EmpowHR: Section 18 - Data Warehouse

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Business Intelligence (BI) and Data Warehouse Overview

Business Intelligence Delivers is the interface used to create alerts based on analytical results. Specific results can be detected within reports and the appropriate people notified immediately through the Web, or any other type of communication channels. Users with the appropriate permissions can use Oracle BI Delivers to set up the conditions to trigger an alert.

BI application consists of prebuilt interactive dashboards and reports that are built using best practices and addresses key functional areas within an organization. Dashboards and reports are tailored for each user role in an organization.

BI Delivers uses intelligence bots called iBots to detect specific results. iBots are software agents, driven by schedules or events that can access, filter, and perform analytics on data based on specified criteria.

The BI applications include Extract-Transform-Load (ETL) routines to extract, transform, and load data into the Data Warehouse. The Data Warehouse allows users with a source of reporting. Data Warehouse intelligently consolidates and enriches data from any source, providing insight into human resource operations to identify trends and discover opportunities.

The Data Warehouse offers several Oracle Business Intelligence Enterprise Edition (OBIEE) components which include the following:

Security

Answers Web Catalog

Exporting

Dashboards

My Dashboard

Business Intelligence Publisher Engine

Getting Started

Reports

Security

Security controls the access to objects, such as subject areas, tables, and columns. Security is a mechanism that provides security for objects stored, such as dashboards, dashboard pages, folders, and reports. A user can view only the objects for which they are authorized.

Security also controls the type and amount of data that is available in a report. Multiple users can run the same report. The results returned to each user depend on their access rights and roles in the organization.

The Department Tree (Organizational Structure) and the EPM Security Tables (User ID and Roles) are used to retrieve data that the user can access in the Workforce Data Mart (where the data is stored). Proper Permissions and Roles must be given to run reports using the Data Warehouse functionality.

Answers Web Catalog

BI Answers provides the answers to business questions. This interface allows users with the appropriate permissions to build and modify reports, which is also called requests, that allows end users to explore and interact with information, and present and visualize information using charts, pivot tables, and reports. The results can be formatted, saved, organized and shared with others.

Reports created can be saved in the Catalog and integrated into any dashboard. Results are viewed through charts and calculations. The user can use drop-downs to view the results in further detail.

Many features in Answers are self-explanatory, and definitions and summary information appear on each page. When more information is available then can fit on one page, a **Help** button appears. Click the button to see more detailed information.

BI Answers is currently available to NFC Administrators and will be availble to agency administrastors in a future release.

Exporting

The results from Answers can be shared with other users. They can be exported to a PDF, HTML by clicking an icon at the bottom of each tab. Answers can also be printed or downloaded in Excel and CSV format by clicking an icon at the bottom of each tab. Once downloaded, the user can attach and email the files as you would any other file.

Dashboards

Interactive Dashboards provide points of access for analytics information. When the user accesses the BI, the default Dashboard is the first page that appears. BI can have multiple Dashboards. By default, the tool is delivered with two Dashboards, the HR (Human Resources) Manager Workforce Management and My Dashboard. Dashboards are typically used to display reports that contain content specific to the needs of the individual users or groups.

Dashboards contain descriptions of reports. They can be used to filter information using drop-downs, sort data by using column headings, and save filtered selections.

Users with the appropriate permissions can place results from BI Answers into dashboards for use by the end users.

Within the HR Workforce Management Dashboard there are several pages and reports within the pages. Below is a list of pages and the corresponding reports:

Dashboard Pages	Reports
Demography	▪ Employee Age Profile ▪ Employee Average Age ▪ Employee Education Profile ▪ Employee Gender Profile ▪ Employee Ethnical Group Distribution
Grade Distribution	▪ Employee Grade Distribution
Headcount Distribution	▪ Employee Headcount Distribution ▪ Employee Headcount - Employee Type ▪ Employee Headcount - Exempt Status
Headcount Trend by Department	▪ Employment Headcount Trend by Department
Employment Change	▪ Employment Change by Ethnical Group
Activities by Period Summary	▪ HR Activities by Period ▪ Termination Details by Period ▪ Termination Turnover Rate
Activities by Period Details	▪ HR Activities by Period - Details
Activities Trend by Department	▪ HR Activities Trend by Department
Minority Profile	▪ Minority Profile by Grade Report
Department Employee Details	▪ Department Employee Details

This section includes the following subject:

[Navigating in BI Interactive Dashboards](#)

Navigating in BI Interactive Dashboards

This section contains the following topics:

Interactive Dashboards

A BI Interactive Dashboard provides personalized views of external information. A Dashboard consists of one or more pages, which appear on the dashboard. Pages can display anything that can be accessed or opened with a Web Browser, such as saved BI requests, alerts from BI Delivers, images, charts, tables, text, and links to Web sites and documents.

The kinds of content that a dashboard can contain are dashboard objects, content that is saved in the BI Presentation Catalog, and views of folders in the Presentation Catalog. Users with appropriate permissions can use the Dashboard Editor to add content to a dashboard by dragging and dropping it from a selection pane onto the Dashboard Layout page, which consists of columns to align content, and sections inside of columns to hold content. The look of a dashboard, such as background colors and the size of the text, is controlled by styles and skins, and can also be change through the use of a cosmetic formatting dialog box.

This section contains the following topics:

Common Terms

Many of the features in the BI Dashboards are self explanatory, and definitions and how-to information appear on each page. When more information is available than will fit on the page, a **Help** button appears near the upper right corner

Dashboard creation is reserved for users with administrative responsibilities. Permission to modify dashboards (personal or shared) is granted to a broader range of users, as determined by the administrator. Users with the appropriate permissions and responsibilities can modify a dashboard.

The table below provides definitions for common terms in BI Interactive Dashboards.

Term	Definition
Columns	Columns are used to align content on a dashboard. (Sections within columns hold the actual content.) Many columns can be created on a dashboard page as needed. Every new dashboard page automatically contains one empty column with one empty section in it. The columns used in BI Interactive Dashboards are not related to the columns used in BI Answers.
Dashboard Objects	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.
Folders	Folders are organizational constructs that hold content saved in the Presentation Catalog, such as requests created with BI Answers. A folder is similar to a Microsoft Windows folder.

Term	Definition
Pages	Pages contain the columns and sections that hold the content of a dashboard. Every dashboard has at least one page. In BI Interactive Dashboards, pages are identified by tabs across the top of the dashboard. Multiple pages are used to organize content.
Results	Results, also called reports, are the output returned from the BI Server that match the request criteria specified in BI Answers. The default format for viewing results in a dashboard is to show them in a table. (This could be different for each agency) Results can also be shown in other formats, such as charts. Results can be examined and analyzed, saved or printed or downloaded to a spreadsheet.
Sections	Sections appear in columns in the dashboard layout. They hold the content dragged and dropped from the selection pane, and are used to organize content within a column.
Skins	Skins control the way the BI Presentation Service Interface appears, such as background colors, logos, and the style sheets to use. Skins can be automatically assigned to users when they log in. The BI Administrator can customize skin and create new skins.
Styles	Styles control how dashboards and results are formatted for display, such as the color of the text and links, the font size of text, the boarders in tables, the color and attributes of charts, and so on. Styles are organized into folders that contain Cascading Style Sheets (files with a .css extension), images, and chart templates. The BI Administrator can customize some style sheets and create new style sheets. Users can override some elements in type sheets, such as table boarders and text size, when formatting results in BI Answers.
Presentation Catalog	The BI Presentation Catalog stores content created with BI Answers and BI Interactive Dashboards. Content organized into folders that are either shared or personal. Types of content that can be stored in the Presentation Catalog include requests created with BI Answers, filters that are applied to results, settings for BI Delivers, and information about dashboards.

Edit a Dashboard

This Edit Dashboard option describes the procedures for creating and managing the content on dashboards.

