746SH	Dept of Children and Family	Flora, Kristine E	7746SH	SWTime-SocialHumanSvc	HR	Employ	3/4/2016	12			1
7713SH	Dept of Children and Family	Gates, Sarah L.	7713SH	SW-SocialHumanSvc	REH	Rehire	3/18/2016	12			1
7713SH	Dept of Children and Family	Hargrove, Shanna Lee	7713SH	SW-SocialHumanSvc	REH	Rehire	3/18/2016	12			1
7713SH	Dept of Children and Family	Headley, Tawanna J	7713SH	SW-SocialHumanSvc	HR	Employ	3/4/2016	12			1
7746SH	Dept of Children and Family	Lowell, Danielle E	7746SH	SWTime-SocialHumanSvc	HR	Employ	3/4/2016	12			1
7746SH	Dept of Children and Family	Lynn, Derryl J.	7746SH	SWTime-SocialHumanSvc	HR	Employ	3/4/2016	12			1
7713SH	Dept of Children and Family	MacDonald, Tylce C.	7713SH	SW-SocialHumanSvc	HR	Employ	3/4/2016	12			1
7746SH	Dept of Children and Family	Mancini, Nina M.	7746SH	SWTime-SocialHumanSvc	HR	Employ	3/18/2016	12			1
7746SH	Dept of Children and Family	Molina, Sydney A.	7746SH	SocialWorkCaseAide	HR	Employ	3/4/2016	12			1

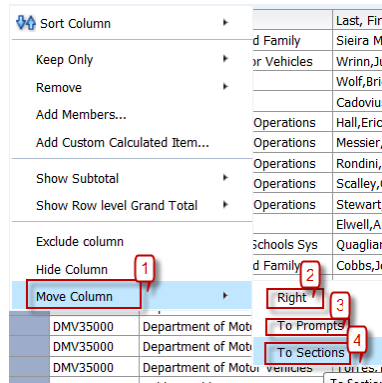
Union Code	Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Employee Hire Count
01	DCF91000	Dept of Children and Family	Sierra Millan, Natalia		3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1
01	DMV35000	Department of Motor Vehicles	Wrin, Judeen T		2432EX	DptyCmmrOfDMV	HJR	Employ	3/18/2016	1
01	DPH48500	Public Health	Wolf, Brie J.		3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1
02	DDS50100	DDS Central Office	Cadovius, Nicole M.		0516MP	Director of Communications 2	HJR	Employ	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Hall, Eric C.		2346TC	TranspMntr2	HJR	Employ	3/22/2016	1
06	DOT57200	Bureau of Highway Operations	Messier, Eric A.		2345TC	TranspMntr1	HJR	Employ	3/18/2016	1
06	DOT57200	Bureau of Highway Operations	Rondini, Brian E.		2345TC	TranspMntr1	REH	Rehire	3/17/2016	1
06	DOT57200	Bureau of Highway Operations	Scalley, George P.		2345TC	TranspMntr1	HJR	Employ	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Stewart, Gregory A.		2345TC	TranspMntr1	HJR	Employ	3/18/2016	1
06	MHA55040	SW Mental Health	Elwell, Andrew		0426TE	Maintainer	HJR	Employ	3/4/2016	1
06	SDE64300	CT Technical High Schools Sys	Quagliardi, Luke W		0426TE	Maintainer	HJR	Employ	3/7/2016	1
07	DCF91000	Dept of Children and Family	Cobbs, Joy L.		7086CL	OfficeAssistant	HJR	Employ	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	LaFleur, Maureen C.		2008CL	ClerkTypist	HJR	Employ	3/7/2016	1
07	DMV35000	Department of Motor Vehicles	Levy, Rachel		3591CL	AdministrativeAssistant	REH	Rehire	3/24/2016	1
07	DMV35000	Department of Motor Vehicles	May, Alyssa		2008CL	ClerkTypist	REH	Rehire	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	Solano, Linette		5833CL	MotorVehicleExaminer	HJR	Employ	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	Torres, Thayne Rose		7086CL	OfficeAssistant	HJR	Employ	3/18/2016	1
07	DPH48500	Public Health	Netleton, Chelsea A.		7086CL	OfficeAssistant	HJR	Employ	3/30/2016	1
07	DRS16000	Dept of Revenue Services	Almquist, Mary Angela P.		2007CL	Clerk	REH	Rehire	3/7/2016	1
07	DRS16000	Dept of Revenue Services	Amin, Jayshree		2007CL	Clerk	REH	Rehire	3/24/2016	1
07	DRS16000	Dept of Revenue Services	Clayton, Kimberly D.		2007CL	Clerk	REH	Rehire	3/22/2016	1
07	DRS16000	Dept of Revenue Services	Downs, Thomas S.		2007CL	Clerk	REH	Rehire	3/24/2016	1
07	DRS16000	Dept of Revenue Services	Floyd, Albert L.		2007CL	Clerk	REH	Rehire	3/24/2016	1

The above screenshot is final display of our results.

Guided Exercise

b. By Run time Option:-

2. Hover over the column header of Union Code and right click to get run time options (aka drop down options). Click on Move Column drop – down menu.



Elements	Description
1. Move Column	This option in Run time Menu allows you to move column to Left, Right, To Prompts, and To Sections & To Columns.
2. Right	It will move column to Right.
3. Left	It will move column to Left.
4. To Prompts	It will move the column to Table Prompt level and restrict the data by select values.
5. To Sections	It will divide the results into sections based on column selected.
6. To Columns	It will move the column back to Tables.

3. Now, move the **Union Code** column to Right. Hover over the column header of the **Union Code** column and right click to get run time options (aka drop down options). Highlight the **Move Column** then select **Right**.

This will move the column to right as shown below:

4. Now move the Union code column to the Table Prompts by clicking on **To Prompts**. To do so, Hover over the column header of the **Union Code** column and right click to get run time options (aka drop down options). Select **Move Column** and then click on **To Prompts**.

Table

Union Code 01

Department ID	Agent	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Employee Hire Count
DCF91000	Children and Family	Sieira Millan, Natalia		3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1
DMV35000	Department of Motor Vehicles	Wynn, Judeen T		2432EX	DptyCmmrOfdMV	HR	Employ	3/18/2016	1
DPH48500	Health	Wolf, Brie J.		3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1

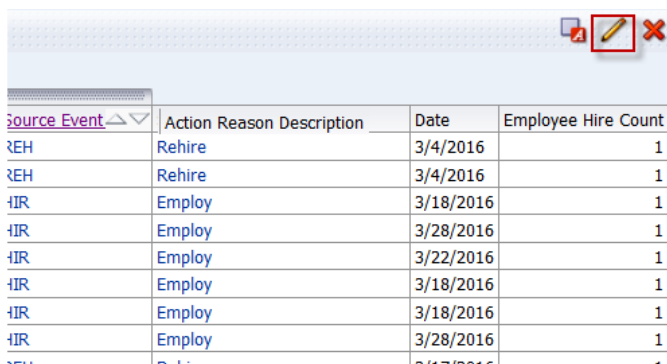
Add to Briefing Book

A screenshot of the 'Move Column' dropdown menu. The menu is open, showing two options: 'To Sections' and 'To Columns'. The 'To Columns' option is highlighted with a red border, indicating it is the selected action.

Guided Exercise

c. By Edit View:-

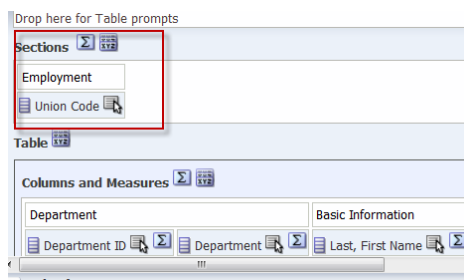
- To move or reorder the columns of your analysis, click the **Edit View** icon in the Table View.



Source Event	Action Reason Description	Date	Employee Hire Count
REH	Rehire	3/4/2016	1
REH	Rehire	3/4/2016	1
HIR	Employ	3/18/2016	1
HIR	Employ	3/28/2016	1
HIR	Employ	3/22/2016	1
HIR	Employ	3/18/2016	1
HIR	Employ	3/18/2016	1
HIR	Employ	3/28/2016	1

The Table Editor appears as shown.

- Under **Layout Pane** drag and drop the **Union Code** column into the **Sections** pane as shown below.



Note: The column can also be moved to Table Prompts based on requirement.

01

Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Employee Hire Count
DCF91000	Dept of Children and Family	Sieira Millan,Natalia		3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1
DMV35000	Department of Motor Vehicles	Wrin,Judeen T		2432EX	DptyCmmrOfDMV	HIR	Employ	3/18/2016	1
DPH48500	Public Health	Wolf,Brie J.		3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1

02

Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Employee Hire Count
DDS50100	DDS Central Office	Cadovius,Nicole M.	188304		Director of Communications 2	HIR	Employ	3/28/2016	1

06

Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Employee Hire Count
DOT57200	Bureau of Highway Operations	Hall,Eric C.		2346TC	TranspMntr2	HIR	Employ	3/22/2016	1
DOT57200	Bureau of Highway Operations	Messier,Eric A		2345TC	TranspMntr1	HIR	Employ	3/18/2016	1
DOT57200	Bureau of Highway Operations	Rondini,Brian E		2345TC	TranspMntr1	REH	Rehire	3/17/2016	1
DOT57200	Bureau of Highway Operations	Scalley,George P.		2345TC	TranspMntr1	HIR	Employ	3/28/2016	1

☒ **Layout**

Drag/drop measures, columns and hierarchies to determine table layout.

Table Prompts

Drop here for Table prompts

Sections

Employment

Union Code

Table

Columns and Measures

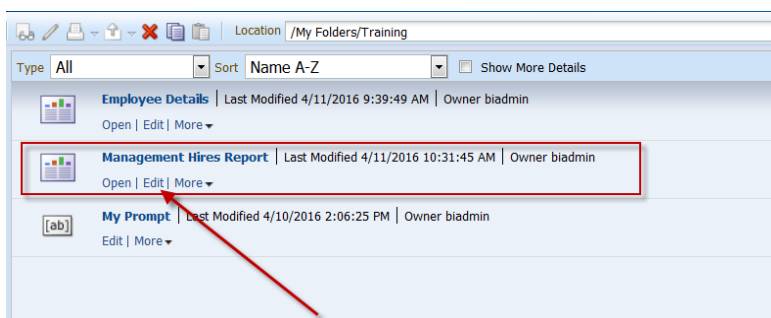
Department	Basic Information	Job Code	HR Event Type			
Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code

Excluded

Drop here to exclude from this Table only

Click **Done**.

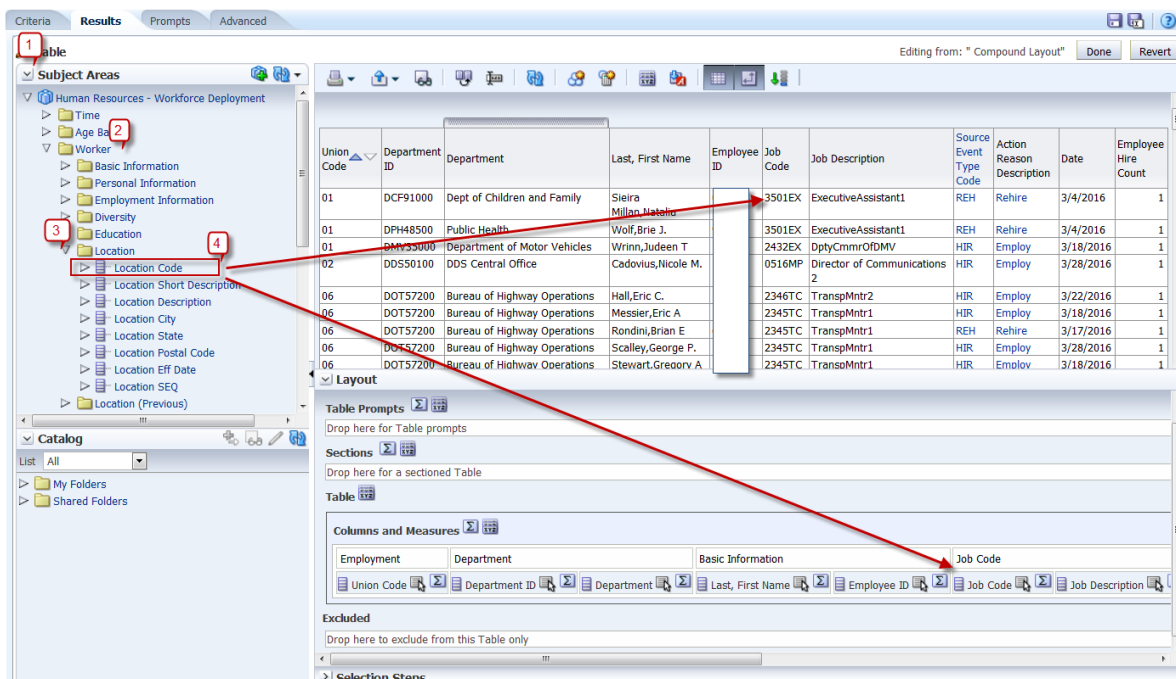
Make sure to open the **“Management Hires Report”** and select the Results tab by clicking on Edit as shown:



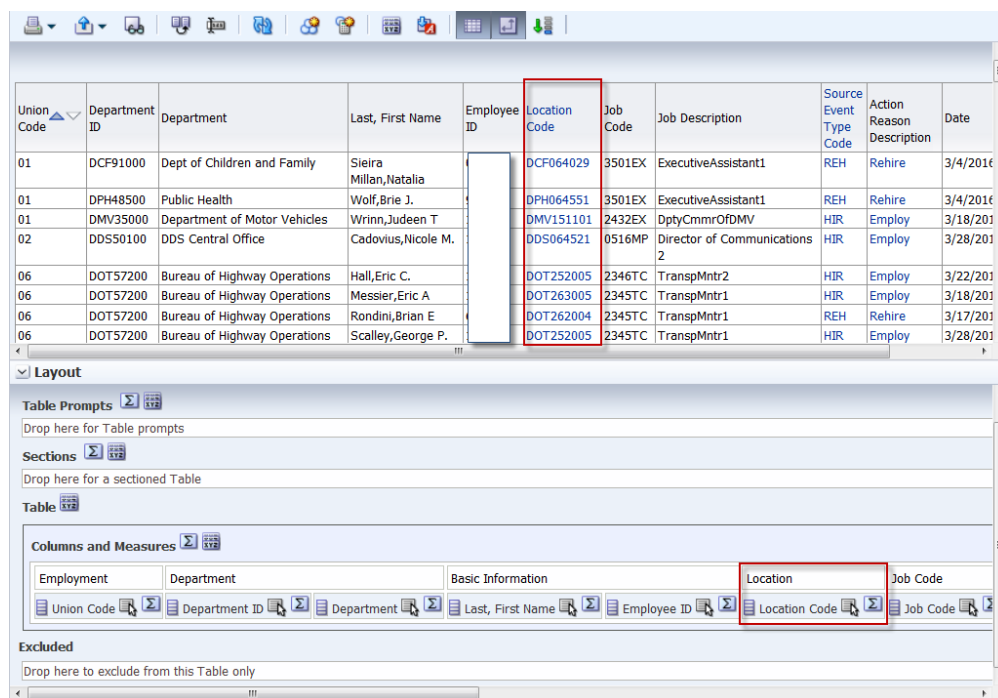
a. **Edit View: -**

- Next we will add **Location Code** to the results.

- Expand **Worker > Location** to select **Location Code** from **Subject Areas** and drag & drop in **Layout pane** in Column & Measures section.



The screenshot shows the OBI- STARS interface. On the left, the 'Subject Areas' pane is expanded to 'Worker' > 'Location', with 'Location Code' selected. On the right, the 'Layout' pane shows a table with columns: Union Code, Department ID, Department, Last, First Name, Employee ID, Job Code, Job Description, Source Event Type Code, Action Reason Description, Date, and Employee Hire Count. The 'Columns and Measures' section in the 'Layout' pane is highlighted, showing the 'Location Code' field being added to the table.



The screenshot shows the OBI- STARS interface with the 'Location Code' field added to the table. The 'Location Code' field is highlighted in red in the 'Columns and Measures' section. The table data is as follows:

Union Code	Department ID	Department	Last, First Name	Employee ID	Location Code	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Employee Hire Count
01	DCF91000	Dept of Children and Family	Sieira Millan,Natalia		DCF064029	3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1
01	DPH48500	Public Health	Wolf,Brie J.		DPH064551	3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1
01	DMV35000	Department of Motor Vehicles	Wynn,Judeen T		DMV151101	2432EX	DptyCmmrOfDMV	HIR	Employ	3/18/2016	1
02	DDS50100	DDS Central Office	Cadovius,Nicole M.		DDS064521	0516MP	Director of Communications 2	HIR	Employ	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Hall,Eric C.		DOT252005	2346TC	TranspMntr2	HIR	Employ	3/22/2016	1
06	DOT57200	Bureau of Highway Operations	Messier,Eric A		DOT263005	2345TC	TranspMntr1	HIR	Employ	3/18/2016	1
06	DOT57200	Bureau of Highway Operations	Rondini,Brian E		DOT262004	2345TC	TranspMntr1	REH	Rehire	3/17/2016	1
06	DOT57200	Bureau of Highway Operations	Scalley,George P.		DOT252005	2345TC	TranspMntr1	HIR	Employ	3/28/2016	1

- Click **Done**.

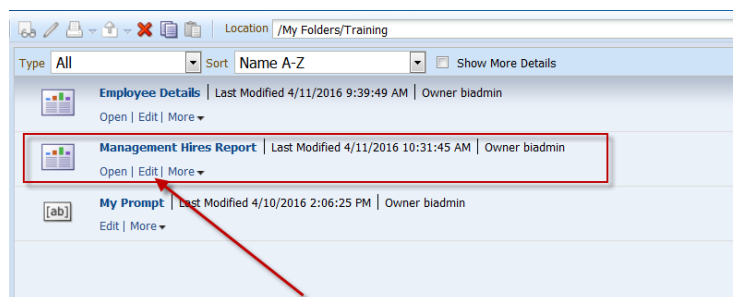
Exclude a column

To Exclude a Column there are two ways:-

Run time Menu

Edit View

Make sure to open the **"Management Hires Report"** and select the Results tab by clicking on Edit as shown:



Guided Exercise

a. Run time Menu:-

1. On Results tab, go to **Location Code** column, right click on column header to view the run time menu. Click **Exclude Column**.

Last, First Name	Employee ID	Location	Sort Column
Sieira Millan, Natalia	DCF064029		Drill
Wolf, Brie J.	DPH064551		Keep Only
Wrin, Judeen T	DMV151101		Remove
Cadovius, Nicole M.	DDS064521		Add Members...
Hall, Eric C.	DOT252005		Add Custom Calculated Item...
Messier, Eric A	DOT263005		Show Subtotal
Rondini, Brian E	DOT262004		Show Row le Grand Total
Scalley, George P.	DOT252005		Exclude column
Stewart, Gregory A	DOT282004		Hide
Elwell, Andrew	MHA015M38		Exclude column
Quagliardi, Luke W	SDE059001		Move Column
Cobbs, Joy L.	DCF103003		
Torres, Thaydee Rose	DMV159601		
Nettleton, Chelsea A.	DPH064T44		
Guiles-Smith, Betheona A.	MCO064001		
Copeland, Nina N	SDR064102	6976CL	Secretary1

2. It will not delete the column, it will just exclude the column.

Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	
Sieira Millan,Natalia		3501EX	ExecutiveAssistant1	REH	F
Wolf,Brie J.		3501EX	ExecutiveAssistant1	REH	F
Wrinn,Judeen T		2432EX	DptyCmmrOfDMV	HIR	E
Cadovius,Nicole M.		0516MP	Director of Communications 2	HIR	E
Hall,Eric C.		2346TC	TranspMntr2	HIR	E
Messier,Eric A		2345TC	TranspMntr1	HIR	E
Rondini,Brian E		2345TC	TranspMntr1	REH	F
Scalley,George P.		2345TC	TranspMntr1	HIR	E

- If you want to include the column, just go to any column and right click to get runtime menu. Click **Include Column** and then **Location Code**.


1	2	3
Department	Sort Column	Job ID
Dept of Children and Family Services	Keep Only	3501EX
Public Health	Remove	3501EX
Department of Motor Vehicles	Add Members...	2432EX
DDS Central Office	Add Custom Calculated Item...	0516MP
Bureau of Highway Operations	Show Subtotal	2346TC
Bureau of Highway Operations	Show Row level Grand Total	2345TC
Bureau of Highway Operations	Exclude column	2345TC
SW Mental Health	Include column	0426TE
CT Technical High Schools System	Hide Column	0426TF
Dept of Children and Family Services	Move Column	7086CL
Department of Motor Vehicles		7086CL
Public Health		6976CL
Off of the Healthcare Advocate		6976CL
Dept of Rehabilitation Svcs	Copeland,Nina N	169565

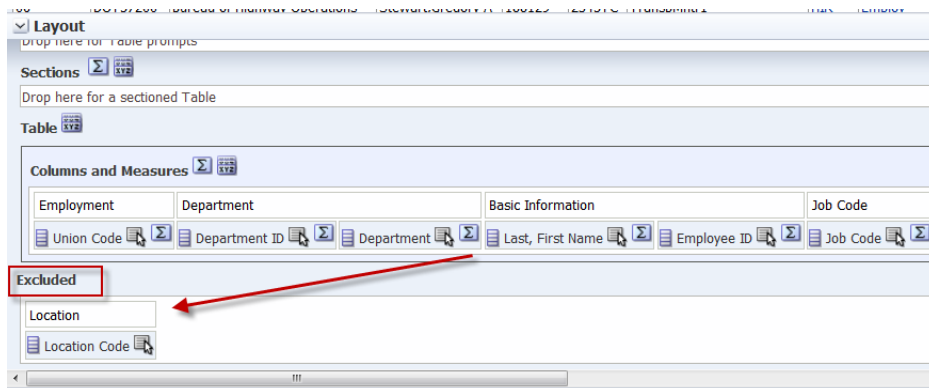
It will include the column.

Department	Location Code	Last, First Name
Dept of Children and Family Services	DCF064029	Sieira Millan,Natalia
Public Health	DPH064551	Wolf,Brie J.
Department of Motor Vehicles	DMV151101	Wrinn,Judeen T
DDS Central Office	DDS064521	Cadovius,Nicole M.
Bureau of Highway Operations	DOT252005	Hall,Eric C.
Bureau of Highway Operations	DOT252005	Scalley,George P.
Bureau of Highway Operations	DOT262004	Rondini,Brian E
Bureau of Highway Operations	DOT263005	Messier,Eric A
Bureau of Highway Operations	DOT282004	Stewart,Gregory A
SW Mental Health	MHA015M38	Elwell,Andrew
CT Technical High Schools System	SDE059001	Quagliardi,Luke W
Dept of Children and Family Services	DCF103003	Cobbs,Joy L.
Department of Motor Vehicles	DMV159601	Torres,Thaydee Rose
Public Health	DPH064T44	Nettleton,Chelsea A.
Off of the Healthcare Advocate	MCO064001	Guiles-Smith,Betheona A.

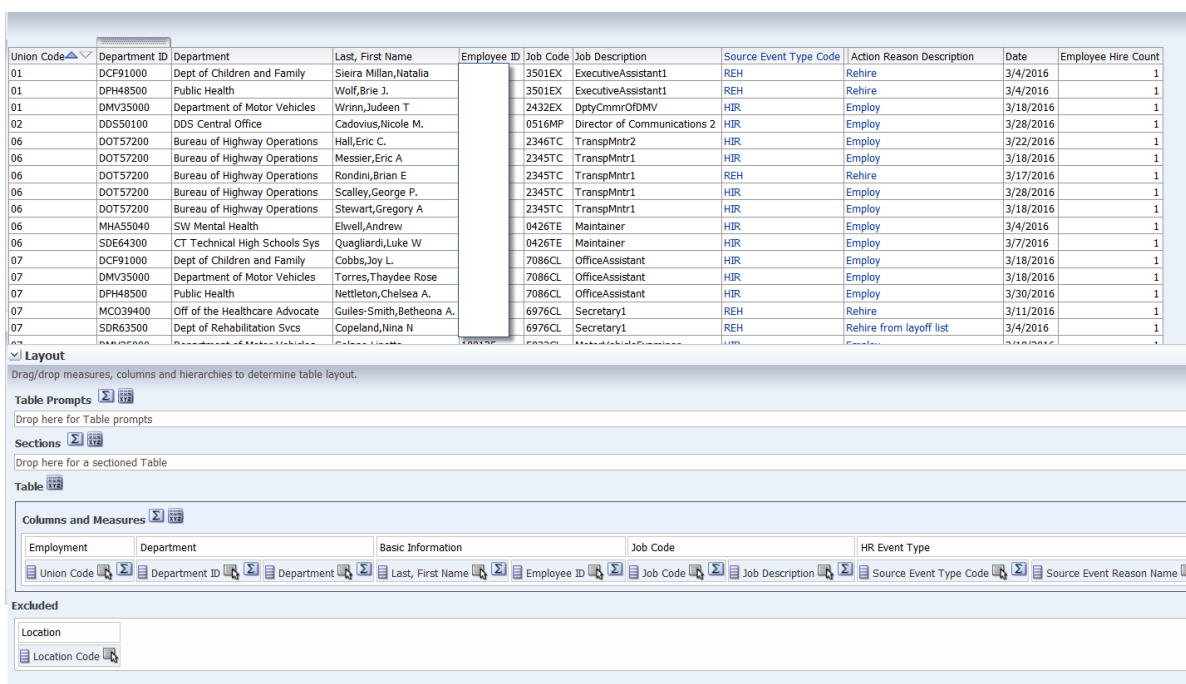
4. Edit View

Guided Exercise

1. To Exclude columns from your analysis, click the **Edit View**  icon in the Table View. Go to Layout pane and Drag Location Code column and drop in **Excluded** as shown below.

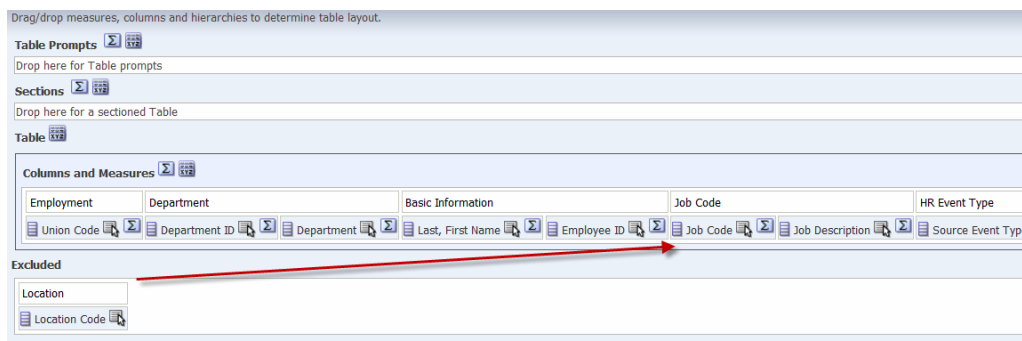


2. Check the Preview layout to see that column is excluded.



Union Code	Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Employee Hire Count
01	DCF91000	Dept of Children and Family	Seira Millan, Natalia		3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1
01	DPH48500	Public Health	Wolf, Brie J.		3501EX	ExecutiveAssistant1	REH	Rehire	3/4/2016	1
01	DMV35000	Department of Motor Vehicles	Wynn, Judeen T		2432EX	DptyCmmrOfDMV	HIR	Employ	3/18/2016	1
02	DDS05100	DDS Central Office	Cadovius, Nicole M.		0516MP	Director of Communications 2	HIR	Employ	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Hall, Eric C.		2346TC	TranspMntr2	HIR	Employ	3/22/2016	1
06	DOT57200	Bureau of Highway Operations	Messier, Eric A		2345TC	TranspMntr1	HIR	Employ	3/18/2016	1
06	DOT57200	Bureau of Highway Operations	Rondini, Brian E		2345TC	TranspMntr1	REH	Rehire	3/17/2016	1
06	DOT57200	Bureau of Highway Operations	Scalley, George P.		2345TC	TranspMntr1	HIR	Employ	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Stewart, Gregory A		2345TC	TranspMntr1	HIR	Employ	3/18/2016	1
06	MHAS0040	SW Mental Health	Elwell, Andrew		0426TE	Maintainer	HIR	Employ	3/4/2016	1
06	SDE64300	CT Technical High Schools Sys	Quagliardi, Luke W		0426TE	Maintainer	HIR	Employ	3/7/2016	1
07	DCF91000	Dept of Children and Family	Cobbs, Joy L.		7086CL	OfficeAssistant	HIR	Employ	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	Torres, Thayne Rose		7086CL	OfficeAssistant	HIR	Employ	3/18/2016	1
07	DPH48500	Public Health	Nettleton, Chelsea A.		7086CL	OfficeAssistant	HIR	Employ	3/30/2016	1
07	MCO39400	Off of the Healthcare Advocate	Gules-Smith, Betheona A.		6976CL	Secretary1	REH	Rehire	3/11/2016	1
07	SR63500	Dept of Rehabilitation Svcs	Copeland, Nina N		6976CL	Secretary1	REH	Rehire from layoff list	3/4/2016	1

Note: It can be included by dragging and dropping back into the Columns and Measures section.



Click **Done**.

Hide/Delete a column

Hide a column:- If you want to include a column but don't want to display in the table, you can hide a column.

Hiding a column doesn't delete column from Criteria tab.

Delete a column:- If you select an incorrect column or a column is no longer necessary for the analysis, you can remove the column from the analysis. You cannot delete the entire table; you must delete each column separately. It deletes column from Criteria tab.

Deleting a column does not delete filters based on the column. The filter will still be active even if the data is not displayed in the results.

Difference between Hide and Exclude Column: If you sort by columns then "hide" them then the table is sorted by the hidden columns. But if you sort by columns then "exclude" them then the table is no longer sorted by the excluded columns. So "hide" allows you to sort by a non-visible column.

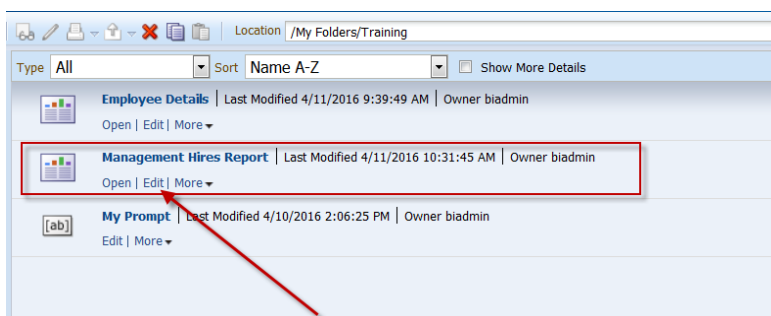
Hide a column

To hide a column, there are two ways:-

Run Time Menu

Edit View

Make sure to open the "**Management Hires Report**" and select the Results tab by clicking on Edit as shown:



Guided Exercise

a. Run Time Menu:-


1. On Results tab, go to the **Location Code** column, right click on column header to view the run time menu.
2. Click Hide.

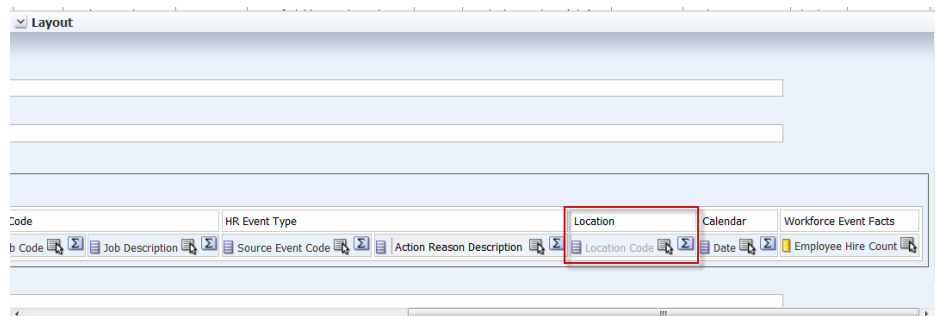
Employee	Location Code	Sort Column	
5901	DCF064025	Drill	
0323	DPH064551	Keep Only	
8106	DMV15110	Remove	
8304	DDS064521	Add Members...	2
8145	DOT25200	Add Custom Calculated Item...	
8110	DOT26300	Show Subtotal	
5689	DOT26200	Show Row level Grand Total	
8188	DOT25200	Exclude column	
8129	DOT28200	Hide Column	
7812	MHA015M3	Move Column	
7964	SDE059001		
8134	DCF103003		
8122	DMV15960		
8266	DPH064T4		
6532	MCO064001	6976CL Secretary1	Hide Col

Note:- From Runtime Menu we cannot display a hidden column.

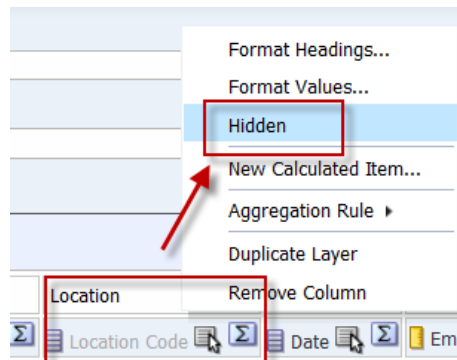
Guided Exercise

b. Edit View:-

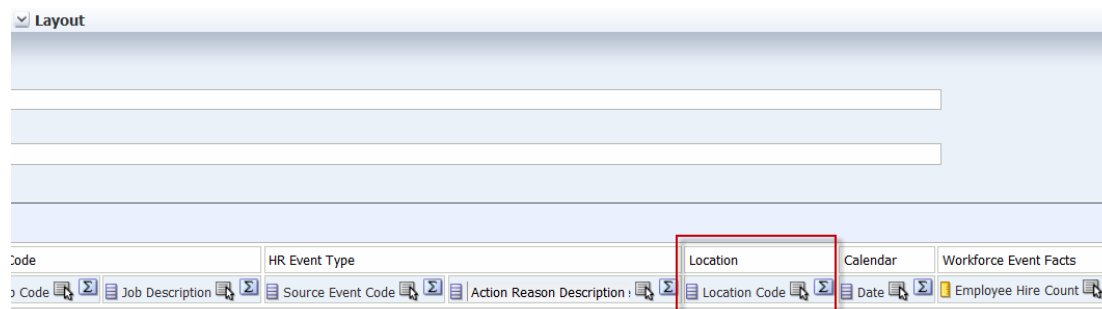
- To Hide column from your analysis, click the **Edit View**  icon in the Table View. Go to Layout menu and you will see Location Code as unhighlighted as we have just Hide the column from Run time Menu.



- To unhide Click the **More Options** icon  for **Location Code** and click Hidden.





This will unhide the column. And again if you want to hide it, repeat the same by going to **More Options**.

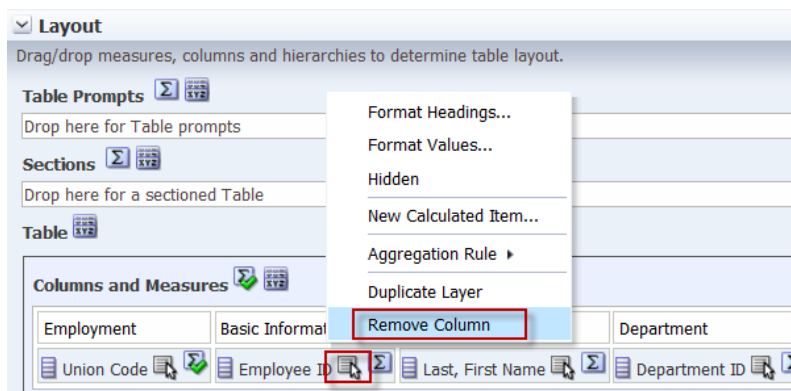


3. Click **Done**.

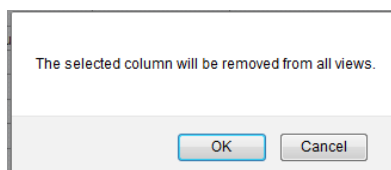
Delete a Column

Guided Exercise

1. To **Delete** Columns from your analysis, click the **Edit View**  icon in the Table View.
2. In the layout pane, click the **More Options** icon  for Employee ID and select **Remove Column**.



3. Click **OK** when a box appears.



Note: Check the Preview Layout to make sure that the column is deleted.

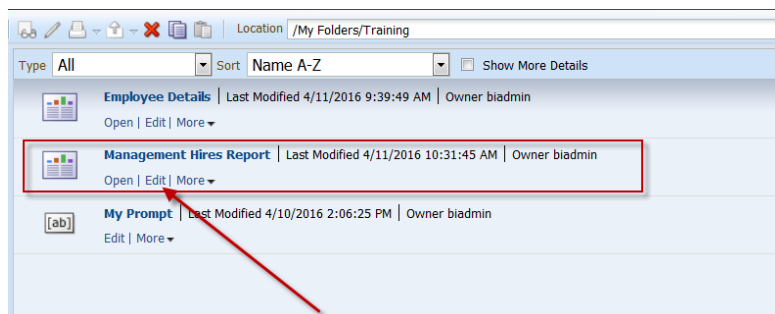
4. Click **Done**.

4.2 Sort a Column

Column results can be sorted in ascending or descending order for an analysis. You can sort on multiple columns for an analysis. When sorting on multiple columns, the sort order is indicated by a number that displays in the lower left corner of the Order by button.

Sorting columns can be done in the following ways:

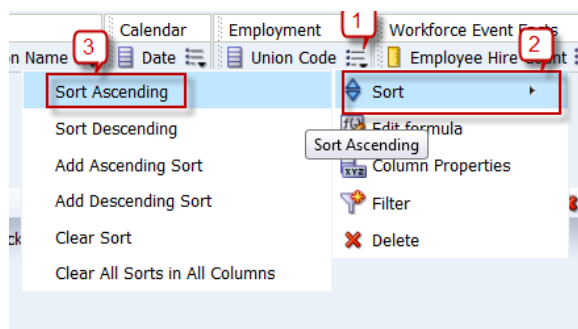
Make sure to open the “**Management Hires Report**” and select the Criteria tab by clicking on Edit as shown:



a. From Criteria Tab:-

Guided Exercise

1. On the Criteria tab, click the **More Options** icon for **Union Code**.
2. Select Sort > Sort Ascending.

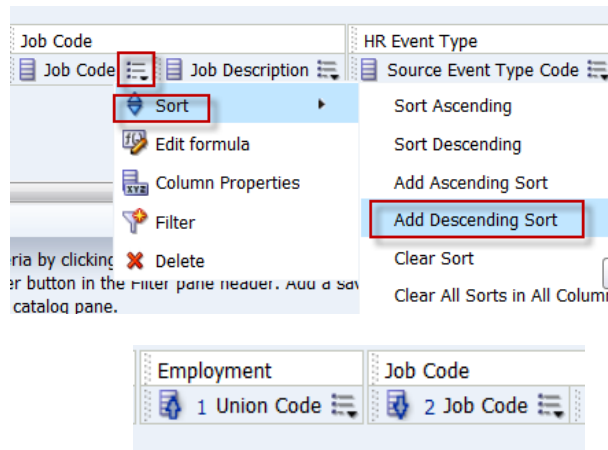


Observe that a sort icon is added to Union code.



Note: The order of the sort is indicated by an arrow, in this case the arrows point up, indicating that it is ascending. Additionally, if multiple sorts are added, a subscript number will also appear, indicating the sequence for the sort order.

3. Add sorting for **Job Code** as Add Descending Sort . A number will now appear showing that it is sorting based on that dimension secondary to **Union Code**.

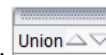


- Click on Results tab to see the results.

b. From Results Tab:-

Guided Exercise

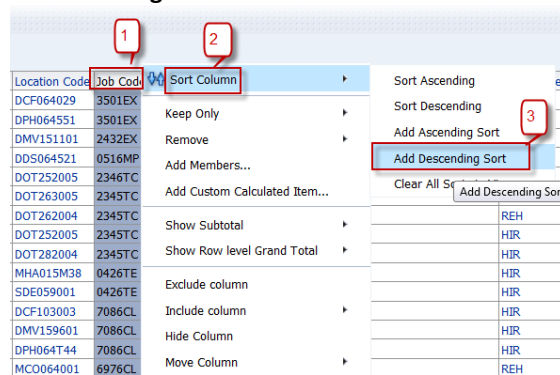
- Hover the cursor over the **Union Code** column header to see two arrows displaying. Click on upside arrow for ascending. Once clicked that arrow will be highlighted.



Union Code	Department ID	Department	Last, First Name
01	DCF91000	Dept of Children and Family	Sieira Millan,Natalia
01	DMV35000	Department of Motor Vehicles	Wrinn,Judeen T
01	DPH48500	Public Health	Wolf,Brie J.
02	DDS50100	DDS Central Office	Cadovius,Nicole M.

The results will also be sorted by Union Code.

- To add More sorting:- Go to Job Code column header and right click so that a run time menu opens up. Go to **Sort Column** to click on **Add Descending Sort**.



The results now will be sorted first by Union Code (ascending order) and then by Job Code (Descending order).

Union Code	Department ID	Department	Last, First Name	Location Code	Job
01	DCF91000	Dept of Children and Family	Sieira Millan,Natalia	DCF064029	3501EX
01	DPH48500	Public Health	Wolf,Brie J.	DPH064551	3501EX
01	DMV35000	Department of Motor Vehicles	Wrinn,Judeen T	DMV151101	2432EX
02	DDS50100	DDS Central Office	Cadovius,Nicole M.	DDS064521	0516MP
06	DOT57200	Bureau of Highway Operations	Hall,Eric C.	DOT252005	2346TC

Note: Difference between Sort Ascending and Add Ascending Sort is that later adds sorting to the already existing sorting where as former just sort the result based on the selected column only.



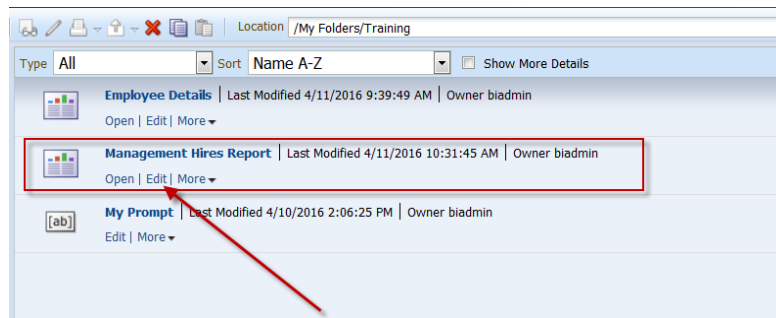
4.3 Add Grand Totals & Sub Totals

You can display a sub-total for a numerical column based on specific criteria; this will total a subset of rows and create an additional row for the subtotal. You can total any number of Attribute columns; you cannot total Fact columns. However, you must have Fact columns in your analysis for the totals to work correctly. You can also analysis a grand total for a numerical column based on all returned records. You can also create a grand total for a numerical column based on all returned records.

Note: If the totals are not correct, you may need to change the Aggregation rule from Default to Sum. Refer to the OBI Documentation for more information.

When you activate the Total By function for a column, the analysis automatically sorts by that column in ascending order. All additional sort order functions occur after the initial sort.

Make sure to open the **“Management Hires Report”** and select the Results tab by clicking on Edit as shown:



Grand Total:

Guided Exercise

1. In Results tab, click on Edit of Table View.

Union Code	Department ID	Department	Last, First Name	Location Code	Job Code	Job Description	Action Reason Description	Source Event Type Code	Date	Employee Hire Count
01	AES48000	Agricultural Exp Station	ANDERSON,JOHN F	AES093123	2531VR	DirAgrExprStat	Conversion	HIR	6/21/2001	1
01	CAT45200	CAT- INACTIVE DO NOT SELECT	Aniskovich,Jennifer S	Unspecified	3510EX	ExDir-Culture and Tourism	Cancel Separation	ZRE	1/19/2007	0
01	CAT45200	CAT- INACTIVE DO NOT SELECT	Bergstrom,Christopher L.	CAT064001	3510EX	ExDir-Culture and Tourism	Employ	HIR	3/31/2011	1
01	CME49500	Office Chief Medical Examiner	Carver,H Wayne	CME052001	1776VR	ChiefMedicalExaminer	Conversion	HIR	2/25/2002	1
01	CME49500	Office Chief Medical Examiner	Gill,James R.	CME052001	1776VR	ChiefMedicalExaminer	Employ	HIR	6/26/2013	1
01	CSC38000	CT Siting Council	Phelps,S. Derek	CSC089000	3544EX	ExDirOfCISitingCnsl	Conversion	HIR	3/13/2003	1
01	CSL66000	CT State Library	Aniskovich,Jennifer S	Unspecified	3510EX	ExDir-Culture and Tourism	Employ	HIR	1/2/2004	1
01	CSL66000	CT State Library	Evans,Douglas	Unspecified	3510EX	ExDir-Culture and Tourism	Conversion	HIR	8/11/2002	1

2. Table View Editor will open.

3. To add a **Grand total** to the analysis, click the Total icon to the right of **Columns and Measures** in the Layout pane of the Table editor.

4. Select **After** from the drop-down list. Review the results in the Preview pane, and note that the **Total** icon now displays a green checkmark, indicating that a grand total has been added to the analysis.


17	SDE64300	CT Technical High Schools Sys	Lombardo, Michael J.	SDE0890001	9213NI	THIS Instr(Hrly)NoCertInt	Dual Employment	HR	3/15/2016	1
17	SDE64300	CT Technical High Schools Sys	Kuslis, Mykal J.	SDE0840001	9213NC	THIS Instr(Hrly)NoCert	Dual Employment	REH	3/8/2016	1
17	SDE64300	CT Technical High Schools Sys	Luca, Patricia Ann	SDE1040001	9213NC	THIS Instr(Hrly)NoCert	Dual Employment	REH	3/4/2016	1
17	SDE64300	CT Technical High Schools Sys	Piccone, Daniel D.	SDE0690001	9213NC	THIS Instr(Hrly)NoCert	Dual Employment	REH	3/3/2016	1
17	SDE64300	CT Technical High Schools Sys	Chaco Jr, John	SDE0840001	9213II	THIS Instr(Hrly)CertInt	Dual Employment	REH	3/15/2016	1
17	SDE64300	CT Technical High Schools Sys	Rappa, Bridget M.	SDE0150001	9213II	THIS Instr(Hrly)CertInt	Dual Employment	REH	3/7/2016	1
17	SDE64300	CT Technical High Schools Sys	Rottner, J. Renana	SDE0620001	9213II	THIS Instr(Hrly)CertInt	Dual Employment	REH	3/23/2016	1
Grand Total										116

Rows 1 - 117 (All Rows)

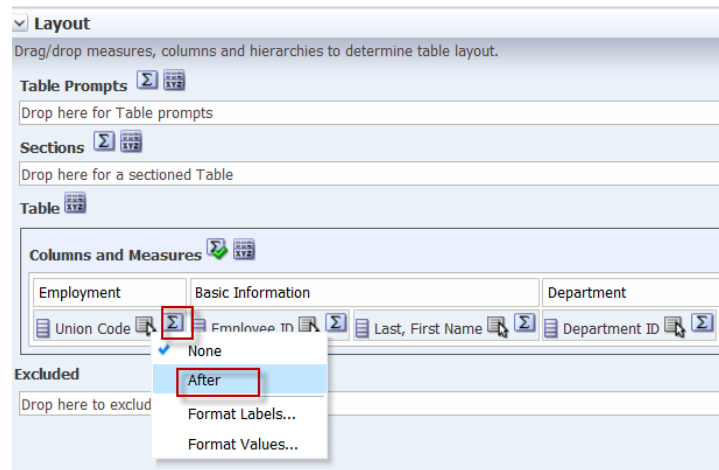
Click **Done**.

Sub Totals:

Guided Exercise

- To add a Sub Total by Union Code to your analysis, click the Edit View  icon in the Table view. The Table Editor appears.

In the Layout pane, click the Total icon for Union Code.



- Select **After** from the **summation** drop-down list. Review the results in the **Preview** pane, and note that the Total icon now displays a green checkmark, indicating that a total has been added for that specific Union Code.

Union Code	Department ID	Department	Last, First Name	Location Code	Job Code	Job Description	Action Reason Description	Source Event Type Code	Date	Employee Hire Count
01	DCF91000	Dept of Children and Family	Sleira Millan,Natalia	DCF064029	3501EX	ExecutiveAssistant1	Rehire	REH	3/4/2016	1
01	DPH48500	Public Health	Wolf,Brie J.	DPH064551	3501EX	ExecutiveAssistant1	Rehire	REH	3/4/2016	1
01	DMV35000	Department of Motor Vehicles	Wynn,Tudeen T	DMV151101	2432EX	DptyCmmrOfDMV	Employ	HIR	3/18/2016	1
01 Total										3
02	DDS0100	DDS Central Office	Cadovius,Nicole M.	DDS064521	0516MP	Director of Communications 2	Employ	HIR	3/28/2016	1
02 Total										1
06	DOT57200	Bureau of Highway Operations	Hall,Eric C.	DOT252005	2346TC	TranspMntr2	Employ	HIR	3/22/2016	1
06	DOT57200	Bureau of Highway Operations	Messier,Eric A	DOT263005	2345TC	TranspMntr1	Employ	HIR	3/18/2016	1
06	DOT57200	Bureau of Highway Operations	Rondini,Brian E	DOT262004	2345TC	TranspMntr1	Rehire	REH	3/17/2016	1
06	DOT57200	Bureau of Highway Operations	Scalley,George P.	DOT252005	2345TC	TranspMntr1	Employ	HIR	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Stewart,Gregory A	DOT282004	2345TC	TranspMntr1	Employ	HIR	3/18/2016	1
06	MHA55040	SW Mental Health	Elwell,Andrew	MHA015M38	0426TE	Maintainer	Employ	HIR	3/4/2016	1
06	SDE64300	CT Technical High Schools Sys	Quagliardi,Luke W	SDE059001	0426TE	Maintainer	Employ	HIR	3/7/2016	1
06 Total										7
07	DCF91000	Dept of Children and Family	Cobbs,Joy L.	DCF103003	7086CL	OfficeAssistant	Employ	HIR	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	Torres,Thaydee Rose	DMV159601	7086CL	OfficeAssistant	Employ	HIR	3/18/2016	1
07	DPH48500	Public Health	Matheson,Chelsea A	DPH064544	7086CL	OfficeAssistant	Employ	HIR	3/18/2016	1

- Click **Done**.

4.4 Edit Column Format


After you create and run an analysis, default formatting rules are applied to the analysis results. You can create additional formatting to apply to specific results. Additional formats help you to highlight blocks of related information and call attention to specific data elements. You can also use additional formatting to customize the general appearance of analyses and dashboards.

Navigate to **My Folders/Training** and select **Management Hires Report** to click **Edit**.

Compound Layout										
Title										
Management Hires Report										
Table (2)										
Union Code	Department ID	Department	Last, First Name	Location Code	Job Code	Job Description	Action Reason Description	Source Event Type Code	Date	Employee Hire Count
01	DCF91000	Dept of Children and Family	Sieira Millan,Natalia	DCF064029	3501EX	ExecutiveAssistant1	Rehire	REH	3/4/2016	1
01	DPH48500	Public Health	Wolf,Brie J.	DPH064551	3501EX	ExecutiveAssistant1	Rehire	REH	3/4/2016	1
01	DMV35000	Department of Motor Vehicles	Wynn,Judeen T	DMV151101	2432EX	DptyCmmrOfDMV	Employ	HIR	3/18/2016	1
02	DDS50100	DDS Central Office	Cadovius,Nicole M.	DDS064521	0516MP	Director of Communications 2	Employ	HIR	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Hall,Eric C.	DOT252005	2346TC	TranspMntr2	Employ	HIR	3/22/2016	1
06	DOT57200	Bureau of Highway Operations	Messier,Eric A	DOT263005	2345TC	TranspMntr1	Employ	HIR	3/18/2016	1
06	DOT57200	Bureau of Highway Operations	Rondini,Brian E	DOT262004	2345TC	TranspMntr1	Rehire	REH	3/17/2016	1
06	DOT57200	Bureau of Highway Operations	Scalley,George P.	DOT252005	2345TC	TranspMntr1	Employ	HIR	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Stewart,Gregory A	DOT282004	2345TC	TranspMntr1	Employ	HIR	3/18/2016	1
06	MHA55040	SW Mental Health	Elwell,Andrew	MHA015M38	0426TE	Maintainer	Employ	HIR	3/4/2016	1
06	SDE64300	CT Technical High Schools Sys	Quagliardi,Luke W	SDE059001	0426TE	Maintainer	Employ	HIR	3/7/2016	1
07	DCF91000	Dept of Children and Family	Cobbs,Joy L.	DCF103003	7086CL	OfficeAssistant	Employ	HIR	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	Torres,Thaydee Rose	DMV159601	7086CL	OfficeAssistant	Employ	HIR	3/18/2016	1
07	DPH48500	Public Health	Nettleton,Chelsea A.	DPH064T44	7086CL	OfficeAssistant	Employ	HIR	3/30/2016	1
07	MCO39400	Off of the Healthcare Advocate	Guiles-Smith,Betheona A.	MCO064001	6976CL	Secretary1	Rehire	REH	3/11/2016	1
07	SDR63500	Dept of Rehabilitation Svcs	Copeland,Nina N	SDR064102	6976CL	Secretary1	Rehire from layoff list	REH	3/4/2016	1
07	DMV35000	Department of Motor Vehicles	Solano,Linette	DMV062228	5833CL	MotorVehicleExaminer	Employ	HIR	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	Levy,Rachel	DMV159302	3591CL	AdministrativeAssistant	Rehire	REH	3/24/2016	1
07	DMV35000	Department of Motor Vehicles	LaFleur,Maureen C	DMV159208	2008CL	ClerkTypist	Employ	HIR	3/7/2016	1
07	DMV35000	Department of Motor Vehicles	May,Alyssa	DMV159205	2008CL	ClerkTypist	Rehire	REH	3/18/2016	1
07	DRS16000	Dept of Revenue Services	Almquist,Mary Angela P.	DRS064850	2007CL	Clerk	Rehire	REH	3/7/2016	1
07	DRS16000	Dept of Revenue Services	Amin,Jayshree	DRS064851	2007CL	Clerk	Rehire	REH	3/24/2016	1
07	DRS16000	Dept of Revenue Services	Clayton,Kimberly D.	DRS064850	2007CL	Clerk	Rehire	REH	3/22/2016	1
07	DRS16000	Dept of Revenue Services	Downs,Thomas S.	DRS064851	2007CL	Clerk	Rehire	REH	3/24/2016	1
07	DRS16000	Dept of Revenue Services	Floyd,Albert L.	DRS064851	2007CL	Clerk	Rehire	REH	3/24/2016	1
07	DRS16000	Dept of Revenue Services	Graham,Johnnie Ruth	DRS064851	2007CL	Clerk	Rehire	REH	3/4/2016	1
07	DRS16000	Dept of Revenue Services	Gumbus,Paul	DRS064851	2007CL	Clerk	Rehire	REH	3/4/2016	1
07	DRS16000	Dept of Revenue Services	Hansley,Cynthia E	DRS064851	2007CL	Clerk	Rehire	REH	3/24/2016	1
07	DRS16000	Dept of Revenue Services	Kaminski,Joseph F	DRS064850	2007CL	Clerk	Rehire	REH	3/7/2016	1
07	DRS16000	Dept of Revenue Services	Kirkland,Valancia D.	DRS064851	2007CL	Clerk	Rehire	REH	3/4/2016	1
07	DRS16000	Dept of Revenue Services	Maran,Bijali	DRS064850	2007CL	Clerk	Rehire	REH	3/21/2016	1
07	DRS16000	Dept of Revenue Services	Ward Sr,Relford	DRS064851	2007CL	Clerk	Rehire	REH	3/24/2016	1

Next we will apply formatting to the **Union Code** column.

Guided Exercise

1. To edit Column header of the analysis, click Edit View  icon on the Table view.
2. Table View Editor will open.

Management Hires Report

Home Catalog Favorites Dashboards New Open Signed In As biadmin

Criteria Results Prompts Advanced

Table

Subject Areas

- Human Resources - Workforce Deploy
 - Time
 - Age Band
 - Worker
 - Employee
 - Comp-ratio Band
 - Department
 - Department (Previous)
 - HR Event Type
 - Length of Service Band
 - Supervisor
 - Supervisor (Previous)
 - Vacancies
 - Facts - Human Resources - Workf
 - MPSR

Catalog

List All

- My Folders
- Shared Folders

Editing from: "Compound Layout"

Done Revert

Preview Pane

Union Code	Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description
01	DCF91000	Dept of Children and Family	Sieira Millan,Natalia		3501EX	ExecutiveAssistant1	REH	Rehire
01	DMV35000	Department of Motor Vehicles	Wynn,Judeen T		2432EX	DptyCmmrOfDMV	HIR	Employ
01	DPH48500	Public Health	Wolf,Brie J.		3501EX	ExecutiveAssistant1	REH	Rehire
02	DDS50100	DDS Office	Cadovius,Nicole M.		0516MP	Director of Communications	HIR	Employ

Layout

Drop here for Table prompts

Sections

Drop here for a sectioned Table


Table

Columns and Measures

Employment	Department	Basic Information	Job Code
Union Code	Department ID	Department	Last, First Name
			Employee ID
			Job Code

Excluded

Selection Steps

- You apply formatting to a heading. In Layout pane, click the **More Options** icon  for **Union Code** and select **Format Headings**.

Layout

Drag/drop measures, columns and hierarchies to determine table layout.

Table Prompts

Drop here for T

Sections

Drop here for a

Table

Columns and

Employment	Department	Basic Information	Job Code
Union Code	Department ID	Department	Last, First Name
			Employee ID
			Job Code

Excluded

Drop here to exclude from this Table only

Format Headings...

Format Values...

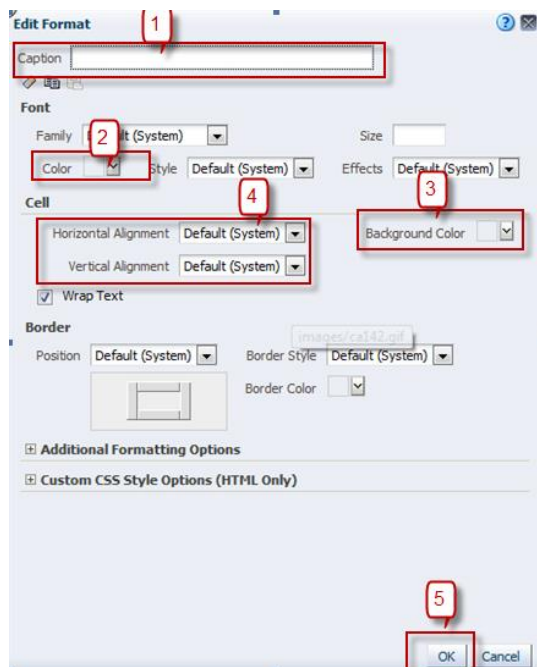
Hidden

New Calculated Item...

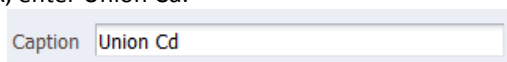
Aggregation Rule

Duplicate Layer

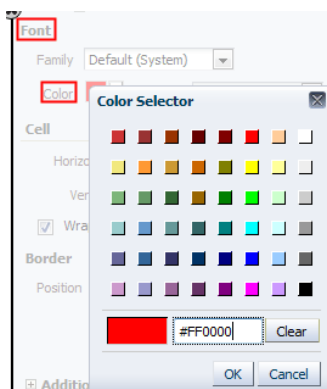
Remove Column



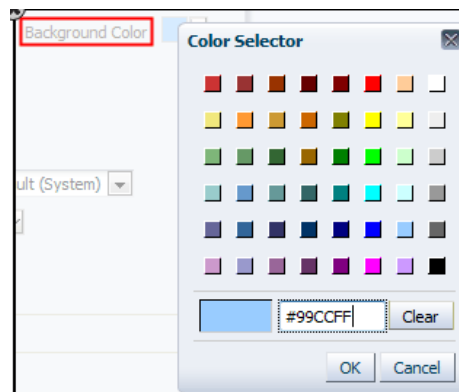
4. In the Caption text box, enter Union Cd.



5. In the Font area, click the drop-down list for Color and select red color from the Color Selector dialog box and click **OK**.



- In the Cell area, click the drop-down list for Background Color and select a light blue color from the Color Selector dialog box and click **OK**.



- Change the Cell Value Alignment to **Center** from the drop – down menu.

Horizontal Alignment: Center

Vertical Alignment: Center

- Click **OK** in the Edit Format dialog box to see the results of your format changes for **Union Code**.

Verify Preview pane to check the change:

Union Cd	Last, First Name	Department ID
01	Sieira Millan,Natalia	DCF91000
01	Wolf,Brie J.	DPH48500
01	Wynn,Judeen T	DMV35000
01 Total		

Click **Done**.

4.5 Edit Value Format

The Column Properties button allows you to edit column and table headings, hide individual columns, change the physical alignment of the results, edit column labels, and modify the format of the displayed data.

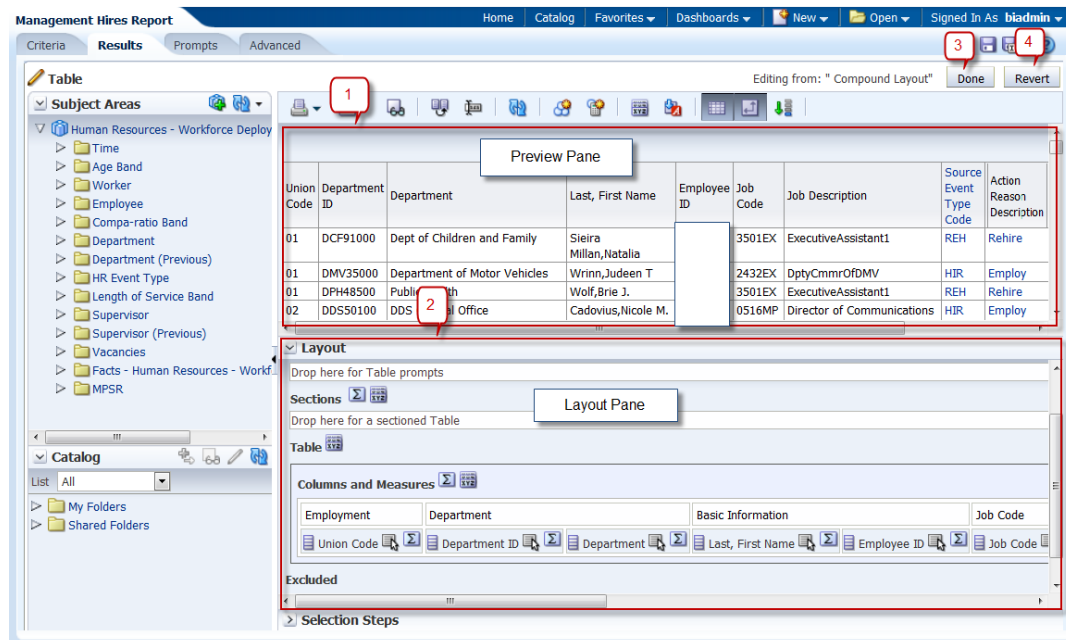
By default, the Analysis Editor uses a specific style sheet to display analysis results. When you build or modify an analysis, you can override the default settings and specify how the data within a column displays.

You can edit the column properties in both the Criteria and Results view. However, the Results view allows you to customize both the header and the column values.

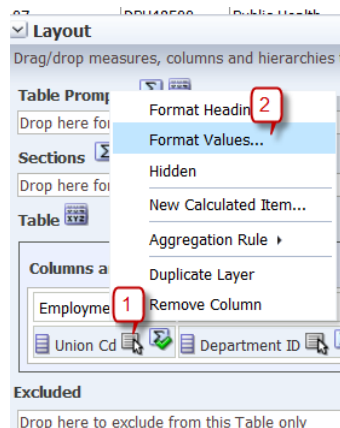
The formatting options you select apply only to the analysis with which you are working, but you can import the designated format into other analyses.

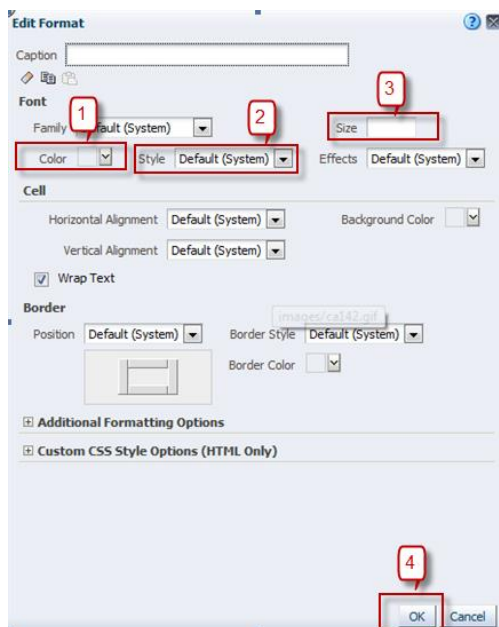
Guided Exercise

1. To edit Values of the analysis, click Edit View  icon on the Table view.
2. Table View Editor will open.

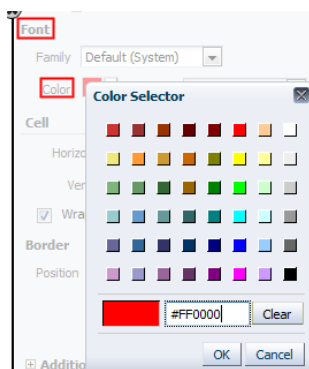


3. In the Layout editor, click the **More Options** icon  for **Union Code** and select **Format Values**.

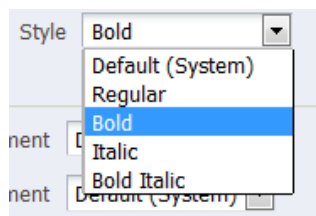




4. In the Font area, click the drop-down list for Color and select red color from the Color Selector dialog box and click **OK**.



5. In the Style drop-down list select **BOLD**.



6. In the size box, enter value as **10**.

Click **OK**. Check the preview layout to see the union code values format.

OBI- STARS (State Analytical Reporting System)



Union Cd	Department ID	Department	Last, First Name
01	DCF91000	Dept of Children and Family	Sieira Millan,Natalia
01	DPH48500	Public Health	Wolf,Brie J.
01	DMV35000	Department of Motor Vehicles	Wynn,Judeen T
01 Total			
02	DDS0100	DDS Central Office	Cadovius,Nicole M.
02 Total			
06	DOT57200	Bureau of Highway Operations	Hall,Eric C.
06	DOT57200	Bureau of Highway Operations	Messier,Eric A
06	DOT57200	Bureau of Highway Operations	Rondini,Brian E
06	DOT57200	Bureau of Highway Operations	Scalley,George P.
06	DOT57200	Bureau of Highway Operations	Stewart,Gregory A
06	MHA55040	SW Mental Health	Elwell,Andrew
06	SDE64300	CT Technical High Schools Sys	Quagliardi,Luke W
06 Total			
07	DCF91000	Dept of Children and Family	Cobbs,Joy L.
07	DMV35000	Department of Motor Vehicles	Torres,Thaydee Rose
07	DPH48500	Public Health	Wynn,Judeen T

Layout

Drag/drop measures, columns and hierarchies to determine table layout.

Table Prompts

Drop here for Table prompts

Sections

Drop here for a sectioned Table

Table

Columns and Measures

Employment Department Basic Information

Union Cd Department ID Department Last, First Name

Excluded

Drop here to exclude from this Table only

7. Click **Revert** and then **Done**.

Note: We are not saving this format change, this is an example for the class.

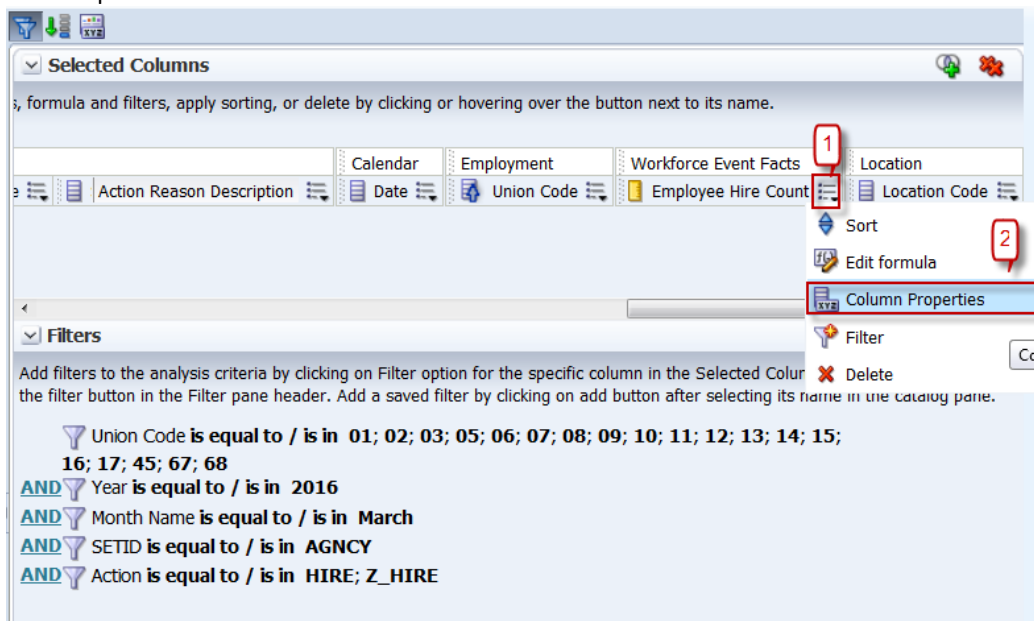
4.6 Edit Data Format

The third tab within the Column Properties window allows you to override the default for alphanumeric data. This function is often used in conjunction with numerical data, such as percent, currency, to designate the number of decimal digits; or with dates, to designate a different mm/dd/yyyy format and month/day name instead of a number (April instead of 4). Refer to the Oracle documentation for more information on supported formats.

Some data elements may have the red parenthesis as the default data format for negative numbers, but not all. In addition, some columns may actually be text fields so you cannot reformat them.

Guided Exercise

1. Return to the Criteria tab.
2. Edit the column properties for Employee Hire count. Click the **More Options** icon and select Column Properties.



The Column Properties dialog box appears.

3. Select the **Data Format** tab in Column Properties dialog
4. Select the **Override Default Data Format** checkbox and select the values as indicated below in the image:



Elements	Description
1. Treat Numbers As	<p>Select the Format of the Number from the available drop – down list.</p>
2. Negative Format	<p>Choose the format in which way you want to represent the negative values in the output.</p>
3. Decimal Format	<p>Select no. of decimals you want to display after the number.</p>
4. Use 1000's Separator	<p>Enabling will use 1000's separator in the output result.</p>

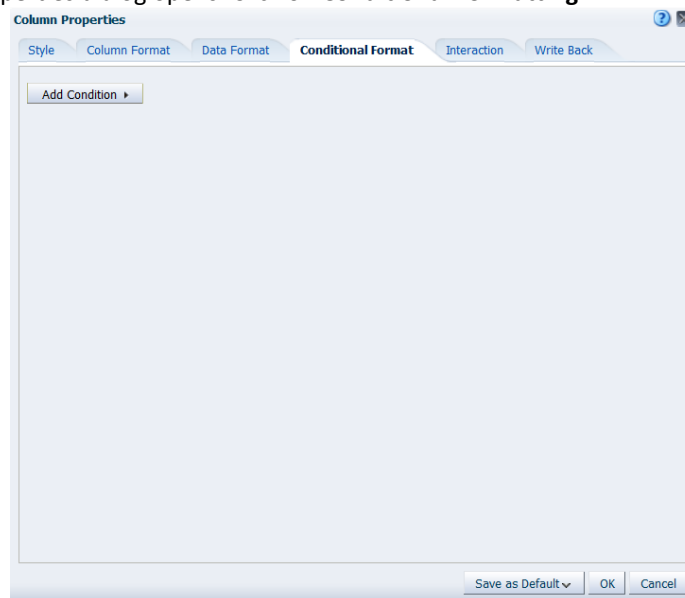


4.7 Apply Conditional Format

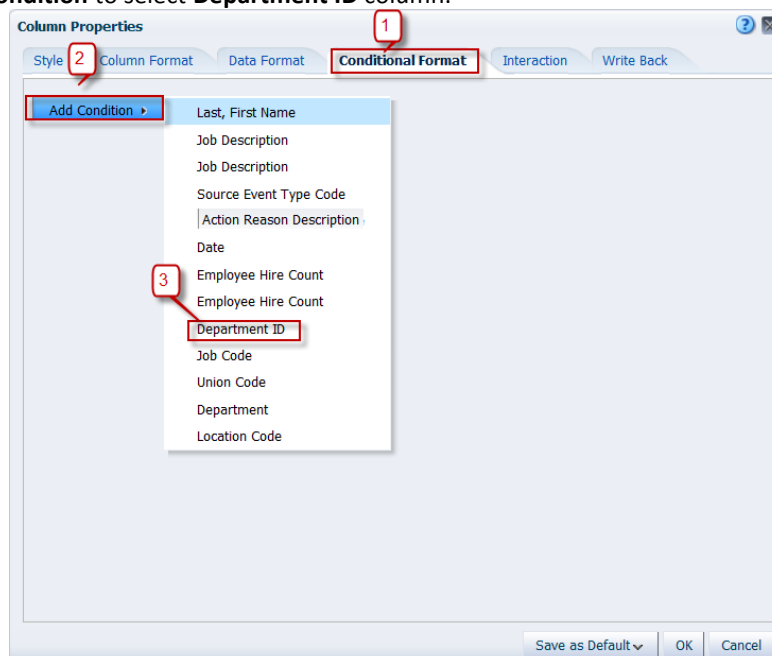
Conditional formatting helps direct attention to a data element when the value meets a certain condition. You can establish conditional formatting within a column by specifying criteria and indicating the use of distinct font, cell, border, and setting options when the condition is met. These types of conditional formats can include colors, fonts, images, and so on, for both the data and for the table cell that contains the data.

Guided Exercise

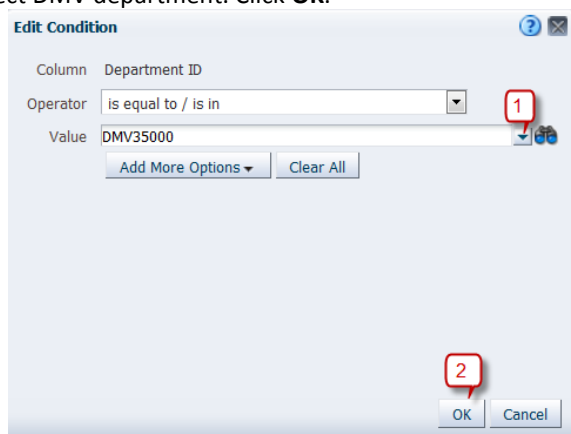
1. Return to Criteria tab.
2. Edit the column properties for Union Code. Click the **More Options** icon and select **Column Properties**.
3. The Column Properties dialog opens. Click on **Conditional Formatting**.



4. Let's add a condition to highlight Union Code values for the DMV department.. So click on **Add Condition** to select **Department ID** column.



5. A Edit box opens. Select DMV department. Click **OK**.

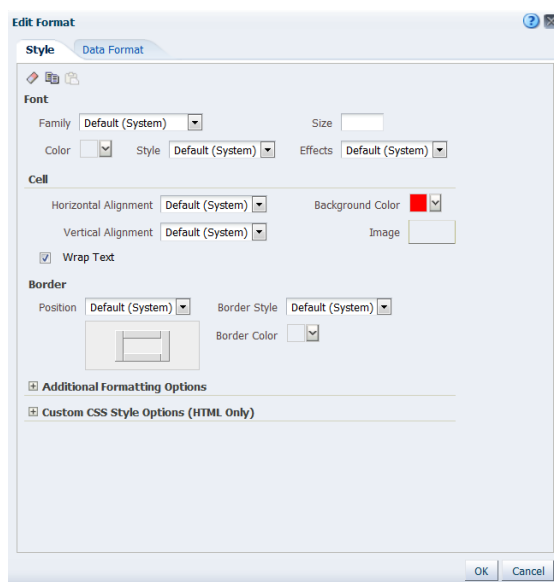


The **Edit Condition** dialog box is shown. It has a title bar with a question mark and a close button. The main area contains the following fields:

- Column:** Department ID
- Operator:** is equal to / is in
- Value:** DMV35000

Below the Value field are two buttons: **Add More Options** and **Clear All**. At the bottom right are **OK** and **Cancel** buttons. A red circle with the number '1' points to the Value field, and a red circle with the number '2' points to the OK button.

6. **Edit Format** dialogue opens. Change the **background color** as shown in below figure.



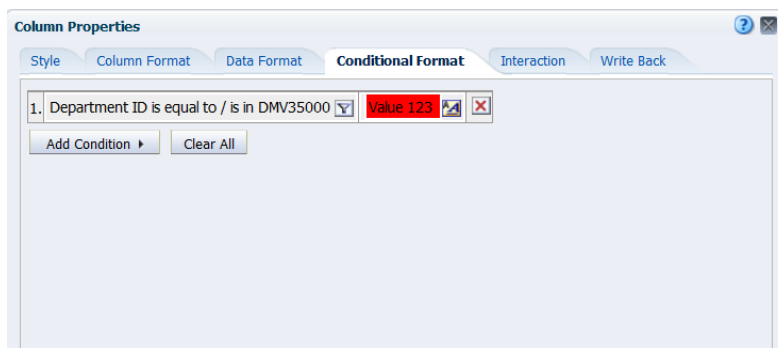
The **Edit Format** dialog box is shown. It has a title bar with a question mark and a close button. The main area is divided into several sections:

- Font:** Family (Default (System)), Size, Color, Style (Default (System)), Effects (Default (System)).
- Cell:** Horizontal Alignment (Default (System)), Vertical Alignment (Default (System)), Background Color (red), Image.
- Border:** Position (Default (System)), Border Style (Default (System)), Border Color.
- Additional Formatting Options:** Custom CSS Style Options (HTML Only).

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

Click **OK**.

7. The Conditional Format screen now will appear as shown:-



The **Column Properties** dialog box is shown with the **Conditional Format** tab selected. The main area contains a list of conditions:

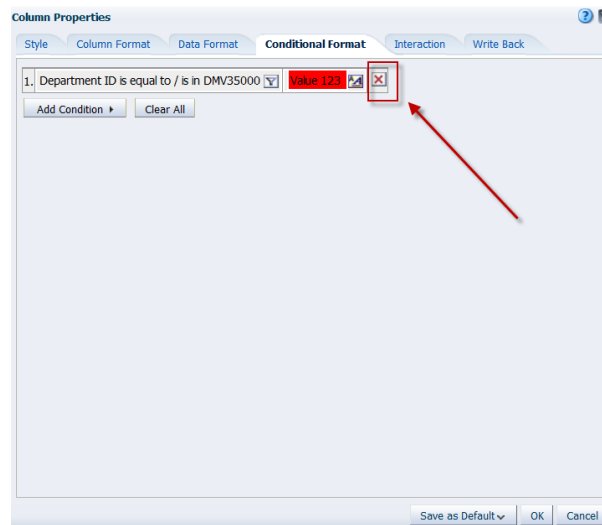
- 1. Department ID is equal to / is in DMV35000

Below the list are **Add Condition** and **Clear All** buttons. The condition text is highlighted in red, and the value 'DMV35000' is also highlighted in red.

8. Click **OK**. And go to Results tab to see the data.

Union Code	Department ID	Department	Last, First Name	Location Code	Job Code	Job Description	Action Reason Description	Source Event Type Code	Date	Employee Hire Count
01	DCF91000	Dept of Children and Family	Sieira Millan, Natalia	DCF064029	3501EX	ExecutiveAssistant1	Rehire	REH	3/4/2016	1
01	DPH48500	Public Health	Wolf,Brie J.	DPH064551	3501EX	ExecutiveAssistant1	Rehire	REH	3/4/2016	1
01	DMV35000	Department of Motor Vehicles	Wynn,Judeen T	DMV151101	2432EX	DptyCmmrOfDMV	Employ	HIR	3/18/2016	1
02	DDS50100	DDS Central Office	Cadovius,Nicole M.	DDS064521	0516MP	Director of Communications 2	Employ	HIR	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Hall,Eric C.	DOT252005	2346TC	TranspMntr2	Employ	HIR	3/22/2016	1
06	DOT57200	Bureau of Highway Operations	Messier,Eric A	DOT263005	2345TC	TranspMntr1	Employ	HIR	3/18/2016	1
06	DOT57200	Bureau of Highway Operations	Rondini,Brian E	DOT262004	2345TC	TranspMntr1	Rehire	REH	3/17/2016	1
06	DOT57200	Bureau of Highway Operations	Scalley,George P.	DOT252005	2345TC	TranspMntr1	Employ	HIR	3/28/2016	1
06	DOT57200	Bureau of Highway Operations	Stewart,Gregory A	DOT282004	2345TC	TranspMntr1	Employ	HIR	3/18/2016	1
06	MHA55040	SW Mental Health	Elwell,Andrew	MHA015M38	0426TE	Maintainer	Employ	HIR	3/4/2016	1
06	SDE64300	CT Technical High Schools Sys	Quagliardi,Luke W	SDE059001	0426TE	Maintainer	Employ	HIR	3/7/2016	1
07	DCF91000	Dept of Children and Family	Cobbs,Joy L.	DCF103003	7086CL	OfficeAssistant	Employ	HIR	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	Torres,Thaydee Rose	DMV159601	7086CL	OfficeAssistant	Employ	HIR	3/18/2016	1
07	DPH48500	Public Health	Nettleton,Chelsea A.	DPH064T44	7086CL	OfficeAssistant	Employ	HIR	3/30/2016	1
07	MCO39400	Off of the Healthcare Advocate	Guiles-Smith,Betheona A.	MCO064001	6976CL	Secretary1	Rehire	REH	3/11/2016	1
07	SDR63500	Dept of Rehabilitation Svcs	Copeland,Nina N	SDR064102	6976CL	Secretary1	Rehire from layoff list	REH	3/4/2016	1
07	DMV35000	Department of Motor Vehicles	Solano,Linette	DMV062228	5833CL	MotorVehicleExaminer	Employ	HIR	3/18/2016	1
07	DMV35000	Department of Motor Vehicles	Levy,Rachel	DMV159302	3591CL	AdministrativeAssistant	Rehire	REH	3/24/2016	1
07	DMV35000	Department of Motor Vehicles	LaFleur,Maureen C	DMV159208	2008CL	ClerkTypist	Employ	HIR	3/7/2016	1
07	DMV35000	Department of Motor Vehicles	May,Alyssa	DMV159205	2008CL	ClerkTypist	Rehire	REH	3/18/2016	1
07	DRS16000	Dept of Revenue Services	Almquist,Mary Angela P.	DRS064850	2007CL	Clerk	Rehire	REH	3/7/2016	1
07	DRS16000	Dept of Revenue Services	Amin,Jayshree	DRS064851	2007CL	Clerk	Rehire	REH	3/24/2016	1
07	DRS16000	Dept of Revenue Services	Clayton,Kimberly D.	DRS064850	2007CL	Clerk	Rehire	REH	3/22/2016	1
07	DRS16000	Dept of Revenue Services	Downs,Thomas S.	DRS064851	2007CL	Clerk	Rehire	REH	3/24/2016	1

9. To **delete** the conditional format, return to Criteria tab and go to Union Code column properties.
In conditional Fromat tab, go to the condition and delete. And click **OK**.



10. Go to Result tab to see conditional format is removed.



5. Customize Analysis View

Introduction	<p>Views use the presentation capabilities of OBI to help you look at results of analyses in meaningful, intuitive ways. You can add a variety of views to the results, such as graphs and pivot tables that allow drilling down to more detailed information, explanatory text, a list of filters that were used to limit the results, and more.</p> <p>When you display the results of a new analysis, the following views are displayed by default in the "Compound Layout" in the "Analysis editor: Results tab":</p> <ul style="list-style-type: none"> • A title view, which displays the name of the saved analysis. • A table or pivot table view, which displays the results of the analysis, depending on the types of columns that the analysis contains: • If the analysis contains only attribute columns, only measure columns, or a combination of both, then a table is the default view. • If the analysis contains at least one hierarchical column, then a pivot table is the default view. <p>You can customize or delete the existing views for an analysis, add other views, and combine and position views anywhere in the pane.</p> <p>Preparing multiple views of results can help you identify trends and relationships in data. If you are customizing results for display on a dashboard, then you can preview how the combination and position of views will look when viewed on a dashboard.</p> <p>You can then save the analysis with the collection of views.</p>
Objectives	<p>At the end of this section, you will be able to complete the following tasks related to customizing Analysis view in compound layout.</p> <ul style="list-style-type: none"> • Type of Views • Edit Table Properties • Add & Customize a Pivot Table • Add Graph • Format Graph • Edit Graph Properties • Add Graph to Pivot Table • Add View Selector • Add Column Selector • Delete View

















5.1 Type of Views

Views:-

Displays the views assembled for display on a dashboard, according the selected compound layout.

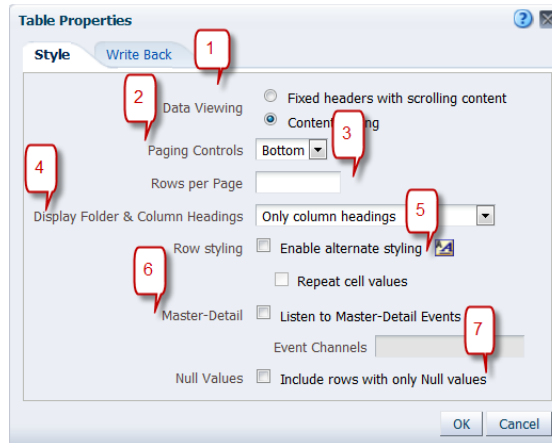
When you run a new analysis, the default assemblage of views can include a title view and either a table or pivot table view.


The administrator might have configured a different default assemblage for your company.

View Name	Description
Compound Layout 	Use this view to display and assemble multiple views. Note: This is the initial default view until another view type is selected.
Title 	Use this view to add a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results. Note: <i>This view is added automatically to analysis results.</i>
Table 	Use this view to show results in a standard table. You can navigate and drill down, add totals, customize headings, and change the formula or aggregation rule for a column. You can also control the appearance of a column and its contents, and specify formatting to apply only if the contents of the column meet certain conditions.
Pivot Table 	Use this view to take row, column and section headings and swap them around to obtain different perspectives. You can drag and drop headings to pivot results, preview them and apply the settings. You can navigate through pivot tables and drill down into information. You can create complex pivot tables that show aggregate and unrelated totals next to the pivoted data, allowing for flexible analysis. For an interactive result set, elements can be placed in pages, allowing you to choose elements.
Graph 	Use this view to modify the graph layout. You can customize the title, legend location, axis titles, data labels, the size, and scale of the graph, and control colors using a style sheet. The Analysis Editor supports a variety of standard graph types, including bar graphs, column graphs, line graphs, area graphs, pie graphs, and scatter graphs.
Funnel 	Use this view to show a three-dimensional graph that represents target and actual values using volume, level, and color. It is useful for depicting target values that decline over time, such as a sales pipeline.
Gauge 	Use this view to display a standard “gauge” graphic to indicate where a measure falls within a specific range. You can choose from several gauge graphics, color scheme size and measure highs and lows.
Map view 	Use this view to present business data to users. As with views such as tables, pivot tables, and graphs, map views allow users to display data on maps in a number of different formats and to interact with the data. When data is visualized on a map, relationships among data values that might not have been obvious previously can be displayed in a much more intuitive manner. For example, a map view can show a map of a city with the zip codes color-coded by sales performance, while an image marker displays the average discount given per order.
Filters 	Use this view to show the filters in effect for an analysis. Filters allow you to constrain an analysis to obtain results that answer a particular question.
Column Selector 	Use this view to change dynamically which columns display in results. This allows you to analyze data along several attributes. By changing the facts, you can dynamically alter the content of the results.
View Selector 	Use this view to change the view dynamically by which analysis results are displayed. Multiple views must be created in order for the View Selector view to be enabled.
Legend 	Use this view to display specific captions or text for a table axis. You can adjust the font and location of the legend within the view.
Narrative 	Use this view to display the results as one or more paragraphs of text. You can type in a sentence with placeholders for each column in the results, and specify how rows should be separated.
Ticker 	Use this view to display the results as a ticker or marquee, similar in style to the stock tickers that run across many financial and news sites on the Internet. You can control what information is presented and how it scrolls across the page.
Static Text 	Use this view to include static text in the results. You can use HTML to add banners, tickers, ActiveX objects, Java applets, links, instructions, descriptions, graphics, and so on, in the results.
Logical SQL 	Use this view to show the SQL generated for the analysis. This view is useful for trainers and administrators, and is usually not included in results for typical users. You cannot modify this view, except to delete it.

5.2 Table Properties

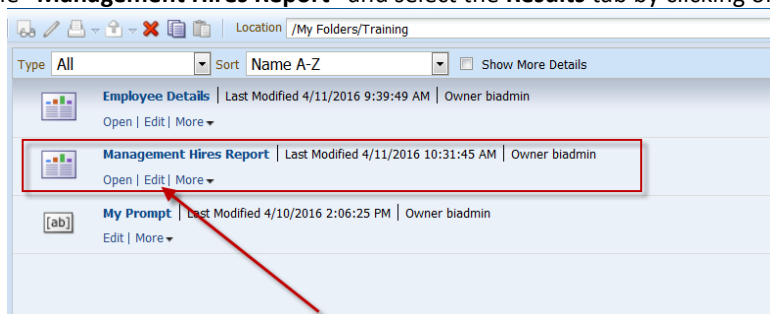
Understand Table Properties:-



Elements	Description
1. Data Viewing	<p>a. Fixed headers with scrolling content:- This will allow us to enter Maximum width and height sizes. By enabling this it will disable option 2 and 3.</p> <p>b. Content Paging:- This is the arrow marks which can be viewed  at the end of table. It will by default gives 100 rows per page. Single arrow will only display only the next 100. Double arrow will display all the rows.</p>
2. Paging Controls	It will give you the option of where to display the Content Paging on the page.
3. Rows per Page	By entering a value in the box it will display only that no. of rows. By default it will display 100 rows per page.
4. Display Folders & Column Headings	Choose the value from the drop-down menu to select, so that based on that the Folders and column headings will be displayed.
5. Row Styling	It will allow us to change the color or format or other formats.
6. Master - Detail	Use this box to specify whether a table or pivot table is to act as a detail view in a master-detail relationship and listen for master-detail events. Select this box and then specify the channel or channels in the Event Channels field.
7. Null Values	It will include rows with only Null Values.