Add a New Page to a Dashboard

Add a Column to a Dashboard

Dashboard Properties

PDF and Print Control

To edit a dashboard:

1. Click the **Page Options** button (**Figure 1**) on the top right hand corner of My Dashboard page (**Figure 34**).

Figure 1. Page Options button on My Dashboard

2. Select *Edit Dashboard*. The Page Options - Edit Dashboard - Dashboard Editor page (**Figure 2**) is displayed.
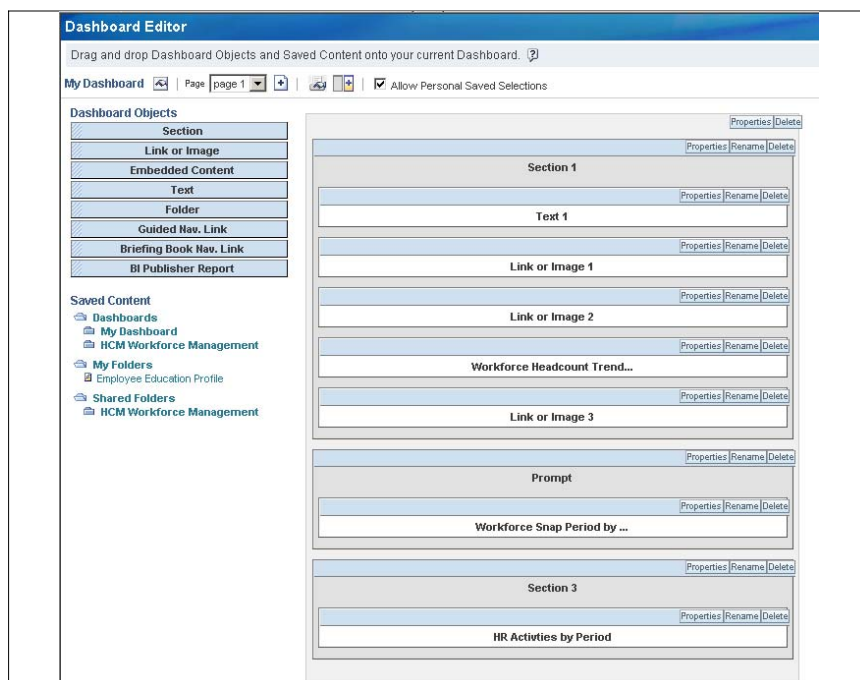
Figure 2. Page Options – Edit Dashboard - Dashboard Editor page

Add a New Page to a Dashboard

Adding a new page to a dashboard:

3.   Click the Add a Page icon to add a page.

The Add Dashboard Page page (**Figure 3**) is displayed.

Figure 3. Add Dashboard Page page

4. Complete the fields as follows:

Page Name	Enter a name for the dashboard page.
Page Description	Enter a description for the dashboard page.

5. Click **OK** to add the page. An Empty Dashboard page (**Figure 4**) is displayed.

              OR
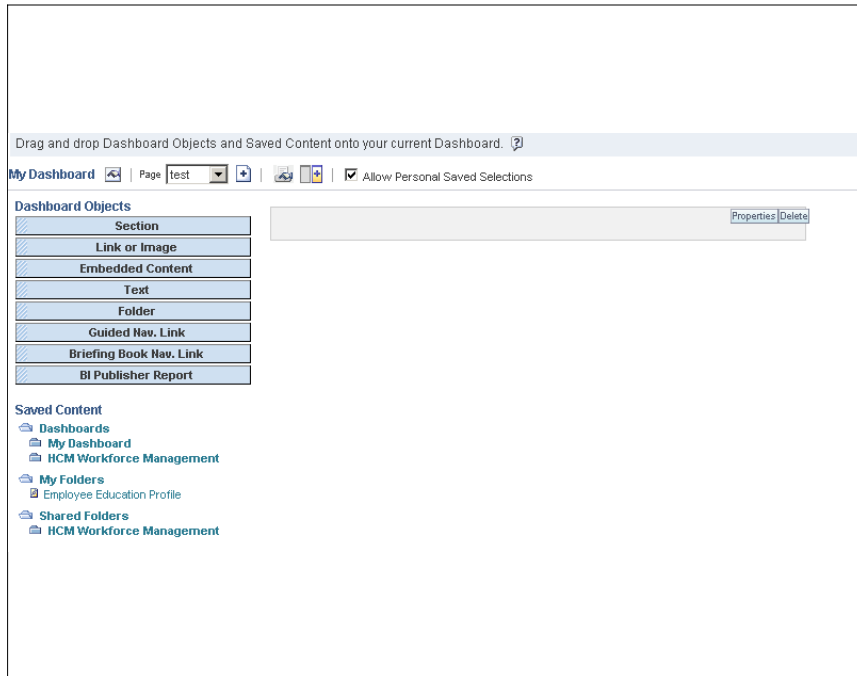
Click **Cancel**.

Figure 4. Empty Dashboard page

6. Click **Save** or **Cancel**. The Empty Dashboard - Enter Content page (**Figure 5**) is displayed. This page contain 2 tabs at the top *Page 1* and *Test*.(Test is the name of the page that was entered on the Add A Dashboard page (**Figure 3**) .
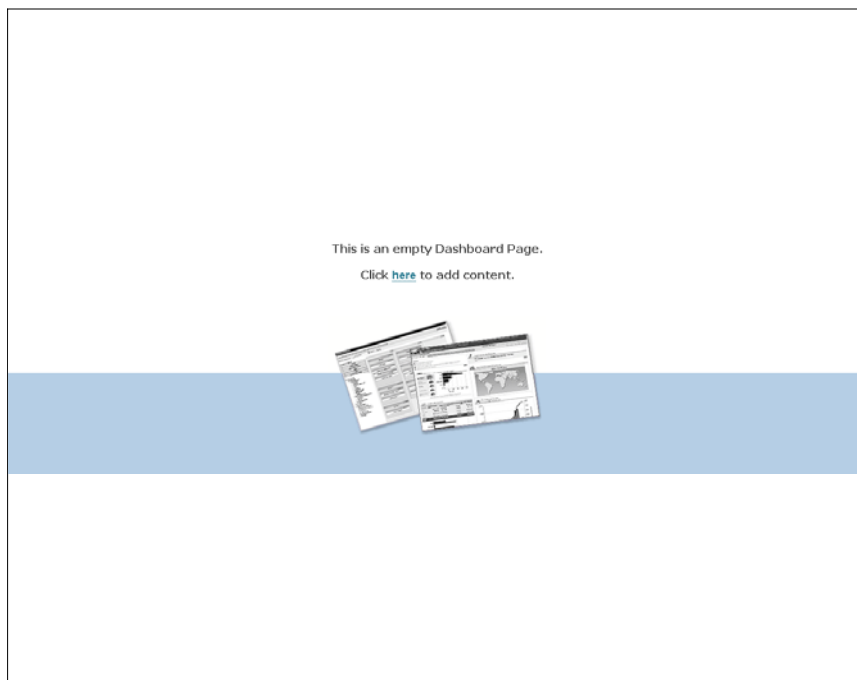

Figure 5. Empty Dashboard - Enter Content page

7. Click *here*. The Empty Dashboard page (**Figure 4**) is displayed.

8. Click the **Properties** button and drag and drop the applicable information from the left to the right. This adds content to the page (**Figure 6**).
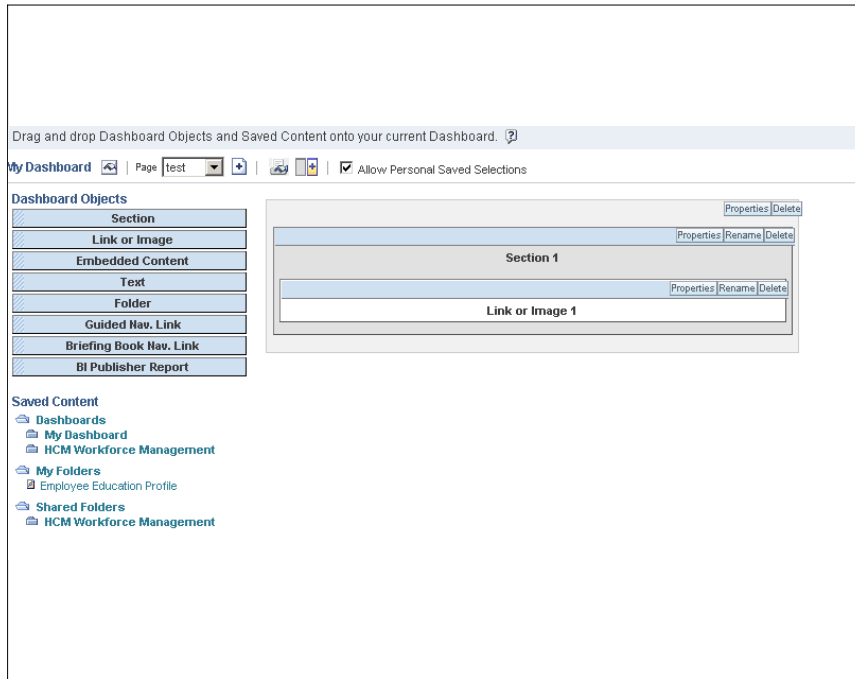

Figure 6. Added Content for the Dashboard page

9. Click the **Delete** button to delete content from the page.

Add a Column to a Dashboard

Columns are used to align content on a dashboard. (Sections within columns hold the actual content). Columns can be added and removed. The width can be set in pixels or as a percentage of the dashboard page, and break column.

When there are more than one column on a dashboard page, columns can be broken to arrange them on a page. (Drag and drop does not reposition columns.)

To add a column to the dashboard page:

1. Click the **Add Column** button near the top of the Dashboard Editor page (**Figure 2**). To add additional columns, continue to click the **Add Column** button.

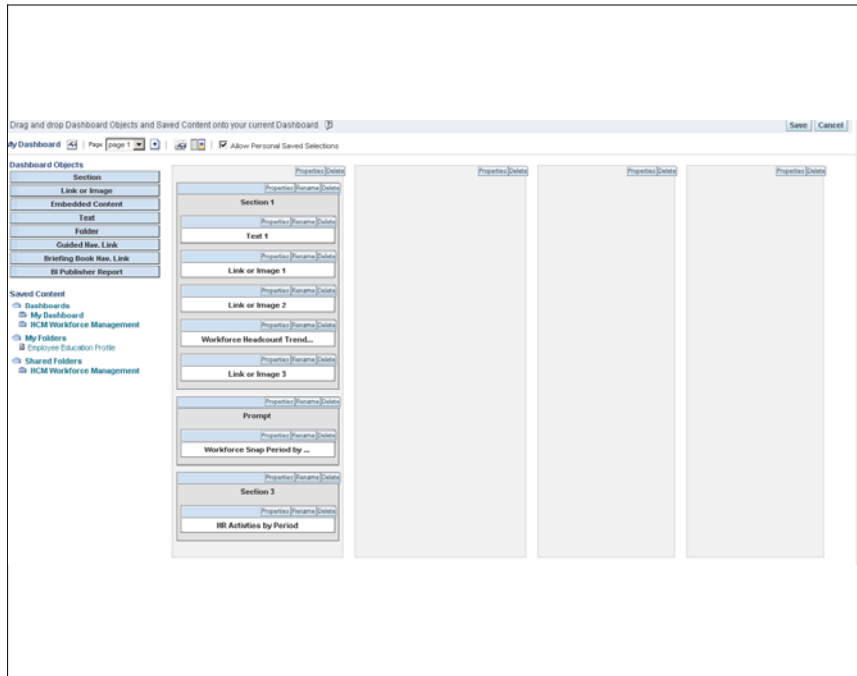A new column is added to the dashboard (**Figure 7**).

Figure 7. A New Column Added to the Dashboard Editor page

Dashboard Properties

When there are more than one column on a dashboard page, the user can break columns to arrange them on the page. The user can also set the attributes of the column.

To break a column:

1. Select the **Properties** button [Properties] on the newly added column.

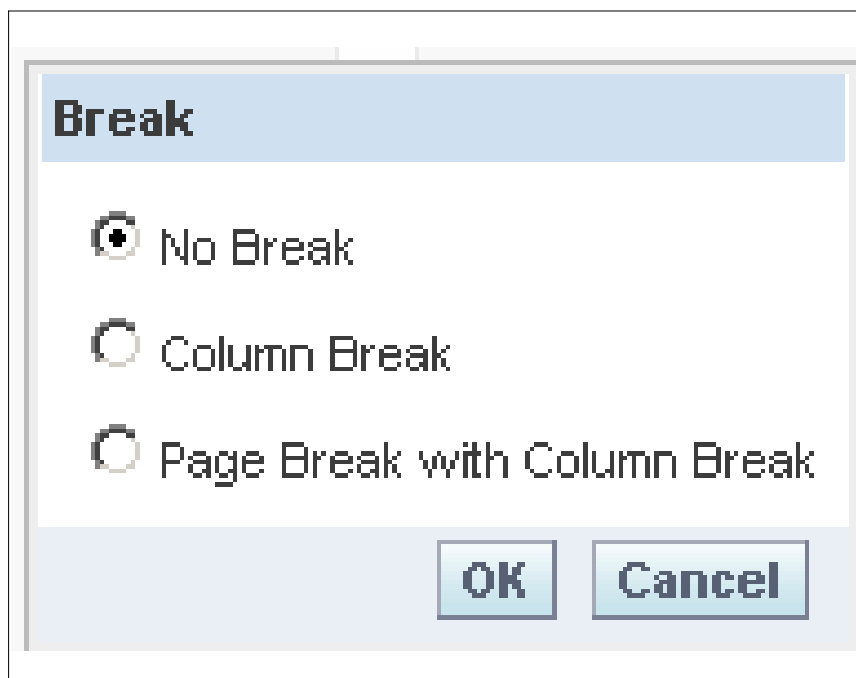2. Select the *Break* option. The Break dialog box (**Figure 8**) is displayed.

Figure 8. Break dialog box

3. Complete the fields as follows:

No Break	Click this radio button if the newly created column does not require a break.
Column Break	Click this radio button to insert a break in the newly created column (**Figure 9**). If the user breaks the column again, the column layout reverts to what it was previously.
Page Break with Column Break	Click this radio button to break a page within a column (**Figure 10**).

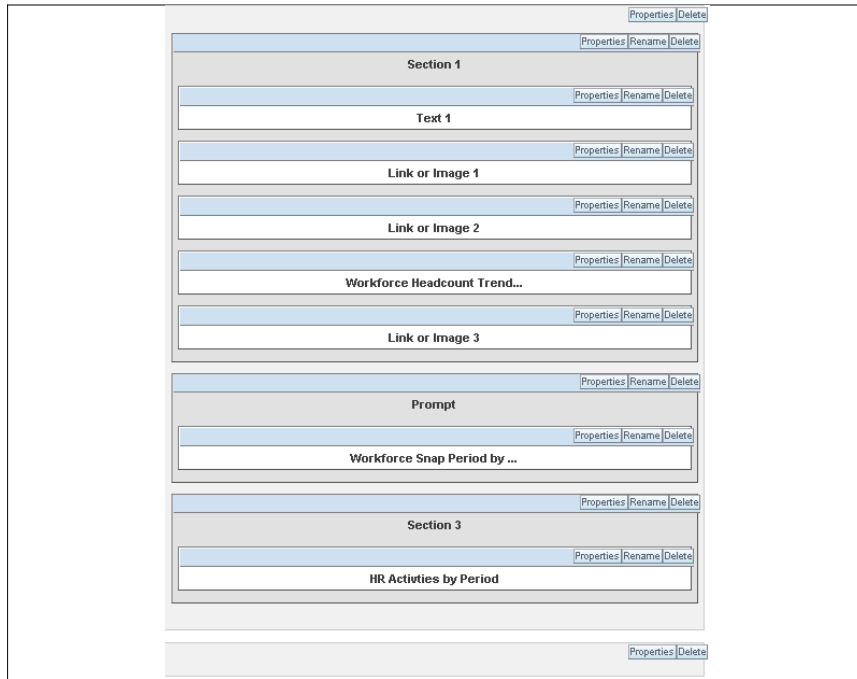4. Click **OK** or **Cancel** to save the option selected and return to the Dashboard Editor.
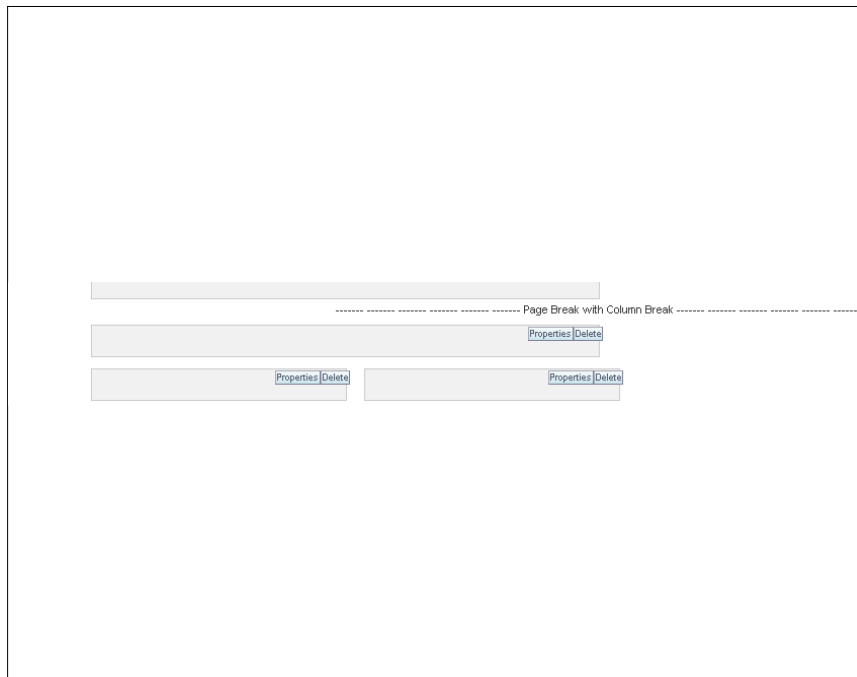
Figure 9. Column Break option results