The properties of views in compound layout can be changed in the following ways:-

Make sure to open the “**Management Hires Report**” and select the **Results** tab by clicking on Edit as shown:



Guided Exercise

1. Click on **Edit** icon of the Table view.

Management Hires Report

Criteria Results Prompts Advanced

Subject Areas

- Human Resources - Workforce Dep
 - Time
 - Age Band
 - Worker
 - Basic Information
 - Personal Information
 - Employment Information
 - Diversity
 - Education
 - Location
 - Location Code
 - Location Short Description
 - Location Description
 - Location City
 - Location State
 - Location Postal Code
 - Location Eff Date
 - Location SEQ
 - Location (Previous)

Compound Layout

Title

Management Hires Report

Table

Union Code	Job Code	Department	Last, First Name	Location Code	Job Code	Job Description	Action Reason Description	Source Event Type Code	Date	Employee Hire Count
01	3501EX	Dept of Children and Family	Sieira Millan, Natalia	DCF064029	3501EX	ExecutiveAssistant1	Rehire	REH	3/4/2016	1
01	3501EX	Public Health	Wolf, Brie J.	DPH064551	3501EX	ExecutiveAssistant1	Rehire	REH	3/4/2016	1
01	2432EX	Department of Motor Vehicles	Wynn, Judeen T	DMV151101	2432EX	DptyCmmrOfDMV	Employ	HIR	3/18/2016	1
02	0516MP	DDS Central Office	Cadovius, Nicole M.	DDS064521	0516MP	Director of Communications 2	Employ	HIR	3/28/2016	1
06	2346TC	Bureau of Highway Operations	Hall, Eric C.	DOT252005	2346TC	TranspMntr2	Employ	HIR	3/22/2016	1
06	2345TC	Bureau of Highway Operations	Messier, Eric A	DOT263005	2345TC	TranspMntr1	Employ	HIR	3/18/2016	1
06	2345TC	Bureau of Highway Operations	Rondini, Brian E	DOT262004	2345TC	TranspMntr1	Rehire	REH	3/17/2016	1
06	2345TC	Bureau of Highway Operations	Scalley, George P.	DOT252005	2345TC	TranspMntr1	Employ	HIR	3/28/2016	1
06	2345TC	Bureau of Highway Operations	Stewart, Gregory A	DOT282004	2345TC	TranspMntr1	Emolov	HIR	3/18/2016	1

2. On top of Preview pane In the toolbar section like on “Table View Properties”.

Management Hires Report

Criteria Results Prompts Advanced

Table

Subject Areas

- Human Resources - Workforce Dep
 - Time
 - Age Band
 - Worker
 - Basic Information
 - Personal Information
 - Employment Information
 - Diversity
 - Education
 - Location
 - Location Code
 - Location Short Description

Table View Properties

Union Code	Job Code	Department	Last, First Name	Location Code	Job Code	Job Description
01	3501EX	Dept of Children and Family	Sieira Millan, Natalia	DCF064029	3501EX	ExecutiveAssistant1
01	3501EX	Public Health	Wolf, Brie J.	DPH064551	3501EX	ExecutiveAssistant1
01	2432EX	Department of Motor Vehicles	Wynn, Judeen T	DMV151101	2432EX	DptyCmmrOfDMV
02	0516MP	DDS Central Office	Cadovius, Nicole M.	DDS064521	0516MP	Director of Communications 2
06	2346TC	Bureau of Highway Operations	Hall, Eric C.	DOT252005	2346TC	TranspMntr2
06	2345TC	Bureau of Highway Operations	Messier, Eric A	DOT263005	2345TC	TranspMntr1
06	2345TC	Bureau of Highway Operations	Rondini, Brian E	DOT262004	2345TC	TranspMntr1
06	2345TC	Bureau of Highway Operations	Scalley, George P.	DOT252005	2345TC	TranspMntr1
06	2345TC	Bureau of Highway Operations	Stewart, Gregory A	DOT282004	2345TC	TranspMntr1

3. Table Properties dialog opens

Table Properties

Style Write Back

Data Viewing ☐ Fixed headers with scrolling content ☒ Content paging

Paging Controls Bottom

Rows per Page

Display Folder & Column Headings Only column headings

Row styling ☐ Enable alternate styling ☐ Repeat cell values

Master-Detail ☐ Listen to Master-Detail Events

Event Channels

Null Values ☐ Include rows with only Null values

OK Cancel

4. Click **OK** to close the Table Properties dialog.
Note: In this exercise, we are not changing anything.

5.3 Add a Pivot Table

A pivot table is a table that you can use to summarize large amounts of data quickly. You can rotate rows and columns to see different summaries of the source data, as well as add column and row grand totals.

Use the Pivot Table view, an additional view available with the results layout, to alter the layout and functionality of a conventional table view. The pivot table view is an interactive view that allows you to rotate the rows, columns, and section headings to obtain different perspectives of the data. Pivot tables are navigable and drillable, and are especially useful for trending and comparative analyses.

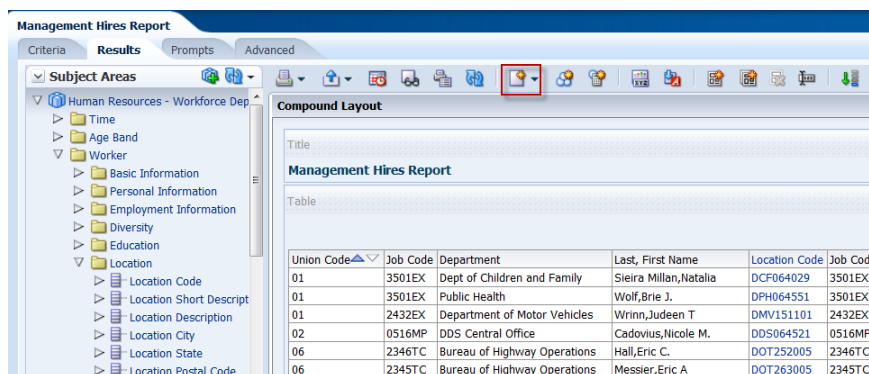
The elements of a Pivot Table:

- Pages create a separate filter within the pivot table, based on the moved column
- Sections create table breaks within the pivot table, based on the moved column
- The More Options button enables you to duplicate columns, modify how data is presented, and calculate sums, averages, percentages, etc.

Next let's add Pivot table to the compound layout of Management Hires Report.

Guided Exercise

1. On Results tab of **Management Hires Report**, click on **New View** icon from the tool bar on top of Compound Layout to click on **Pivot Table**.



Management Hires Report

Criteria Results Prompts Advanced

Subject Areas

- Human Resources - Workforce Dep
 - Time
 - Age Band
 - Worker
 - Basic Information
 - Personal Information
 - Employment Information
 - Diversity
 - Education
 - Location
 - Location Code
 - Location Short Descript
 - Location Description
 - Location City
 - Location State
 - Location Postal Code

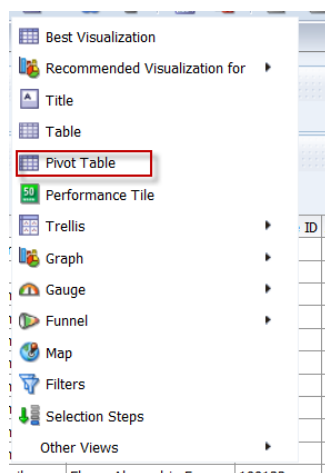
Compound Layout

Title

Management Hires Report

Table

Union Code	Job Code	Department	Last, First Name	Location Code	Job Code
01	3501EX	Dept of Children and Family	Sieira Millan,Natalia	DCF064029	3501EX
01	3501EX	Public Health	Wolf,Brie J.	DPH064551	3501EX
01	2432EX	Department of Motor Vehicles	Wynn,Judeen T	DMV151101	2432EX
02	0516MP	DDS Central Office	Cadovius,Nicole M.	DDS064521	0516MP
06	2346TC	Bureau of Highway Operations	Hall,Eric C.	DOT252005	2346TC
06	2345TC	Bureau of Highway Operations	Messier,Eric A	DOT263005	2345TC



Best Visualization

Recommended Visualization for

Title

Table

Pivot Table

Performance Tile

Trellis

Graph

Gauge

Funnel

Map

Filters

Selection Steps

Other Views

OBI- STARS (State Analytical Reporting System)



It will add another view in the compound layout under the table view.

The screenshot shows the Oracle BI Answers interface. On the left, the 'Views' pane is expanded, showing a tree structure with 'Table' and 'Pivot Table' views. A red arrow points from the 'Pivot Table' view in the 'Views' pane to the 'Pivot Table View' in the main report area. The main report area displays a 'Compound Layout' with a table view and a 'Pivot Table View'. The table view shows a list of hires with columns for Union Code, Date, Job Code, Job Description, Last, First Name, and Employee Hire Count. The 'Pivot Table View' shows a pivot table with columns for Action Reason Description, Union Code, Date, Job Code, Job Description, Last, First Name, and Employee Hire Count.

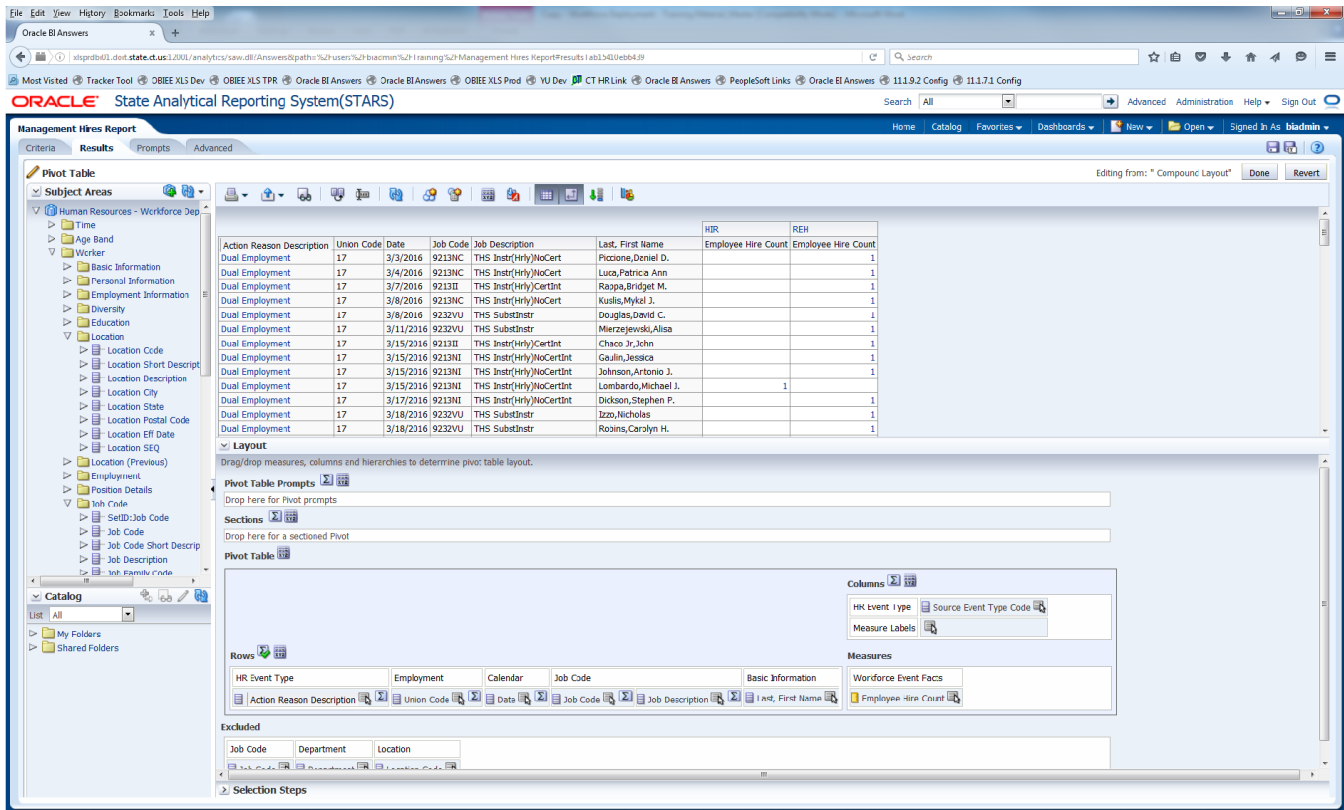
It will also show on the **Views** Pane on the left side of the screen as shown in above screenshot.

2. In this exercise, we will create pivot table based on **no. of Hires per department**.

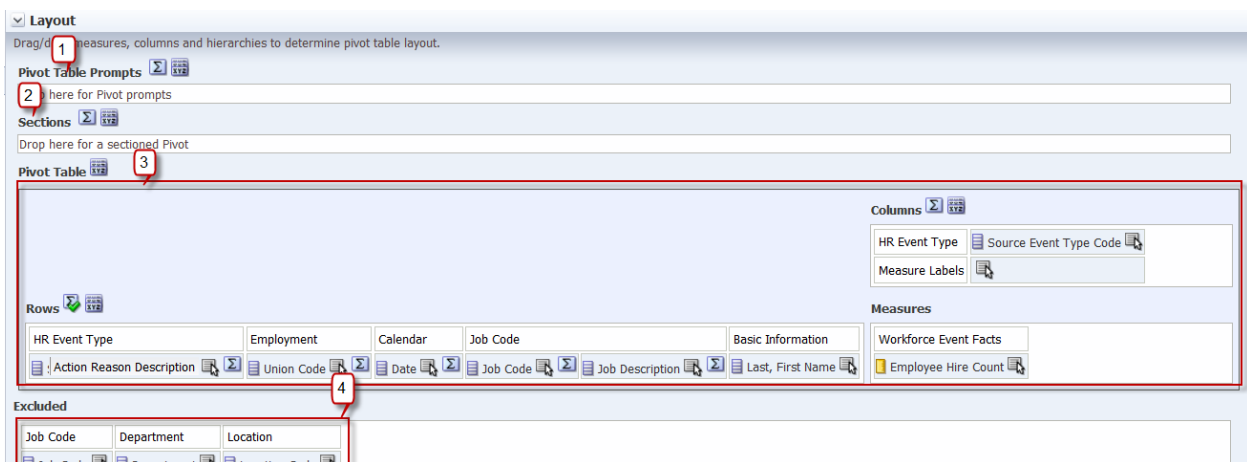
Click on Edit View icon  on Pivot Table.


The screenshot shows the Oracle BI Answers interface. On the left, the 'Views' pane is expanded, showing a tree structure with 'Table' and 'Pivot Table' views. A red arrow points from the 'Pivot Table' view in the 'Views' pane to the 'Pivot Table View' in the main report area. The main report area displays a 'Compound Layout' with a table view and a 'Pivot Table View'. The table view shows a list of hires with columns for Union Code, Date, Job Code, Job Description, Last, First Name, and Employee Hire Count. The 'Pivot Table View' shows a pivot table with columns for Action Reason Description, Union Code, Date, Job Code, Job Description, Last, First Name, and Employee Hire Count.

3. Pivot table layout editor opens:



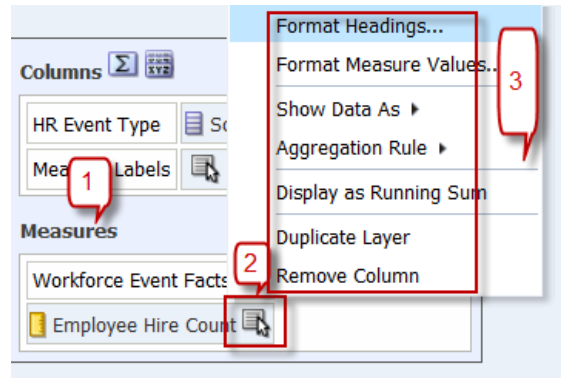
4. In the Layout pane, the following section is similar to the Table Edit View.



Elements	Descriptions
1. Pivot Table Prompts	It is used to reduce the rows and to retrieve the data quickly.
2. Sections	It is used to see the data according to the particular description values.
3. Pivot Table	In this section, we can swap the columns @ different perspective to get output as different view. Using the edit more option  menu, can color and modify the report headings name, size and the value to fit to the table.
4. Excluded	It is used to Exclude columns from the report. And can be included when

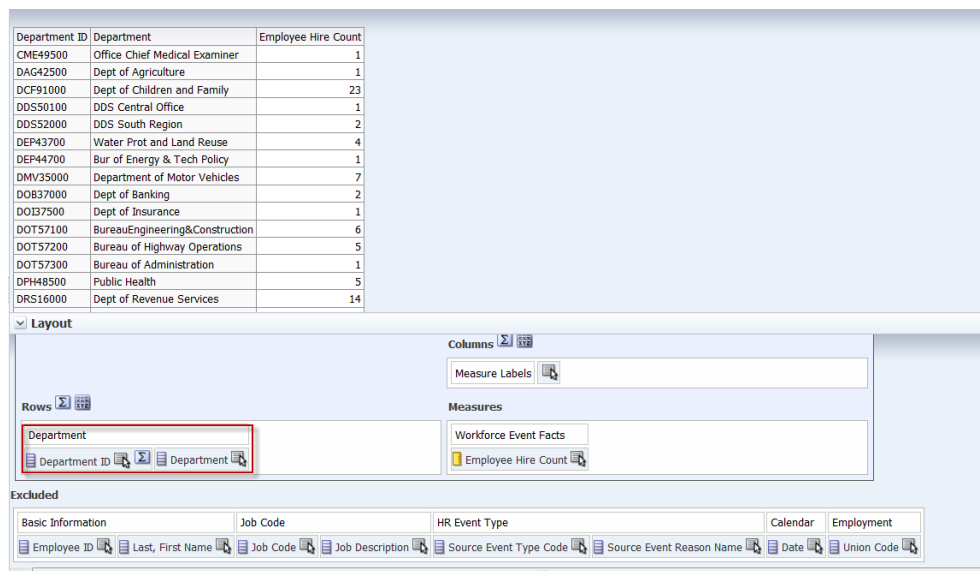
	needed.
--	---------

5. In the Measures column, edit column by clicking on more option as shown in below screenshot



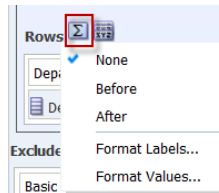
The below are the available options we get, when we click on More icon on Fact/Measure column.	
Elements	Description
1. Format Heading	It is used to edit the column name
2. Format Values	It is used to edit the values
3. Show Data as	It is used to show values as 'values', 'percent of', 'index of'
4. Aggregation rule	It is used to calculate the measure values as different functions are sum, min, max, Avg, first, last, count, count distinct, none.
5. Display as running sum	It is used to calculate the values according filters and condition @ running time of the report.
6. Duplicate Layer	It is used to make duplicate copy of the same column, to use the column more than one time for different condition and in various perspective on the same report
7. Remove Column	It is used to remove column from all perspective of the report

6. Since in this exercise we are creating a report to find total no. of hires based on department, so move all columns to Excluded section and put Department ID & Department in the Rows section as shown:-



Check the preview layout to verify the data.

- On the pivot table layout, Rows – click on summation button to calculate the total values according to column of measure values, options to show the total values as in row format.




Elements	Description
None	It shows no total
Before	It shows the total value as in row format before the rows
After	It shows the total value as in row format at the end of the rows
Format Labels & Values	It is used to edit the content heading and values



- Click on “**After**” and see the results in preview pane. And also see that the Summation icon is highlighted with green tick mark.

MCO39400	Off of the Healthcare Advocate	1
MHA53350	Conn Valley Hospital	1
MHA53810	Western CT Mental Health	1
MHA55040	SW Mental Health	5
SDE64300	CT Technical High Schools Sys	28
SDR63500	Dept of Rehabilitation Svcs	1
TRB77500	Teachers Rtrmnt Board	2
Grand Total		115

Layout

Rows 

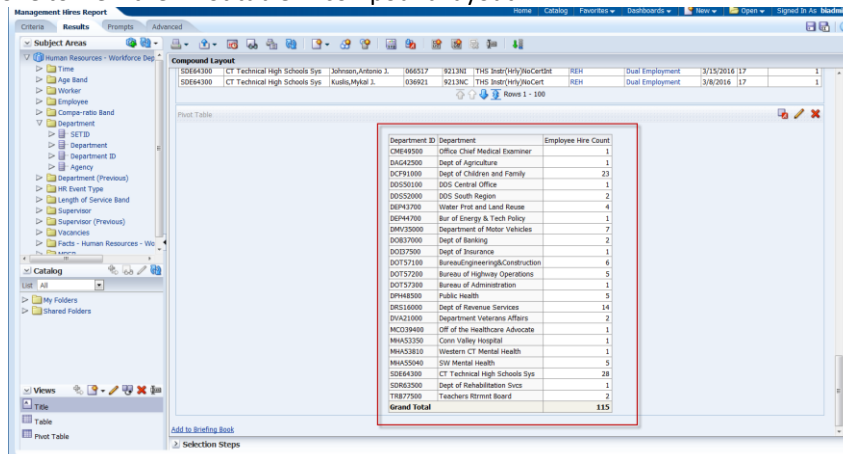
Department

Department ID  Department 

Excluded

Basic Information Job Code

- Click Done to view the Pivot table in compound layout.



Department ID	Department	Employee Hire Count
CME49500	Office Chief Medical Examiner	1
DAG42500	Dept of Agriculture	1
DCP91000	Dept of Children and Family	23
DOCS61000	DOCS Central Office	1
DOCS20000	DOCS South Region	2
DEP43700	Water Front and Land Reuse	4
DEP44700	Bur of Energy & Tech Policy	1
DEP52000	Department of Motor Vehicles	2
DOB37000	Dept of Banking	2
DOO7500	Dept of Insurance	1
DOT57100	Bureau of Engineering/Construction	6
DOT57200	Bureau of Highway Operations	5
DOT57300	Bureau of Administration	1
DPH48500	Public Health	5
DRS16000	Dept of Revenue Services	14
DVA21000	Department Veterans Affairs	2
MCO39400	Off of the Healthcare Advocate	1
MHA53350	Conn Valley Hospital	1
MHA53810	Western CT Mental Health	1
MHA55040	SW Mental Health	5
SDE64300	CT Technical High Schools Sys	28
SDR63500	Dept of Rehabilitation Svcs	1
TRB77500	Teachers Rtrmnt Board	2
Grand Total		115

- We will rename this Pivot table as “**By Department**”. Go to Views section and select the Pivot Table view and

Click on rename icon . Follow the below screenshots:

OBI- STARS (State Analytical Reporting System)



Management Hires Report

Criteria Results Prompts Advanced

Subject Areas

- Human Resources - Workforce Dep
 - Time
 - Age Band
 - Worker
 - Employee
 - Comp-ratio Band
 - Department
 - SETD
 - Department
 - Department ID
 - Agency
 - Department (Previous)
 - HR Event Type
 - Length of Service Band
 - Supervisor
 - Supervisor (Previous)
 - Vacancies
 - Facts - Human Resources - Workforce

Catalog

List All

- My Folders
- Shared Folders

Views

- Title
- Table
- Pivot Table

Add to Briefing Book

Selection Steps

Compound Layout

Department ID	Department	Employee Hire Count
CME49500	Office Chief Medical Examiner	1
DAG42500	Dept of Agriculture	1
DCP91000	Dept of Children and Family	23
DOSS0100	DDS Central Office	1
DOSS2000	DDS South Region	2
DEP43700	Water Prot and Land Reuse	4
DEP44700	Bur of Energy & Tech Policy	1
DMV35000	Department of Motor Vehicles	7
DOB37000	Dept of Banking	2
DOI27500	Dept of Insurance	1
DOTS7100	BureauEngineering&Construction	6
DOTS7200	Bureau of Highway Operations	5
DOTS7300	Bureau of Administration	1
DPH48500	Public Health	5
DRS16000	Dept of Revenue Services	14
DVA21000	Department Veterans Affairs	2
MCO39400	Off of the Healthcare Advocate	1
MHA53350	Conn Valley Hospital	1
MHA53810	Western CT Mental Health	1
MHA55040	SW Mental Health	5
SDE64300	CT Technical High Schools Sys	28
SDR63500	Dept of Rehabilitation Svcs	1
TRB77500	Teachers Rtrmt Board	2
Grand Total		115

Rename View

View Name By Department

OK Cancel

Management Hires Report

Criteria Results Prompts Advanced

Subject Areas

- Human Resources - Workforce Dep
 - Time
 - Age Band
 - Worker
 - Employee
 - Comp-ratio Band
 - Department
 - SETD
 - Department
 - Department ID
 - Agency
 - Department (Previous)
 - HR Event Type
 - Length of Service Band
 - Supervisor
 - Supervisor (Previous)
 - Vacancies
 - Facts - Human Resources - Workforce

Catalog

List All

- My Folders
- Shared Folders

Views

- Title
- Table
- By Department

Add to Briefing Book

Selection Steps

Compound Layout

Department ID	Department	Employee Hire Count
CME49500	Office Chief Medical Examiner	1
DAG42500	Dept of Agriculture	1
DCP91000	Dept of Children and Family	23
DOSS0100	DDS Central Office	1
DOSS2000	DDS South Region	2
DEP43700	Water Prot and Land Reuse	4
DEP44700	Bur of Energy & Tech Policy	1
DMV35000	Department of Motor Vehicles	7
DOB37000	Dept of Banking	2
DOI27500	Dept of Insurance	1
DOTS7100	BureauEngineering&Construction	6
DOTS7200	Bureau of Highway Operations	5
DOTS7300	Bureau of Administration	1
DPH48500	Public Health	5
DRS16000	Dept of Revenue Services	14
DVA21000	Department Veterans Affairs	2
MCO39400	Off of the Healthcare Advocate	1
MHA53350	Conn Valley Hospital	1
MHA53810	Western CT Mental Health	1
MHA55040	SW Mental Health	5
SDE64300	CT Technical High Schools Sys	28
SDR63500	Dept of Rehabilitation Svcs	1
TRB77500	Teachers Rtrmt Board	2
Grand Total		115

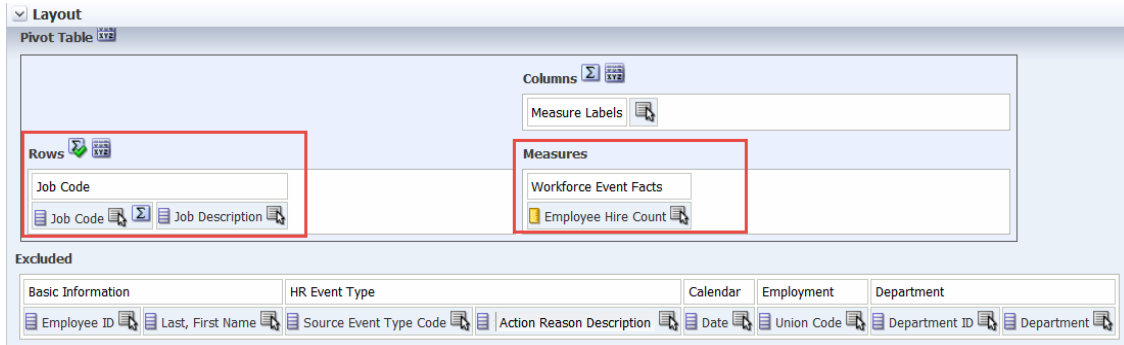
Pivot Table view name changed to By Department

11. Let's create following two more pivot table views in similar way :-
 - a. By Job Code
 - b. By Union Code

Click on Add Views icon to add two more Pivot tables views and then follow the above steps to create results based on no.of hires by Job Code and Union Code. Rename them to **By Job Code** and **By Union Code**.

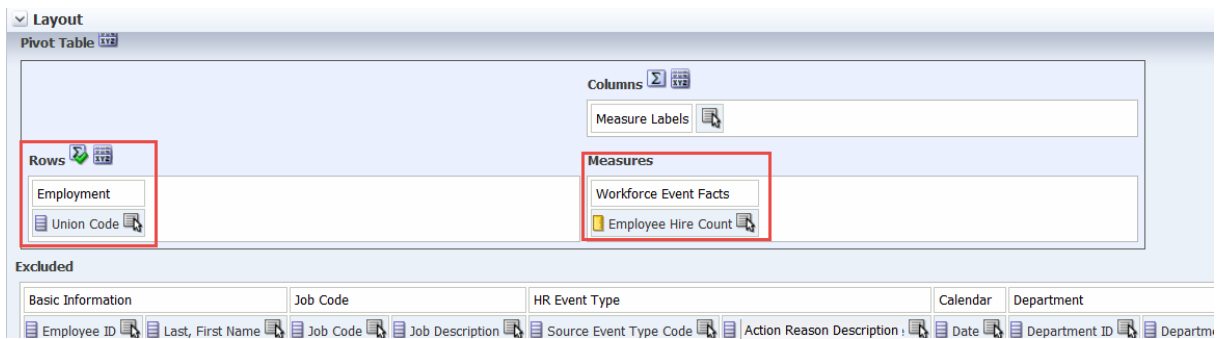
The pivot table view editor for the two pivot tables should look like the below:-

By Job Code:-



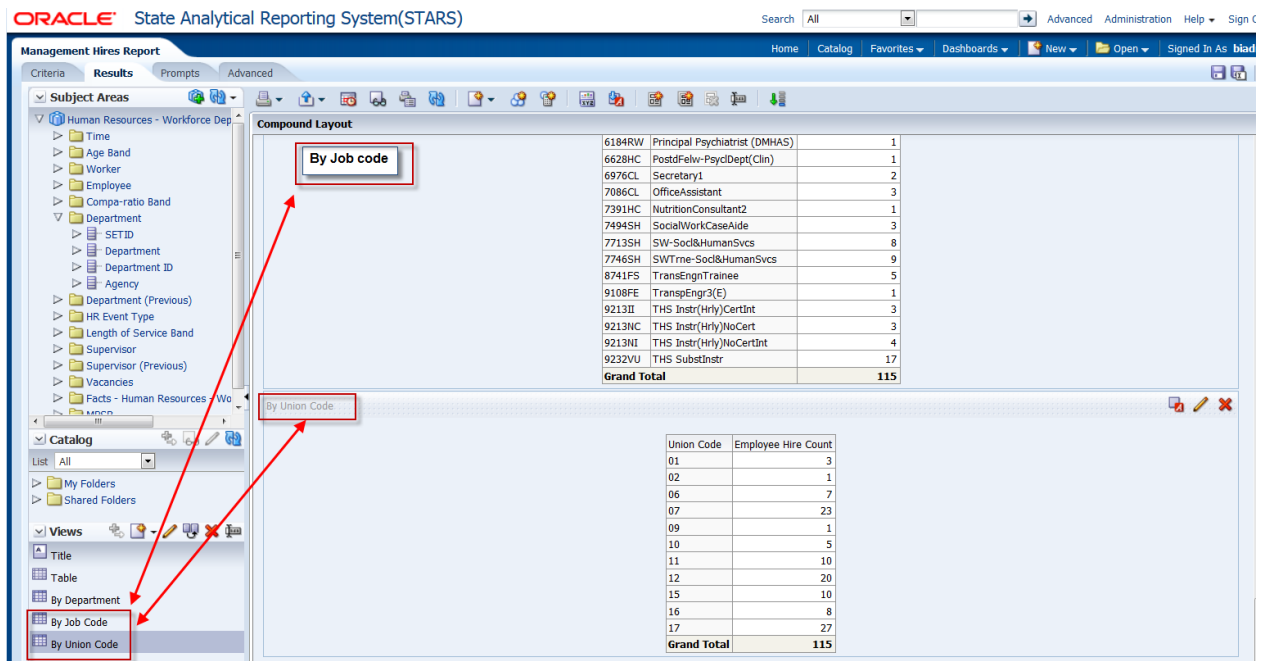
The screenshot shows the 'Layout' tab of the Pivot Table editor. The 'Rows' field is set to 'Job Code'. The 'Columns' field is empty. The 'Measures' field contains 'Workforce Event Facts' and 'Employee Hire Count'. The 'Excluded' field contains 'Basic Information', 'HR Event Type', 'Calendar', 'Employment', and 'Department'.

By Union Code:-



The screenshot shows the 'Layout' tab of the Pivot Table editor. The 'Rows' field is set to 'Union Code'. The 'Columns' field is empty. The 'Measures' field contains 'Workforce Event Facts' and 'Employee Hire Count'. The 'Excluded' field contains 'Basic Information', 'Job Code', 'HR Event Type', 'Calendar', and 'Department'.

After creating two more views the screen will display as follows:-



The screenshot shows the 'Management Hires Report' in the STARS system. The 'Subject Areas' pane on the left shows 'Human Resources - Workforce Dep' expanded. The 'Views' pane on the left shows 'By Department', 'By Job Code', and 'By Union Code'. The 'Compound Layout' pane shows two tables. The top table is titled 'By Job code' and shows a list of job codes and their corresponding hire counts. The bottom table is titled 'By Union Code' and shows a list of union codes and their corresponding hire counts. Red arrows point from the 'By Job Code' and 'By Union Code' views in the 'Views' pane to the respective tables in the 'Compound Layout' pane.

Job Code	Employee Hire Count
6184RW	1
6628HC	1
6976CL	2
7086CL	3
7391HC	1
7494SH	3
7713SH	8
7746SH	9
8741FS	5
9108FE	1
9213II	3
9213NC	3
9213NI	4
9232VU	17
Grand Total	115

Union Code	Employee Hire Count
01	3
02	1
06	7
07	23
09	1
10	5
11	10
12	20
15	10
16	8
17	27
Grand Total	115





















Save the Analysis.

5.4 Add a Graph

Once you create and run an analysis, you can display results in a graph format. Graphs display a graphical representation of the extracted data. You can add a graph view to analysis results, or you can replace the table with a graph.

Note: You must click the Save button and resave the analysis in order to add the graph permanently to the results display.

The following are types of Graphs:-

Graph Type	Description
Bar  Recommended Subtype  Vertical  Horizontal  Stacked Vertical  Stacked Horizontal  100% Stacked Vertical  100% Stacked Horizontal	<p>Shows quantities associated with categories. Bar graphs show quantities as bar lengths and categories as bars or groups of bars.</p> <p>Bar graphs are useful for comparing differences among like items; for example, competing product sales, same product sales over different time periods, or same product sales over different markets.</p> <p>Can be used to compare measure columns by showing bars in a horizontal or vertical direction.</p>
Line  Line	<p>Shows quantities over time or by category.</p> <p>Line graphs are useful for showing trends over time.</p> <p>Can be used to plot multiple measure columns.</p>
Area  Recommended Subtype  Stacked  100% Stacked	<p>Shows the trend of the contribution of each value over time or by category.</p> <p>It is a line graph for which the regions between lines are filled in. Regions stack, adding up to the total value for each time period or category.</p>
Pie  Pie	<p>Shows data sets as percentages of a whole.</p> <p>Pie graphs are useful for comparing parts of a whole, such as sales by region or by district.</p>
Line-Bar  Recommended Subtype  Standard  Stacked	<p>Plots two sets of data with different ranges, one set as bars, and one set as lines overlaid on the bars.</p> <p>Line bar graphs are useful for showing trend relationships between data sets.</p>
Time Series Line  Time Series Line	<p>Plots time series data. It scales the horizontal axis based on the time that has elapsed between data points.</p>
Pareto  Pareto	<p>Is a form of bar graph and line graph that displays criteria in descending order. In this graph type, the line shows a cumulative total of the percentages.</p> <p>Pareto graphs are useful for identifying significant elements, such as best and worst or most and least.</p>
Scatter  Scatter	<p>Displays x-y values as discrete points, scattered within an x-y grid. It plots data points based on two independent variables. This enables you to plot large numbers of data points and observe the clustering of data points.</p> <p>Scatter graphs are useful for observing relationships and trends in large data sets.</p>
Bubble  Bubble	<p>Is a variation of a scatter graph that displays data elements as circles (bubbles). It shows three variables in two dimensions. One value is represented by the location of the circle on the horizontal axis. Another value is represented by the location of the circle on the vertical axis. The third value is represented by the radius of the circle.</p> <p>Bubble graphs are useful for plotting data with three variables, and for displaying financial data over a period of time.</p>
Radar  Radar	<p>Plots the same information as a bar graph, but instead displays data radiating from the center of the graph. Each data element has its own value axis.</p> <p>Radar graphs are useful for examining overlap and distribution.</p>

Guided Exercise

In our exercise, we will add a Vertical Bar graph.

1. Click the **Results** tab, click **New View** icon.

Management Hires Report

Criteria Results Prompts Advanced

Subject Areas

- Human Resources - Workforce Dep
 - Time
 - Age Band
 - Worker
 - Employee
 - Comp-ratio Band
 - Department
 - SETID
 - Department
 - Department ID
 - Agency
 - Department (Previous)
 - HR Event Type
 - Length of Service Band
 - Supervisor
 - Supervisor (Previous)
 - Vacancies
 - Facts - Human Resources - Wo

Compound Layout

Title: Management Hires Report

Table

Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Union Code	Employee Hire Count
CME49500	Office Chief Medical Examiner	Voisine, Kyle A.		3991HN	Forensic Technician 1	HJR	Employ	3/4/2016	10	1
DAG42500	Dept of Agriculture	Aguliar, Elizabeth		2292AR	CtCarTrne(A&R)	HJR	Employ	3/28/2016	16	1
DCF91000	Dept of Children and Family	Battle-Dawson, Crystal D		7746SH	SWTrne-Soc&Human Svcs	REH	Rehire	3/18/2016	12	1
DCF91000	Dept of Children and Family	Brown, Randall D		7746SH	SWTrne-Soc&Human Svcs	HJR	Employ	3/4/2016	12	1
DCF91000	Dept of Children and Family	Cobbs, Joy L.		7086CL	Office Assistant	HJR	Employ	3/18/2016	07	1
DCF91000	Dept of Children and Family	DeJesus, Natalie		7713SH	SW-Soc&Human Svcs	HJR	Employ	3/4/2016	12	1
DCF91000	Dept of Children and Family	Ellis, Alfred A.		7494SH	Social Work Case Aide	HJR	Rehired Empl Frm	3/4/2016	12	1

2. Select **Graph > Bar > Vertical** from the menus.

1

2

3

4

Best Visualization

Recommended Visualization for

Title

Table

Pivot Table

Performance Tile

Trellis

Graph

Gauge

Funnel

Map

Filters

Selection Steps

Other Views

Estes, Vania M. 8/8903

Family Failey, Krystal Lashawn 078991

Family Findley, Erin E. 616094

Family Florez, Alexandria E 188132

Family Florio, Kristine E 187900

Family Gates, Sarah L. 612972

Bar

Line

Area

Pie

Line-Bar

Time Series Line

Pareto

Scatter

Bubble

Radar

Waterfall

Recommended Subtype

Vertical

Horizontal

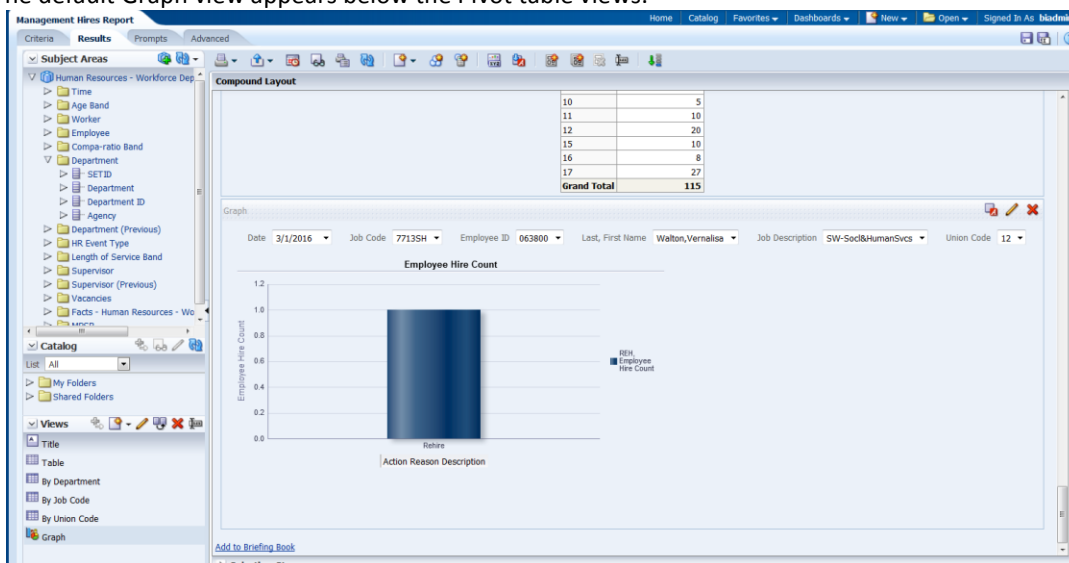
Stacked Vertical

Stacked Horizontal

100% Stacked Vertical

100% Stacked Horizontal

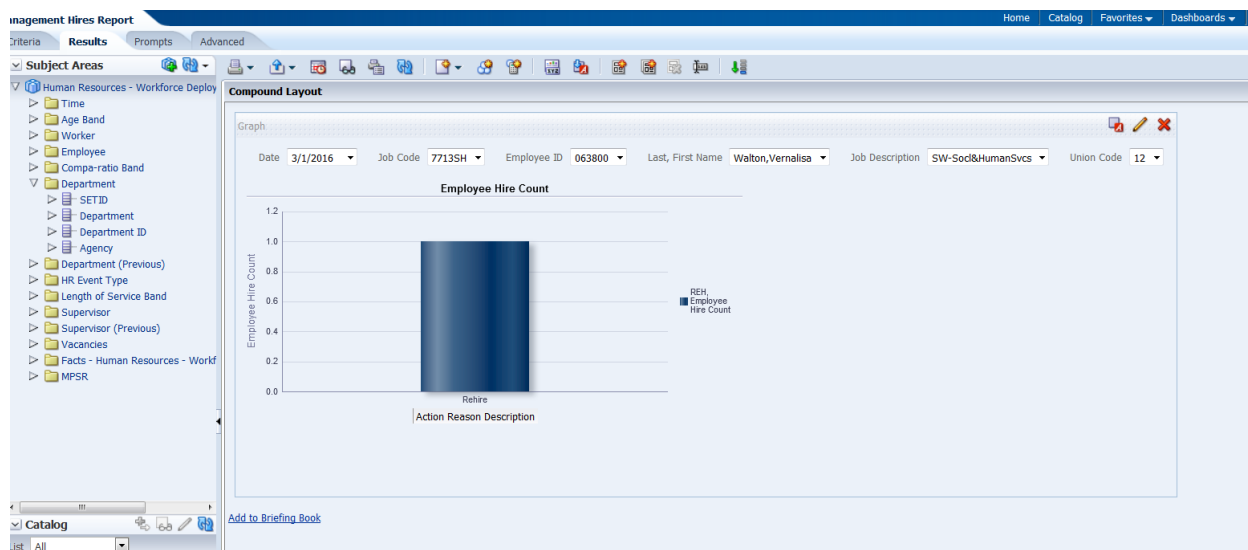
The default Graph view appears below the Pivot table views.



3. Click the **Remove View from Compound Layout** icon for Title and all the above views (Table & 3 Pivot tables)



Note: Both views are removed from the Compound Layout. Note however, that they are still available for use from the Views pane.



Save the Analysis.

5.5 Format Graph

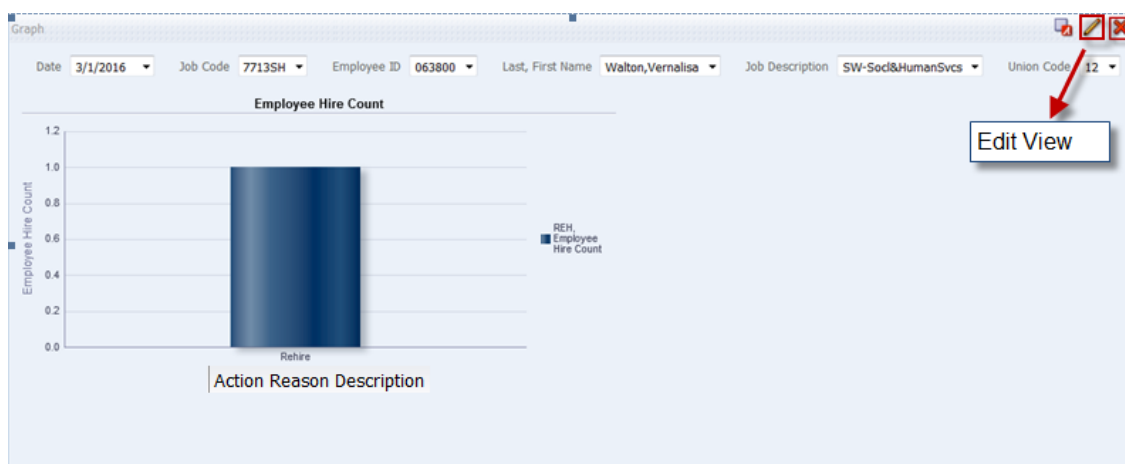
The default graph for an analysis is a two-dimensional vertical bar graph, drawn using the attributes and measures that are selected first within the analysis. You can select additional columns to display within a graph based on what is available in the Columns section of the Add/Edit Graph view.

You can also change the formatting, displayed text, legend, style, and size of a graph, which adjusts the landscape of a dashboard page.

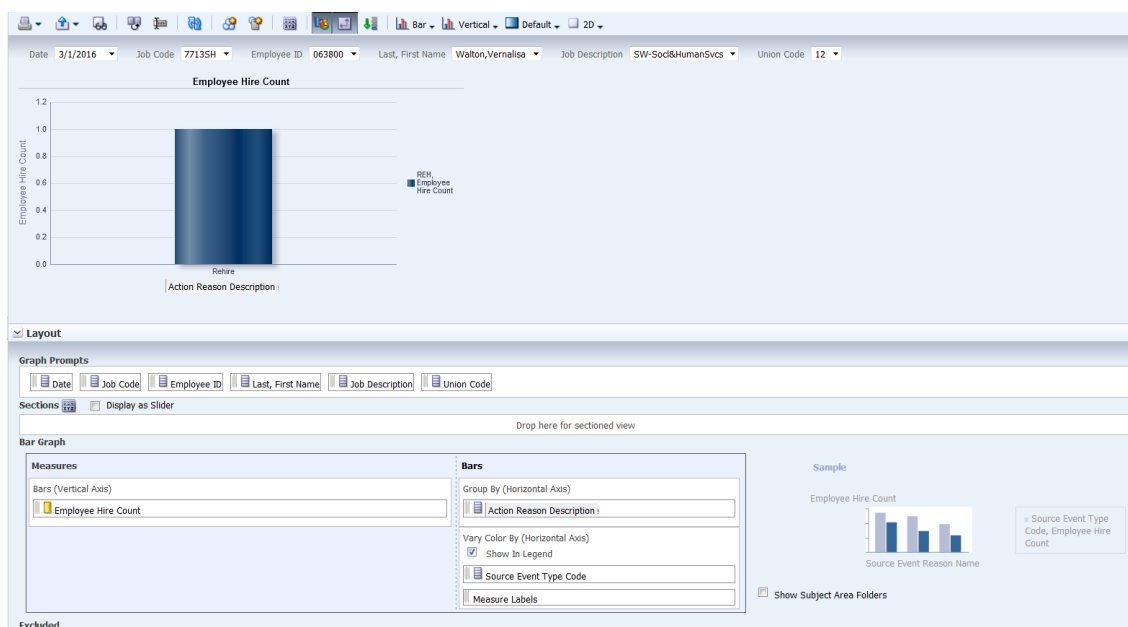
Guided Exercise

To enhance the appearance of a graph, perform the following steps:

1. Click the **Edit View** icon to begin your formatting changes. The Graph editor appears.



2. Like other views it also has same sections:-




Next we will create a graph on **total no.of hires based on Union Code**.

- Let's move all the columns to **Excluded** sections except for Employee Hire Count in Measures and Union Code in the Horizontal Axis section.

Layout

Graph Prompts

Drop here for graph prompts

Sections  ☐ Display as Slider

Drop here for sectioned view

Bar Graph

Measures

Bars (Vertical Axis)

Employee Hire Count

Bars

Group By (Horizontal Axis)

Union Code

Vary Color By (Horizontal Axis)

☐ Show In Legend

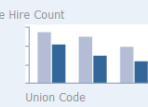
Measure Labels

Excluded

Employee ID Last, First Name Job Code Job Description Source Event Type Code Action Reason Description Date Department Department ID

Sample

Employee Hire Count



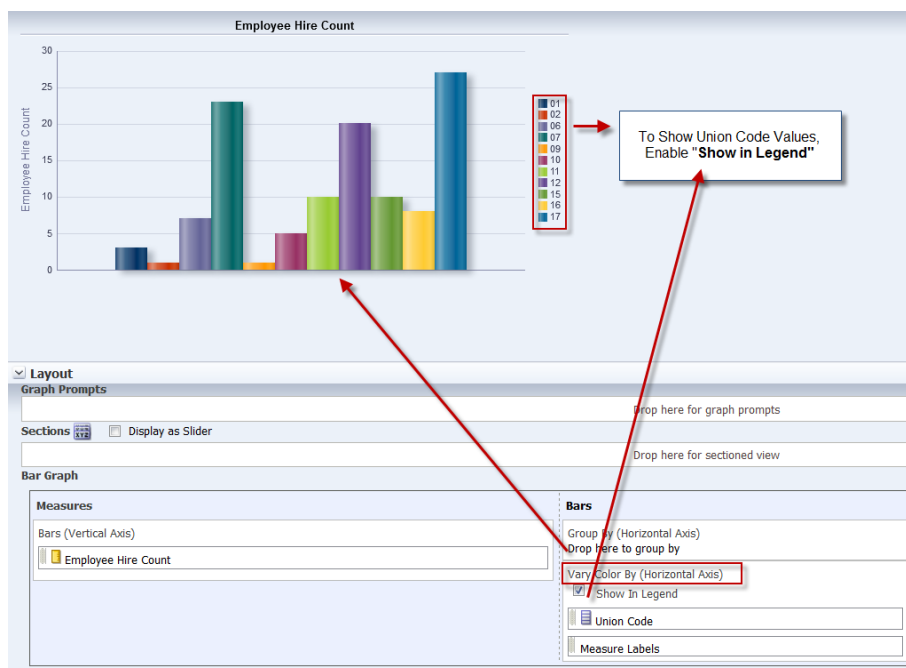
Union Code

☐ Show Subject Area Folders

- Preview the graph in preview pane.

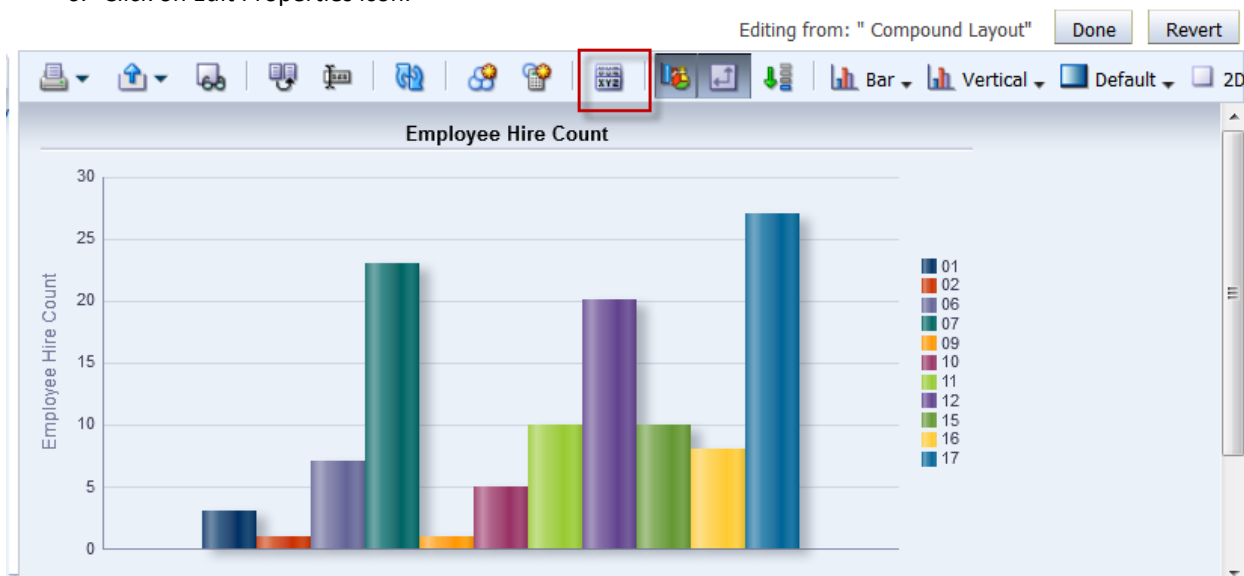


- If you want the bar colors to change based on each Union Code value then move the Union Code column from **Group By (Horizontal Axis)** to **Vary Color By (Horizontal Axis)**.

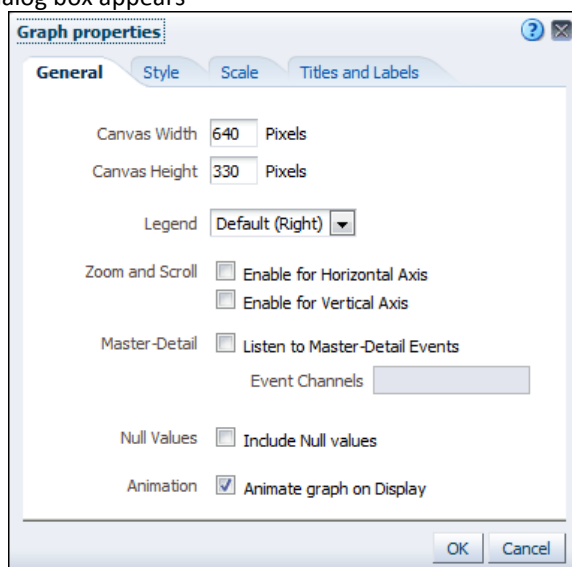


5.6 Edit Graph Properties

6. Click on Edit Properties icon.



7. The Graph properties dialog box appears



Graph properties

General Style Scale Titles and Labels

Canvas Width: 640 Pixels

Canvas Height: 330 Pixels

Legend: Default (Right)

Zoom and Scroll: ☐ Enable for Horizontal Axis ☐ Enable for Vertical Axis

Master-Detail: ☐ Listen to Master-Detail Events

Event Channels:

Null Values: ☐ Include Null values

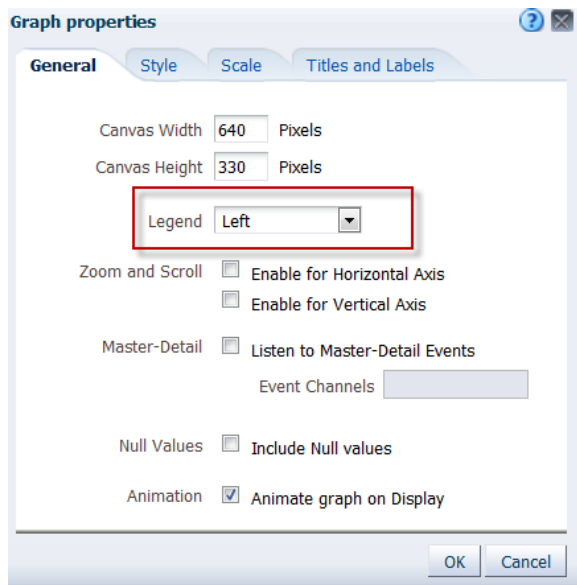
Animation: ☒ Animate graph on Display

OK Cancel

The Graph properties dialog box is composed of four tabs: General, Style, Scale, and Titles and Labels. These tabs allow you to do the following:

General	Set properties related to the graph canvas, such as canvas width, height, legend location, and so on.
Style	Set properties that control the appearance of the graph such as plot area and gridlines.
Scale	Set properties for parts of the graph, that is axis limits and tick marks.
Titles and Labels	Set properties that control the display of titles and labels for the graph.

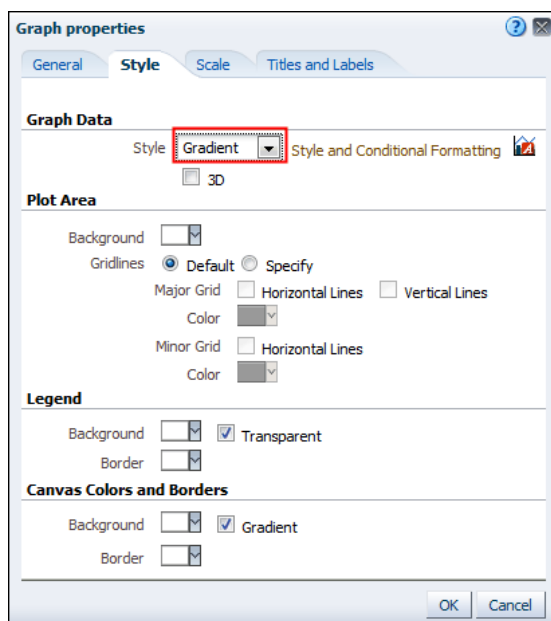
- Select **left** from the **Legend** location drop-down list. The dialog box should look like this:



Note: The "**Animate graph on Display**" checkbox specifies whether to show initial rendering effects and is selected by default. For example, the bars on a horizontal graph start at the x-axis and move up the scale on the x-axis to the current measurement level.

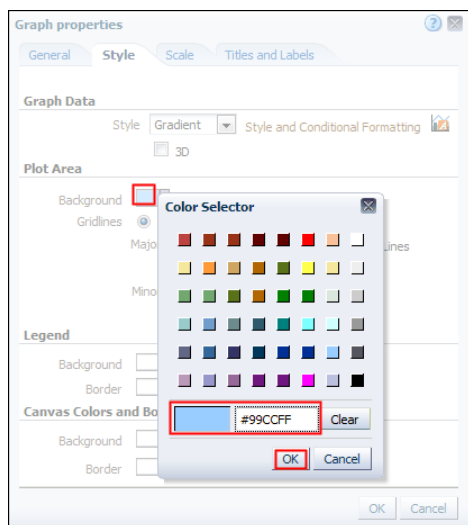
"**Listen to Master-Detail Events**" allows you to specify this analysis as a detail view in a master-detail relationship. You will use this option in a subsequent step when working with pivot tables

- Click the **Style** tab.

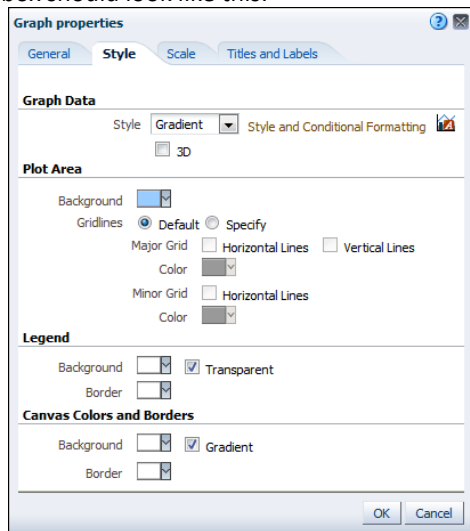


Click the **Style** drop-down list for Graph Data and select **Gradient**. The Graph Data area allows you to choose a style for specific types of graphs. For example, you might choose pattern fill for to highlight differences on a line-bar graph or gradient for a bar graph to make the data values stand out.

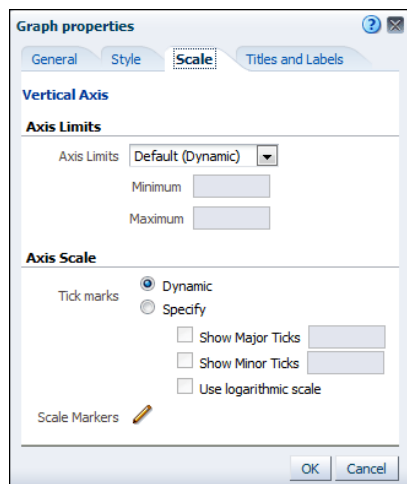
- Click the **Background** drop-down list in the Plot area, and select a **light blue color** from the Color Selector and click **OK**.



The Graph properties dialog box should look like this:

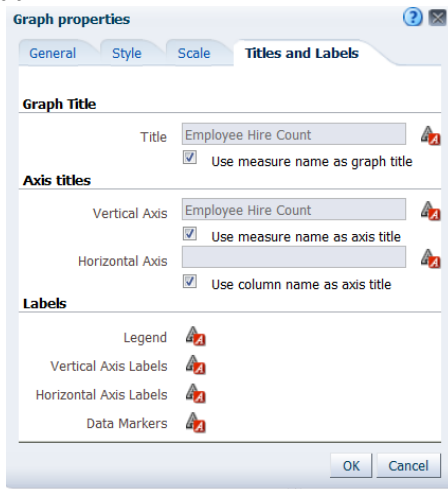


- Click the **Scale** tab. The Scale tab appears.



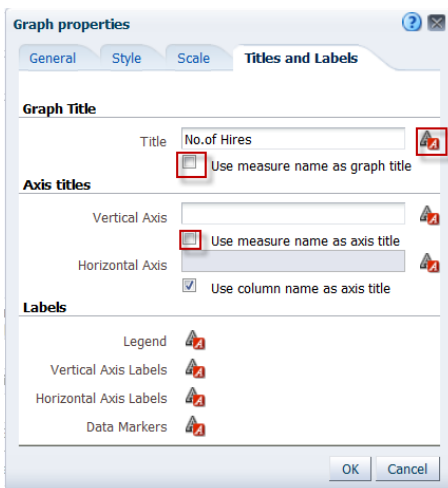
Specifically setting axis limits and tick marks allows you to control what you see on your graph. If you override the system default for tick marks, the colors that you have selected for horizontal and vertical gridlines on the General properties tab will be applied to both major and minor ticks.

12. Click the **Titles and Labels** tab.




The 'Graph properties' dialog box is shown with the 'Titles and Labels' tab selected. The 'Graph Title' section has 'Employee Hire Count' in the Title text box and the checkbox 'Use measure name as graph title' is checked. The 'Axis titles' section has 'Employee Hire Count' in the Vertical Axis text box, with 'Use measure name as axis title' checked, and the Horizontal Axis text box is empty with 'Use column name as axis title' checked. The 'Labels' section has checkboxes for Legend, Vertical Axis Labels, Horizontal Axis Labels, and Data Markers, all of which are currently unchecked.

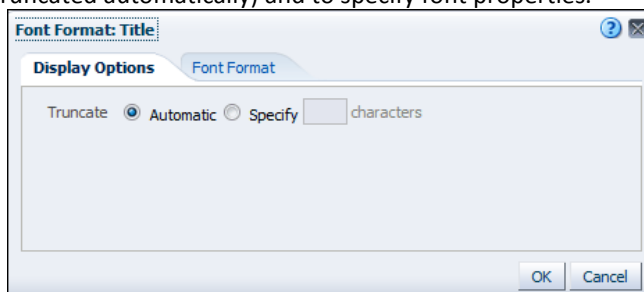
13. Deselect the checkbox for **Use measure name as graph title** and enter **No. of Hires** in the Title text box. In similar way deselect the checkbox for **Use measure name as Axis title** and Leave blank in the Vertical Axis text box.



The 'Graph properties' dialog box is shown with the 'Titles and Labels' tab selected. The 'Graph Title' section has 'No. of Hires' in the Title text box and the checkbox 'Use measure name as graph title' is now unchecked. The 'Axis titles' section has the Vertical Axis text box empty and the checkbox 'Use measure name as axis title' is now unchecked. The Horizontal Axis text box is empty and 'Use column name as axis title' is checked. The 'Labels' section remains the same with all checkboxes unchecked.

14. Click the **Format Title** icon  for Graph Title.

The "Font Format: Title" dialog box appears. Use this dialog box to specify how titles, legend labels, and so on are handled (such as truncated automatically) and to specify font properties.

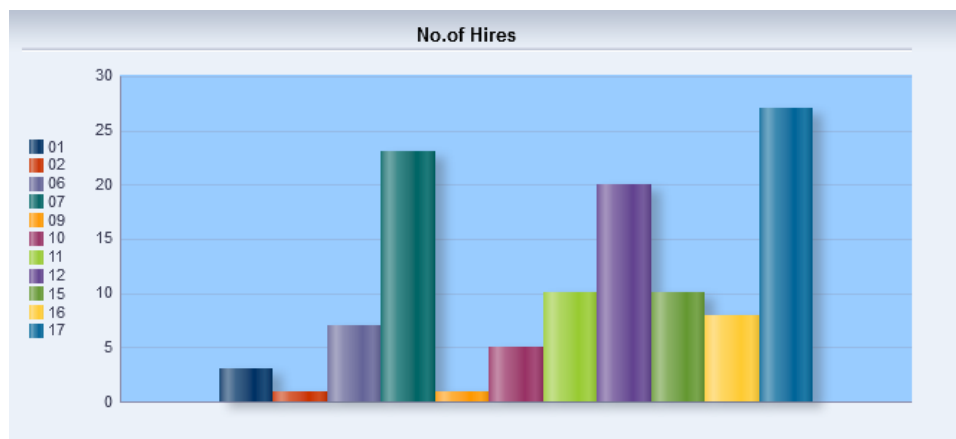


The 'Font Format: Title' dialog box is shown with the 'Display Options' tab selected. The 'Truncate' radio button is selected, and the 'Automatic' radio button is also selected. The 'Specify' radio button is unselected, and the 'characters' text box is empty. The 'Font Format' tab is also visible.

Click **OK**.



15. Click **OK** to close the Graph Properties dialog box.
The preview pane refreshes and should look like this:



Examine the changes that you made to the graph. The formatting changes have been applied along with a new title.

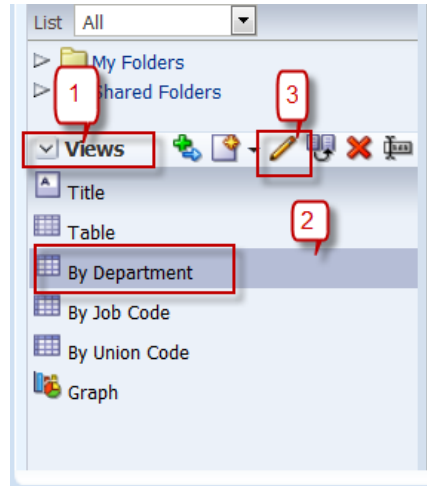
Click **Done**.

5.7 Add Pivot Table Graph

A graph can be added to Pivot table.

Guided Exercise

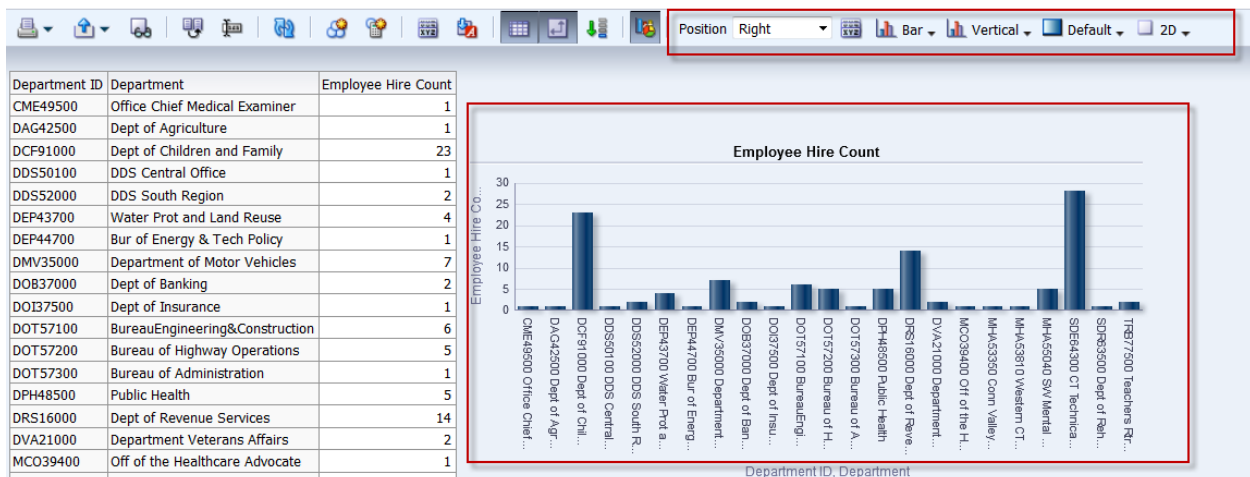
1. Navigate to views section, select “**By Department**” view and click on **Edit View** icon.



2. Now in the toolbar click on Graph **Pivoted Results** icon.



3. After clicking on the icon, it opens **more graph options on the toolbar** and also a graph by default displays on the right side of the table.



Select the option from the tool bar and click **Done**.

5.8 Add a View Selector

A view selector view allows users to select a specific view of the results from among the saved views for an analysis. When placed on a dashboard, the view selector is displayed as a list from which users can choose the view that they want to display below the selector.

Generally, you would include views in the view selector that are not being displayed in the Compound Layout view. For example, you might create a table, graph, gauge, and view selector view for an analysis, but include only the table and view selector view on the Compound Layout view. When the analysis is displayed on a dashboard page, users can select the graph or gauge view from the view selector view.

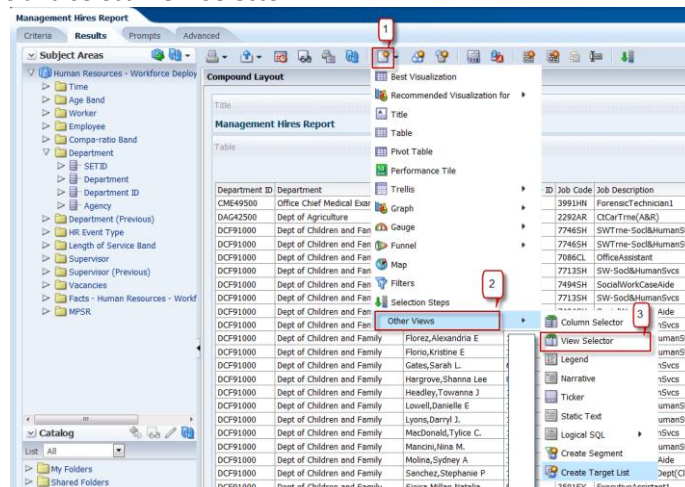
Next we will add three pivot tables in a view selector (By Department, By Job Code and By Union Code).

Guided Exercise

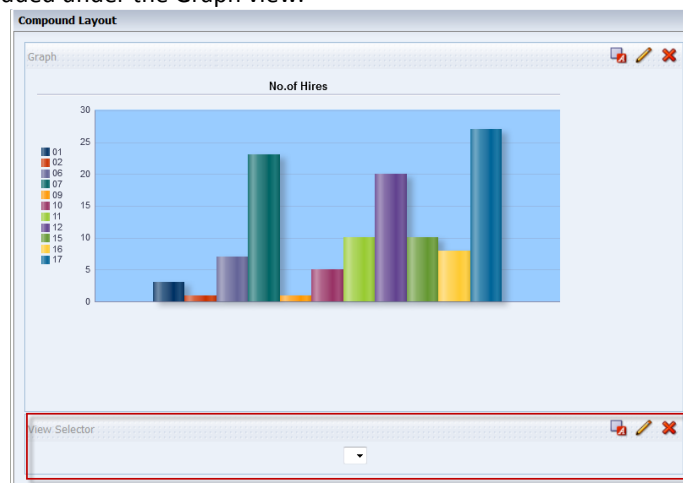
1. Return to Results tab, click on **New View** icon.



2. Click **Other Views** and select **View Selector**.



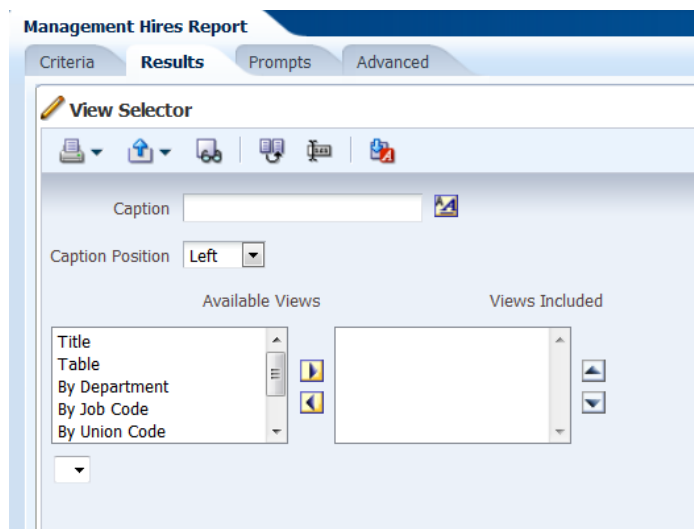
A new View will be added under the Graph view.



- Click on **Edit** View icon of **View Selector**.

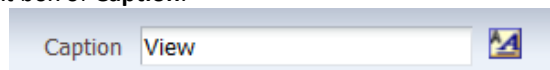


A View selector Edit view page will open.



Elements	Description
Caption	Text entered in this place will appear as a caption to the View Selector
Caption Position	It is to select position of the Caption
Available Views	It will show all the available Views
Views Included	It will show the views which are included to show in the View selector.

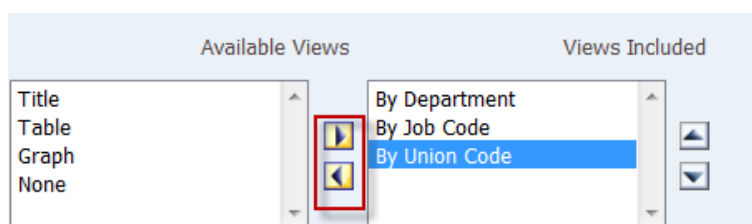
- Enter "View" in the text box of **Caption**.



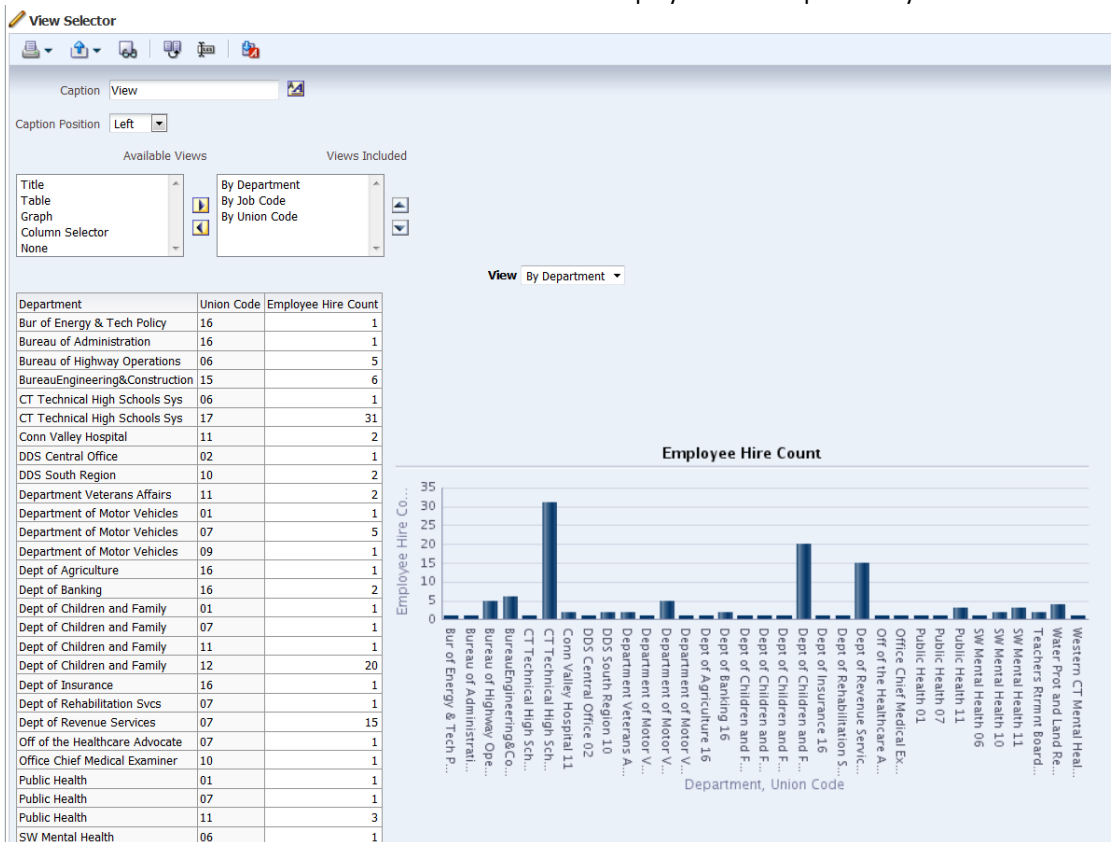
- Leave the **Caption Position** as default (Left).



- Move **By Department, Job Code & Union Code** from Available Views to Views Included using arrows. You can select multiple values by holding CTRL



7. Check the Preview to see how the View selector will display in the Compound Layout.



View Selector

Caption: View

Caption Position: Left

Available Views:

- Title
- Table
- Graph
- Column Selector
- None

Views Included:

- By Department
- By Job Code
- By Union Code

View: By Department

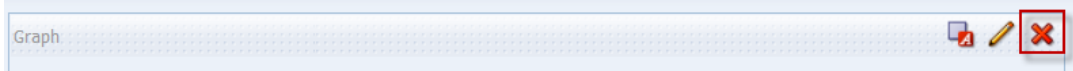
Department	Union Code	Employee Hire Count
Bur of Energy & Tech Policy	16	1
Bureau of Administration	16	1
Bureau of Highway Operations	06	5
BureauEngineering&Construction	15	6
CT Technical High Schools Sys	06	1
CT Technical High Schools Sys	17	31
Conn Valley Hospital	11	2
DDS Central Office	02	1
DDS South Region	10	2
Department Veterans Affairs	11	2
Department of Motor Vehicles	01	1
Department of Motor Vehicles	07	5
Department of Motor Vehicles	09	1
Dept of Agriculture	16	1
Dept of Banking	16	2
Dept of Children and Family	01	1
Dept of Children and Family	07	1
Dept of Children and Family	11	1
Dept of Children and Family	12	20
Dept of Insurance	16	1
Dept of Rehabilitation Svcs	07	1
Dept of Revenue Services	07	15
Off of the Healthcare Advocate	07	1
Office Chief Medical Examiner	10	1
Public Health	01	1
Public Health	07	1
Public Health	11	3
SW Mental Health	06	1

Employee Hire Count

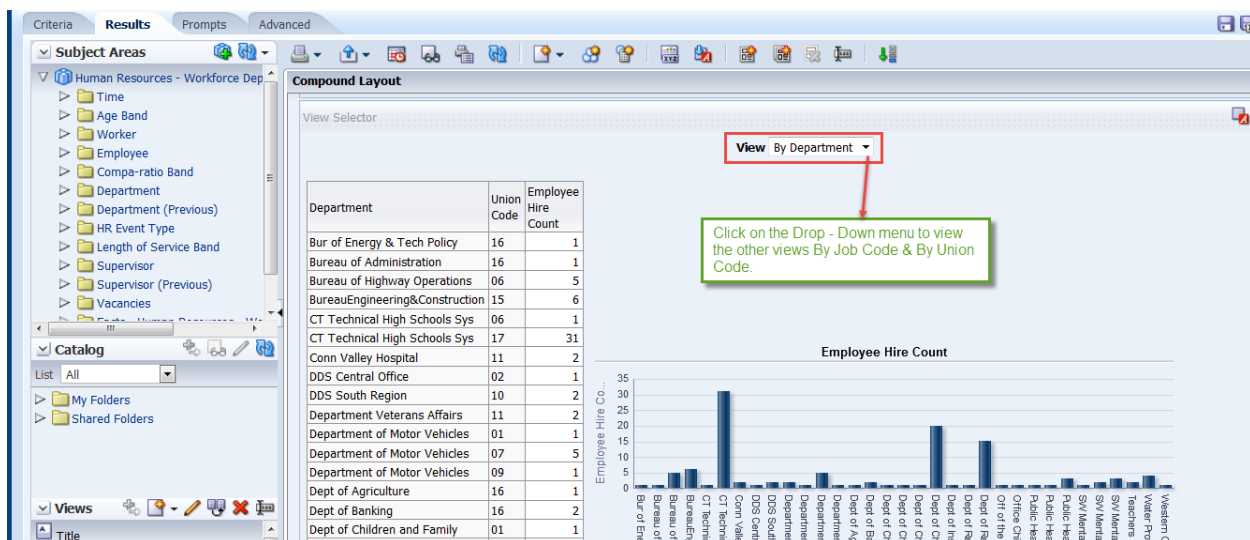
Bar chart showing Employee Hire Count by Department, Union Code.

Click **Done**.

8. Delete Graph View from Compound layout by clicking on the red 'X' in the corner of the Graph view window.



9. Compound Layout in **Results** tab, should appear as shown.



Compound Layout

View Selector

View: By Department

Click on the Drop - Down menu to view the other views By Job Code & By Union Code.

Department	Union Code	Employee Hire Count
Bur of Energy & Tech Policy	16	1
Bureau of Administration	16	1
Bureau of Highway Operations	06	5
BureauEngineering&Construction	15	6
CT Technical High Schools Sys	06	1
CT Technical High Schools Sys	17	31
Conn Valley Hospital	11	2
DDS Central Office	02	1
DDS South Region	10	2
Department Veterans Affairs	11	2
Department of Motor Vehicles	01	1
Department of Motor Vehicles	07	5
Department of Motor Vehicles	09	1
Dept of Agriculture	16	1
Dept of Banking	16	2
Dept of Children and Family	01	1

Employee Hire Count

Bar chart showing Employee Hire Count by Department, Union Code.

5.9 Add Column Selector

The Column Selector view allows you to change dynamically which columns display in an analysis. One column selector can be attached to each column in a specific analysis, and multiple columns (attributes) can be attached to each column selector.

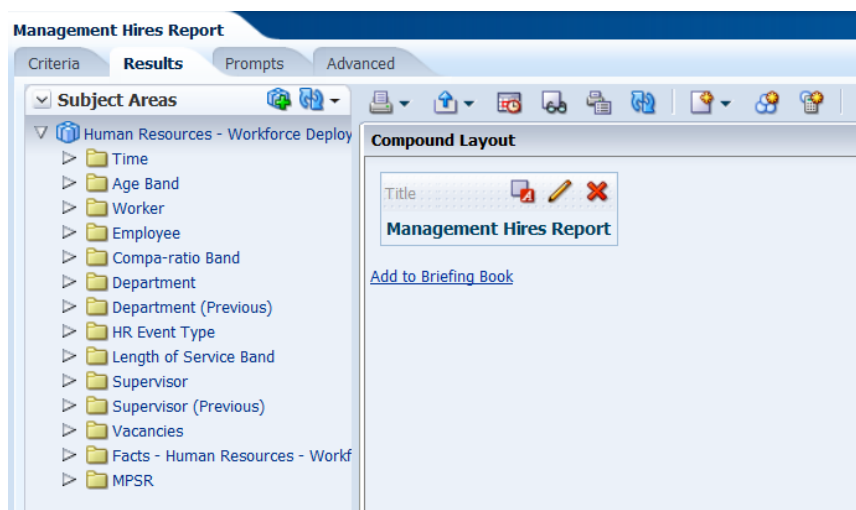
Selecting a column enables you to analyze data along several attributes and/or metrics. It also enables you to configure the column order within a dashboard to display data in a clearer layout.

Guided Exercise

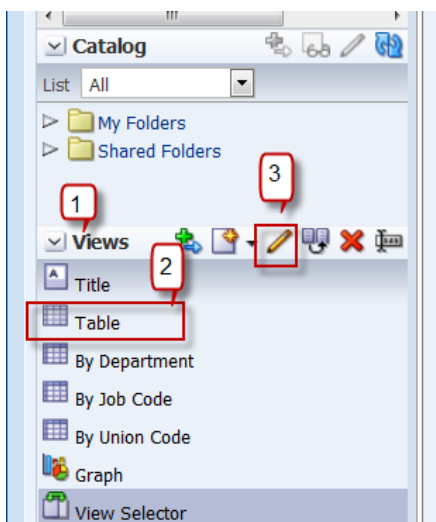
1. Delete the View selector from the compound layout.



After deleting View Selector view the compound layout appears as shown below:-



2. Go to **Views** section and select **Table** to click **Edit**.



3. The Edit View of the table looks as below:

Department ID	Department	Last, First Name	Employee ID	Job Code	Job Description	Source Event Type Code	Action Reason Description	Date	Union Code	Employee Hire Count
CME49500	Office Chief Medical Examiner	Voisine,Kyle A.		3991HN	ForensicTechnician1	HIR	Employ	3/4/2016	10	1
DAG42500	Dept of Agriculture	Aguilar,Elizabeth		2292AR	CtCarTrme(A&R)	HIR	Employ	3/28/2016	16	1
DCF91000	Dept of Children and Family	Battle-Dawson,Crystal D		7746SH	SWTrme-Socl&HumanSvcs	REH	Rehire	3/18/2016	12	1
DCF91000	Dept of Children and Family	Brown,Randall D		7746SH	SWTrme-Socl&HumanSvcs	HIR	Employ	3/4/2016	12	1
DCF91000	Dept of Children and Family	Cobbs,Joy L.		7086CL	OfficeAssistant	HIR	Employ	3/18/2016	07	1
DCF91000	Dept of Children and Family	DeJesus,Natalie		7713SH	SW-Socl&HumanSvcs	HIR	Employ	3/4/2016	12	1
DCF91000	Dept of Children and Family	Ellis,Alfred A.		7494SH	SocialWorkCaseAide	HIR	Rehired Empl Frm Other System	3/4/2016	12	1
DCF91000	Dept of Children and Family	Estes,Vania M.		7713SH	SW-Socl&HumanSvcs	REH	Rehire	3/18/2016	12	1
DCF91000	Dept of Children and Family	Failey,Krystal Lashawn		7494SH	SocialWorkCaseAide	REH	Rehire	3/18/2016	12	1
DCF91000	Dept of Children and Family	Findley,Erin E.		7713SH	SW-Socl&HumanSvcs	REH	Rehire	3/4/2016	12	1
DCF91000	Dept of Children and Family	Florez,Alexandria E		7746SH	SWTrme-Socl&HumanSvcs	HIR	Employ	3/18/2016	12	1
DCF91000	Dept of Children and Family	Florio,Kristine E		7746SH	SWTrme-Socl&HumanSvcs	HIR	Employ	3/4/2016	12	1
DCF91000	Dept of Children and Family	Gates,Sarah L.		7713SH	SW-Socl&HumanSvcs	REH	Rehire	3/18/2016	12	1
DCF91000	Dept of Children and Family	Hargrove,Shanna Lee		7713SH	SW-Socl&HumanSvcs	REH	Rehire	3/18/2016	12	1
DCF91000	Dept of Children and Family	Headley,Towanna J		7713SH	SW-Socl&HumanSvcs	HIR	Employ	3/4/2016	12	1
DCF91000	Dept of Children and Family	Lowell,Danielle E		7746SH	SWTrme-Socl&HumanSvcs	HIR	Employ	3/4/2016	12	1

Layout

Drag/drop measures, columns and hierarchies to determine table layout.

Table Prompts

Drop here for Table prompts

Sections

Drop here for a sectioned Table

Table

Columns and Measures

Department Basic Information Job Code HR Event Type Calendar Employment

Department ID Department Last, First Name Employee ID Job Code Job Description Source Event Type Code Action Reason Description Date Union Code

Excluded

Drop here to exclude from this Table only

4. Exclude all the columns by leaving **Department ID** and **Employee Hire Count** in Columns and Measures. Click on **Summation** and click **After** to get grand total.

Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2

Layout

Drag/drop measures, columns and hierarchies to determine table layout.

Table Prompts

Drop here for Table prompts

Sections

Drop here for a sectioned Table

Table

Columns and Measures

Department Workforce Event Facts

Department ID Employee Hire Count

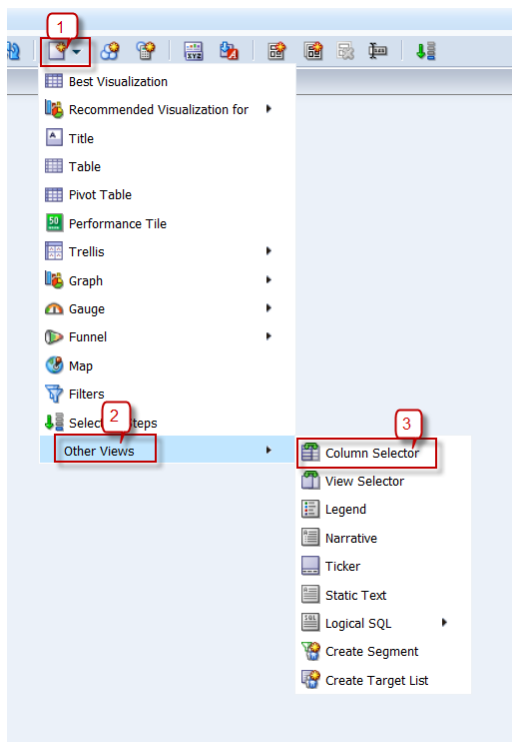
Excluded

Basic Information Job Code HR Event Type Calendar Employment Department

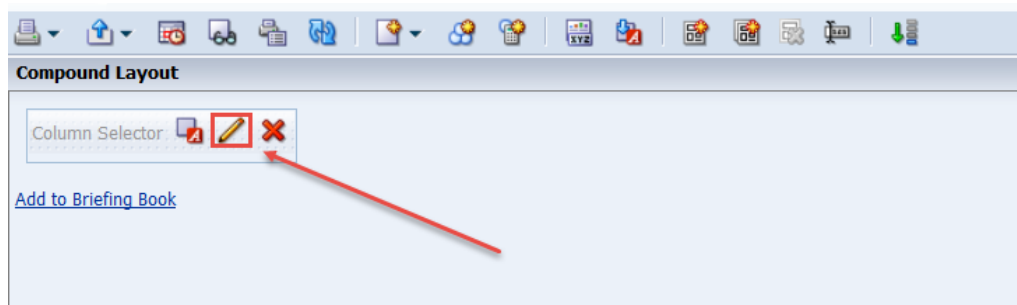
Employee ID Last, First Name Job Code Job Description Source Event Type Code Action Reason Description Date Union Code Department

5. Click **Done**.

- Return to Results tab. Click **New View** icon. Go to **Other Views** to select **Column Selector**.



- Click on **Edit** view of Column Selector.



Column Selector Editor Page appears as follows:

	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Label (optional) Choices	<input type="checkbox"/> Include Selector Department	<input type="checkbox"/> Include Selector Department ID	<input type="checkbox"/> Include Selector Employee ID	<input type="checkbox"/> Include Selector Last, First Name	<input type="checkbox"/> Include Selector Job Code	<input type="checkbox"/> Include Selector Job Description	<input type="checkbox"/> Include Selector Source Event Type Code	<input type="checkbox"/> Include Selector Action Reason Description	<input type="checkbox"/> Include Selector Date	<input type="checkbox"/> Include Selector Union Code	<input type="checkbox"/> Include Selector Employee Hire Count	<input type="checkbox"/> Include Selector Location Code

- Enable **Include Selector** in Column that contains **Department ID**. By checking corresponding box.