Figure 10. Page Break with Column Break option results

5. Click the **Delete** button to revert back to the option selected.

To set column properties:

1. Select the **Properties** button [Properties] on the newly added column.

2. Select **Column Properties**. The Column Properties dialog box (**Figure 11**) is displayed.

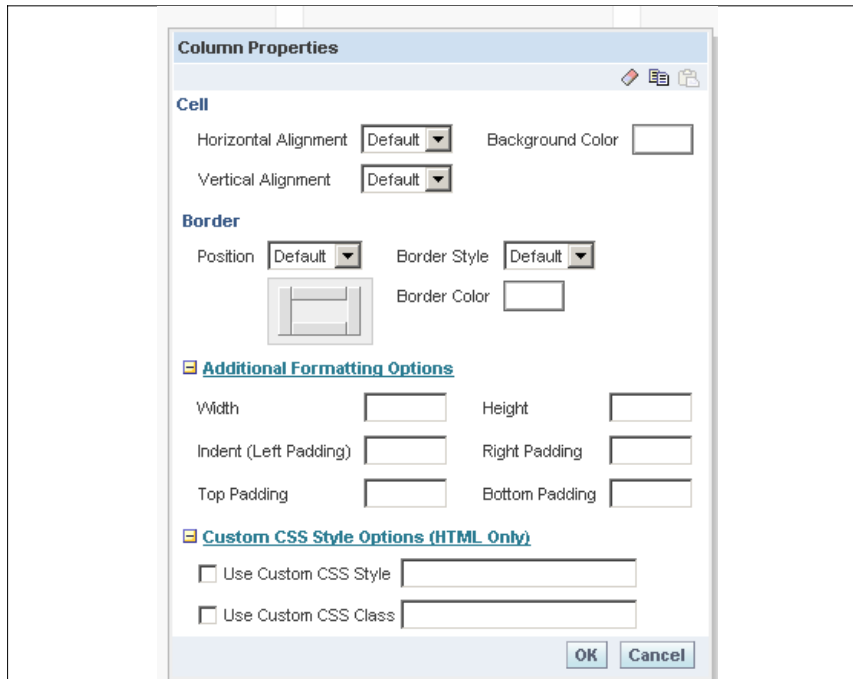**Figure 11. Column Properties dialog box**

3. Complete the fields as follows:

Cell

Horizontal Alignment	This option defaults to `Default`. To change the horizontal alignment of the column, select data from the drop-down list. The valid values are `Left`, `Center`, and `Right`.
Verticle Alignment	This option defaults to `Default`. To change the verticle alignment of the column, select data from the drop-down list. The valid values are `Top`, `Center`, and `Bottom`.
Background Color	This option changes the color of the column. Click in the block and the color selection is displayed. Select the applicable color from the chart.

Border

Position	This option defaults to `Default`. To change the border position in the column, select data from the drop-down list. The valid values are `None`, `All`, and `Custom`. This option is interactive with the **Border Style** is selected.
Border Style	This option defaults to `Default`. To change the border position in the column, select data from the drop-down list. The valid values are `Single`, `Double`, and `Thick`. As these options are selected the **Border Style** becomes interactive.
Border Color	This option changes the color of the border. Click in the block and the color selection is displayed. Select the applicable color from the chart.

4. Click the **+** next to Additional Formatting Options to expand the window for additional formatting options.

Additional Formatting Options

Width	This option sets the width of the column.
Height	This option sets the height of the column.
Indent (Left Padding)	This option indents the column to include a space on the left hand side of the column.
Right Padding	This option indents the column to include a space on the right hand side of the column.
Top Padding	This option includes a space on the top of the column.
Bottom Padding	This option includes a space on the bottom of the column.

5. Click the **+** next to Custom CSS Style Options (HTML Only) to expand the window for additional style options

Use Custom CSS Style	Enter the HTML style as applicable.
Use Custom CSS Class	Enter the HTML custom class as applicable.

6. Click **OK** or **Cancel** to save the changes and exit the Custom Properties page.

Below are options on the top of the dialog box:

Copy Section Properties icon.

Paste Section Properties icon.

Clear Format (restore defaults) icon.

To Set Text Properties

1. Select the **Properties** button Properties on a Text section The Text Properties dialog box (**Figure 12**) is displayed.
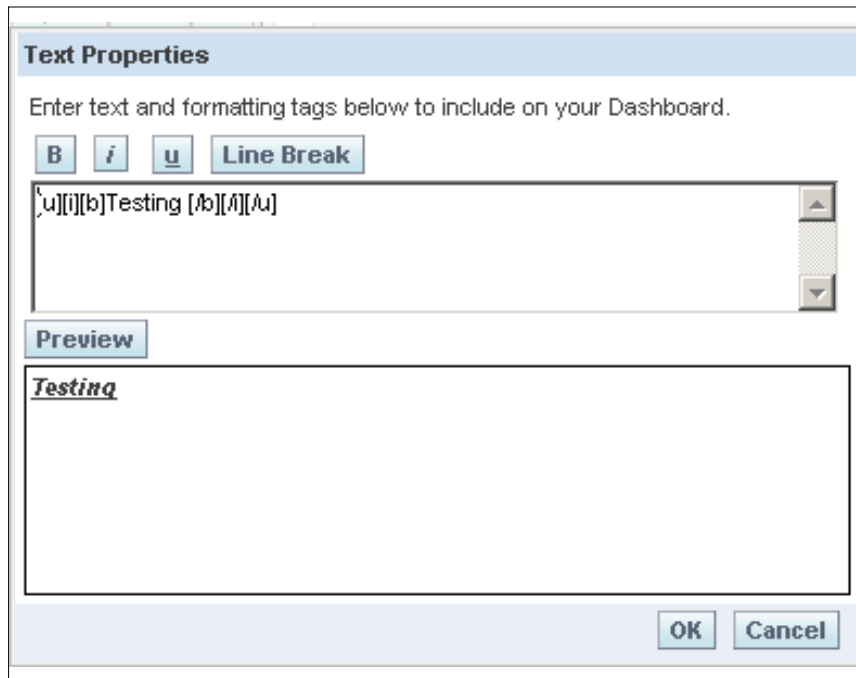
Figure 12. Text Properties dialog box

The options below change the appearance of the Text box on the dashboard.

- Click the **B** to bold the information in the box.

- Click the **I** to initialize the information in the box .

- Click the **U** to underline the information in the box.

- Click the **Line Break** to create a line space before the information in the box.

- Click **Preview** to view the results of the option selected.

2. Click **OK** to save the changes.

> **OR**

Click **Cancel** to exit the window with no changes.

To Set Link Properties:

The guided navigation links can be static or conditional.

1. Select the **Properties** button on the Link 1 or Image 1 section (**Figure 13**). The Link or Image Properties dialog box (**Figure 14**) is displayed.
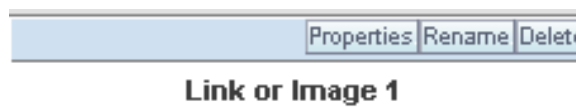

Figure 13. Properties button on a Link or Image section

The steps below can be used for any link that is selected from the pane into the section in the dashboard page.

Figure 14. Link or Image Properties dialog box

2. Complete the fields as follows:

| Caption	Enter a narrative caption for the link.
Destination/URL	Click this radio button to have the link as a URL. For the URL option, provide the full path in the field below.
Destination/Request or Dashboard	Click this radio button to have the link or image placed on a Request or Dashboard.
TargetCurrent Window	Click this radio button to place the information on the current window only.
Target/New Window	Click this radio button to place the information on the new window only.
Image	Enter the information where the image should reside.
Layout	This is where the image should reside on the request or dashboard. The valid values are **Left**, **Right**, and **Center**.

3. Click **OK** to save the changes.

OR

Click **Cancel** to exit the dialog box with no changes.