Column 2

☒ Include Selector

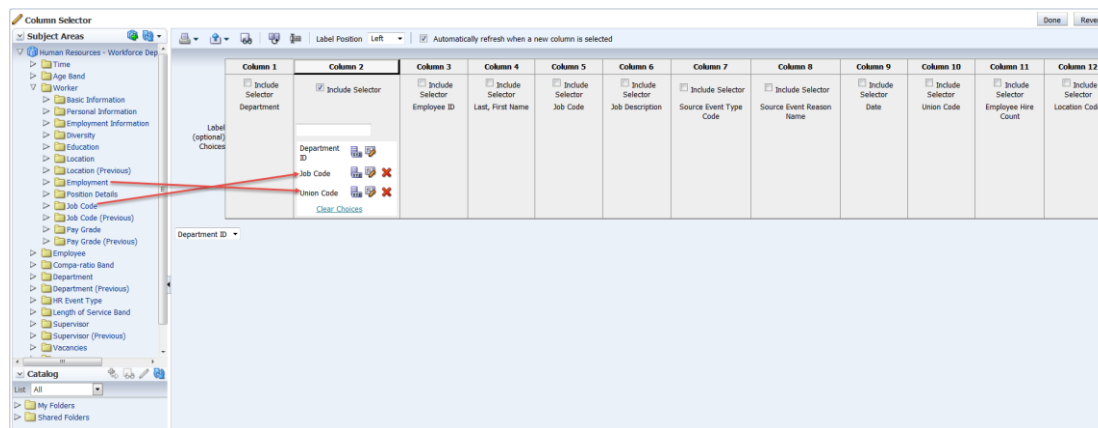
Department ID

[Clear Choices](#)

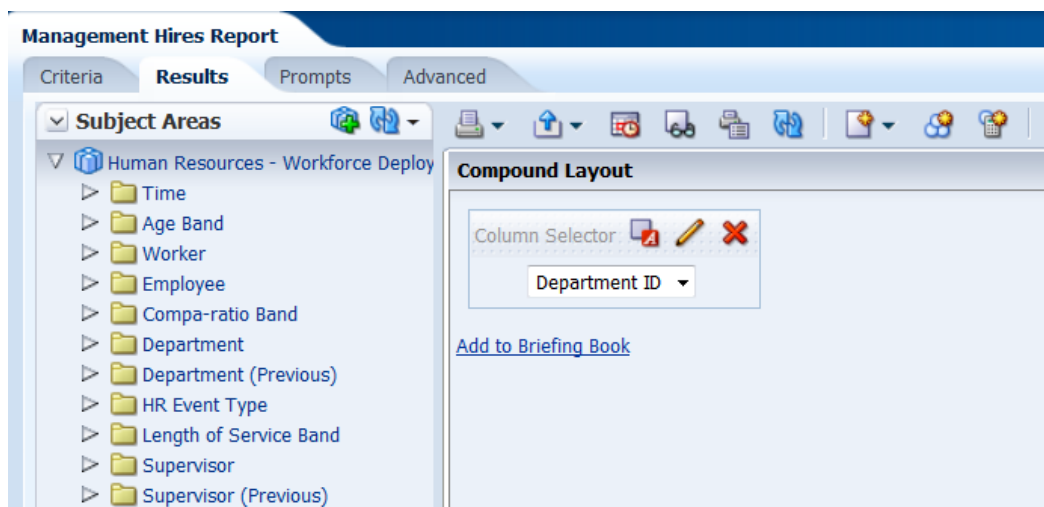
- From Subject Areas section expand folders and double click on following columns:

Worker > Job Code to select **Job Code**

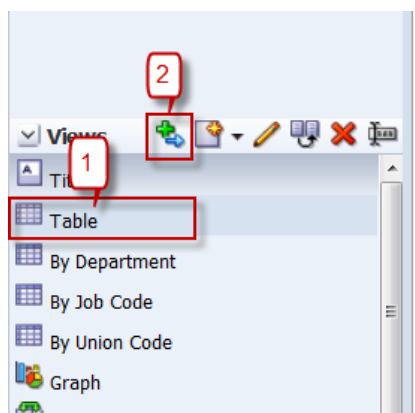
Worker > Employment to select **Union Code**



- Click **Done**.






- Add Table to **Compound Layout** from Views section.






12. After adding Table to **Compound layout**, it appears as below:

Compound Layout

Column Selector:   

Department ID ▾




Table:   

Union Code	Employee Hire Count
01	3
02	1
06	7
07	23
09	1
10	5
11	10
12	20
15	10
16	8
17	27
Grand Total	115




[Add to Briefing Book](#)

13. Select the value in **column selector**, based on that column the first column changes.

Compound Layout

Column Selector:   

Department ID ▾

Table:   

Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOB37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2
MCO39400	1
MHA53350	1
MHA53810	1
MHA55040	5
SDE64300	28
SDR63500	1
TRB77500	2
Grand Total	115

[Add to Briefing Book](#)

14. **Save** the Analysis.

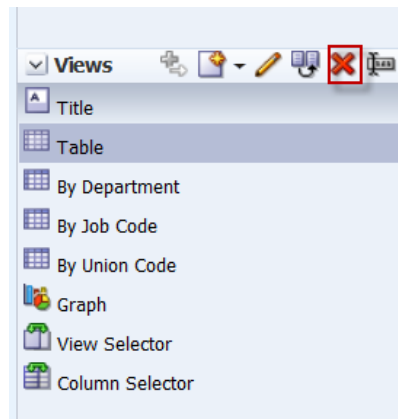


5.10 Delete Views

You can remove views from the Views pane when they are no longer useful. This removes the view permanently from the Analysis.

Be careful when deleting a view, as there is no warning message.

You must use the Remove View from Analysis button in the Views pane; the Remove View from Compound Layout button within the workspace only hides the view.





6. Drill down Functionality

Introduction	This tutorial shows you how to build and use actions to provide guided navigation, link to external web content, and invoke web services. You learn how to guide user navigation in dashboards and analyses using actions and action links, to access external web content in the context of your OBI analysis, to use conditions and agents with actions to automate initiation of business processes, and to invoke a Web Service using actions and action links.
Objectives	At the end of this section, you will be able to complete the following tasks related of Drill Down functionality. <ul style="list-style-type: none"> • Copy an Existing Analysis • Create Action Link • Test Action Link

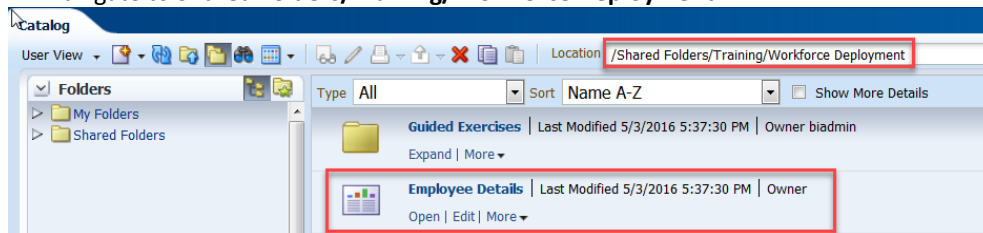
6.1 Copy an Existing Analysis

We have created **Employee Details** analysis and placed under **Shared Folders/Training/Workforce Deployment**.

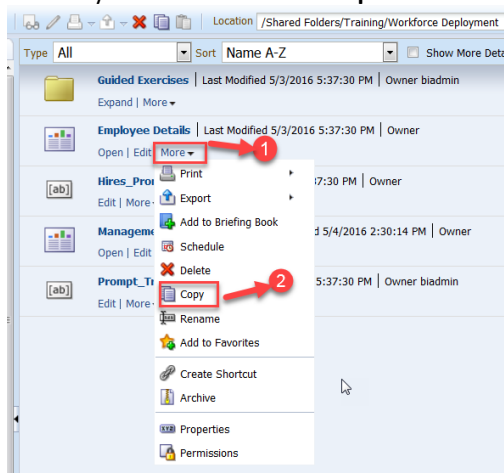
Navigate to the folder and Copy the analysis to paste it under **My Folders/Training**.

Guided Exercise

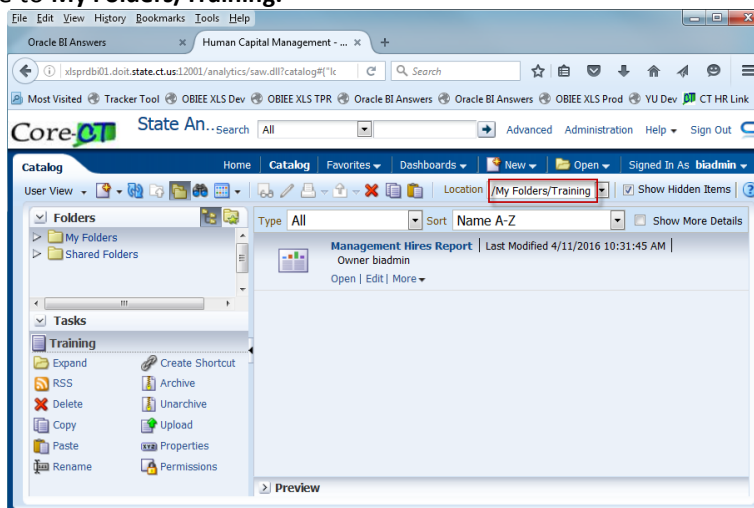
1. Navigate to **Shared Folders/Training/Workforce Deployment**.



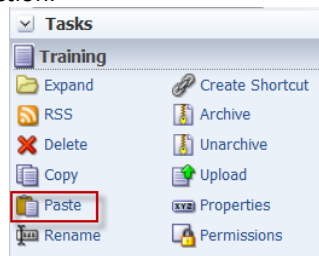
2. Select **Employee Details** analysis and click on **More Options** to select **Copy**.



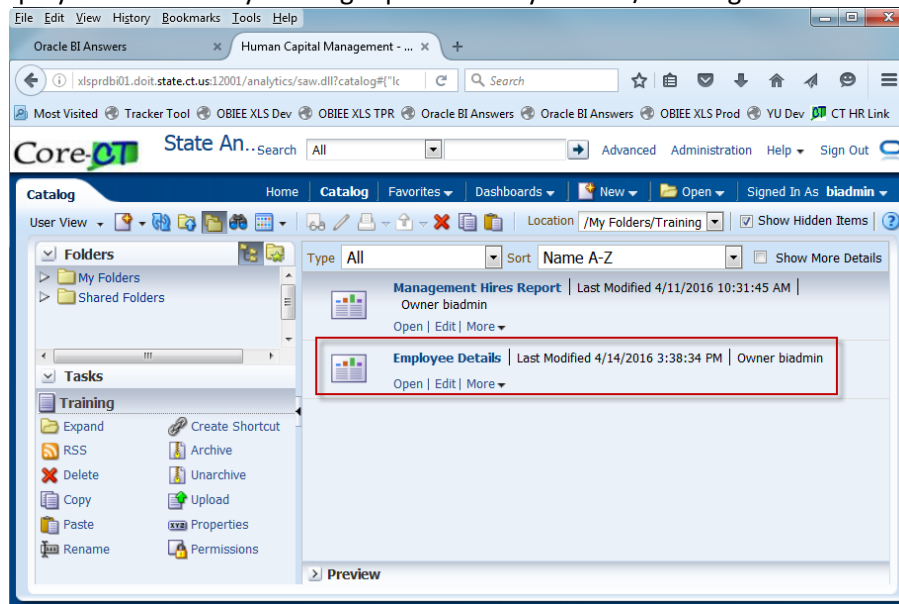
3. Navigate to **My Folders/Training**.



- Click on **Paste** from **Tasks** section.



- Employee Details analysis will get pasted in My Folders/Training folder.



Employee Details Analysis:-

This analysis is created to view Employee Details of those who were hired based on SETID, Union Code, Year and Month Name and use in Management Hires Report as a **detail report** by creating action link.

This analysis has following columns and filters:-

Columns:

Folder Name	Column Name
Worker > Basic Information	Last, First Name
Department	Department
Worker > Job Code	Job Description
Worker > Employment	Union Code Description
Worker > Location	Location Description
Worker > Employment	HR Status Description
Worker > Employment	Full Time Flag
Worker > Employment Information	Original Hire Date
Worker > Employment Information	Job Entry Date
Facts – Human Resources – Workforce Deployment > Workforce Event Facts	Employee Hire Count



Filters:

Column Name	Operator	Condition
Year	Is prompted	
Month Name	Is prompted	
SETID	Is equal to / is in	AGNCY
Action	Is equal to / is in	HIRE; Z_HIRE
Union Code	Is equal to / is in	01;02;03;05;06;07;08;09;10;11;12;13;14;15;16;17;45;67;68
Department ID	Is prompted	
Job Code	Is prompted	

The columns and conditions in the analysis will appear as shown below.

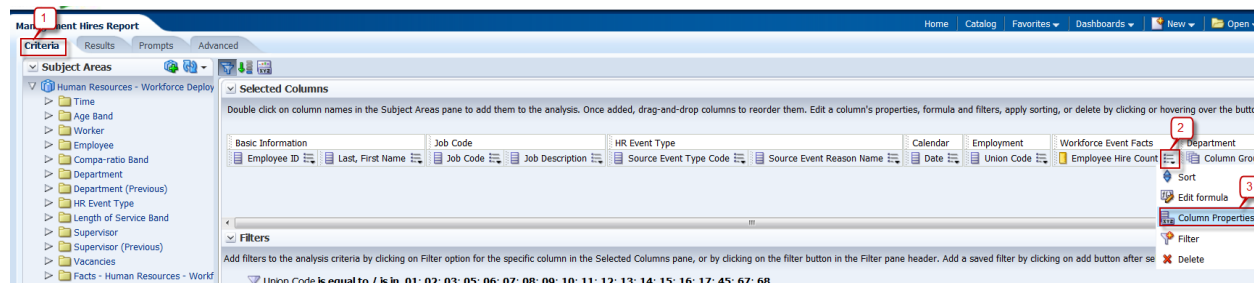
The screenshot displays the Oracle BI Answers web interface. The main window is titled 'Employee Details' and shows a configuration for an analysis. The 'Selected Columns' pane on the left lists various data points from the HR system, including 'Last, First Name', 'Original Hire Date', 'Job Entry Date', 'Location Description', 'HR Status Description', 'Full Time Flag', 'Union Code Description', 'Job Description', 'Department', and 'Employee Hire Count'. The 'Filters' pane on the right shows the configured filters: 'Year is prompted', 'Month Name is prompted', 'SETID is equal to / is in AGNCY', 'Action is equal to / is in HIRE; Z_HIRE', 'Union Code is equal to / is in 01;02;03;05;06;07;08;09;10;11;12;13;14;15;16;17;45;67;68', 'Department ID is prompted', and 'Job Code is prompted'. The interface includes a search bar, navigation tabs, and a sidebar with links to various system components.

Note: We will use the above analysis and “is prompted” filters when creating a dashboard page and placing the analysis on the dashboard. The values from the Dashboard Prompt will then use these filters to display the results.

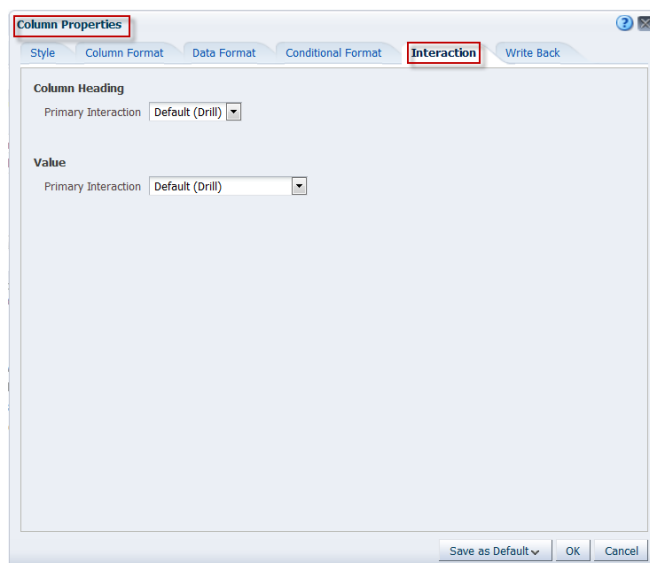
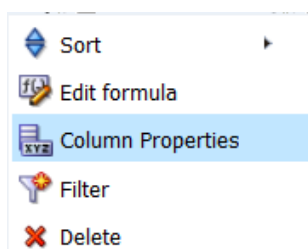
6.2 Create Action Link

An **action link** is a link to an action that you have embedded in an analysis, dashboard page, scorecard objective, scorecard initiative, or KPI that, when clicked, runs an associated action.

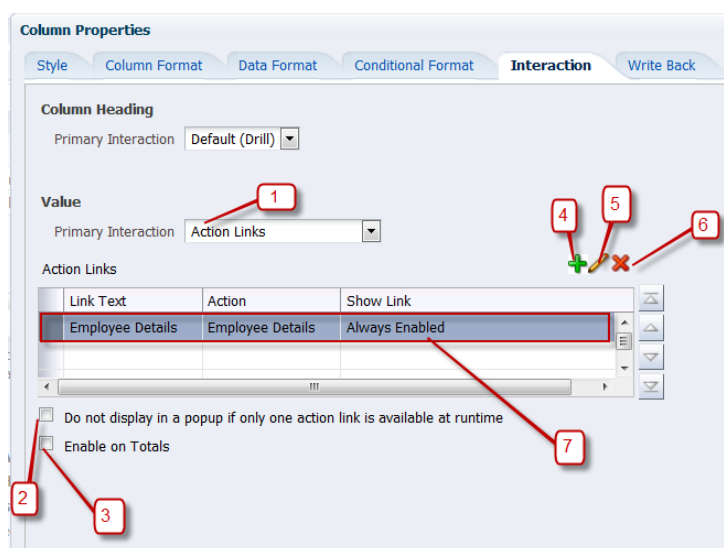
To Navigate to Action Link, Go to Column Properties of a column as shown below in the screenshot:



Action link is available in column properties of a column by going to Interaction tab.


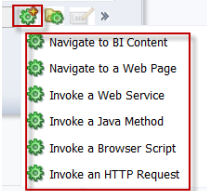


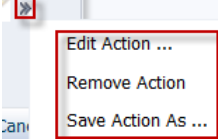


Action links can be added in Column Heading or in Value by clicking on drop down menu.



Elements	Description
1. Action Links	In the Action Links list, you can view, add, edit, and delete actions associated with the column. Notice that you can have multiple action links associated with a column. By default, actions available for a column appear in a popup when a user clicks the column value or heading in an analysis.
2. Do not display in a popup if only one action is available at runtime	This option is used to reset, so that in the event only one action is available for a value or heading, the action is executed upon the user interaction. Leave this option unchecked
3. Enable on Totals	This option is used to enable action links for Grand Totals and Sub Total level.
4. Add Action Link	To add Action Link
5. Edit Action Link	Used to edit an existing analysis.
6. Delete Action Link	Delete an existing analysis

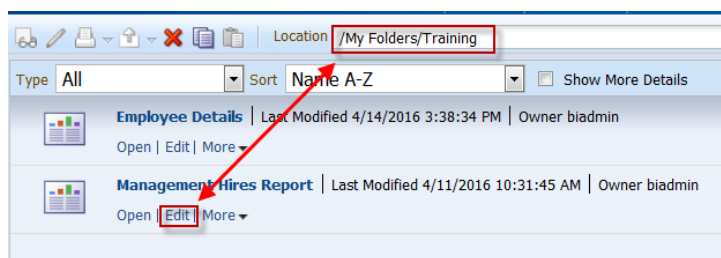
New Action Link window displays:

Elements	Description
1. Link Text	Enter some text in the “Link text”, this will popup whenever the user clicks on the column value
2. Action	Choose the type of action link. In this exercise we will choose “Navigate to BI Content” as we are going to navigate to a page within our dashboards.
3. Show Link	It is used to apply conditions based on which the action link needs to apply
4. Add Action Link 	Choose the type of action link. In this example we will choose “Navigate to BI Content” as we are going to navigate to another analysis. 
5. Select existing Action 	Choose an action link which has been already created and saved in the folder.
6. More 	This option is used to edit or remove or save action link as. 

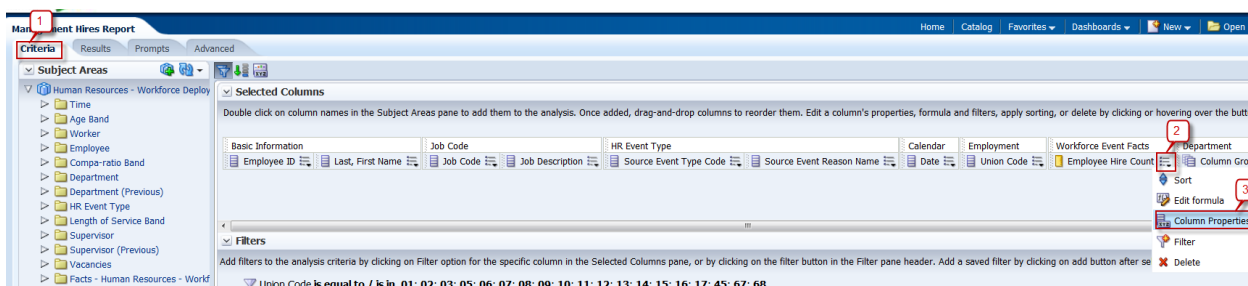
Next we will create **action link** between **Management Hires Report** and **Employee Detail**.

Guided Exercise

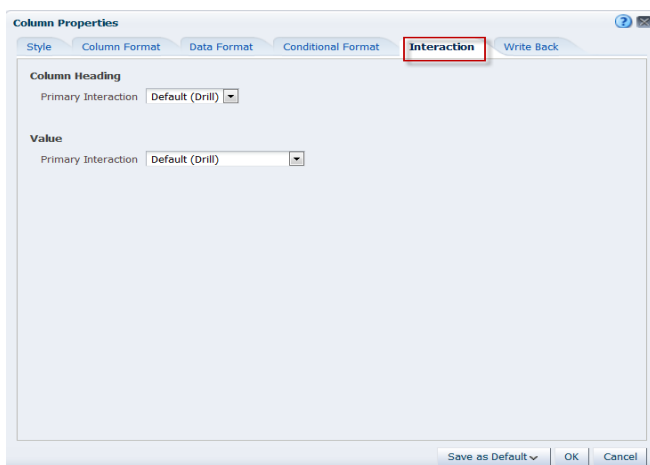
1. Navigate to **My Folder/Training** folder and select **"Management Hires Report"** to click on Edit.



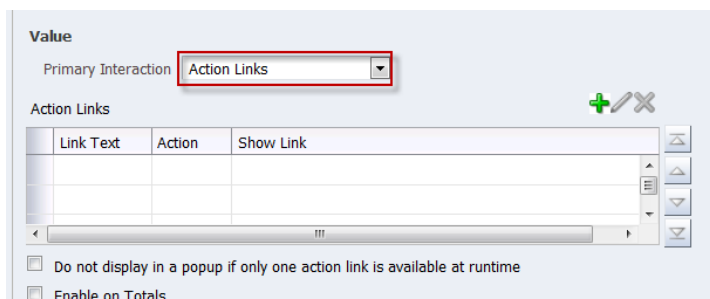
2. Click on **Criteria** tab and in **Selected Columns** section Hover over **Employee Hire Count** column **More** icon and select **Column Properties** from dropdown menu.




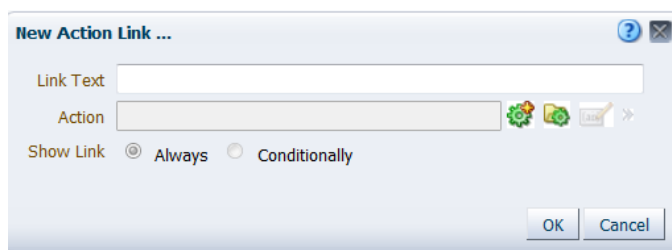
3. **Column Properties** dialogue opens, click on the **Interaction** tab.



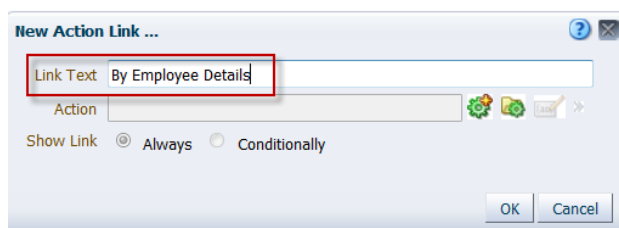
- In the Value section (not the Column Heading section) select Action Links from Primary Interaction drop down menu.




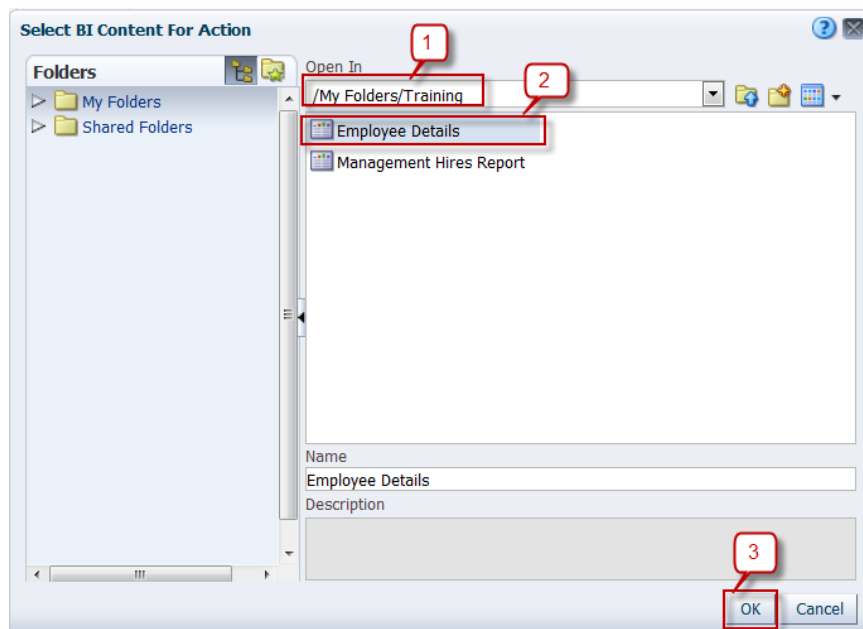
- Click on **Add** action link icon . **New Action Link...** dialogue opens



- Enter **"By Employee Details"** in Link Text box.

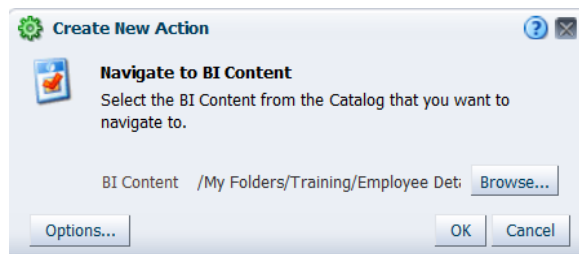


- Click on **Create New Action** icon  to select **"Navigate to BI Content"**.
- Select BI Content for Action dialogue opens, navigate to My Folders/Training folder and select **Employee Details** analysis.



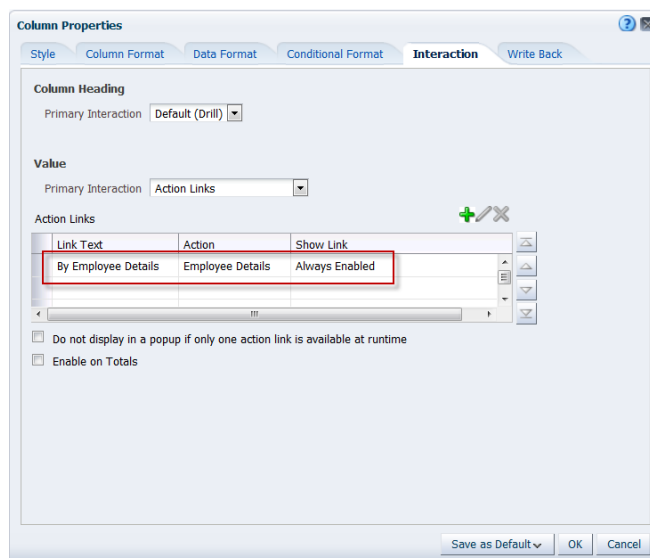
9. Click **OK**.

10. **Create New Action** dialogue appears as follows:-



Click **OK** then again Click **OK** to close New Action Link dialogue.

11. **Interaction** tab displays as follows:-



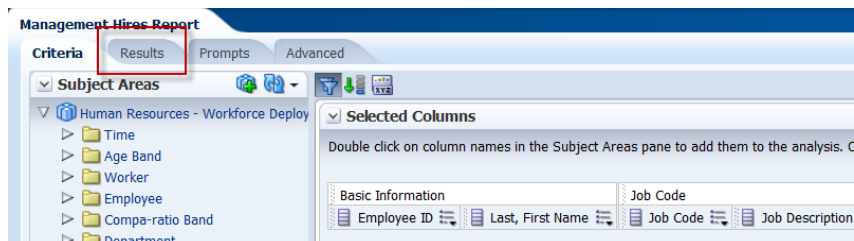
Click **OK** to close column properties dialogue.

12. **Save** the Analysis.

6.3 Test Action Link



Guided Exercise

1. Click the **Results** tab.



2. In the Results tab, all the values are highlighted with action links.

Compound Layout

Column Selector:  




Department ID 

Table:  

Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2
MCO39400	1
MHA53350	1
MHA53810	1
MHA55040	5
SDE64300	28
SDR63500	1
TRB77500	2
Grand Total	115

3. Click on a value in the Employee Hire Count column, then click on the Employee Details link.



Compound Layout

Column Selector: [X] [Y] [Z]

Department ID [v]

Table [X] [Y] [Z]

Department ID	Employee Hire Count
CME49500	1
DAG42500	23
DCF91000	2
DDS50100	4
DDS52000	1
DEF43700	7
DEF44700	2
DMV35000	1
DO837000	6
DOI37500	5
DOT57100	1
DOT57200	5
DOT57300	14
DPH48500	2
DRS16000	1
DVA21000	1
MCO39400	1
MHA53350	1
MHA53810	5
MHA55040	28
SDE64300	1
SDR63500	2
TRB77500	115
Grand Total	

Employee Details

4. It will open a new window and will give you the Employee Details of the **DCF91000** employees.

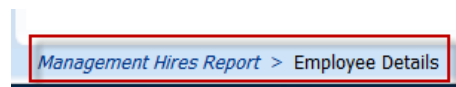
Employee Details

Last, First Name	Department	Job Description	Union Code Description	Location Description	HR Status Description	Full Time Flag	Original Hire Date	Job Entry Date	Employee Hire Count
Battle-Dawson, Crystal D	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	Milford Services	Active	Yes	4/16/2004	4/16/2006	1
Brown,Randall D	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	Milford Services	Active	Yes	3/4/2016	3/4/2016	1
Cobbs,Joy L.	Dept of Children and Family	OfficeAssistant	Administrative Clerical (NP-3)	Norwalk Services	Active	Yes	3/18/2016	3/18/2016	1
DeJesus,Natalie	Dept of Children and Family	SW-Socl&HumanSvcs	Social and Human Services(P-2)	Milford Services	Active	Yes	3/4/2016	3/4/2016	1
Ellis,Alfred A.	Dept of Children and Family	SocialWorkCaseAide	Social and Human Services(P-2)	Waterbury Services	Active	No	3/4/2016	3/4/2016	1
Estes,Vania M.	Dept of Children and Family	SW-Socl&HumanSvcs	Social and Human Services(P-2)	Milford Services	Active	Yes	1/31/2003	1/31/2003	1
Failey,Krystal Lashawn	Dept of Children and Family	SocialWorkCaseAide	Social and Human Services(P-2)	Hartford Services	Active	Yes	9/12/2008	9/12/2008	1
Findley,Erin E.	Dept of Children and Family	SW-Socl&HumanSvcs	Social and Human Services(P-2)	New Britain Services	Active	Yes	6/15/2001	1/11/2004	1
Florez,Alexandria E.	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	New Britain Services	Active	Yes	3/18/2016	3/18/2016	1
Florio,Kristine E.	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	New Haven Services	Active	Yes	3/4/2016	3/4/2016	1
Gates,Sarah L.	Dept of Children and Family	SW-Socl&HumanSvcs	Social and Human Services(P-2)	Waterbury Services	Active	Yes	8/16/1996	2/25/1997	1
Hargrove,Shanna Lee	Dept of Children and Family	SW-Socl&HumanSvcs	Social and Human Services(P-2)	Waterbury Services	Active	Yes	8/17/2007	8/17/2007	1
Headley,Tawanna J.	Dept of Children and Family	SW-Socl&HumanSvcs	Social and Human Services(P-2)	Middletown Services	Active	Yes	3/4/2016	3/4/2016	1
Lowell,Danielle E.	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	New Britain Services	Active	Yes	3/4/2016	3/4/2016	1
Lyons,Darryl J.	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	Milford Services	Active	Yes	3/4/2016	3/4/2016	1
MacDonald,Tylicce C.	Dept of Children and Family	SW-Socl&HumanSvcs	Social and Human Services(P-2)	New Haven Services	Active	Yes	3/4/2016	3/4/2016	1
Mancini,Nina M.	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	Milford Services	Active	Yes	3/18/2016	3/18/2016	1
Molina,Sydney A.	Dept of Children and Family	SocialWorkCaseAide	Social and Human Services(P-2)	Waterbury Services	Active	No	3/4/2016	3/4/2016	1
Sanchez,Stephanie P	Dept of Children and Family	PostdFclw-Psycd(Clin)	Health Professional (P-1)	Solnit South Facility Treat	Active	No	3/18/2016	3/18/2016	1
Sieira Millan,Natalia	Dept of Children and Family	ExecutiveAssistant1	Exempt/Elected/Appointed	CO Legal Division	Active	Yes	5/11/2009	5/11/2009	1
Spikes,Alisha L.	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	New Britain Services	Active	Yes	9/29/2006	9/29/2008	1
Surreira,Michelle M	Dept of Children and Family	SWTrme-Socl&HumanSvcs	Social and Human Services(P-2)	Waterbury Services	Active	Yes	10/31/2001	10/31/2001	1
Walton,Vernalisa	Dept of Children and Family	SW-Socl&HumanSvcs	Social and Human Services(P-2)	Norwich Services	Active	Yes	10/26/2007	4/25/2008	1

This release contains a new feature: **Breadcrumbs**.

Breadcrumbs have been added to help you understand your current location within OBI content and the path that you have used to navigate OBI content.

Observe the bottom left corner of My Dashboard. Breadcrumbs are active links that you can click to return to the place from which you navigated and to the state of the content when you left it.



5. Click on Management Hires Report to **return**.



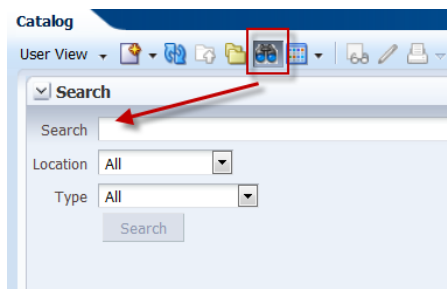
7. Search, Print and Export Analysis

Introduction	<p>We can search for objects in the Oracle BI Presentation Catalog.</p> <p>You can print analysis results to HTML and PDF formats. Additionally, you can export a complete list of analysis results to the following formats:</p> <ul style="list-style-type: none"> · Download to Excel 2003 +exports the data in and the formatting as it displays in the view, including graphs, filters, etc... · The Download Web Archive is an HTML page and not modifiable. · Download Data exports just rows of data without formatting. · Download to PowerPoint exports to PowerPoint <p>In this module, you will learn how to display analysis results in PDF format and Microsoft Excel®.</p>
Objectives	<p>At the end of this section, you will be able to complete the following tasks relating to:</p> <ul style="list-style-type: none"> • Search an Analysis • Print Results to PDF • Export Results to Excel®

7.1 Search for an Analysis

The basic catalog search allows you to search for an object from the Global Header, Home page, or Catalog page. You can search for an object by its name, location, or type only, which is similar to using a Find dialog box in many products. You will find only those objects for which you have the appropriate permissions. When the desired object is located, you can click it to display it for viewing or editing, as your permissions allow.


Understand Search elements:-

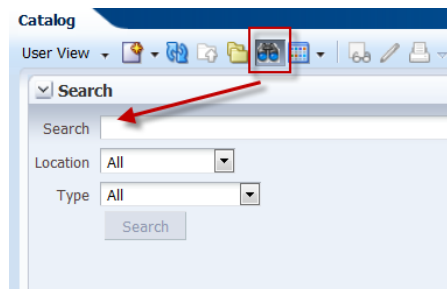


Elements	Description
Search	Enter the name of the Analysis, Dashboard, Prompts and so on.
Location	Choose in which folder you want to search. <div> <div>Location</div> <div>All</div> </div> <div> <div>Type</div> <div>All</div> <div>My Folders</div> <div>Shared Folders</div> </div>
Type	Select the type of the Search you're looking for. <div> <div>Type</div> <div>All</div> <div>Action</div> <div>Agent</div> <div>Analysis</div> <div>Briefing Book</div> <div>Calculated Item</div> <div>Condition</div> <div>Dashboard</div> <div>Dashboard Prompt</div> <div>Data Model</div> <div>Filter</div> <div>Financial Reporting</div> <div>Group</div> <div>KPI</div> <div>KPI Watchlist</div> <div>List Format</div> <div>Mobile App</div> <div>Report</div> <div>Scorecard</div> <div>Segment</div> </div>

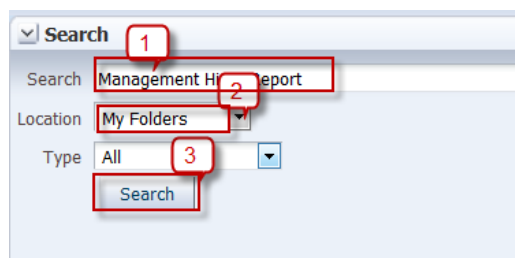
Guided Exercise

To search an analysis, follow the below steps:

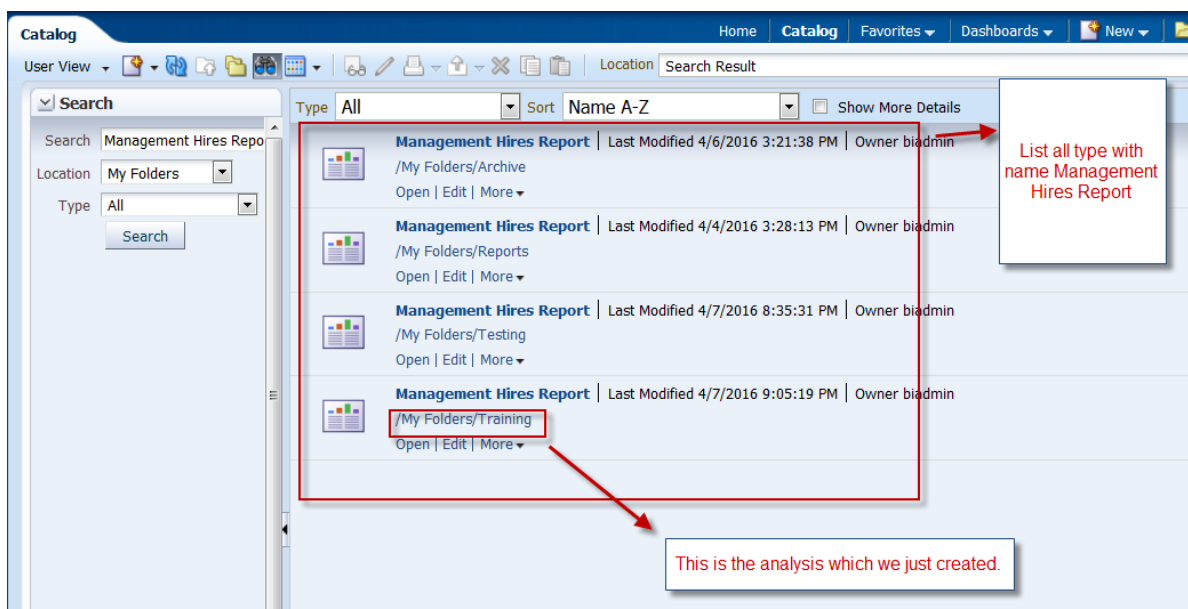
1. On home page, click on Catalog in Global header.
2. Now click on **Search** icon  in the Common Header.



3. Enter **Management Hires Report** under Search. And select **My Folders** as Location. Click **Search**.



Now it will display all the reports with Management Hires Report along with their folder path in My Folders.



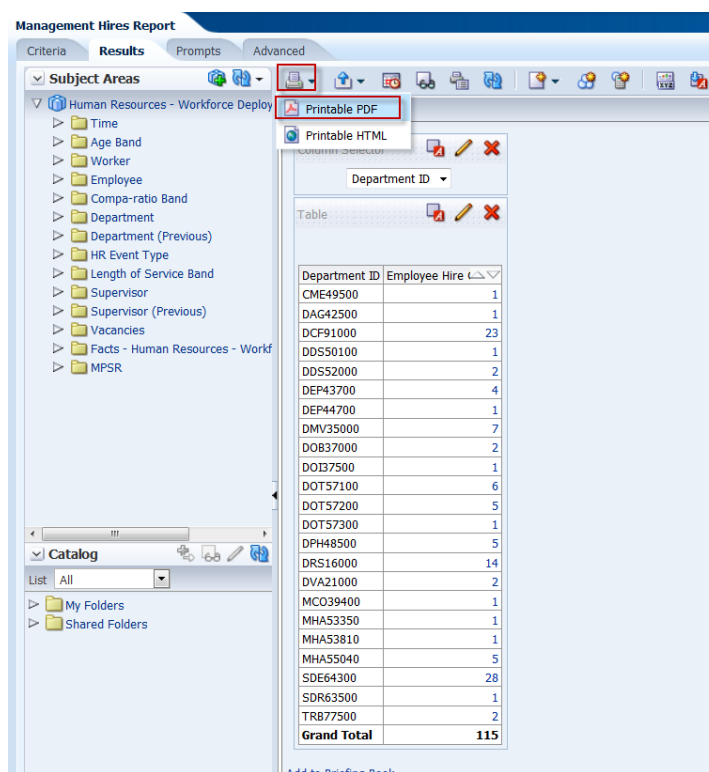
7.2 Print Results to PDF

You can export analyses to a PDF format. By exporting analyses, you have the ability to print analyses as well as send an analysis to an individual.

Make sure to open the “**Management Hires Report**” and select the Results tab.

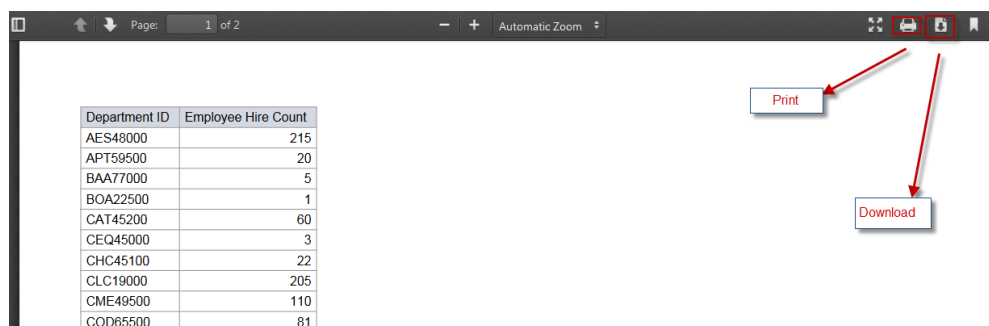
Guided Exercise

1. Go to Results tab, and click on **Print this Analysis** icon.



Department ID	Employee Hire
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2
MCO39400	1
MHA53350	1
MHA53810	1
MHA55040	5
SDE64300	28
SDR63500	1
TR877500	2
Grand Total	115

2. Click on **Printable PDF**, a new window opens with PDF version of the results. You can either save the analysis as PDF in your desktop or give print to printer.



Department ID	Employee Hire Count
AES48000	215
APT59500	20
BAA77000	5
BOA22500	1
CAT45200	60
CEQ45000	3
CHC45100	22
CLC19000	205
CME49500	110
COD65500	81

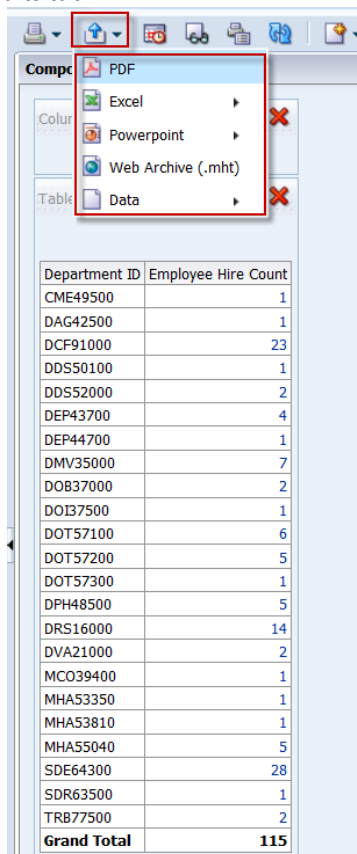
7.3 Export Results to Excel

You have the ability to export an analysis to Microsoft Excel®. By exporting to Microsoft Excel®, you can save, print, email or manipulate the data in a spreadsheet.

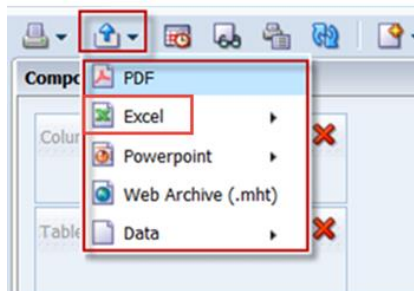
Make sure to open the “**Management Hires Report**” and select the Results tab.

Guided Exercise

1. Click Export this analysis icon on Results tab.



2. Click **Excel** and **Save** the file.





8. Work with Dashboard Prompt

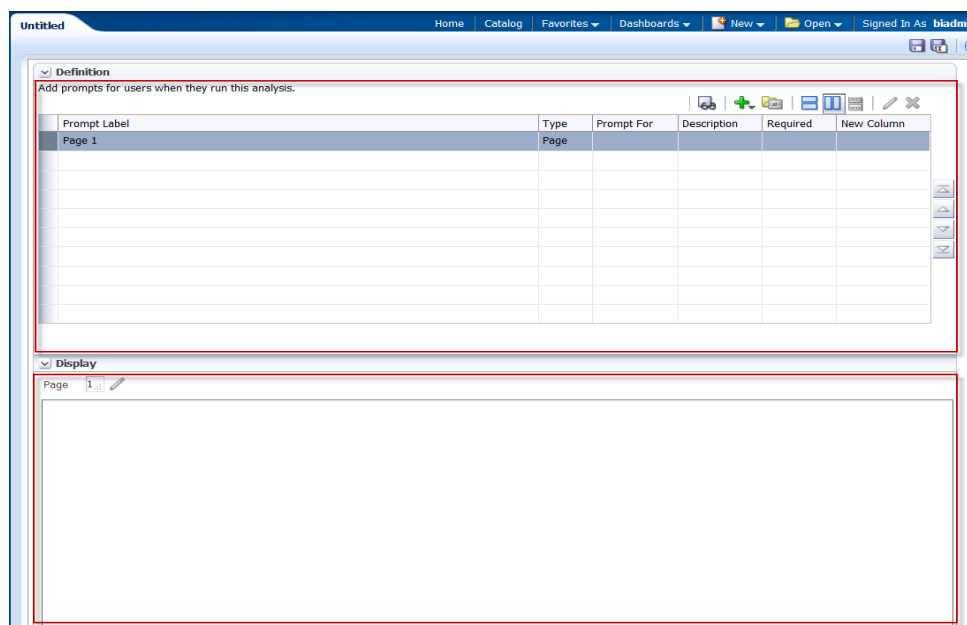
Introduction	<p>A dashboard prompt is a special filter that filters analyses embedded in a dashboard. The prompt created at the dashboard level is called a Dashboard Prompt, because, the prompt is created outside of a specific dashboard and stored in the catalog as a prompt object, which can then be applied to any dashboard or dashboard page that contains the columns, which are specified in the prompt. It can filter one or any number of analyses embedded on the same dashboard page. You can create and save these named prompts to a private folder or a shared folder.</p> <p>A Dashboard Prompt is interactive and will always appear on the dashboard page so that the user can prompt for different values without having to rerun the dashboard. A Dashboard Prompt can also interact with selection steps. You can specify a dashboard prompt to override a specific selection step. The step will be processed against the dashboard column with the user-specified data values collected by the dashboard column prompt, whereas all other steps will be processed as originally specified.</p>
Objectives	<p>At the end of this section, you will be able to complete the following tasks related to creating Dashboard Prompts.</p> <ul style="list-style-type: none">• Understand a Dashboard Prompt• Create a Dashboard Prompt

8.1 Understand a Dashboard Prompt

A prompt that is created at the dashboard level is called a dashboard prompt because the prompt is created outside of a specific dashboard and is stored in the catalog as an object, which can then be added to any dashboard or dashboard page that contains the columns that are specified in the prompt. Dashboard prompts are reusable, because you can create one prompt and use it many times. When the prompt object is updated and saved, those updates are immediately displayed in all dashboards where the prompt is used. A dashboard prompt is interactive and is always displayed on the dashboard page so that the user can prompt for different values without having to re-run the dashboard. Users can create and save dashboard prompts to either a private folder or to a shared folder.

Navigate and Understand Dashboard Prompt

Dashboard prompt screen opens which will have two sections Definition & Display section.



The **Definition pane** allows you to add, organize, and manage a named prompt's columns. You can use column prompts, image prompts (maps), currency prompts, and variable prompts. The Definition table lets you view high-level information about the prompt's columns. You can also use this table to select columns for editing or deleting, arrange the order in which the prompts appear to the user, or insert row or column breaks between prompt items.

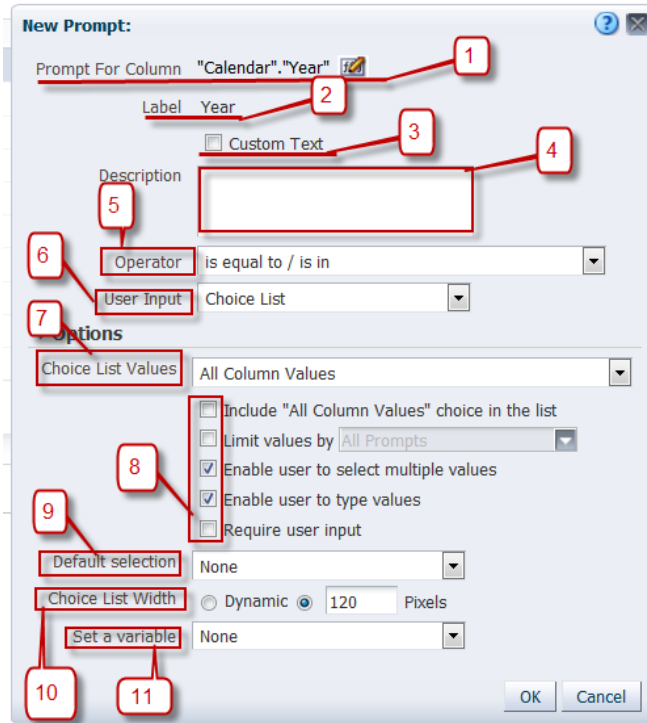
The **Display pane** is a preview pane that allows you to view the prompt's layout and design.

Definition pane:-



Elements	Description
1. New	Used to add a new Column prompt, Variable prompt or Image prompt
2. Column / Row based layout	This is used to select the type of layout you want on the prompts page either Column or Row based.
3. Edit	Edit Prompt
4. Delete	Delete Prompt

New Column Prompt dialog, for example we will select **Year**.



The 'New Prompt' dialog box contains the following elements:

- 1**: Prompt For Column (Text field: "Calendar"."Year")
- 2**: Label (Text field: Year)
- 3**: Custom Text (Checkbox)
- 4**: Description (Text area)
- 5**: Operator (Dropdown menu: is equal to / is in)
- 6**: User Input (Dropdown menu: Choice List)
- 7**: Options section containing:
 - Choice List Values** (Dropdown menu: All Column Values)
 - 8**: Checkboxes for:
 - Include "All Column Values" choice in the list
 - Limit values by (Dropdown menu: All Prompts)
 - Enable user to select multiple values
 - Enable user to type values
 - Require user input
 - 9**: Default selection (Dropdown menu: None)
 - Choice List Width** (Radio buttons: Dynamic, 120 Pixels)
 - Set a variable** (Dropdown menu: None)
- 10**: OK button
- 11**: Cancel button

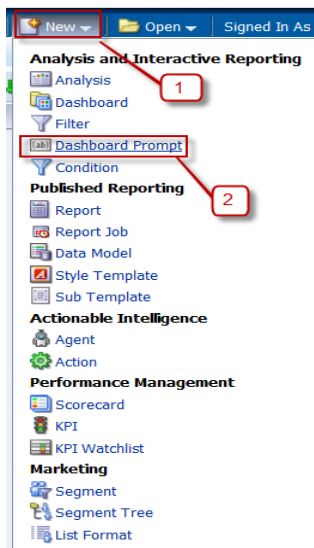
Elements	Description
1. Prompt for Column	It shows the column name of the prompt
2. Label	It is label which will be displayed
3. Custom Text	Enable this to change the default Label
4. Description	We can add description for this column
5. Operator	Choose appropriate operator
6. User Input	The User Input field's drop-down list appears for column and variable prompts and provides you with the option to determine the User Input method for the user interface—in other words, the user will see one of the following: check boxes, radio buttons, a choice list, or a list box. . Use this item in conjunction with the Choice List Values item to specify which data values appear for selection.
7. Choice List Values	The Options section provides you with the opportunity to constrain values available for selection. None All Column Values Specific Column Values SQL Results Members of Groups All Column Values and Specific Groups
8. <input type="checkbox"/> Include "All Column Values" choice in the list <input type="checkbox"/> Limit values by All Prompts <input checked="" type="checkbox"/> Enable user to select multiple values <input checked="" type="checkbox"/> Enable user to type values <input type="checkbox"/> Require user input	The series of checkboxes allow you to restrict the amount of data returned. Select Enable user to select multiple values , and Require user input . Allowing multiple selection of values lets you choose more than one value (region for example), and requiring input forces you to enter at least one value.
9. Default Selection	It allows you to selection an initial value
10. Choice List Width	You the change the width of the Choice List by enabling dynamic or fixing it.
11. Set a variable	It allows you to create a new variable that this column prompt will populate

8.2 Create Dashboard Prompt

Next we will create Dashboard Prompt with two columns from Human Resource – Workforce Deployment subject area.

Guided Exercise

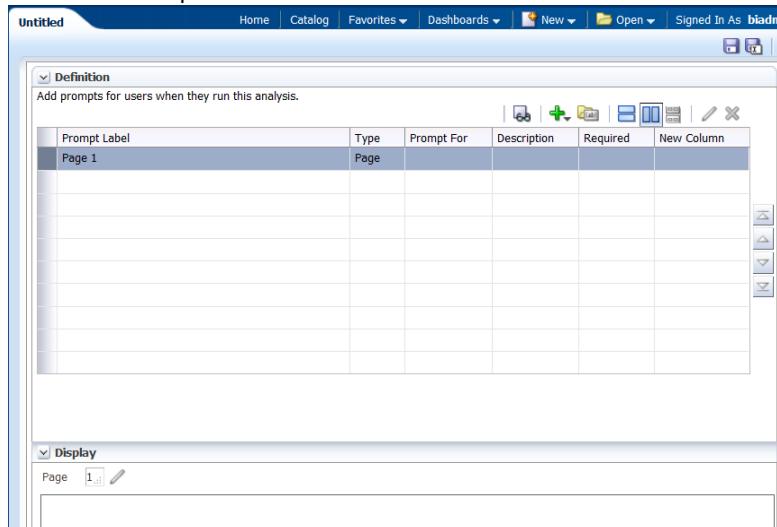
1. Click on **New** icon from global header and select **Dashboard Prompt**.




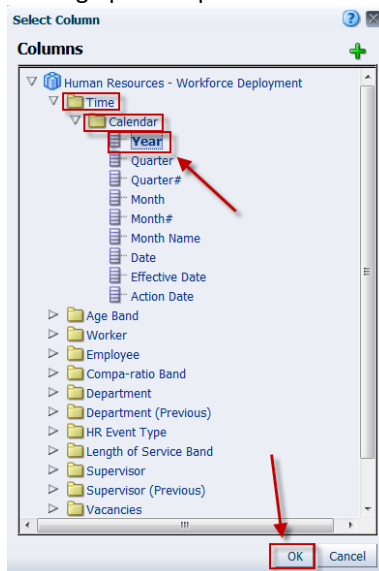
2. Select **Human Resource – Workforce Deployment** from the Subject Area dialog.



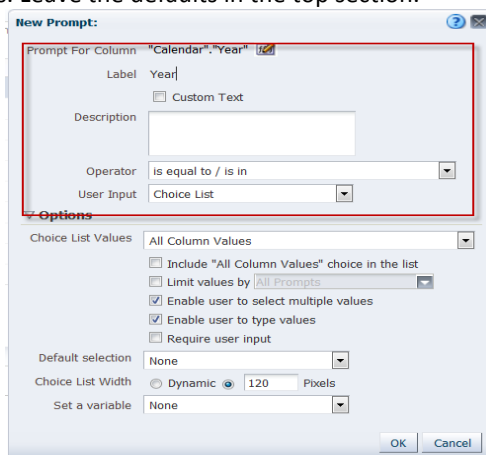
It will open Dashboard Prompt window:



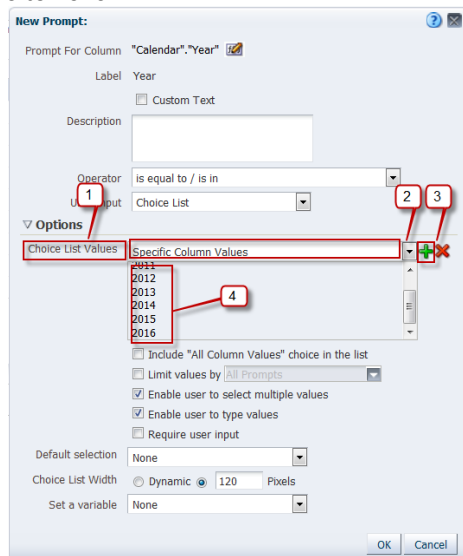
- Click on **New** icon  and select **Column Prompt**.
Subject Area with select column dialog opens: Expand Time > then Calendar and select **Year**.



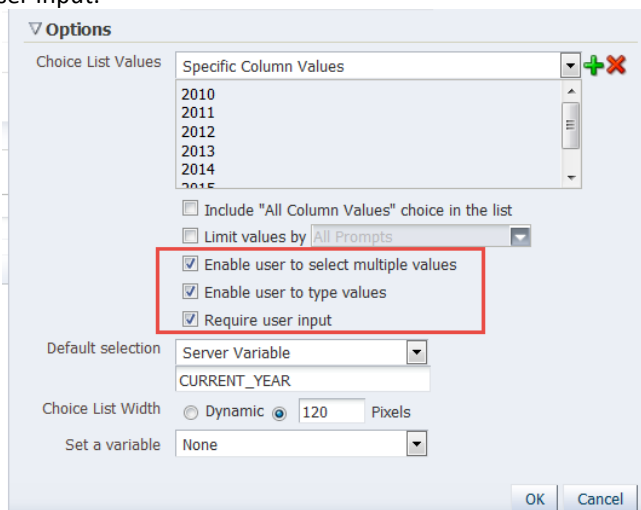
- New Prompt** dialog opens. Leave the defaults in the top section.



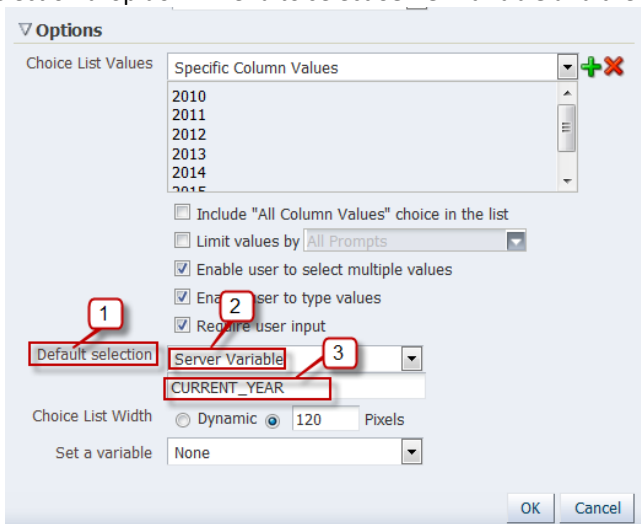
- Click on **Choice List Value** drop down menu to select **"Specific Column Values"**. Then click on **Add** icon next to it, and select Years from 2010 to 2016.



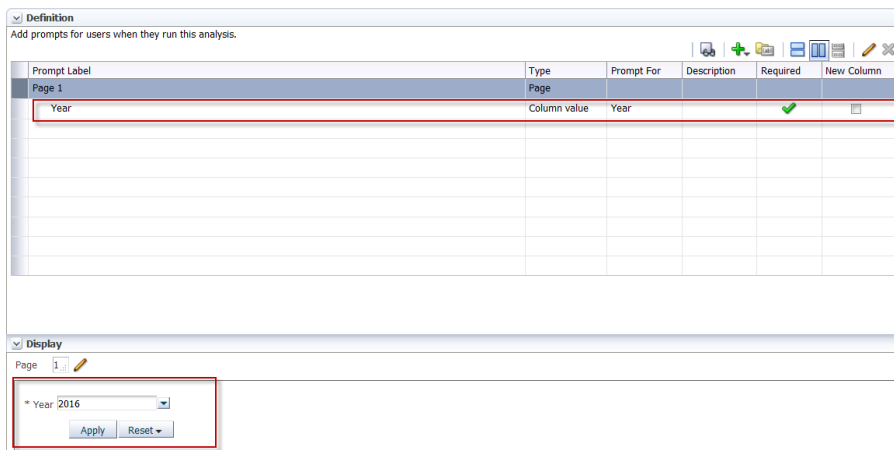
6. Enable Require user Input.



7. Click on Default selection drop down menu to select **Server Variable** and then type **CURRENT_YEAR**.



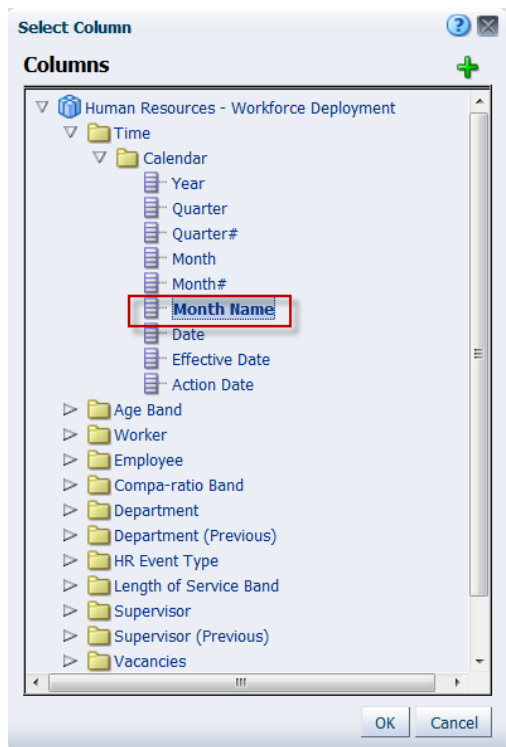
8. Click **OK** to close the Prompt.
9. The Definition pane and Display pane appears as follows:-



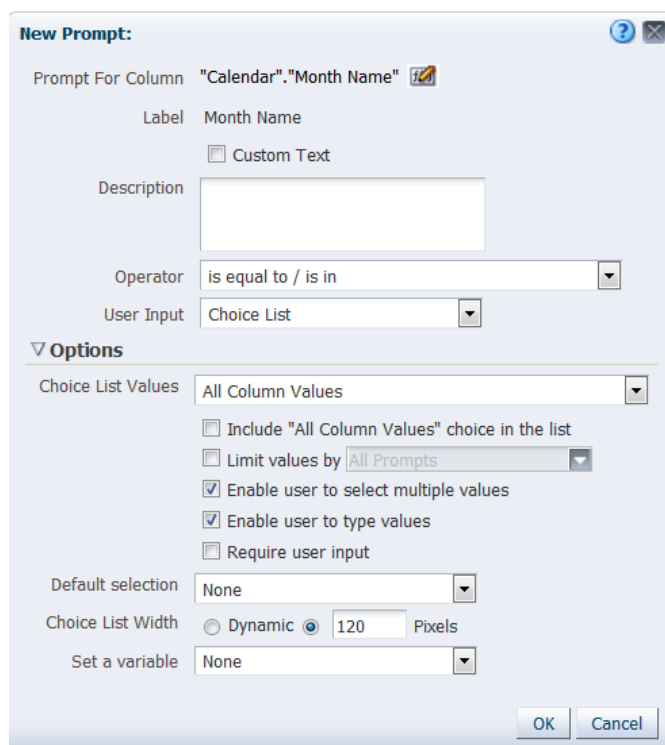
Next we will add **Month Name** in similar way.

Guided Exercise

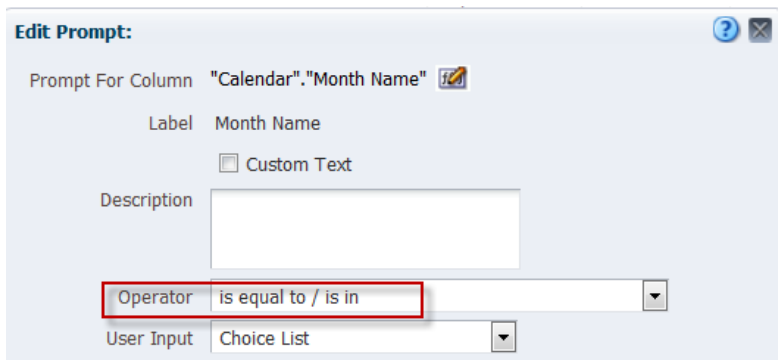
1. Click Add icon to select **Column Prompt** and select Month Name by expanding Time > Calendar folder.




2. Month Name Prompt dialog opens:



- Click on **Operator** drop down menu and select “is equal to / is in”.



Edit Prompt:

Prompt For Column "Calendar"."Month Name" 

Label Month Name

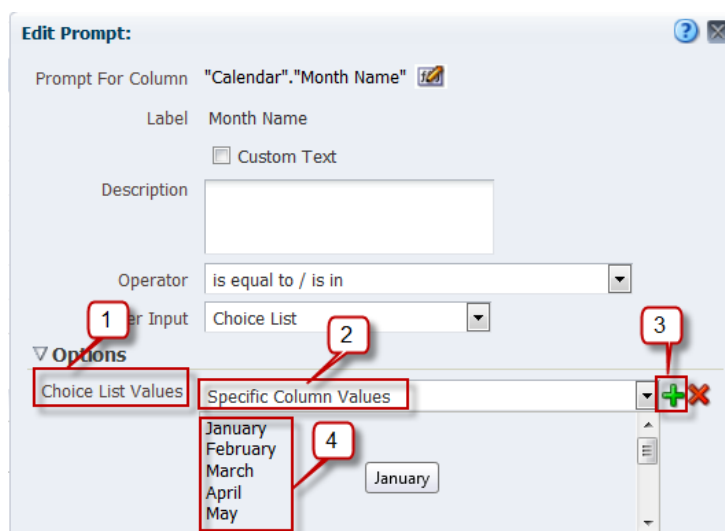
☐ Custom Text

Description


Operator is equal to / is in

User Input Choice List

- In Options section click on **Choice List Values** drop down menu to select **Specific Column Values** to display. Then click on Add and select Month Name from **Jan to Dec**.



Edit Prompt:

Prompt For Column "Calendar"."Month Name" 

Label Month Name



☐ Custom Text

Description

Operator is equal to / is in

User Input Choice List

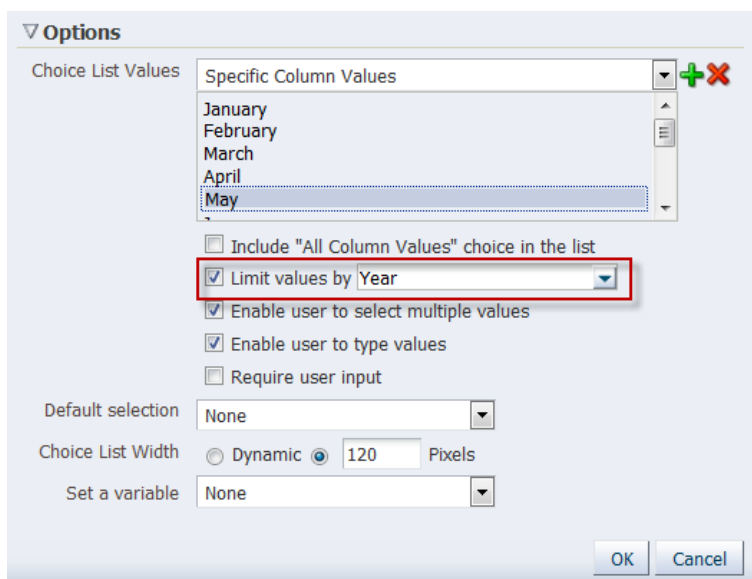
Options

Choice List Values **Specific Column Values**  



January
February
March
April
May

January

- Enable **Limit values by** and select Year.



Options

Choice List Values **Specific Column Values**  

January
February
March
April
May

☐ Include "All Column Values" choice in the list

☒ Limit values by Year

☒ Enable user to select multiple values

☒ Enable user to type values

☐ Require user input

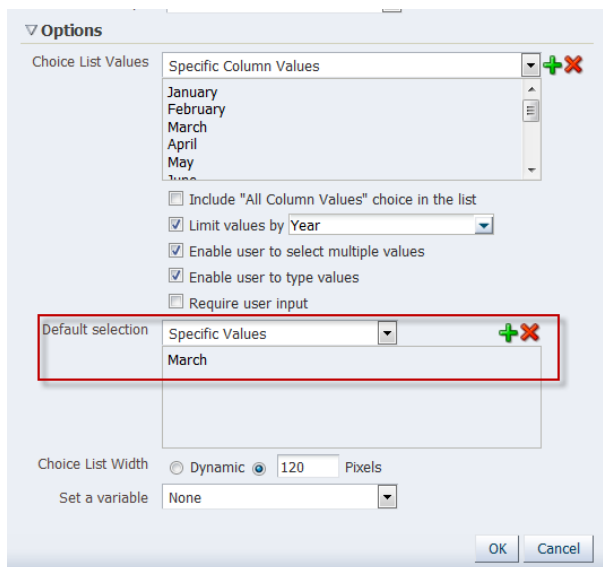
Default selection None

Choice List Width ☐ Dynamic ☒ 120 Pixels

Set a variable None

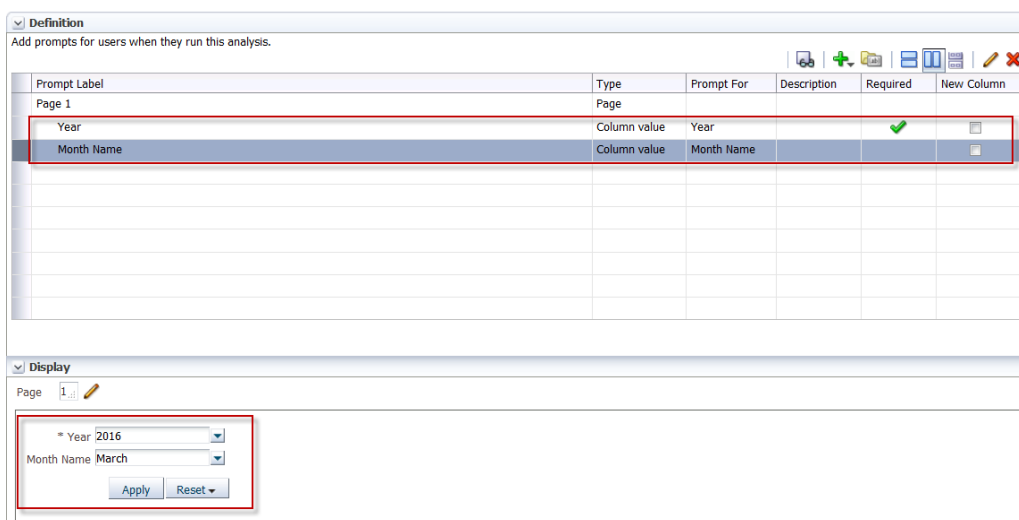
OK Cancel

- Click on drop down menu of Default selection to select **Specific Values** and click on **Add** icon  to select March.



The Options dialog box is shown. The 'Choice List Values' section has a dropdown menu set to 'Specific Column Values'. Below this is a list of months: January, February, March, April, May, June. The 'Default selection' section has a dropdown menu set to 'Specific Values' and a text box containing 'March'. The 'Choice List Width' section has 'Dynamic' selected and '120' pixels. The 'Set a variable' section is set to 'None'. The 'OK' and 'Cancel' buttons are at the bottom right.

- Click **OK** to close the dialog and see the Definition and Display pane.




The Definition and Display panes are shown. The Definition pane has a table with the following data:

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Year	Column value	Year		✓	
Month Name	Column value	Month Name			

The Display pane shows the prompts layout. It has a 'Page' dropdown set to '1'. Below it are two prompts: 'Year' with a dropdown set to '2016' and 'Month Name' with a dropdown set to 'March'. There are 'Apply' and 'Reset' buttons at the bottom.

- In Display pane the prompts layout is based on Column. We will change it to **Row based layout**.

Click on Row based layout icon .

Definition
Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Row
Page 1	Page				
Year	Column value	Year		✓	
Month Name	Column value	Month Name			

Display

Page 1

Year 2016 Month Name March

Apply Reset

9. Save Dashboard Prompt under My Folders/Training as Prompt_Training.

Save As

Folders

- My Folders
- Shared Folders

Save In

/My Folders/Training

Employee Details

Management Hires Report

Name

Prompt_Training

Description

OK Cancel




Click **OK**

10. Navigate to **My Folders/Training** to view the Dashboard Prompt.

Location /My Folders/Training

Show Hidden Items

Type All Sort Name A-Z Show More Detail

	Employee Details Last Modified 4/14/2016 3:38:34 PM Owner biadmin
Open Edit More	
	Management Hires Report Last Modified 4/14/2016 6:18:11 PM Owner biadm
Open Edit More	
	Prompt_Training Last Modified 4/14/2016 7:46:44 PM Owner biadmin
Edit More	



9. Build & Design Dashboard

Introduction	<p>In this topic, you will learn about My Dashboard view and adding a saved analysis and dashboard prompt that you have created previously. Dashboards provide personalized views of corporate and external information. Based on your permissions, you can view pre-configured dashboards or create your own personalized views. Users with administrative privileges can create shared dashboards for groups of users with common responsibilities or job functions. The ability to create and edit dashboards is controlled by the Manage Dashboard privilege, which is managed by the administrator. You can view your personalized views by selecting My Dashboard from the Dashboards drop-down list. You can also set My Dashboard as your default dashboard. Pre-configured dashboards appear in the Dashboards drop-down list. They can be created by administrators and shared with groups of users with common responsibilities or job functions.</p>
Objectives	<p>At the end of this section, you will be able to complete the following tasks related to building a Dashboard.</p> <ul style="list-style-type: none">• Understanding & Navigating My Dashboard• Build My Dashboard• Edit My Dashboard• Save a Dashboard Customization• Set Preference• Export My Dashboard to Excel Spreadsheet

9.1 Understanding and Navigating My Dashboard

Understanding Dashboards

Dashboards consist of multiple pages, which display as tabs across the top of the dashboard screen. Additionally, Analysis Editor Users have a personal dashboard, called My Dashboard, which enables you to personalize content to meet your requirements.

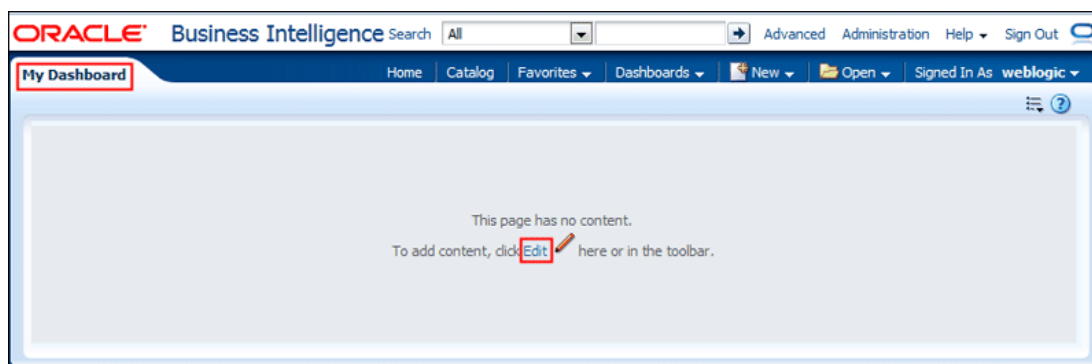
Pages can display anything that you can access or open with your Web browser, such as saved OBI analyses, images, graphs, tables, text, and links to Web sites and documents.

Dashboard objects are items that are used only in a dashboard. Examples of dashboard objects are sections to hold content, navigation links, and embedded content appearing within a frame in a dashboard.

You can add content to your personal dashboard by clicking and dragging it from the Dashboard Objects section onto the dashboard layout page, which consists of columns used to align content, and sections used to hold content. The look of a dashboard, such as background colors and the size of text, is controlled by styles and skins. You can modify individual objects on the dashboard to change the overall page appearance.

Navigate My Dashboard

The initial My Dashboard page.



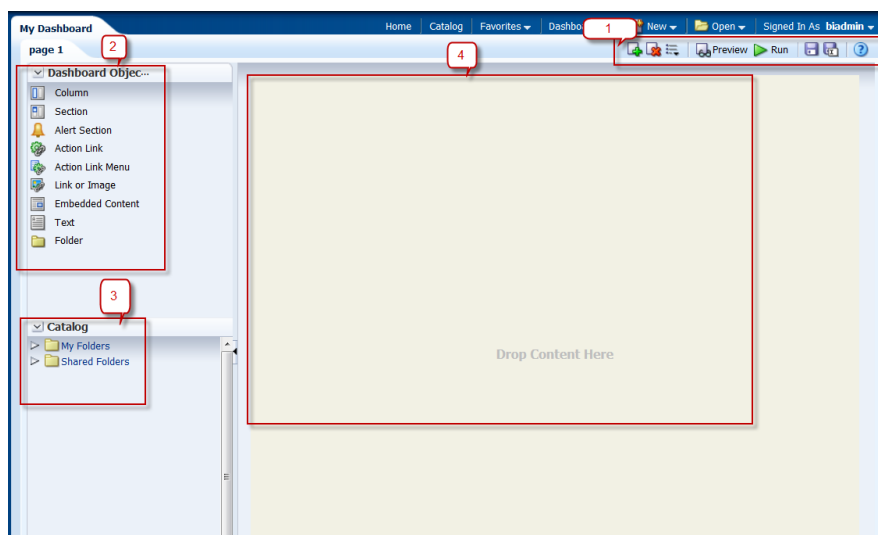
When you open a dashboard, including My Dashboard, the content appears in one or more dashboard tabs. Pages contain the columns and sections that hold the content of a dashboard, and every dashboard has at least one page. Multiple pages are used to organize content.

This example shows an empty My Dashboard page with no content. Hover over the Edit icon to edit the dashboard and add content.

Note: If you have chosen or if your company has setup My Dashboard as your default, then Use dashboard template pages to populate your personal dashboards (My Dashboard) when you first log in as a new user. This allows you to see one or more dashboard pages with content, rather than an empty dashboard. It also gives you a starting point to build your own dashboard pages.

The Dashboard Builder appears and automatically creates **page 1** of your dashboard (the first tab).

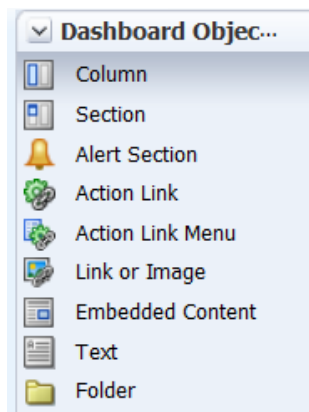
Using the Dashboard Builder, you can add pages and objects to a dashboard and control the page layout. The Dashboard Builder is composed of the following:



Sections	Description
1. Dashboard Toolbar	The toolbar allows you to perform tasks such as adding or deleting pages, previewing, saving, and so on.
2. Dashboard Objects pane	Items that are used only in a dashboard. Examples of dashboard objects are sections to hold content, action links, and embedded content that is displayed in a frame on a dashboard
3. Catalog pane	Items that you or someone else has saved to the Catalog, for example, analyses, prompts, and so on. In a dashboard, the results of an analysis can be shown in various views, such as a table, graph, and gauge. (The results of an analysis are the output that is returned from the OBI Server that matches the analysis criteria.) Users can examine and analyze results, save or print them, or download them to a spreadsheet.
4. Page Layout pane	This is a workspace that holds your objects, which are displayed on the dashboard.

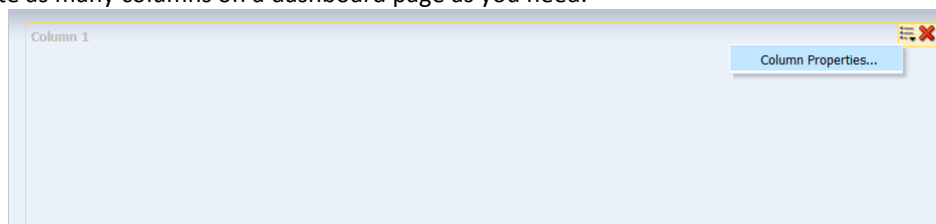
Dashboard Object Pane: -

As mentioned above, the Dashboard Objects pane provides you with a list of objects to add as content to a dashboard page. You will have to drag the object to the Page Layout pane on the right.



The two most important objects used from Dashboard Object pane are as follows:-

Columns are used to align content on a dashboard. (Sections within columns hold the actual content.) You can create as many columns on a dashboard page as you need.



We can click on Column Properties of Column and change the style, alignment, font, color and soon.

Sections are used within columns to hold the content, such as action links, analyses, and so on. You can drag and drop as many sections as you need to a column.

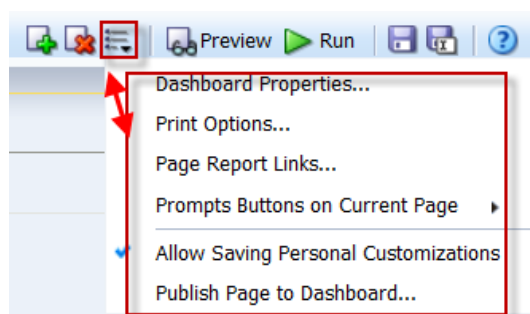







Elements	Description
Conditions	Use conditions to determine the following: Whether sections and their content appear on the dashboard page <ul style="list-style-type: none"> Whether agents deliver their content and execute their actions Whether action links appear on dashboard pages Conditions are evaluated based on a Boolean expression; in other words, the condition is either True or False
Format Section	Use this option to display the Section Properties dialog box, where you specify the properties for the section, such as cell alignment and border color.
Rename	Use this option to display the Rename dialog box, which allows you to rename the section.
Drill in Place	Use this option to specify how the results appear when a user drills in an analysis. If a check mark appears in front of the "Drill in Place" option, the original analysis is replaced when the user drills (the section will

	<p>automatically resize to fit the new analysis). If the check mark is not present in front of “Drill in Place,” the entire dashboard content is replaced. Use this option for prompts that are created for hierarchical columns.</p> <p>Note: You can use the back button in the browser to view the original analysis.</p>
Collapsible	Use this option to specify whether the user can expand and collapse this section on a dashboard page or whether the section is always expanded. If a check mark appears in front of the Collapsible option, you can expand and collapse the section.
Show Section Header	Use this option to specify whether to display the header for the section, which initially includes the title of the section. You can hide the title using the Show Section Title option.
Show Section Title	Use this option to specify whether to display the title of the section.

Dashboard Toolbar pane: -

The toolbar allows you to perform tasks such as adding or deleting pages, previewing, saving, and so on.



Add Dashboard Pages 	It is used to add pages on the dashboard
Delete Current Page 	When there are single or multiple page then It deletes the current page.
Tools 	It provides options to set dashboard properties, Print options, set page report links, and so on
Preview 	We can Preview the content on the dashboard before saving the Dashboard
Run 	After saving the dashboard page click on Run to view the Dashboard.

Dashboard Properties:-

Dashboard Properties

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

General Properties

1. Style: Default (FusionFx)

2. Description: [Text Area]

3. Page Size: ☐ Fit Content ☒ Fill Browser Window

4. Filters and Variables: [Edit Icon]

5. Dashboard Report Links: [Edit Icon]

6. Prompts Apply Buttons: Use page settings

7. Prompts Reset Buttons: Use page settings

8. Prompts Auto-Complete: ☐ Use user preference settings ☒ Off

Dashboard Pages

9. [Warning Icon] Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

Elements	Description
1. Style	Styles control how dashboards and results are formatted for display, such as the color of text and links, the font and size of text, the borders in tables, the colors and attributes of graphs, and so on
2. Description	Descriptions are displayed when OBI Administrators use the Catalog Manager
3. Page Size	Use these options to specify how a dashboard page is to be sized Fit Content — This option sizes the container to the content with no wrapping. If the browser window is smaller than needed to fit the content, a scroll bar is displayed. Fill Browser Window - Sizes dashboard columns to the largest section in each column Expands columns (except columns for which a specific absolute size has been specified) and sections proportionally to fill the browser window, if there is any additional horizontal space in the browser window. Aligns content within columns and sections in the center, by default
4. Filters and Variables	To define default filters and variables, embed dashboard prompts with default values. These prompts will not be shown on the dashboard.
5. Dashboard Report Links	The report links at the dashboard level. Report links can be set at the dashboard, dashboard page (click Page Options> Page Report Links), or analysis level (click the properties icon for the specific analysis within the Dashboard Builder and then select Report Links).
6. Prompt Apply	Use this list to specify if you want to include or exclude the



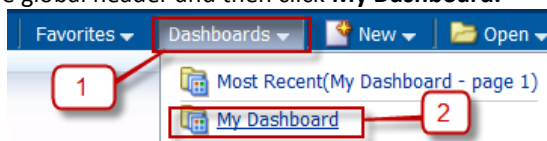
Buttons	<p>prompt's Apply buttons on the dashboard at runtime</p> <p>Use page setting — Select this option to use the Apply buttons as defined by the dashboard page settings</p> <p>Show All Apply buttons — Select this option to override the dashboard page setting's Apply button preferences and show the Apply buttons for the prompts included on the dashboard and embedded analyses</p> <p>Hide All Apply buttons — Select this option to override the dashboard page setting's Apply button preferences and hide the Apply buttons for the prompts included on the dashboard and embedded analyses.</p>
7. Prompts Reset Buttons	<p>Use this list to specify whether you want to include or exclude the prompt's Reset buttons on the dashboard at runtime</p> <p>Use page setting — Select this option to use the Reset buttons as defined on the dashboard page settings</p> <p>Show All Reset buttons — Select this option to override the dashboard page setting's Reset button preferences and show the Reset buttons for the prompts included on the dashboard and embedded analyses.</p> <p>Hide All Reset buttons — Select this option to override the dashboard page setting's Reset button preferences and hide the Reset buttons for the prompts included on the dashboard and embedded analyses.</p>
8. Prompts Auto Complete	<p>Use this option to enable or disable the auto-complete functionality for the dashboard. When enabled, OBI suggests and highlights matching prompt values as the user types in the dashboard's prompt selection field, and highlights matching prompt values in the "Select Values dialog"</p>
9. Dashboard Pages	<p>Displays the pages in the dashboard. Use this area to perform operations (such as hide or rename) on dashboard pages using the dashboard pages toolbar buttons.</p>
10. Dashboard Page toolbar	<p>This toolbar contains the following buttons:</p> <ul style="list-style-type: none"> • Rename — Use this button to display the "Rename dialog", where you specify a new name for the page in the dashboard. • Select a prompt to capture default filters and variables — Use this button to display the "Filters and Variables – page dialog", which enables you to add hidden named prompts to the dashboard page. • Permissions — Use this button to display the "Permission dialog", where you specify which accounts have which levels of access to the contents of the dashboard page. The Permissions button is displayed for shared dashboards only, and only if your user ID is authorized to access the security features. • Delete — Use this button to delete the page from the dashboard. After you click the button, you see a page that prompts you to confirm the deletion. • Specify Who Can Save Shared Customizations — Use this button to display the Permission dialog, where you specify which accounts can save shared customizations for the page. • Specify Who Can Assign Default Customizations — Use this button to display the Permission dialog, where you specify which accounts can assign default customizations for the page.

9.2 Build My Dashboard

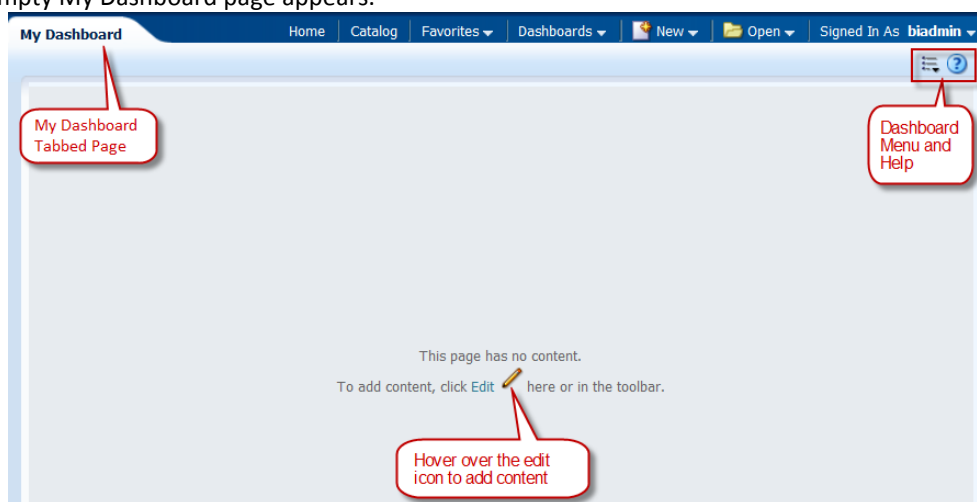
In this section, we will build My Dashboard which will have two pages.

Guided Exercise

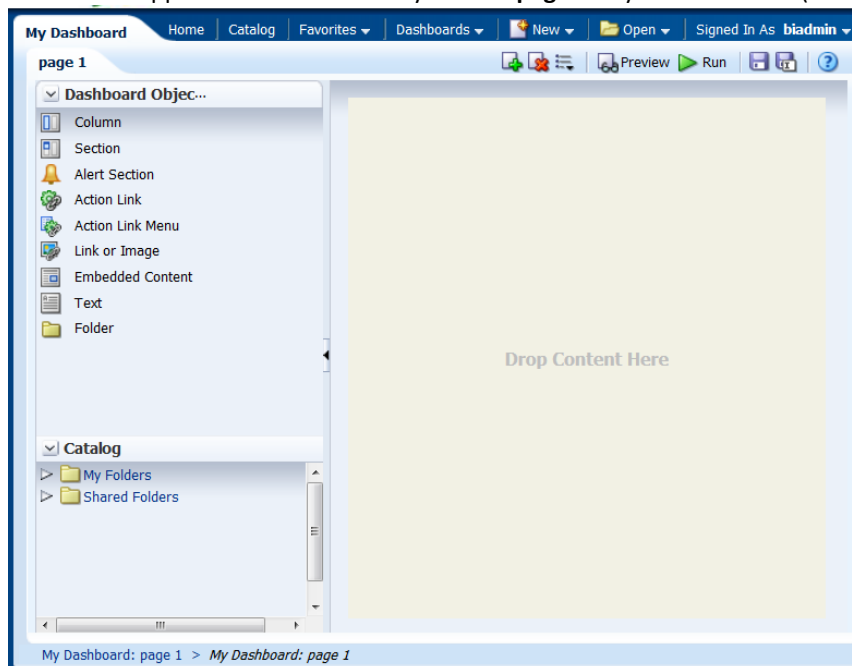
1. Click the **Dashboards** link on the global header and then click **My Dashboard**.



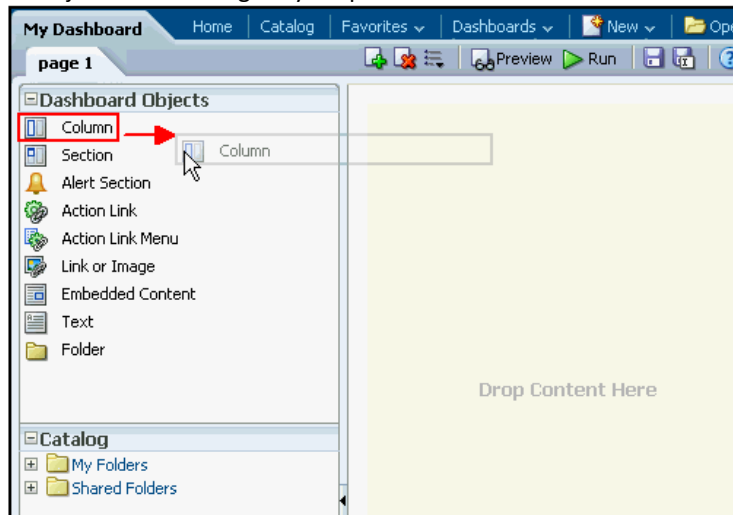
An empty My Dashboard page appears.