To Set Workforce Headcount Trend Prompt and Workforce Snapshot Period by Level 2 Properties:

1. Select the **Properties** button on a Workforce section.

1. Select Modify from the drop-down list .

2. Modify the section.
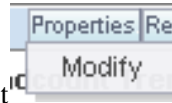
To Set HR Activities Properties:

1. Select the **Properties** button on a HR Activities section. The HR Activities drop-down list (**Figure 15**) options below are displayed.
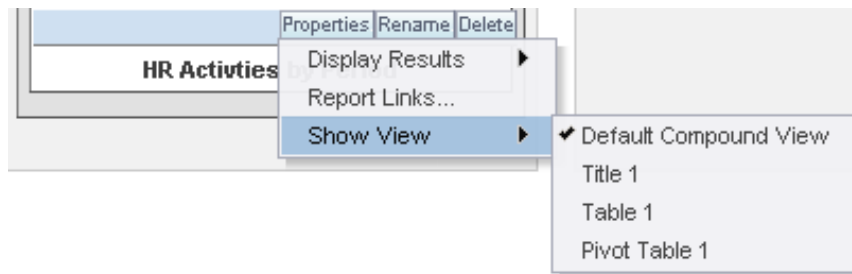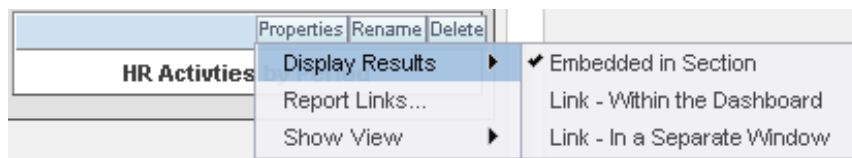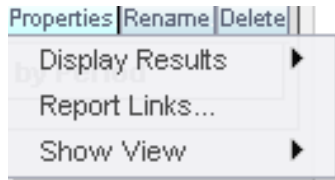

Figure 15. HR Activities drop-down lists

2. Select the applicable option to change the display on a request or dashboard. The options selected will not change the look on the Dashboard Editor; however, the look will change on a request or dashboard.

To Set Section Properties:

Guided navigation can aid users' insight into business issues and appropriate actions to take by guiding their exploration of results obtained from BI Answers. When based on common scenarios and best practices for your organization, guided navigation allows users to see and analyze related issues by navigating to a related set of results, another dashboard, or a URL. Guided navigation is specified using the Dashboard Editor.

There are three types of guided navigation:

Type of Navigation	Description
Guided Navigation Using Static Links	When specified for a request, the results on the dashboard always include a link to another request, a dashboard, or URL.
Guided Navigation Using Conditional Links	When specified for a request, a link to another request, dashboard, or URL appears only if the results met certain criteria.
Guided Navigation Using Conditional Actions	Entire dashboard sections can appear based upon the results returned by BI Answers for a particular request.

The user can make an entire section of a dashboard and its content appear conditionally based upon the results returned by BI Answers for a particular request.

1. Select the **Properties** button [Properties] on a Section or Prompt. The Section or Prompt drop-down list (**Figure 16**) options is displayed.
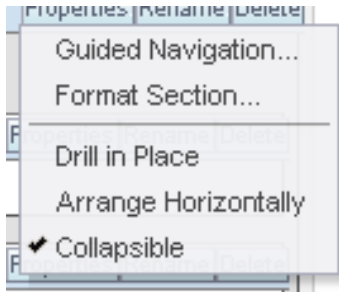

Figure 16. Section or Prompt drop-down list

2. Select the *Guided Navigation* option. The Guided Navigation Section Properties page (**Figure 17**) is displayed.

Figure 17. Guided Navigation Section Properties page

3. Complete the fields as follows:

Reference Source Request	Click the applicable radio button. The valid values are **Yes** to create a conditional Dashboard Section and **No** to denote not to create a conditional Dashboard Section.
Source Request	Specify a Source Request to create a conditional Dashboard Section.
Show Section/If Request Returns Rows	Click this radio button to show a section if the rows return data.
Show Section/If Request Returns Nothing	Click this radio button to show a section if no data is returned on a row.

4. Click **OK** to save the information.

> **OR**

Click **Cancel** to exit the dialog box.

To format a section or prompt:

1. Select the **Properties** button on a Section or Prompt.

2. Select the ***Format Section*** option from the drop-down list (**Figure 18**). The Section Properties dialog box (**Figure 19**) is displayed.
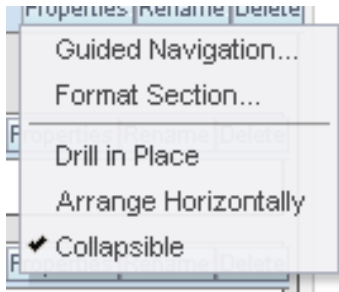
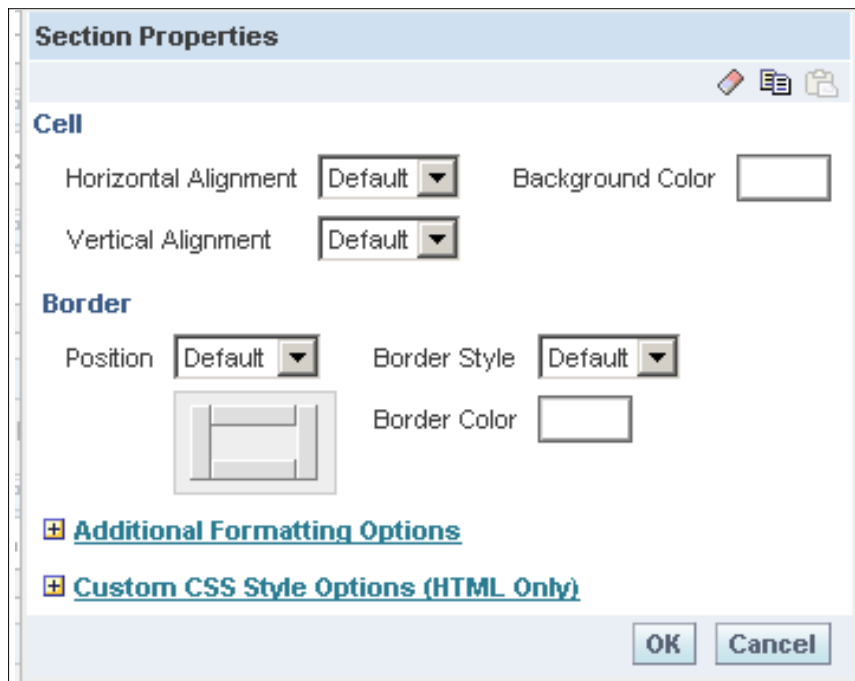**Figure 18. Section or Prompt drop-down list**

Figure 19. Section Properties dialog box

3. Complete the Section Properties as follows:

Cell

Horizontal Alignment	This option defaults to `Default`. To change the horizontal alignment of the section, select data from the drop-down list. The valid values are `Left`, `Center`, and `Right`.
Verticle Alignment	This option defaults to `Default`. To change the verticle alignment of the section, select data from the drop-down list. The valid values are `Top`, `Center`, and `Bottom`.
Background Color	This option changes the color of the section. Click in the block and the color selection is displayed. Select the applicable color from the chart.

Border

Position	This option defaults to `Default`. To change the border position in the section, select data from the drop-down list. The valid values are `None`, `All`, and `Custom`. This option is interactive with the **Border Style** selected.
Border Style	This option defaults to `Default`. To change the border position in the section, select data from the drop-down list. The valid values are `Single`, `Double`, and `Thick`. As these options are selected the **Border Style** becomes interactive.
Border Color	This option changes the color of the border. Click in the block and the color selection is displayed. Select the applicable color from the chart.

4. Click the **+** next to Additional Formatting Options to expand the window for additional formatting options.

Additional Formatting Options

Width	This option sets the width of the section.
Height	This option sets the height of the section.
Indent (Left Padding)	This option indents the column to include a space on the left hand side of the section.
Right Padding	This option indents the column to include a space on the right hand side of the section.
Top Padding	This option adds a space on the top of the section.
Bottom Padding	This option adds a space on the bottom of the section.

5. Click the **+** next to Custom CSS Style Options (HTML Only) to expand the window for additional style options.

Use Custom CSS Style	Enter the HTML style as applicable.
Use Custom CSS Class	Enter the HTML custom class as applicable.

6. Click **OK** or **Cancel** to save the changes.

Below are options on the top of the dialog box:

Copy Section Properties icon.

Paste Section Properties icon.

Clear Format (restore defaults) icon.