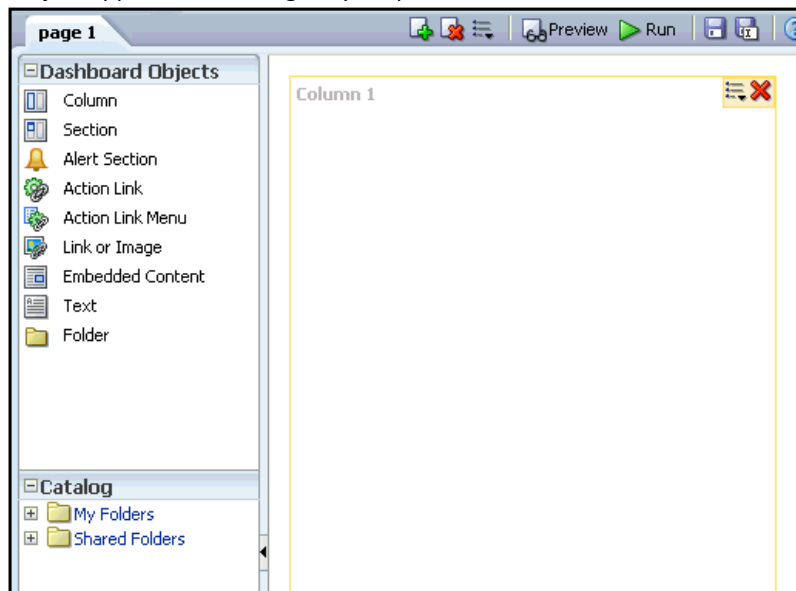
2. Click the **Edit** icon (✎) to add content to your empty dashboard page.
The Dashboard Builder appears and automatically creates **page 1** of your dashboard (the first tab).



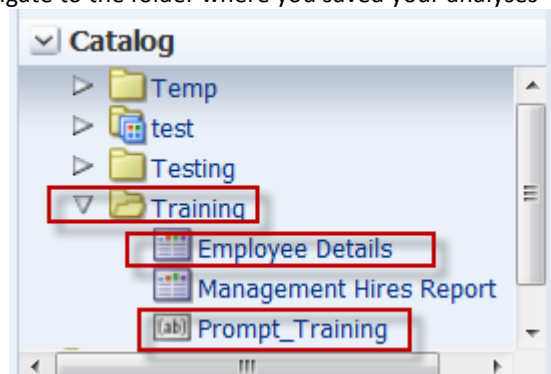
3. Drag the **Column** object onto the Page Layout pane.



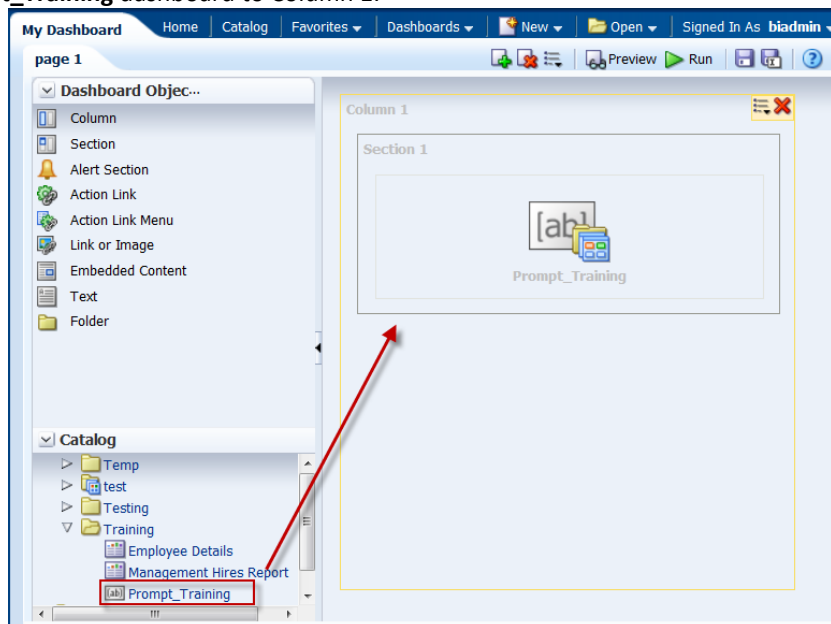
The Column object appears on the Page Layout pane



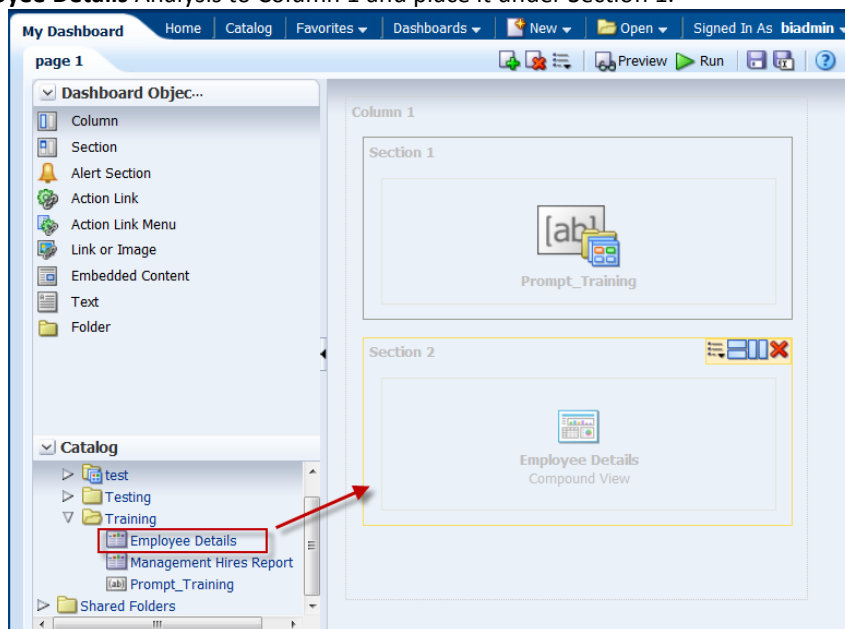
4. In the **Catalog** pane, navigate to the folder where you saved your analyses





5. Drag **Prompt_Training** dashboard to Column 1.



6. Drag **Employee Details** Analysis to Column 1 and place it under Section 1.





- Click the **Save** icon () to save the dashboard page and then click the **Run** icon () My Dashboard appears with the selected analysis **Employee Details** using Dashboard Default prompt Year and Month Name.

My Dashboard

Home Catalog Favorites Dashboards New Open Signed In As biadmi

* Year 2016 Month Name March

Apply Reset

Employee Details

Last, First Name	Department	Job Description	Union Code Description	Location Description	HR Status Description	Full Time Flag	Original Hire Date	Job Entry Date	Employee Hire Count
Aarrestad,Ansel O	Water Prot and Land Reuse	EnvironmentalIntern	Engineer, Scien, Tech (P-4)	Wtr-Plan&Std-Monitor&Assmt	Active	Yes	5/14/2012	5/14/2012	1
Aguilar,Elizabeth	Dept of Agriculture	CtCarTrme(A&R)	Admin and Residual (P-5)	Ag Develop Marketing	Active	Yes	3/28/2016	3/28/2016	1
Almquist,Mary Angela P.	Dept of Revenue Services	Clerk	Administrative Clerical (NP-3)	Operations Temps	Active	Yes	11/14/2014	11/14/2014	1
Amin,Jayshree	Dept of Revenue Services	Clerk	Administrative Clerical (NP-3)	Processing Temps	Active	Yes	2/21/2012	2/21/2012	1
Asgharian,Nima	Dept of Banking	AccountingCareersTrainee	Admin and Residual (P-5)	Financial Institutions-Div.	Active	Yes	1/11/2013	1/11/2013	1
Bachar,Yelena V.	Dept of Insurance	InsuranceAssociateExaminer	Admin and Residual (P-5)	Life and Health Division	Active	Yes	10/3/2003	10/3/2003	1
Barber,Mary L.	CT Technical High Schools Sys	THS SubstInstr	St Vocation Federation Teacher	Eli Whitney THS	Active	No	3/30/2016	3/30/2016	1
Barresi,Bart J.	CT Technical High Schools Sys	THS SubstInstr	St Vocation Federation Teacher	E C Goodwin THS	Active	No	3/4/2016	3/4/2016	1

- Scroll Down to bottom of page and at the end of the table there are **arrow buttons** with no. of rows displaying.

Scalley,George P.	Bureau of Highway Operations	TranspMntr1	Service/Maintenance (NP-2)	W Willington Mnt Grg (Crew 14)	Active	Yes	3/28/2016	3/28/2016	1
Sleira Millan,Natalia	Dept of Children and Family	ExecutiveAssistant1	Exempt/Elected /Appointed	CO Legal Division	Active	Yes	5/11/2009	5/11/2009	1
Solano,Linette	Department of Motor Vehicles	MotorVehicleExaminer	Administrative Clerical (NP-3)	Branch Op Hamden	Active	No	3/18/2016	3/18/2016	1
Spikes,Alisha L.	Dept of Children and Family	SWTrne-Soc&HumanScvs	Social and Human Services(P-2)	New Britain Services	Active	Yes	9/29/2006	9/29/2008	1
Stewart,Gregory A	Bureau of Highway Operations	TranspMntr1	Service/Maintenance (NP-2)	East Granby Mnt Grg (Crew 12)	Active	Yes	3/18/2016	3/18/2016	1

Rows 1 - 100


Click on **single sided arrow** to display next 100 rows.

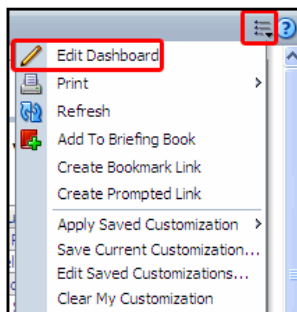
Click on **double sided arrow** to display all the rows for this analysis.

9.3 Edit My Dashboard

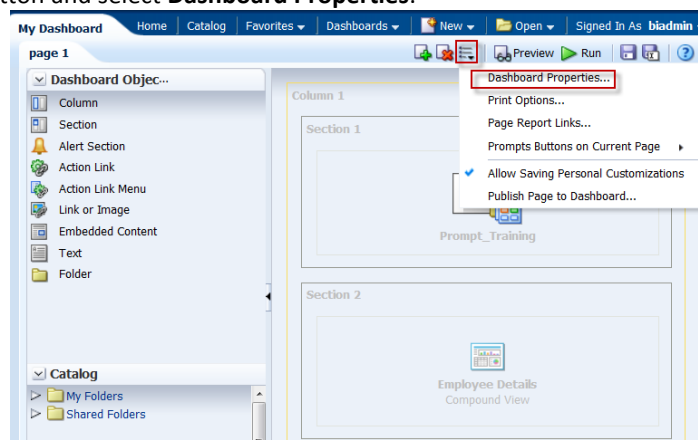
To begin enhancing My Dashboard, perform the following steps:

Guided Exercise

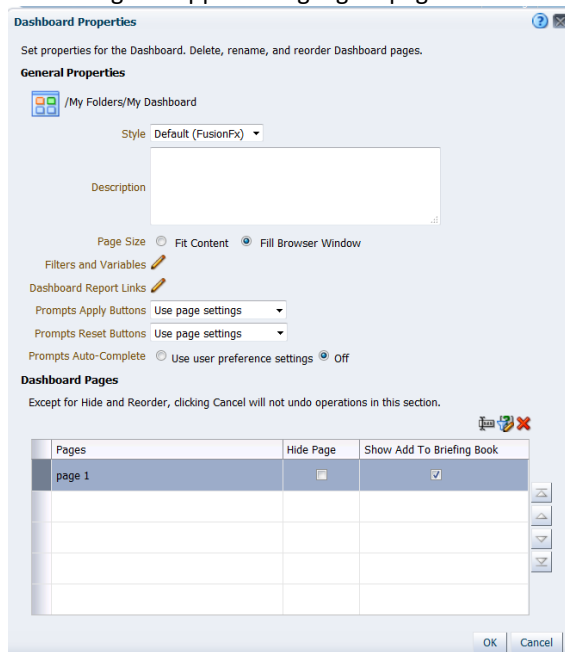
1. Click the **Page Options** icon () and select **Edit Dashboard**.




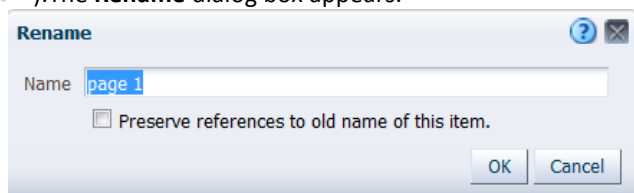
2. Give the existing tab a more meaningful name.
Click the **Tools** button and select **Dashboard Properties**.



The **Dashboard Properties** dialog box appears. Highlight “page 1” under the **Dashboard Pages** section.



- Click **Rename** icon ().The **Rename** dialog box appears.



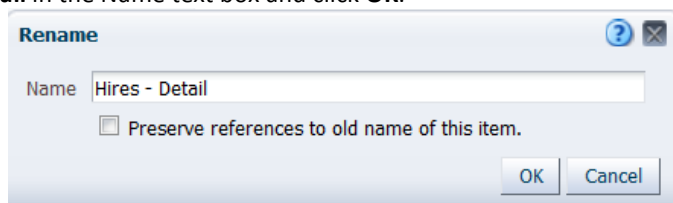
Rename

Name

☐ Preserve references to old name of this item.

OK Cancel

- Enter **Hires – Detail** in the Name text box and click **OK**.



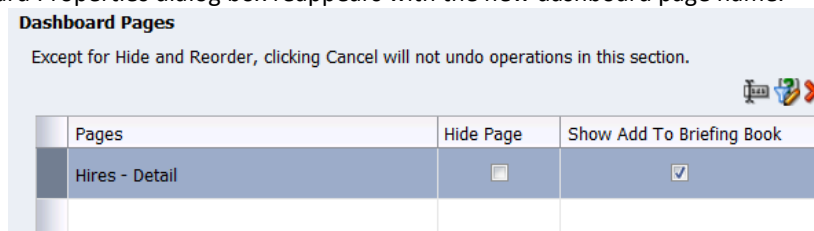
Rename

Name

☐ Preserve references to old name of this item.

OK Cancel

- The Dashboard Properties dialog box reappears with the new dashboard page name.

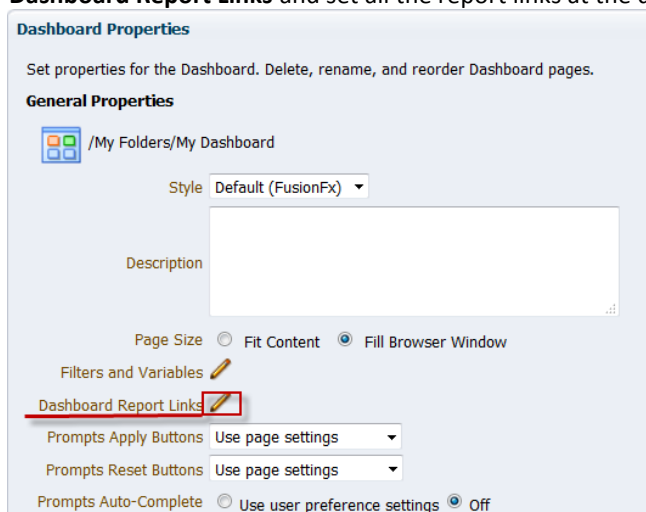


Dashboard Pages

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book
Hires - Detail	<input type="checkbox"/>	<input checked="" type="checkbox"/>


- Click on Edit icon for **Dashboard Report Links** and set all the report links at the dashboard level.



Dashboard Properties

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


General Properties


 /My Folders/My Dashboard

Style

Description

Page Size ☐ Fit Content ☒ Fill Browser Window

Filters and Variables 

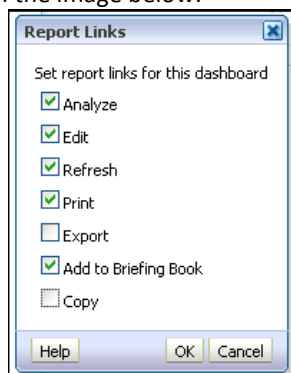
Dashboard Report Links 

Prompts Apply Buttons

Prompts Reset Buttons

Prompts Auto-Complete ☐ Use user preference settings ☒ Off

- Select the check boxes as indicated in the image below:



Report Links

Set report links for this dashboard

☒ Analyze

☒ Edit

☒ Refresh

☒ Print

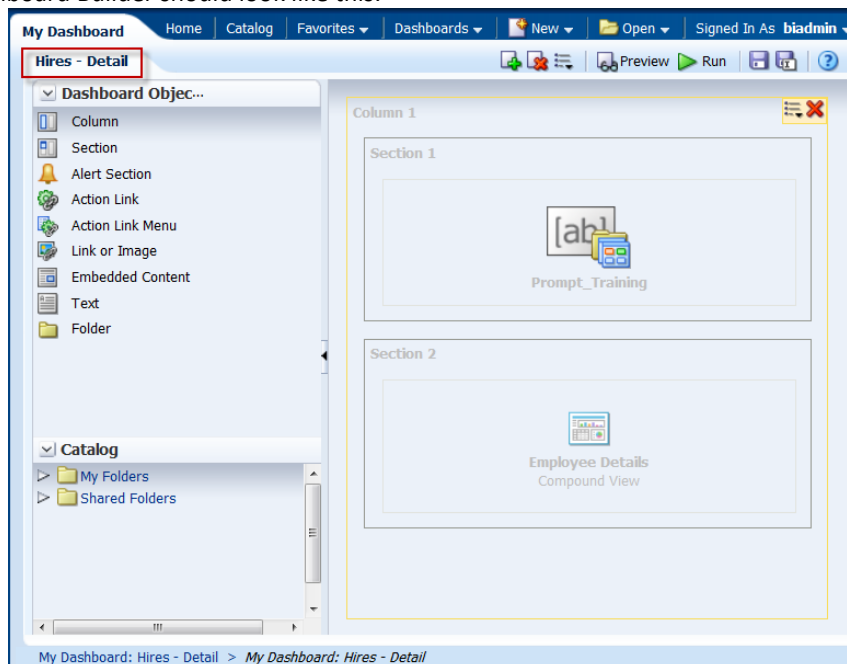
☐ Export

☒ Add to Briefing Book

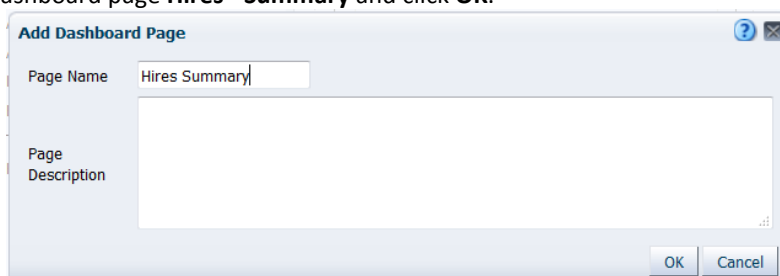
☐ Copy

Help OK Cancel

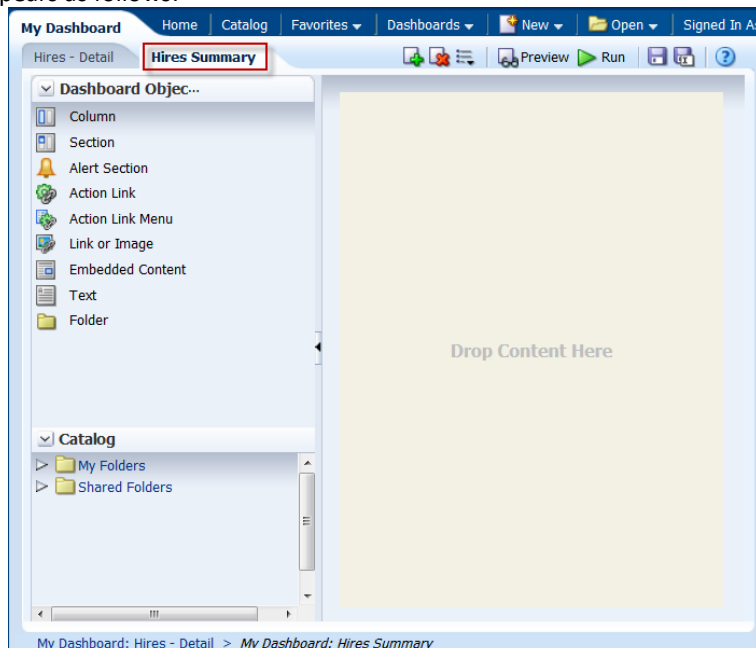
8. Click **OK** and then click **OK** again to return to the Dashboard Builder.
The Dashboard Builder should look like this:



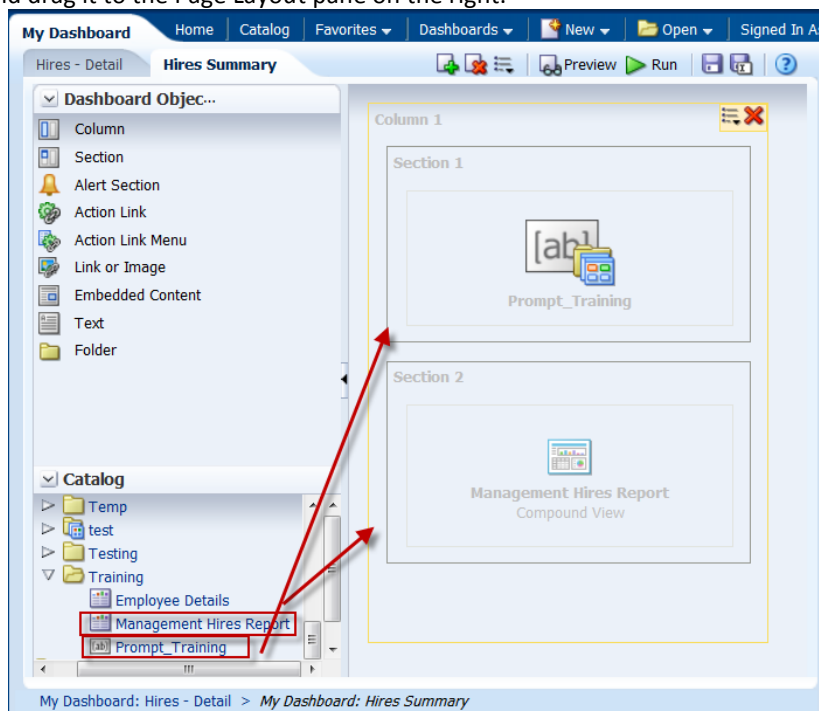
9. Click the **Add Dashboard Page** icon (). The Add Dashboard Page dialog box appears. Name the dashboard page **Hires - Summary** and click **OK**.



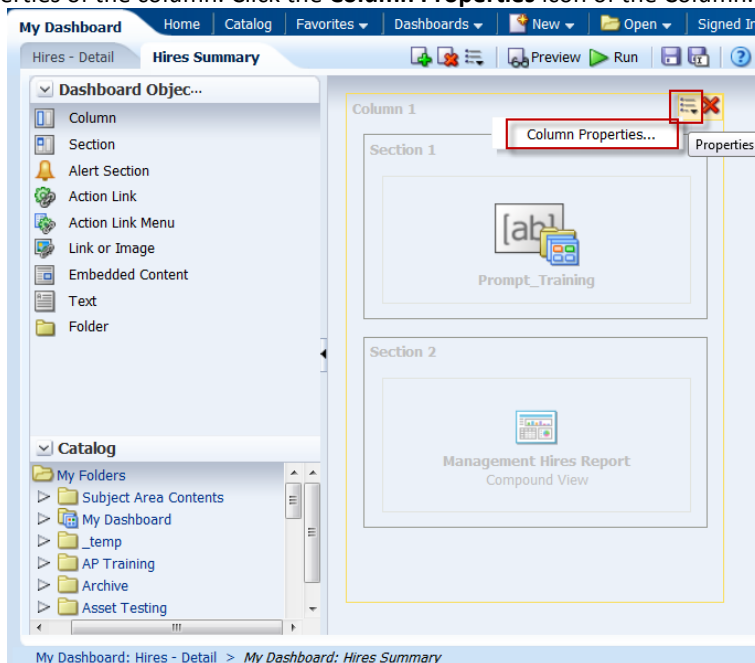
10. New page appears as follows:



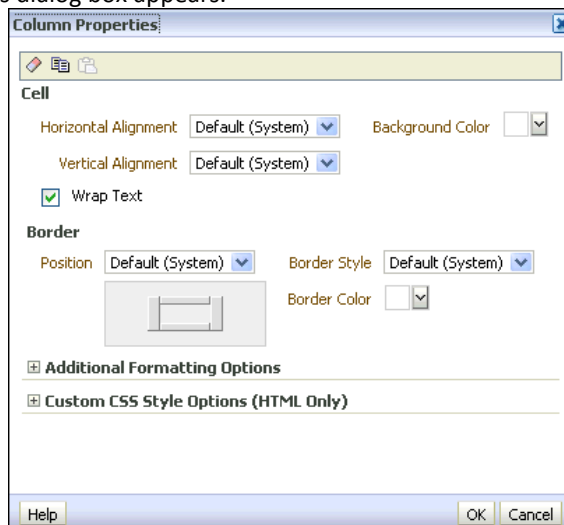
11. In the Catalog pane, navigate to My Folders/Training and Select Prompt – Training and Management Hires Report analysis and drag it to the Page Layout pane on the right.



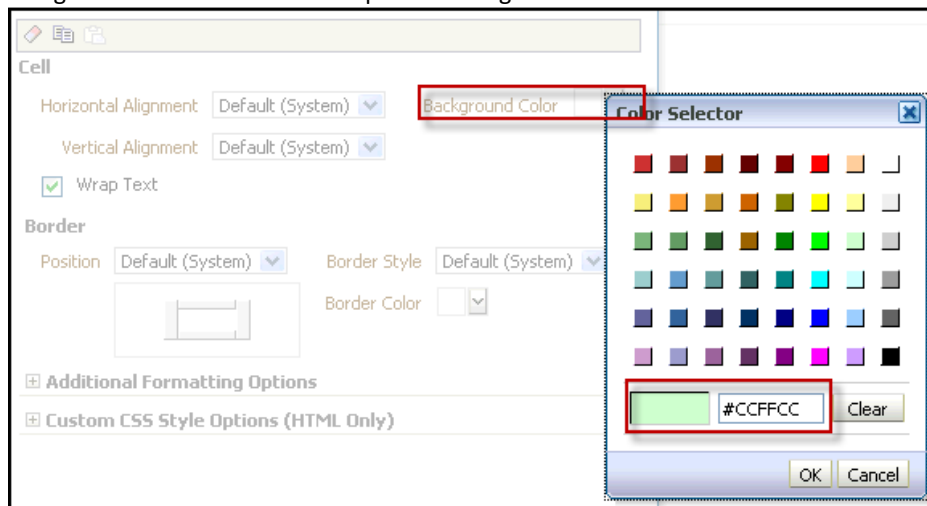
12. Edit the properties of the column. Click the **Column Properties** icon of the Column.



13. The Column Properties dialog box appears.



14. Select the drop-down list for **Background Color** within the Cell area and choose **light green**. Click **OK**, then click **OK** again to close the Column Properties dialog box.

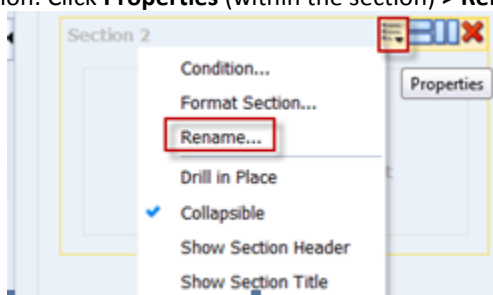


15. Click **Preview** to preview the dashboard. After previewing close the Window.

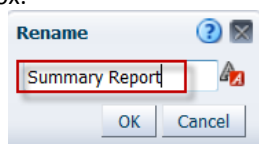
Year 2016
Month Name March

Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2
MCO39400	1
MHA53350	1
MHA53810	1
MHA55040	5
SDE64300	29
SDR63500	1
TRB77500	2
Grand Total	116

16. Save the Dashboard.
17. You will rename the section. Click **Properties** (within the section) > **Rename**. The Rename dialog box appears.

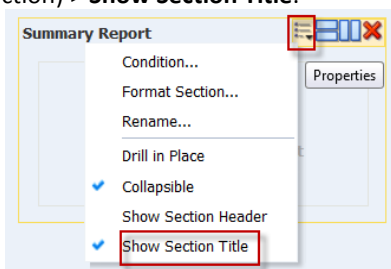


18. Enter Summary Report in the text box.



Click **OK**.

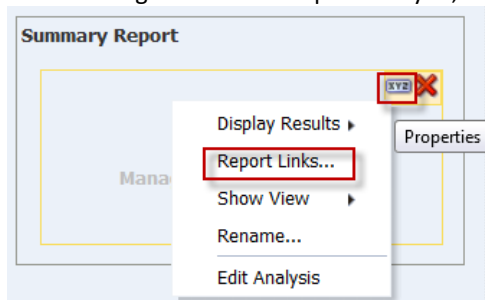
19. Click **Properties** (within the section) > **Show Section Title**.



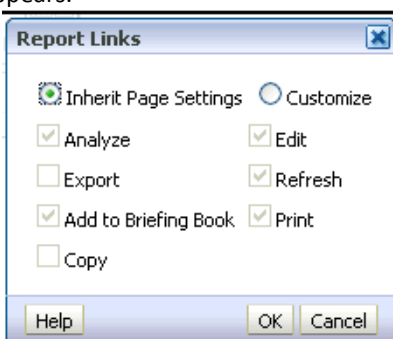
20. Preview the dashboard page once again to see your changes.

Year 2016	
Month Name March	
Summary Report	
Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2
MCO39400	1
MHA53350	1
MHA53810	1
MHA55040	5
SDE64300	29
SDR63500	1
TRB77500	2
Grand Total	116

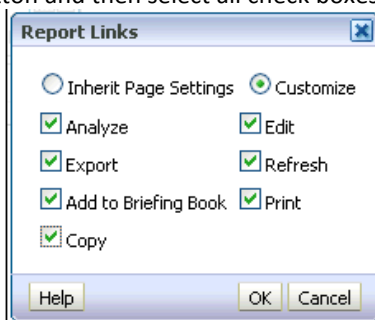
21. Save the Dashboard.
22. Override the default dashboard report links at the analysis level.
Click the **Properties** icon for the Management Hires Report analysis, and select **Report Links**.



The Report Links dialog box appears.



Select the **Customize** radio button and then select all check boxes.



Report Links

☐ Inherit Page Settings ☒ Customize

☒ Analyze ☒ Edit

☒ Export ☒ Refresh

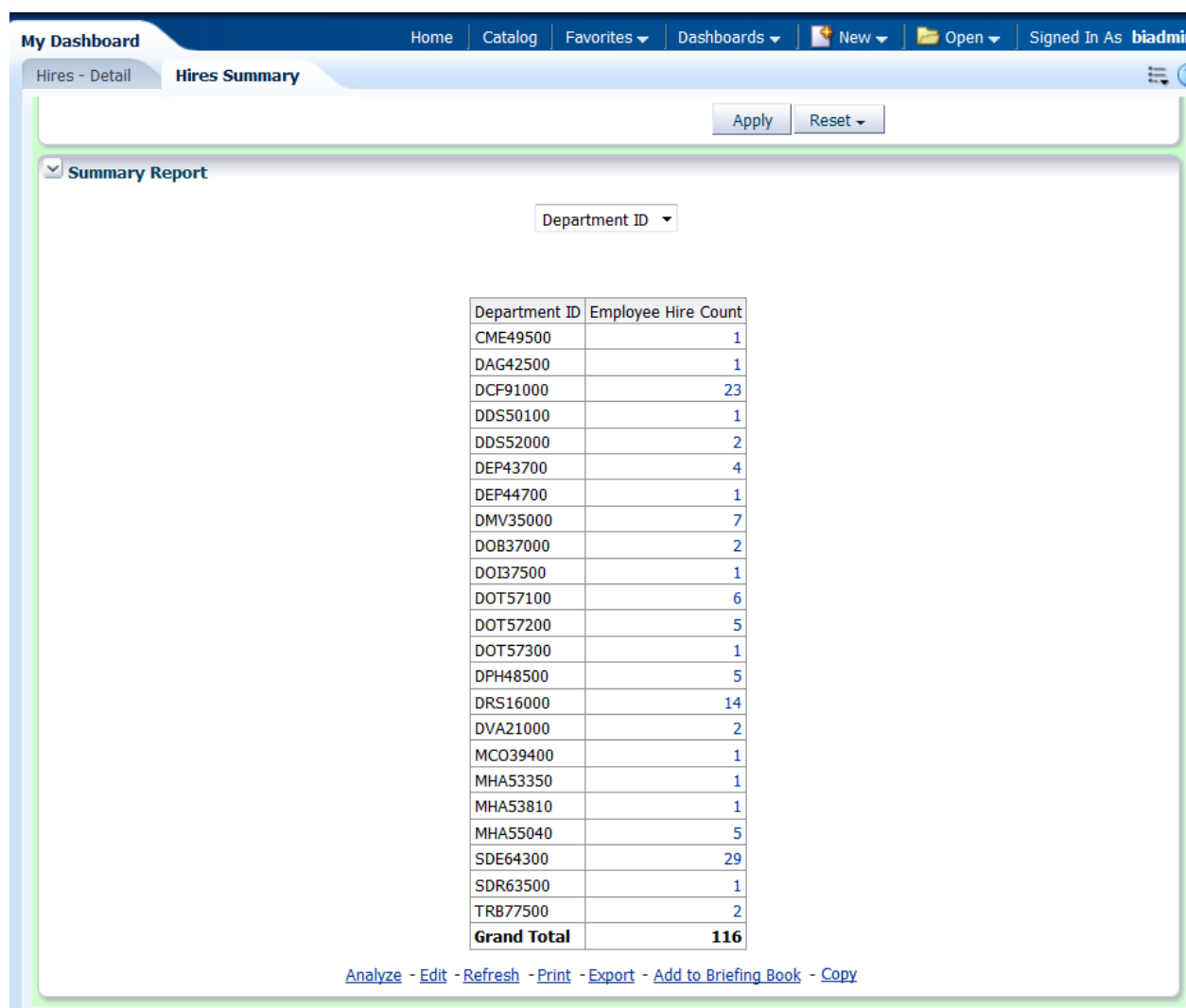
☒ Add to Briefing Book ☒ Print

☒ Copy

Help OK Cancel

Click **OK**.

23. Save and run the dashboard page. You are now able to export and copy this analysis from the dashboard.



My Dashboard Home Catalog Favorites Dashboards New Open Signed In As biadmin

Hires - Detail **Hires Summary**

Apply Reset

Summary Report

Department ID

Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2
MCO39400	1
MHA53350	1
MHA53810	1
MHA55040	5
SDE64300	29
SDR63500	1
TRB77500	2
Grand Total	116

[Analyze](#) - [Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#) - [Copy](#)

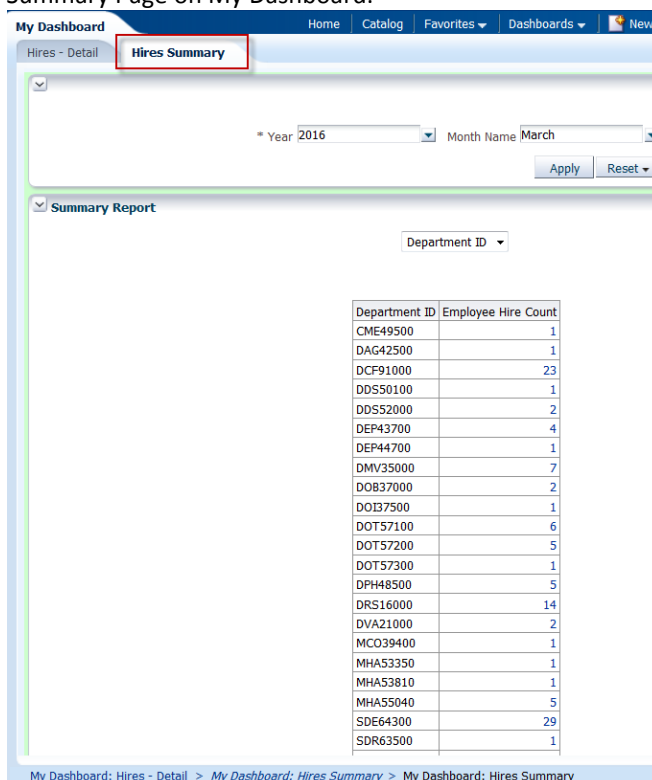
9.4 Save a Dashboard Customization

To save a dashboard Customization and set preferences, perform the following steps:

Create a personal, customized view of your dashboard page. Saved customizations allow you to save and view dashboard pages in their current state with your most frequently used or favorite choices for items such as filters, prompts, column sorts, drills in analyses, and section expansion and collapse. By saving customizations, you do not need to make these choices manually each time that you access the dashboard page.

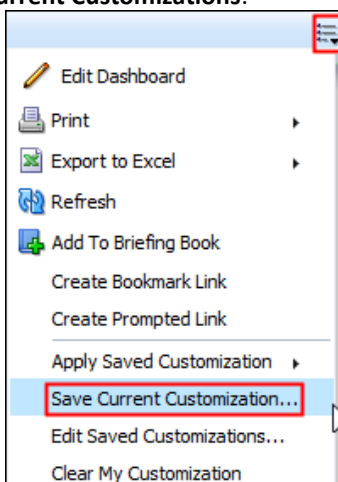
Guided Exercise

1. Click on Hires Summary Page on My Dashboard.



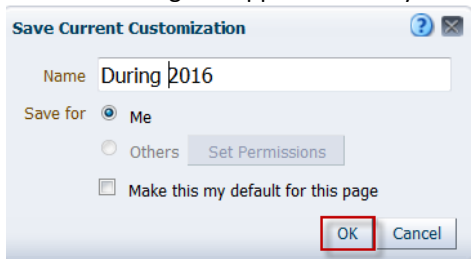
Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2
MCO39400	1
MHA53350	1
MHA53810	1
MHA55040	5
SDE64300	29
SDR63500	1

2. Click **Page Options > Save Current Customizations**.



- Edit Dashboard
- Print
- Export to Excel
- Refresh
- Add To Briefing Book
- Create Bookmark Link
- Create Prompted Link
- Apply Saved Customization
- Save Current Customization...**
- Edit Saved Customizations...
- Clear My Customization

- The Save Current Customization dialog box appears. Name your customization **During 2016** and click **OK**.



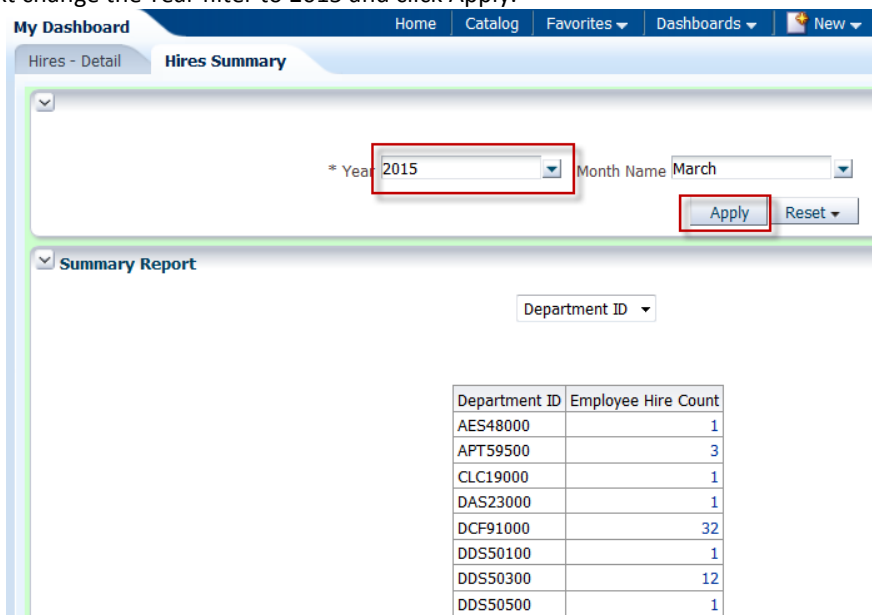
Save Current Customization

Name:

Save for: ☒ Me ☐ Others

☐ Make this my default for this page

- Next change the Year filter to 2015 and click Apply.



My Dashboard Home Catalog Favorites Dashboards New

Hires - Detail **Hires Summary**

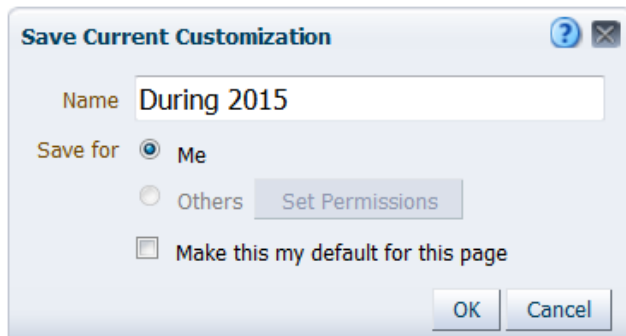
* Year: Month Name:

Summary Report

Department ID

Department ID	Employee Hire Count
AES48000	1
APT59500	3
CLC19000	1
DAS23000	1
DCF91000	32
DDS50100	1
DDS50300	12
DDS50500	1

- Click **Page Options > Save Current Customizations** and name the Customization as **During 2015**.



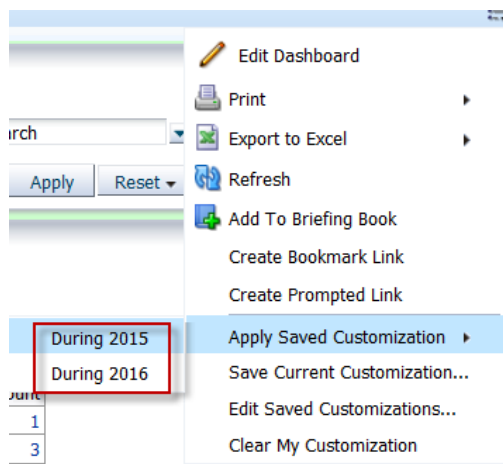
Save Current Customization

Name:

Save for: ☒ Me ☐ Others

☐ Make this my default for this page

6. Your Saved Customization should appear as follows:-



Now you can apply the saved customization to a dashboard page.

7. Click **Page Options > Apply Saved Customization > During 2016**. And the Dashboard will run for the saved filters under this customization.

My Dashboard Home Catalog Favorites Dashboards New

Hires - Detail **Hires Summary**

* Year 2016 Month Name March Apply Reset

Summary Report

Department ID

Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5
DOT57300	1
DPH48500	5
DRS16000	14
DVA21000	2

-
- The screenshot shows the 'Customize' menu with the following options:
- Edit Dashboard
 - Print
 - Export to Excel
 - Refresh
 - Add To Briefing Book
 - Create Bookmark Link
 - Create Prompted Link
 - Apply Saved Customization
 - Save Current Customization...
 - Edit Saved Customizations...
 - Clear My Customization
- A sub-menu for 'During 2015' is open, showing:
- During 2015
 - During 2016** (highlighted in a red box)

-
- Edit Saved Customizations**
- Rename, delete and control group access to Saved Customizations, as well as specify which Saved Customization, if any, should be used as your default for the current Dashboard page.
- Saved Customizations**
- | Name | My Default | Shared |
|----------------------------|----------------------------------|--------|
| No Personal Customizations | <input checked="" type="radio"/> | |
| During 2015 | <input type="radio"/> | |
| During 2016 | <input type="radio"/> | |
- OK Cancel

- Page | 143

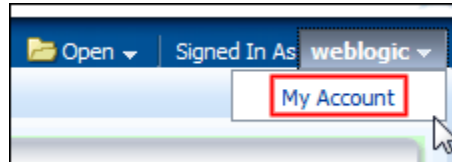


9.5 Set Preference

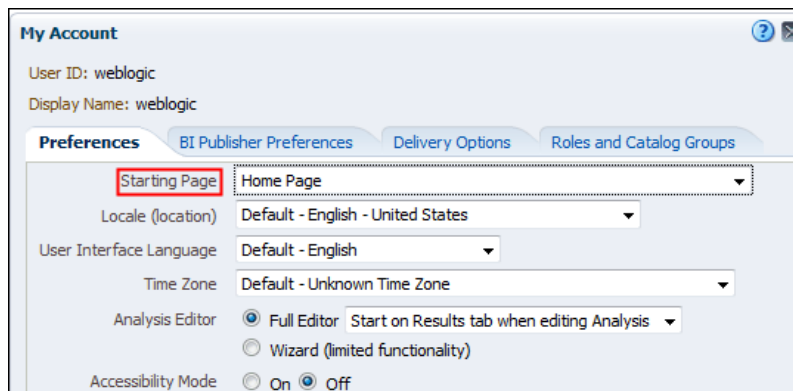
Set your preferences. Use the Preferences tab in the My Account dialog box to specify your personal preferences, such as dashboard starting page, locale, and time zone. The available options depend upon your privileges.

Guided Exercise

1. Click your **User ID** on the global header and then select **My Account**.



The My Account dialog box appears.



2. Click the **Starting Page** drop-down list and scroll to view the available pages. Only the dashboard pages to which you have privileges appear in this list. Select the **My Dashboard** as your default.

Other tabs in the **My Account** dialog box include the following:

- **BI Publisher Preferences**—Use this tab to view the default profile for BI Publisher.
- **Delivery Options**—Use this tab to configure your delivery profiles for the delivery of alerts by agents.
- **Roles and Catalog Groups**—Use this tab to view a list of the roles to which you have been assigned by the OBI Administrator.