To make a section appear horizontal:

1. Select the **Properties** button [Properties] on a Section or Prompt. The Section or Prompt drop-down list (**Figure 20**) options is displayed.
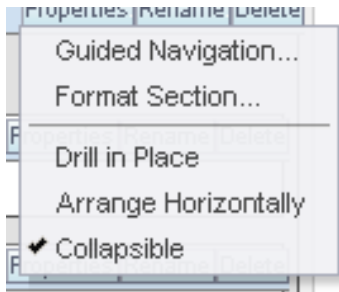

Figure 20. Section or Prompt drop-down list

2. Select the *Arrange Horizontally* option. The Section or Prompt result (**Figure 21**) displays horizontally.
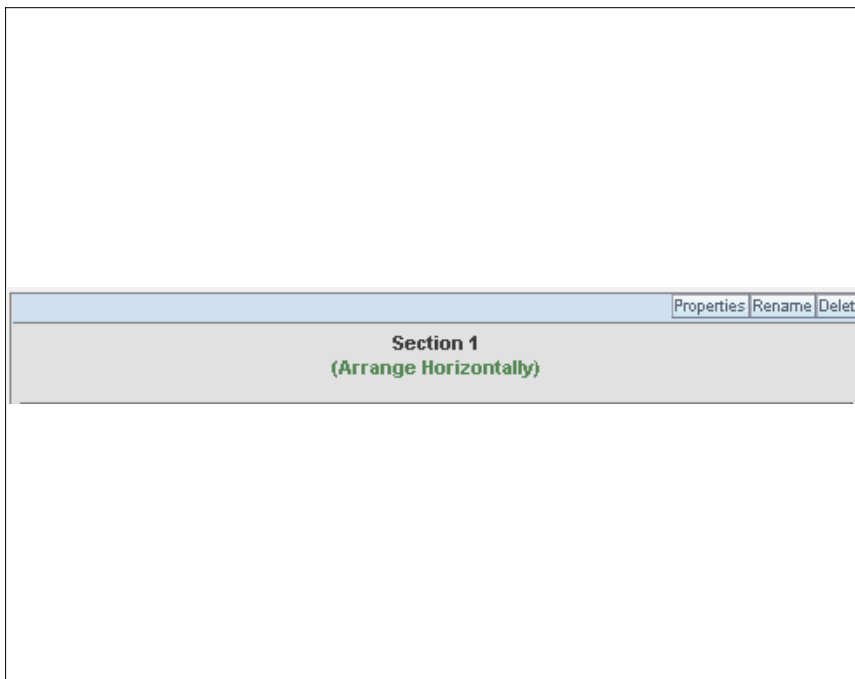

Figure 21. Horizontial Section result

To rename the information selected from the left hand pane:

On the Dashboard Editor, items can be selected from the pane on the left. These item can be renamed.

1. Click the **Rename** button on the item to be renamed. The rename dialog box (**Figure 22**) is displayed.
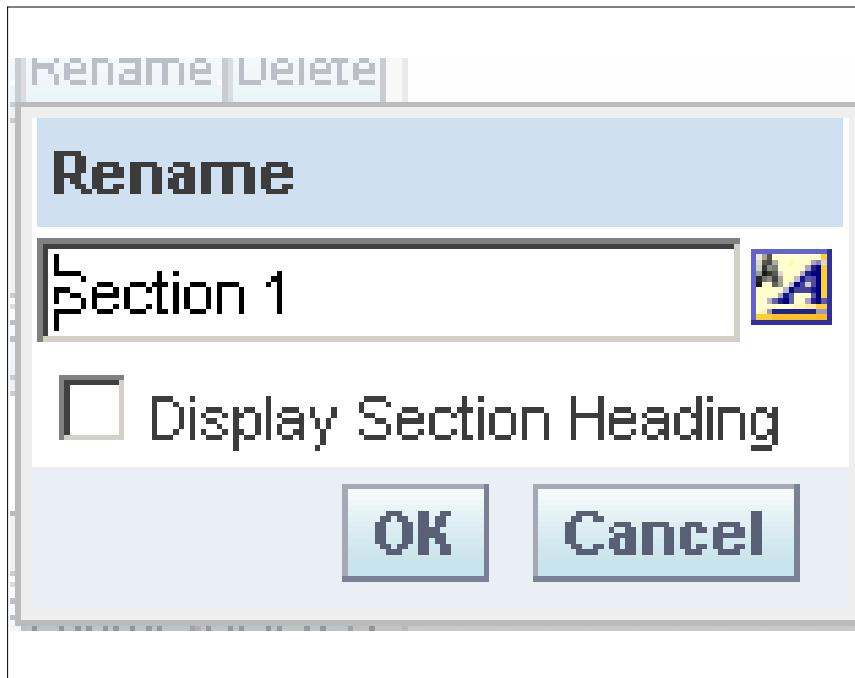
Figure 22. Rename dialog box

2. Rename the section.

3. Select the **Display Section Heading** to display the renamed section as a heading.

4. Click **OK** to save the information.

    OR

    Click **Cancel** to exit the dialog box.

To access the Dashboard Properties from the Dashboard Editor:

1. Click the Dashboard Properties button on the top of the Dashboard Editor page. The Dashboard Properties dialog box (**Figure 23**) is displayed.
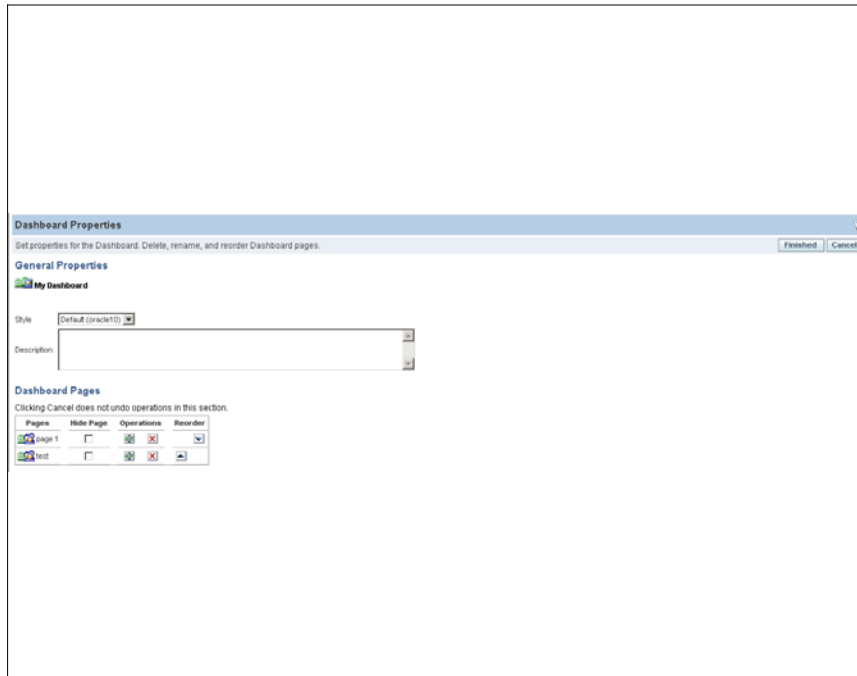
Figure 23. Dashboard Properties dialog box

2. Complete the fields on the Dashboard Properties as follows:

General Properties

Style	Styles control how dashboard and results are formatted for display. If a style is not selected, results are formatted using a default style. Select the applicable data from the drop-down list. The valid values are **Oracle 10**, **Sliebel 77**, and the **Default (oracle1c)**.
Description	Enter a description for the dashboard.

Dashboard Pages

This section of the page is used to rename, delete, reorder, and hide dashboard pages. Dashboard Pages area of the Dashboard Properties page shows the pages for the dashboard. The pages are listed in the same order as their tabs.

Hide Page	Check this box to hide the page.
Reorder	Select the down arrow to change the order of the pages listed. To move a dashboard page up in the list, click the **Move Up** button. This moves the tab for the page to the left on the dashboard page.
	To move a page down in the list, click the **Move Down** button. This moves the tab for the page to the right on the dashboard page.