3. Set the **Locale**, **User Interface Language**, **Time Zone**, **Currency**, and **Accessibility Mode** appropriately for your own needs and click **OK**.

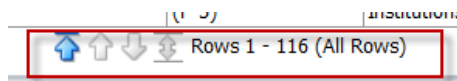
Note: The Analysis Editor drop-down is a new feature in the current release.

4. Click **OK**.
5. To verify that your starting page is now set to the My Dashboard page, log out and log back in. Your start page would be your My Dashboard.

9.6 Export My Dashboard to Excel Spreadsheet

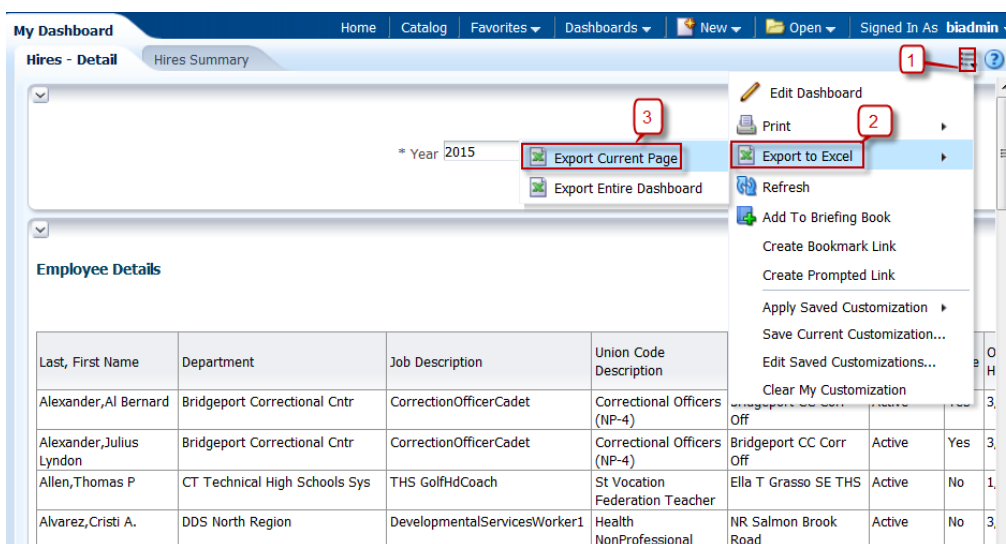
You can export an entire dashboard or a single dashboard page to Microsoft Excel 2007+.

Note: - If there are more than 100 rows then scroll down to the analysis and click on double sided arrow, so that it displays all the rows and now we can export the analysis.



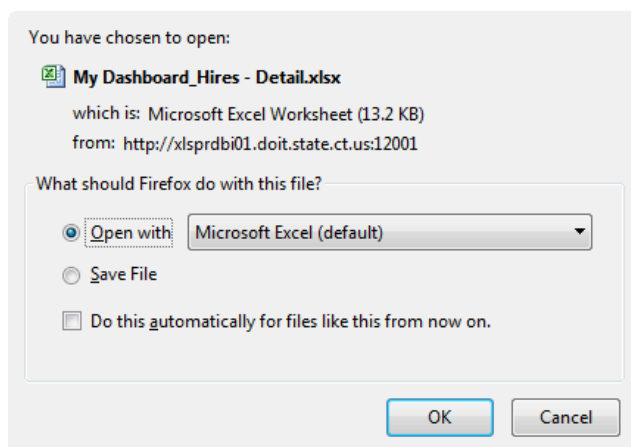
Guided Exercise

1. Click **Page Options > Export to Excel** to select **Export Current Page**.



Note: - If you choose **Export Entire Dashboard** then all dashboard pages of **My Dashboard** are exported to excel 2007. But make sure that in all pages the double sided arrow is clicked so that all the rows will be downloaded.

2. Choose **Export Current Page** and following window will pop up.



Click **OK** to see the dashboard page on the Excel.



10. Agents

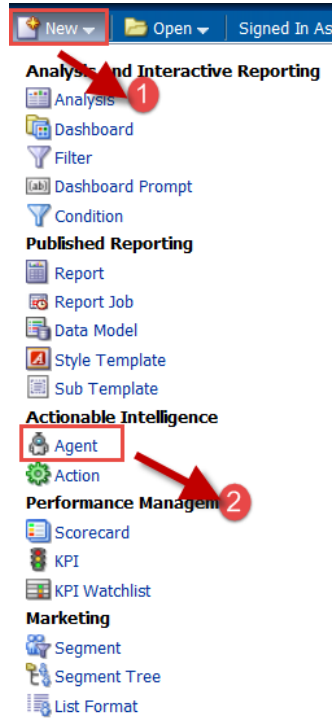
Introduction	Agents enable you to automate your business processes. You can use them to provide event-driven alerting, scheduled content publishing, and conditional event-driven action execution. Agents can dynamically detect information-based problems and opportunities, determine the appropriate individuals to notify, and deliver information to them through a wide range of devices (email, phone, and so on).
Objectives	<p>At the end of this section, you will be able to complete the following tasks related to agents.</p> <ul style="list-style-type: none"> • Understand Agents • Create Agents • Verify the Mail Client for the Agent/Alerts

10.1 Understand Agents

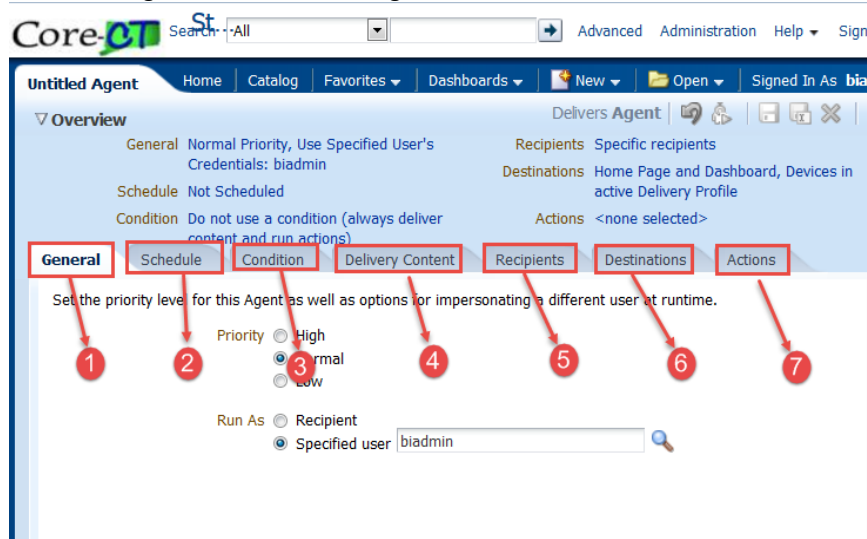
In the simplest format, an agent automatically performs a specified catalog analysis based on a defined schedule, and examines the results for a specific problem or opportunity. If the specific problem or opportunity is detected in the results, an alert is generated and delivered to specified recipients and to subscribers to the agent, using the delivery options that are specified for each person.

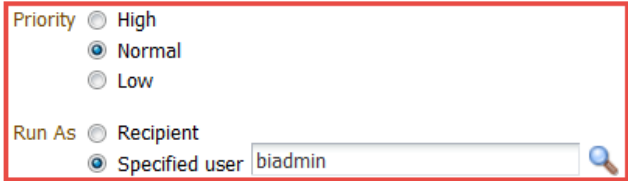
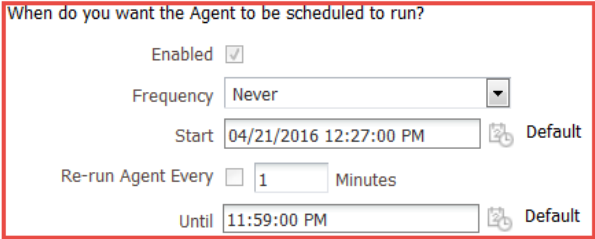
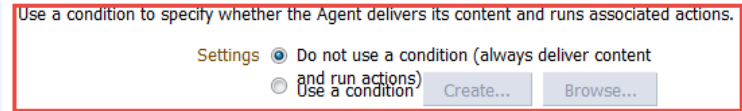
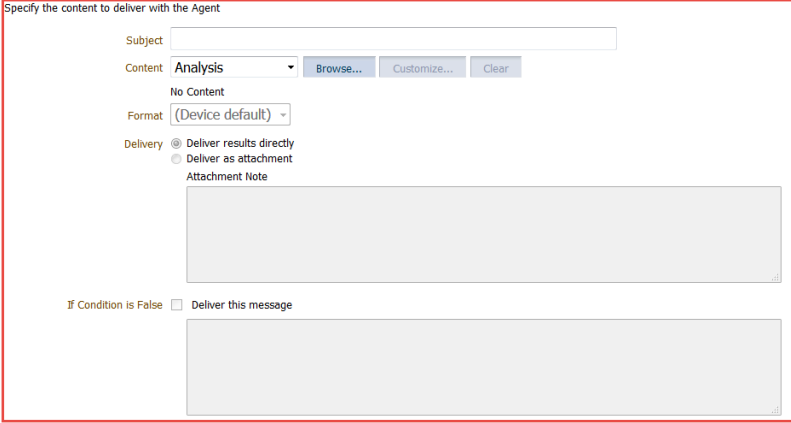
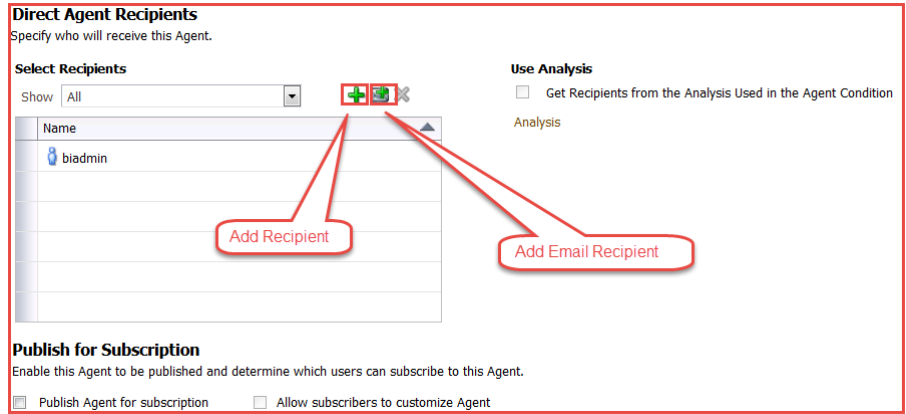
Guided Exercise

1. Click on **New** > then **Agents** from **Global Header**.











2. The following are the contents of Agents.



Contents	Description
1. General	<p>General tab to specify the priority of the agent and how to send the delivery content.</p> 
2. Schedule	<p>Schedule tab and verify that scheduling is enabled, Frequency is set to Once, and the Start date and time are set to the current date and time.</p> 
3. Condition	<p>Condition tab, select the Use a condition option and click Create. The Create Condition dialog box appears.</p> 
4. Delivery Content	<p>Delivery Content tab to identify the content that will be delivered by the agent.</p> 
5. Recipients	<p>Recipients tab, select the default option to identify the recipients of the agent.</p> 
6. Destinations	<p>Destinations tab, select the destination for the agent.</p>



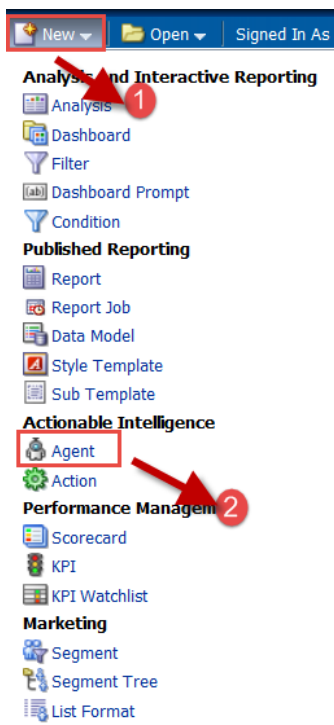
	<p>Specify where this Agent will be delivered.</p> <p>User Destinations <input checked="" type="checkbox"/> Home Page and Dashboard</p> <p><input checked="" type="checkbox"/> Devices</p> <p><input checked="" type="radio"/> Active Delivery Profile</p> <p><input type="radio"/> Specific Devices (will override a user's Active Delivery Profile)</p> <p><input type="checkbox"/> Email</p> <p><input type="checkbox"/> Pager</p> <p><input type="checkbox"/> Digital Phone</p> <p><input type="checkbox"/> Handheld Device</p> <p>System Services <input type="checkbox"/> Oracle BI Server Cache (For seeding cache)</p>																				
<p>7. Actions</p>	<p>Action tab, specifies any actions to invoke when the Agent completes.</p> <p>Specify any actions to invoke when the Agent completes.</p> <p>Agent Condition True or No Condition Exists</p> <p>Actions    </p> <table border="1"> <thead> <tr> <th>Name</th> <th>Invoke per Row</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table> <p>Agent Condition is False</p> <p>Actions    </p> <table border="1"> <thead> <tr> <th>Name</th> <th>Invoke per Row</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>	Name	Invoke per Row									Name	Invoke per Row								
Name	Invoke per Row																				
Name	Invoke per Row																				

10.2 Create Agents

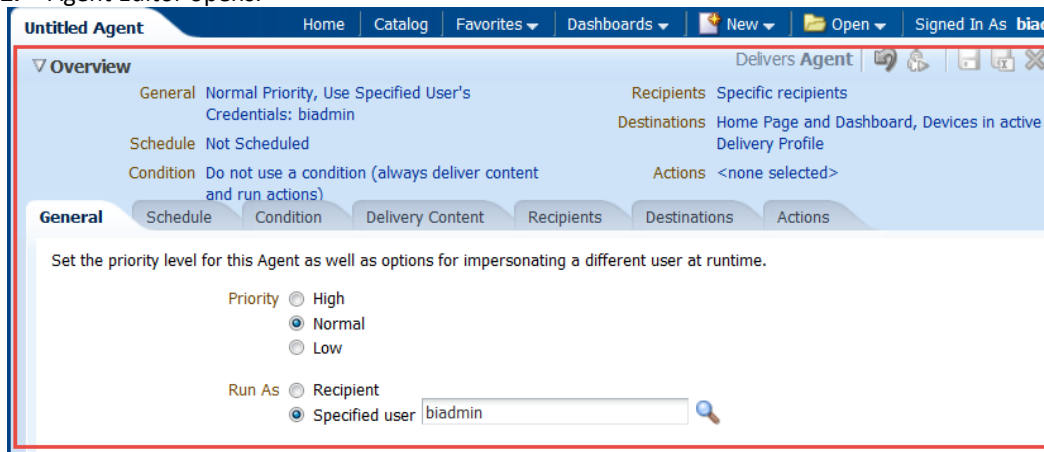
This topic covers how to create an alert/agent based on a condition and how to define the destination for both the dashboard and the email Client.

Guided Exercise

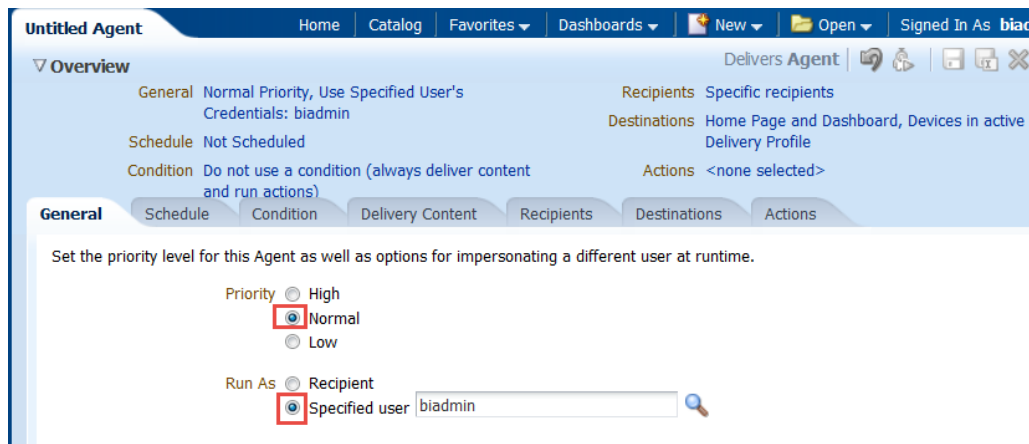
1. Click **New** in the Global Header and select **Agent** to navigate to the **Agent Editor**.



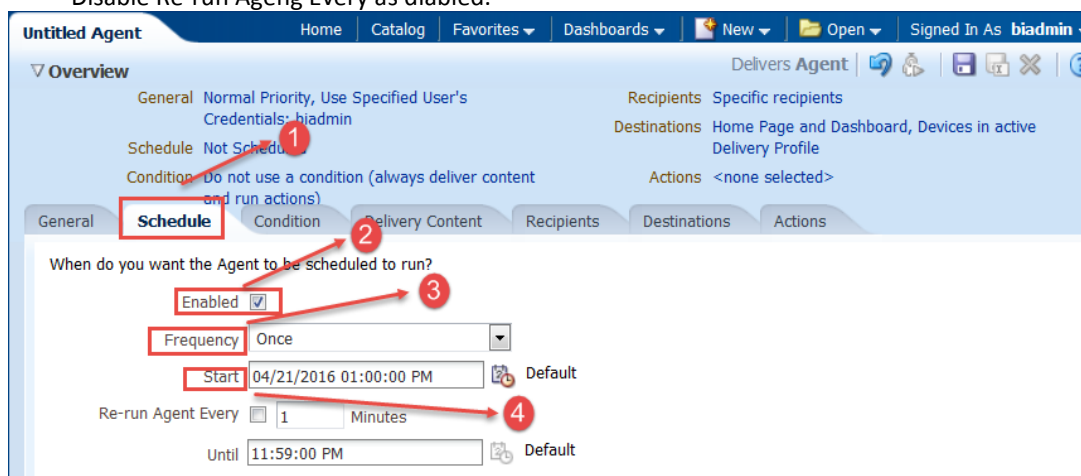
2. Agent Editor opens.



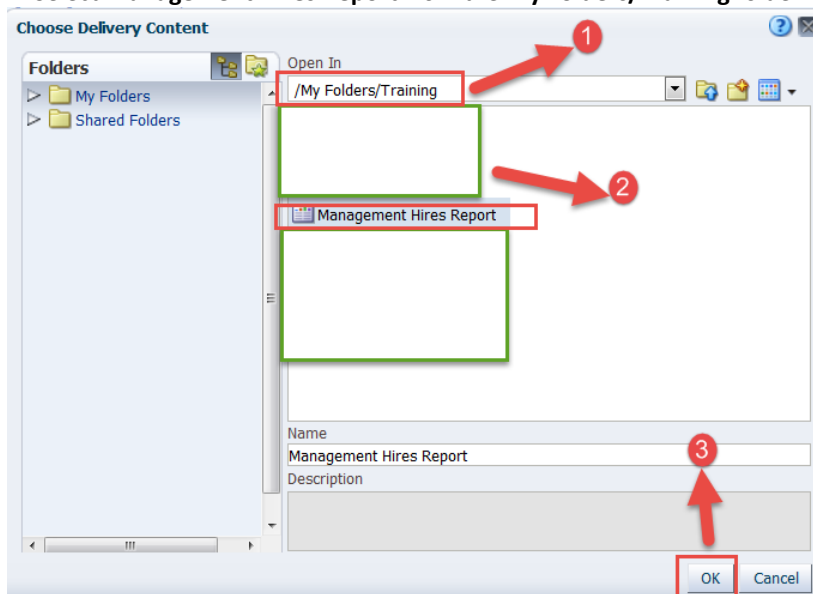
3. On General tab, select the following options:
 - a. Priority **Normal**
 - b. Run as **Specified user**



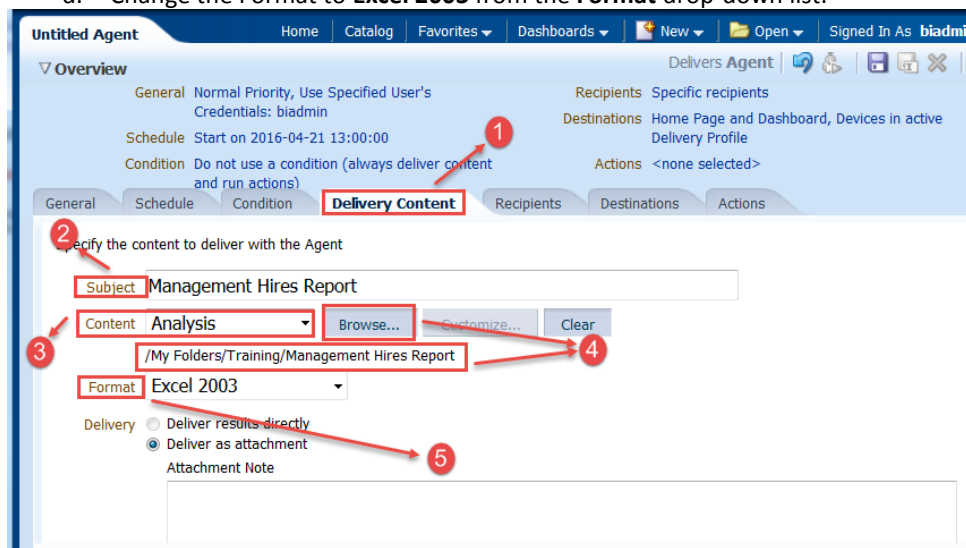
4. Click the **Schedule** tab and verify that scheduling is enabled. **Frequency** is set to Once, and the start date and time are set to the current date and time.
Disable Re-run Agent Every as disabled.



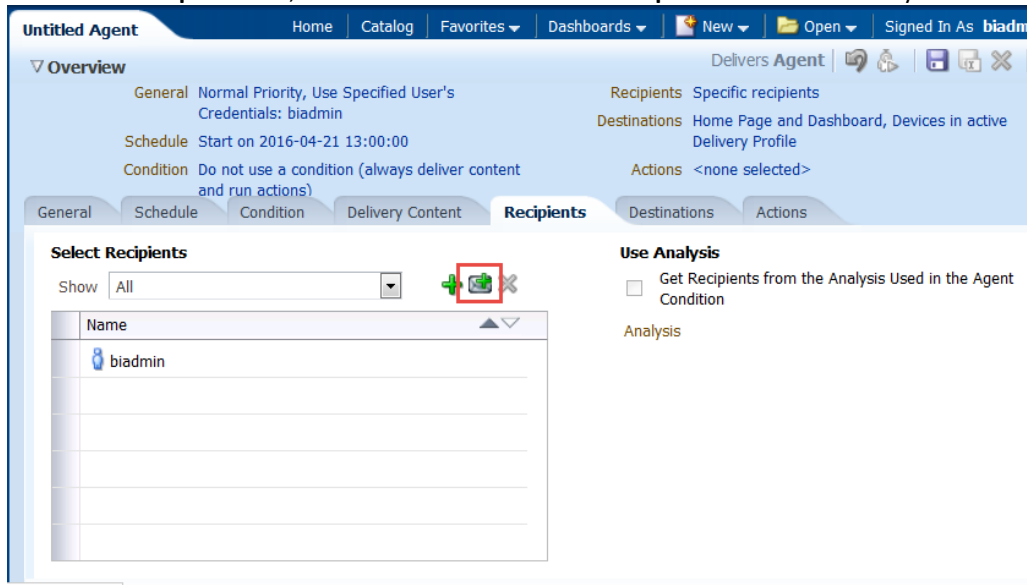
5. Click Delivery Content tab and enter the following:
 - a. Enter a **Subject Name**
 - b. Select Analysis from the **Content** drop-down list and click **Browse** to select the analysis.
 - c. Select **Management Hires Report** from the **My Folders/Training** folder in Catalog.



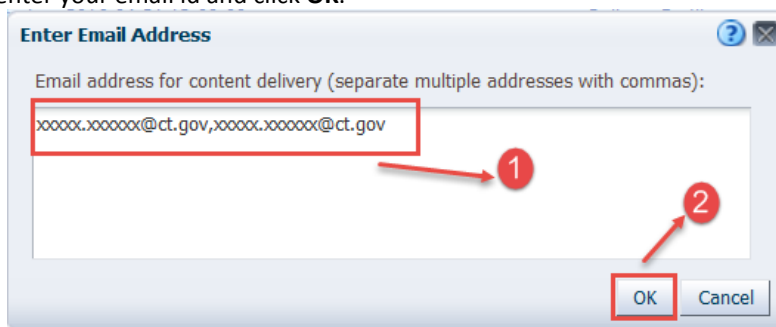
d. Change the Format to **Excel 2003** from the **Format** drop-down list.



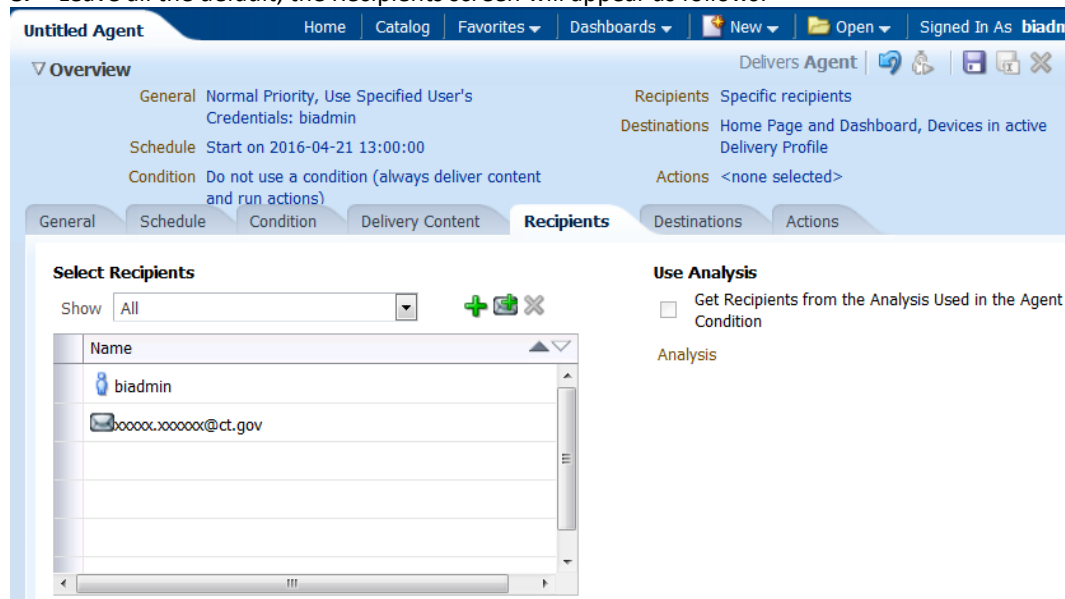
6. Click on **Recipients** tab, and click on **Add User Email Recipient** icon  to add your email id.



7. **Enter Email Address** dialog opens where we can enter **multiple** Email address by separating with **commas**. Please enter your email id and click **OK**.

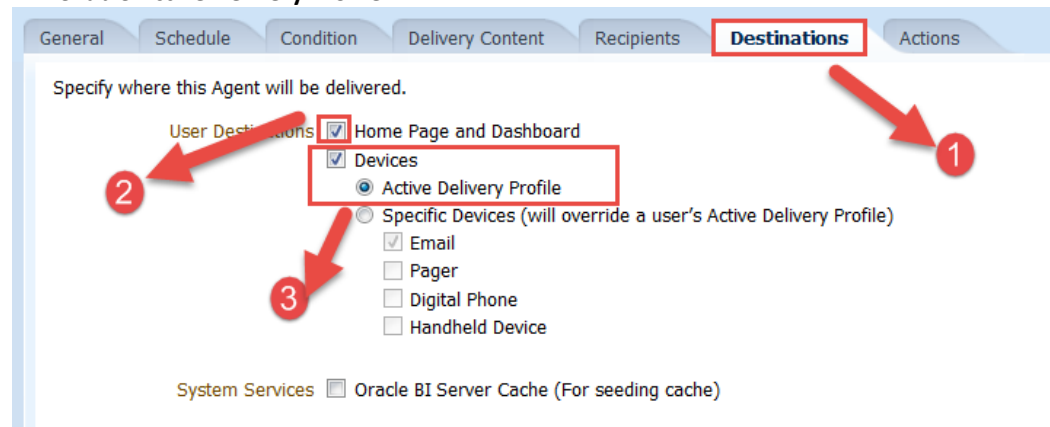



8. Leave all the default, the Recipients screen will appear as follows:

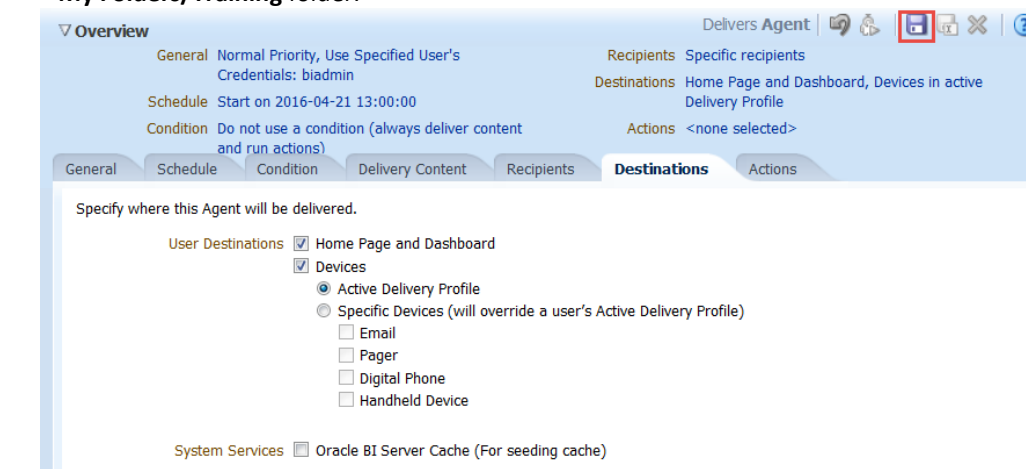


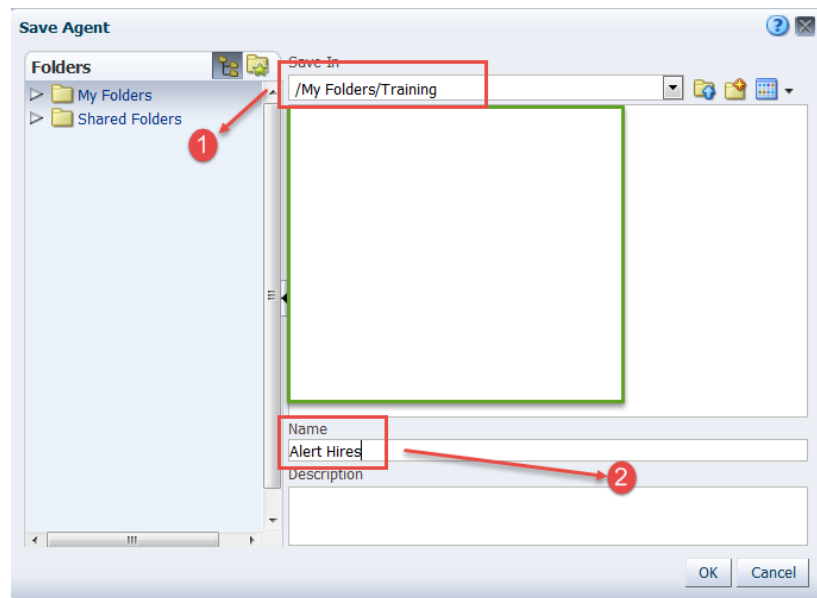
9. On the **Destinations** tab, select the destination for the agent.

For User Destinations, select the **Home Page and Dashboard** check boxes. Select the **Devices** check box and enable **Active Delivery Profile**.

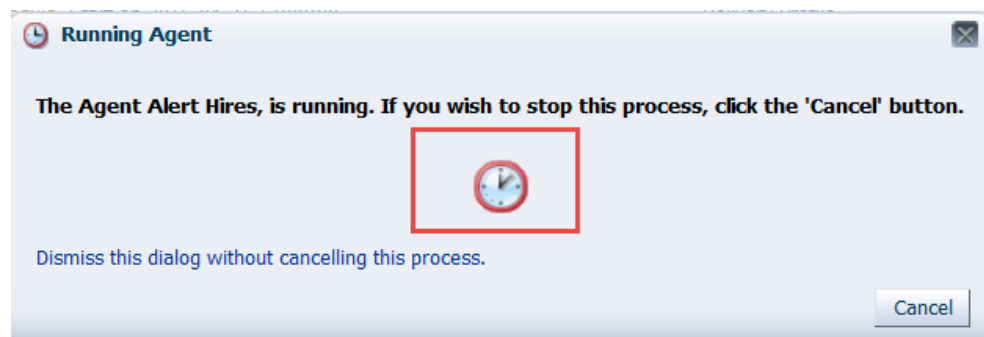


10. Click the **Save** button  to save the agent. In the Save Agent dialog box, save the agent as **Alert Hires** in the **My Folders/Training** folder.

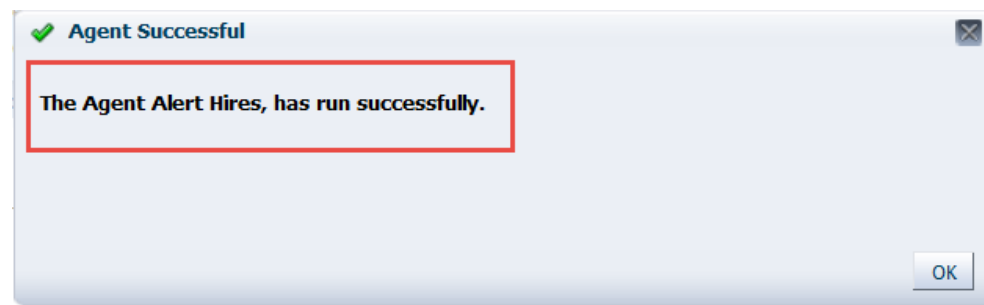




11. Click the **Run Agent Now** button. Verify that the agent is running in the Running Agent dialog box:



When the agent has run successfully, you should receive a confirmation:



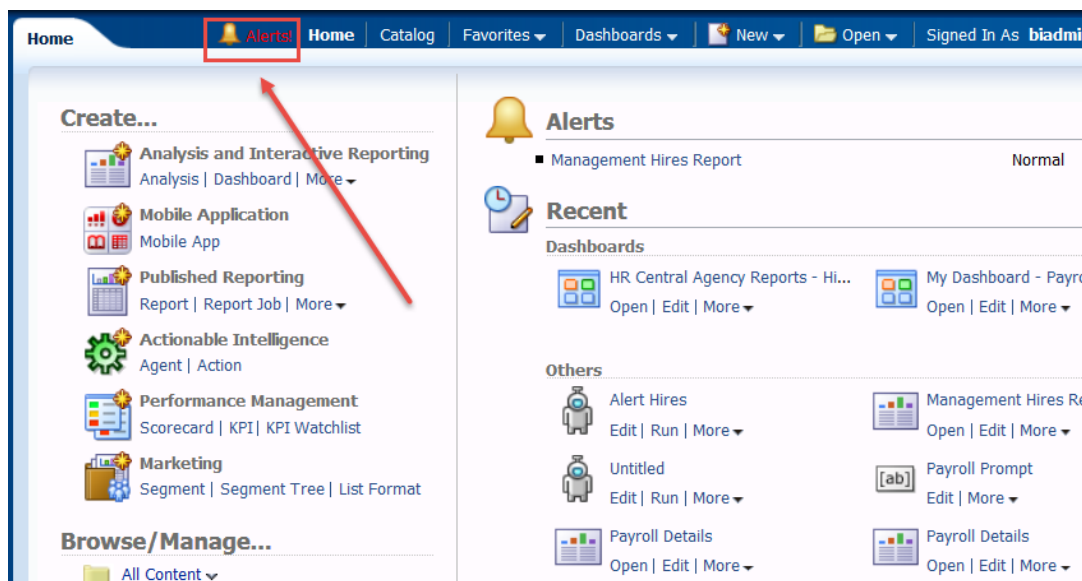
Click **OK**.

Verify that the agent ran successfully and generated alerts in the expected locations. These locations are Home Page and Dashboard, and the email Client.

10.3 Verify the Mail Client for the Agent/Alert

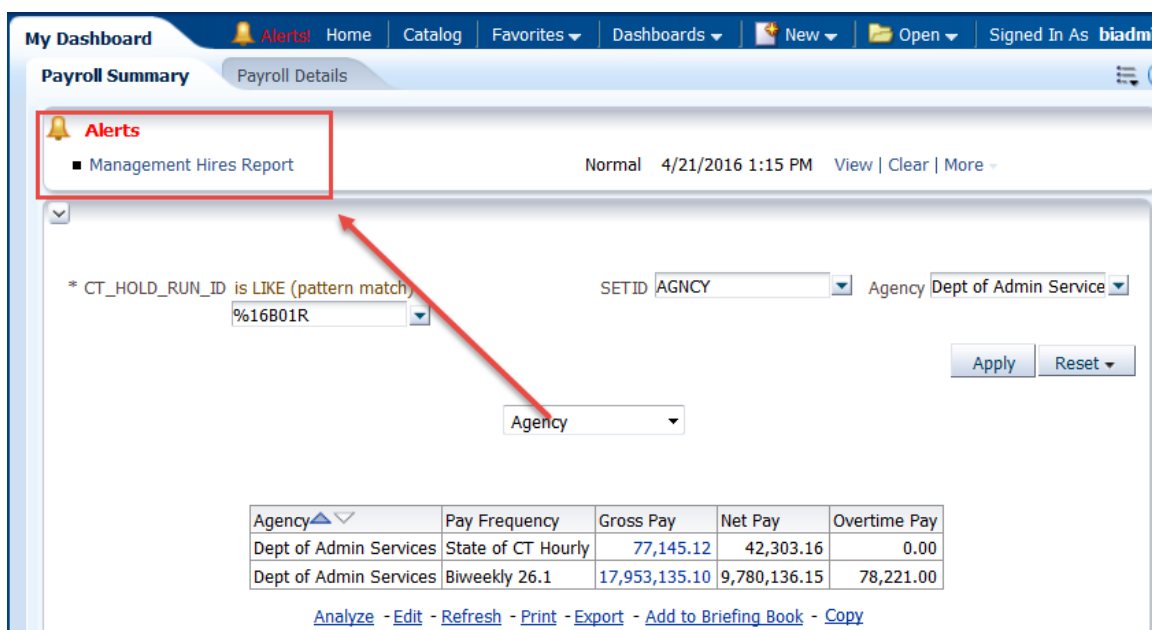
In this topic, you verify the alerts generated by the agent that you created. The alerts appear on the Dashboard and the email client as well.

1. Navigate to the **Home** page. There is an **alert** in the Global Header.



Click the **Alerts** link in the Global Header to view the alert.

2. Navigate to **My Dashboard** and verify that the alert appears.



- Click on **Management Hires Report** action link to see the results run by the agent.



Alert

Management Hires Report

Priority Normal

Delivered 4/21/2016 1:15 PM

Recurrence 1

Source Agent Alert Hires

Department ID	Employee Hire Count
CME49500	1
DAG42500	1
DCF91000	23
DDS50100	1
DDS52000	2
DEP43700	4
DEP44700	1
DMV35000	7
DOB37000	2
DOI37500	1
DOT57100	6
DOT57200	5

Clear Alert OK

- You can click the **Alerts** link in the Global Header to view the alert from Global Header where you can Edit, Delete or Run Again.

My Dashboard **Alerts** Home Catalog Favorites Dashboards New Open Signed In As biadmin

Payroll Summary Payroll Details

Alerts

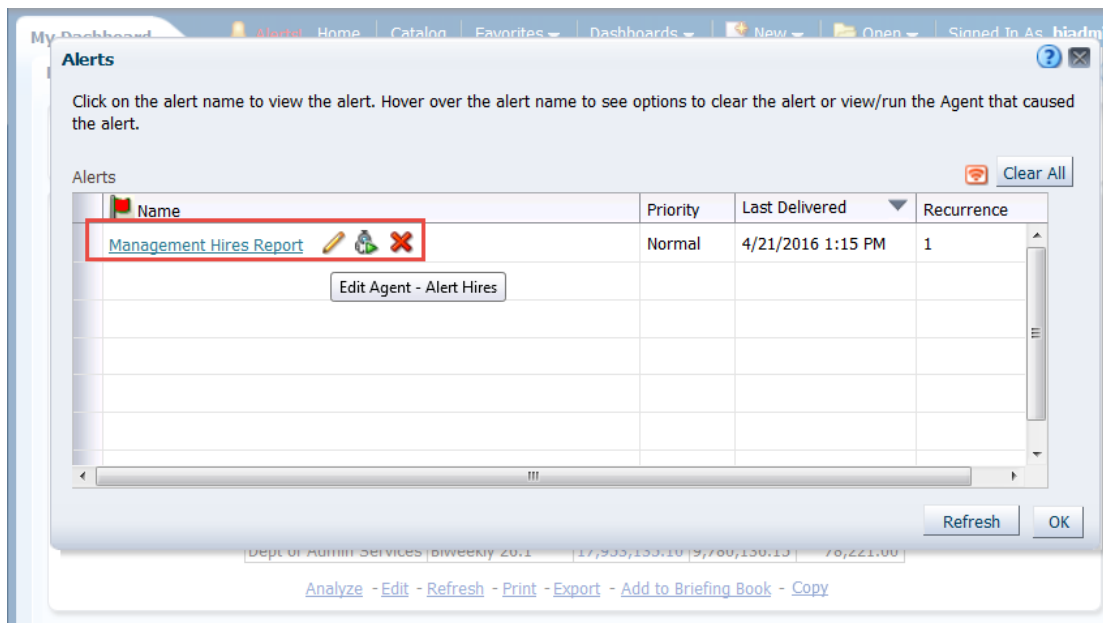
■ Management Hires Report Normal 4/21/2016 1:15 PM View | Clear | More

* CT_HOLD_RUN_ID is LIKE (pattern match)

SETID AGENCY Agency Dept of Admin Service

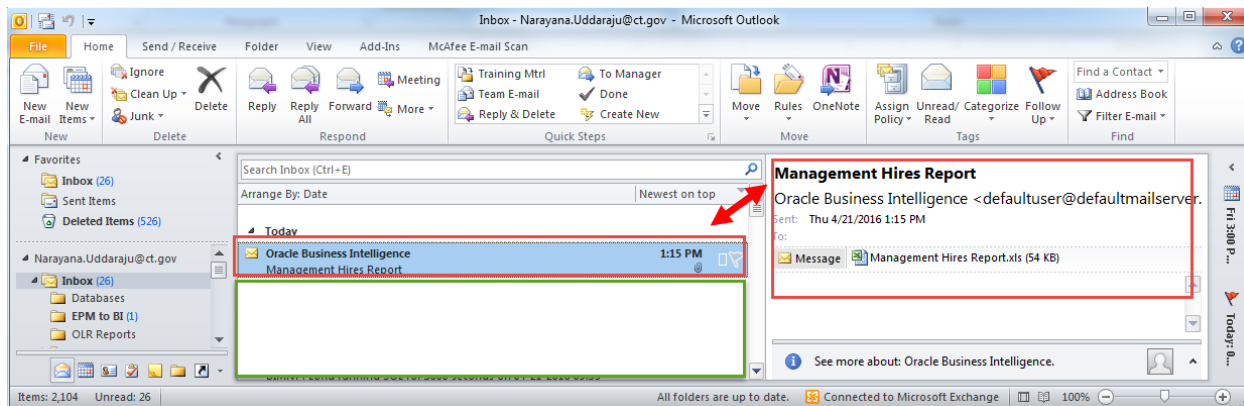
%16B01R

Apply Reset



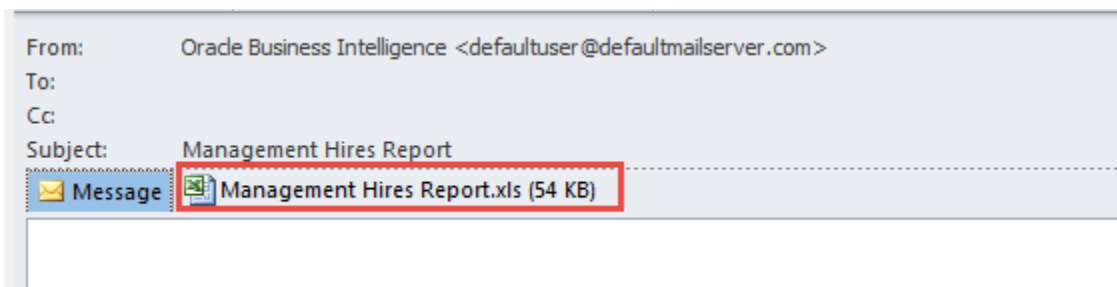
*Note:- By clicking on **Clear All** will delete all the Alerts. And even the alert will disappear from the Home and Dashboard Page.*

5. Click **OK** to close the alert.
6. Open your Client Email (Outlook) to check for the alert emails.



You see the messages sent by OBI for the alert/agent that you created.

7. Double-click the alert message to open it. The message is displayed with the details that you entered while creating the agent. The analysis is delivered as an attachment.



OBI- STARS (State Analytical Reporting System)



Click the attached report to open it.

	A	B	C	D
1				
2	Department ID	Employee Hire Count		
3	CME49500	1		
4	DAG42500	1		
5	DCF91000	23		
6	DDS50100	1		
7	DDS52000	2		
8	DEP43700	4		
9	DEP44700	1		
10	DMV35000	7		
11	DOB37000	2		
12	DOI37500	1		
13	DOT57100	6		
14	DOT57200	5		
15	DOT57300	1		
16	DPH48500	5		
17	DRS16000	14		
18	DVA21000	2		
19	MCO39400	1		
20	MHA53350	1		
21	MHA53810	1		
22	MHA55040	5		
23	SDE64300	31		
24	SDR63500	1		
25	TRB77500	2		
26	Grand Total	118		
27				
28				
29				

This concludes the topic of sending **alerts** through OBI Delivers.