3. Click the Rename icon . The Edit Item Name and Description page (**Figure 24**) is displayed. When renaming a dashboard, the users' references to the dashboard with the previous name can be

preserved. This creates a shortcut with the old name that points to the renamed dashboard in the Presentation Catalog.
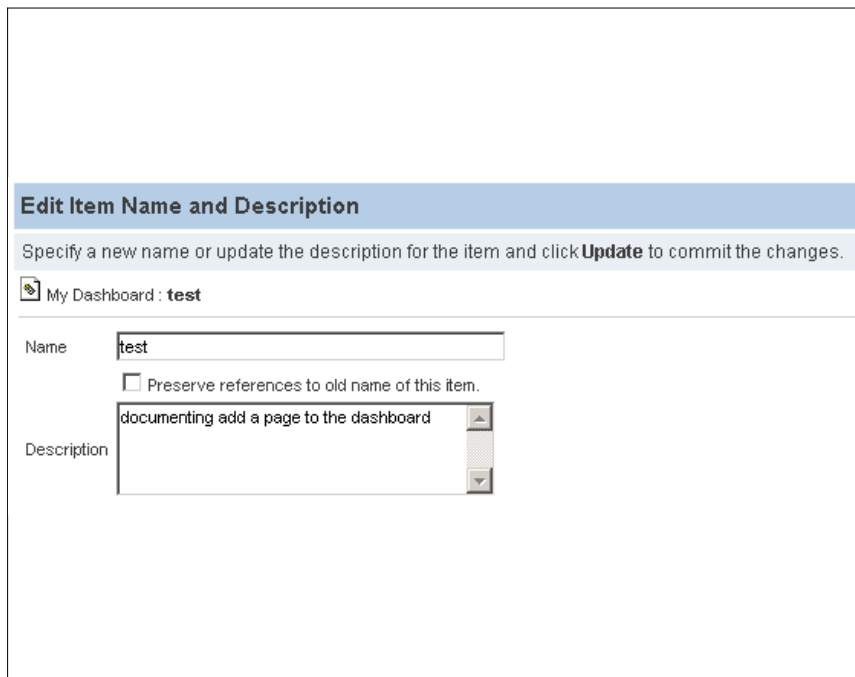

Figure 24. Edit Item Name and Description dialog page

4. Complete the fields as follows:

Name	Rename the dashboard if applicable.
Description	Rename the description of the dashboard if applicable.

5. Click **Update** to confirm changes.

A Dashboard Page can be deleted from the Edit Dashboard dialog box (**Figure 23**).

6. Click the Delete icon to delete the dashboard name. The Confirm Delete pop-up (**Figure 25**) is displayed.
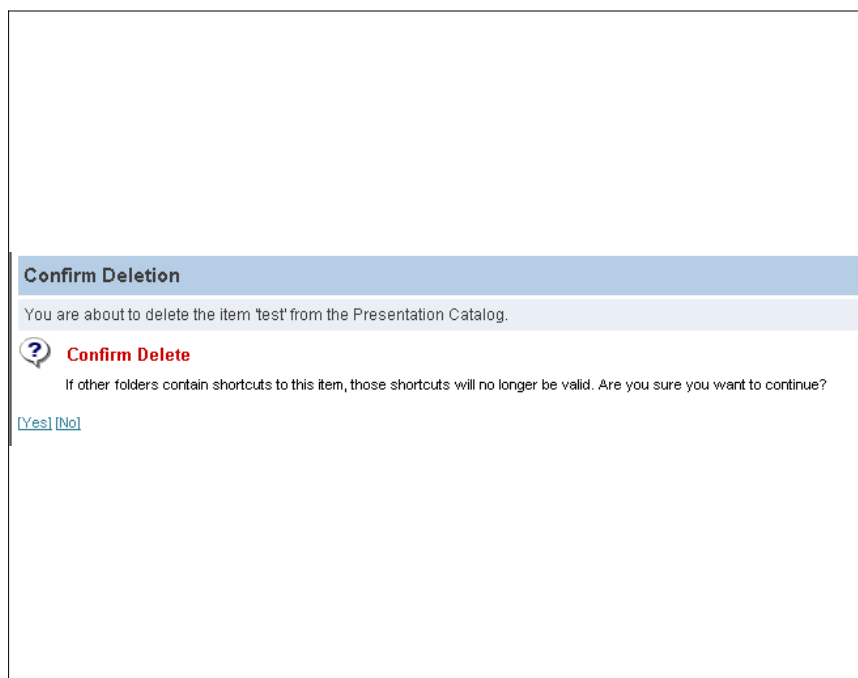
Figure 25. Confirm Deletion pop-up

7. Click the **Yes** link to delete and **No** link to keep the original information and return to the Dashboard Properties dialog page (**Figure 23**).

8. Click **Finished** on the Dashboard Properties dialog box (**Figure 23**).to save the information.

        OR

Click **Cancel** on the Dashboard Properties dialog box (**Figure 23**) to exit the page. The cancel button does not undo the actions performed on the Dashboard Properties dialog box (**Figure 23**) page.

PDF and Print Control

When printing a dashboard in BI Interactive Dashboards or to view in BI Answers, the user can specify page settings and header and footer content for the PDF output. Dashboards and views are printed in Adobe Acrobat PDF format. Adobe Reader 6.0 or greater is required to print using Adobe PDF.

Header and footer formatting will appear in HTML and PDF output.

Note: The print selections that is specified apply to PDF output only. If printed the PDF on a local or network printer, the print selections specified in the browser are in effect, such as the selection of paper size.

1. Click the **PDF and Print Control Properties** button   near the top of the workspace. The PDF and Print Control dialog box (**Figure 26**) is displayed.
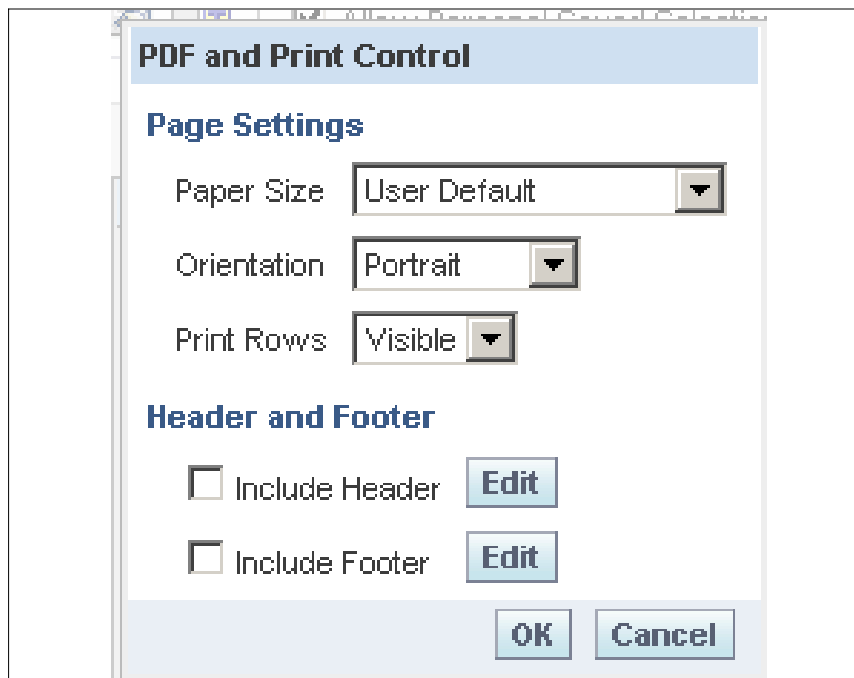
Figure 26. PDF and Print Control dialog box

2. Complete the fields on the PDF and Print Control dialog box as follows:

Page Settings

Paper Size	Select the applicable size paper for the print. The valid values are as follows:

Paper Size Valid Values
Default
U.S. Letter (8.5 X11)
A4 (210mm X 297mm)
A3 (297mm X 420mm)
A5 (148mm X 120mm)
Folio (8.5" X 13")
Legal (8.5" X 14")

Orientation	Select the view for the output. The valid values are **Portrait** and **Landscape**.
Print Rows	Select the applicable option for printing rows. The valid values are **Visible** and **All**.

Header Footer

Use the options in the dialog box to construct the header and footer. Headers and footers may each contain up to three lines.

3. Complete the fields as follows:
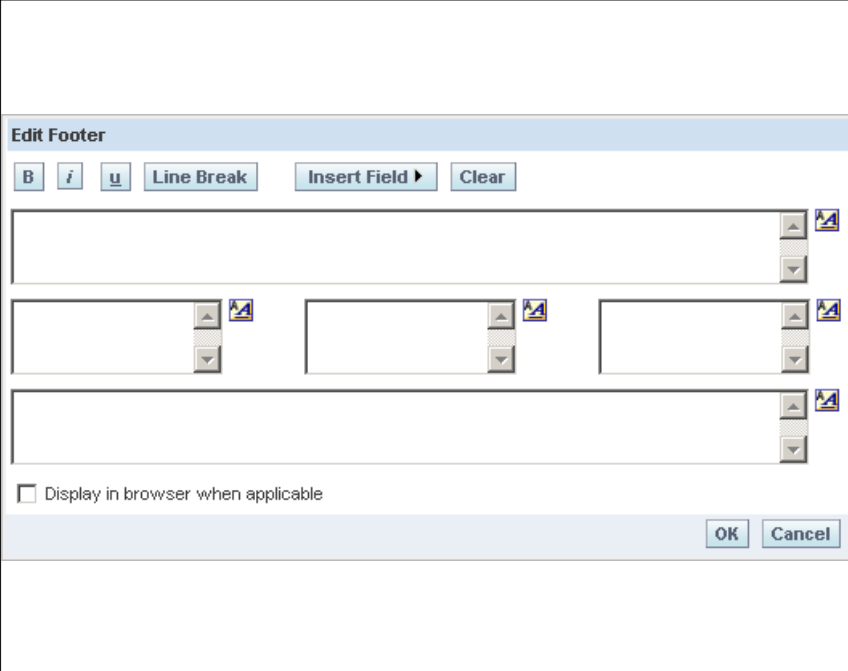
Include Header	Select this option to include a header.
Include Footer	Select this option to include a footer.

4. Click the **Edit** button next to the Header or the Footer. The Edit Header (**Figure 27**) and Edit Footer (**Figure 29**) dialog box is displayed. These dialog boxes are used to cosmetically format the header and footer.

Figure 27. Edit Header dialog box

5. In the Edit Font Area, (**Figure 28**) make a selection if applicable. The selections include **B** for bold, **I** to initialize, **U** to underline, **Line Break** to insert a blank line. The **Insert field** is available with values `Saved Name`, `Author Name`, `Date`, `Time`, `Page No`, and `Image`
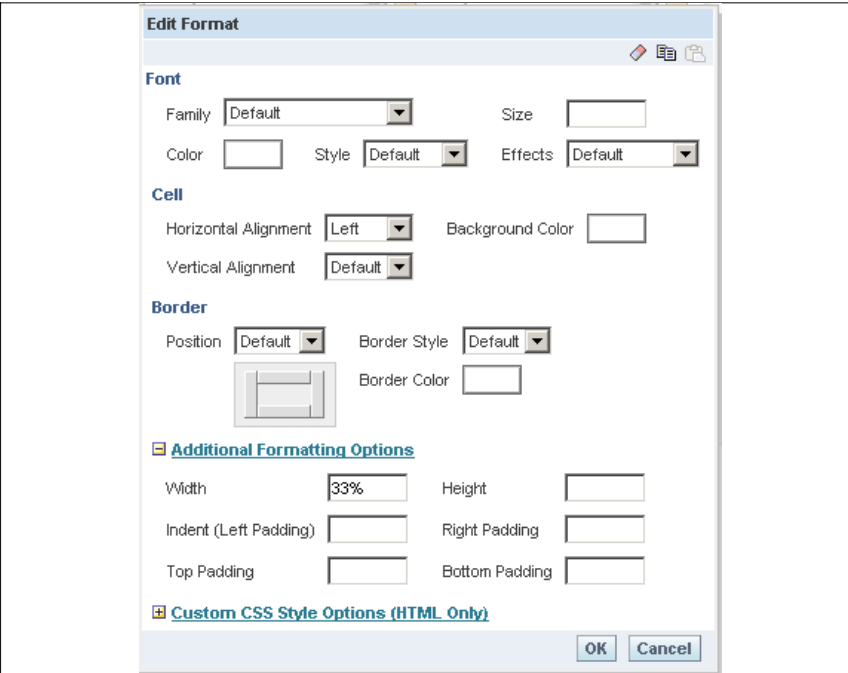
Figure 28. Font Area

Figure 29. Edit Footer dialog box

6. Click the Editing icon . The Edit Format dialog box (**Figure 30**) is displayed.

Figure 30. Edit Format dialog box

7. Complete the fields on the Edit Format dialog box as follows:

Cell

Horizontal Alignment	To change the horizontal alignment of the section, select data from the drop-down list. The valid values are as follows:
Horizontal Alignment Valid Values	**Usage Notes**
Left	Left justifies the data. This is the most common justification for text data.
Right	Right justifies the data. The is the most common justification for number data.
Center	Centers the data.
Default	Retains the default data alignment.

Verticle Alignment	This option defaults to `Default`. To change the verticle alignment of the section, select data from the drop-down list. The valid values are as follows:
Vertical Alignment Valid Values	**Usage Notes**
Top	Aligns the data to the top.
Bottom	Aligns the data to the bottom.
Center	Aligns the data to the center.
Default	Retains the default data alignment.

Background Color	This option changes the color of the section. Click in the block and the color selection is displayed. Select the applicable color from the chart.

Border

Position	This option defaults to `Default`. To change the border position in the section, select data from the drop-down list. The valid values are `None`, `All`, and `Custom`. This option is interactive with the **Border Style** is selected.
Border Style	This option defaults to `Default`. To change the border position in the section, select data from the drop-down list. The valid values are `Single`, `Double`, and `Thick`. As these options are selected, the **Border Style** becomes interactive. Select or deselect a custom boarder by clicking the top, bottom, left , and right boarder near the Position drop-down list.
Border Color	This option changes the color of the border. Click in the block and the color selection is displayed. Select the applicable color from the chart.

8. Click the **+** next to Additional Formatting Options to expand the window for additional formatting options.

Additional Formatting Options

Width	This option sets the width of the section.
Height	This option sets the height of the section.
Indent (Left Padding)	This option indents to include a space on the left hand side of the section.

Right Padding	This option indents to include a space on the right hand side of the section.
Top Padding	This option includes a space on the top of the section.
Bottom Padding	This option includes a space on the bottom of the section.

9. Click the **+** next to Custom CSS Style Options (HTML Only) to expand the window for additional style options. The advance style formatting options are for use by users who know how to work with cascading style sheet.

Use Custom CSS Style	Enter the HTML style as applicable.
Use Custom CSS Class	Enter the HTML custom class as applicable.

10. Click **OK** to save the information.

<div align="center">**OR**</div>

Click **Cancel** to clear the options selected and exit the page.

To use the page option on the Dashboard Editor:

This option allows the user to view a page from the Dashboard Editor page (**Figure 2**).
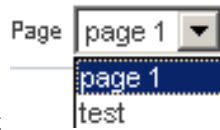
1. Click the **Page** drop-down list   to view pages created.

2. Select a page name to display that page in the Dashboard Editor.

Page Options

Saved selections allow users to view dashboard pages with their most frequently used or favorite choices for filters and prompts selected, without the need to make choices manually for prompts and filters that appear on the dashboard. Users can save multiple view selections with different combinations of prompt and filter choices, and switch between them.

Multiple customized versions of a reusable dashboard can also be created using **Saved Selections**, and assigned to appropriate user groups. Users with the appropriate permissions can perform the following tasks to create, save, and assign view selections:

- Save various combinations of choices for filters, and prompts as view selections, for their personal use or use by others.

- Specify which saved selection is the default, view, for their personal use or use by others.

For users with the appropriate permissions, a **Page Options** button appears on the dashboard that replaces the Dashboard Editor link. (Access to the Dashboard Editor is one of the selections available from the **Page Options** menu.) For additional information on Edit Dashboard refer to <u>Edit a Dashboard</u>.

1. Click the **Page Options** button. The choices available depend on the users permissions. The **Edit Dashboard** options is discussed in Edit a Dashboard.
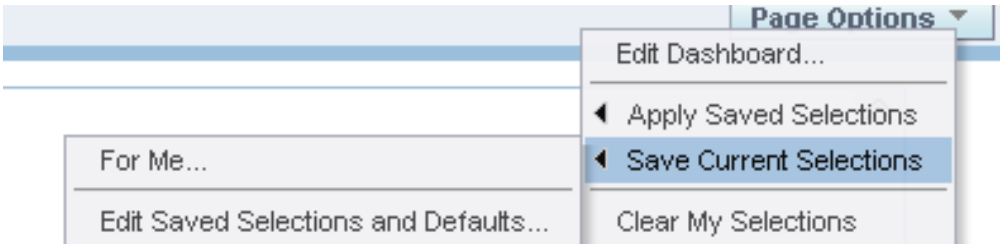

Figure 31. Page Options menu drop-down list

To save a selections for your personal use or for use by others:

2. Choose **Save Current Selections** option **For Me** to save the selection for your personal use. The Save Current Selections page (**Figure 32**) is displayed.

Figure 32. Save Current Selections - For Me page

3. Complete the fields as follows:

Name	Specify a name for the Saved Selection.
Make this my default for this page	Check this box to set the name as a default page.

4. Click **OK** to save the information or click **Cancel** to return to the Page Options menu (**Figure 31**).
   OR

Choose **Save Current Selections** option for **Edit Saved Selections and Defaults**. The Edit Saved Selections and Defaults page (**Figure 33**) is displayed.
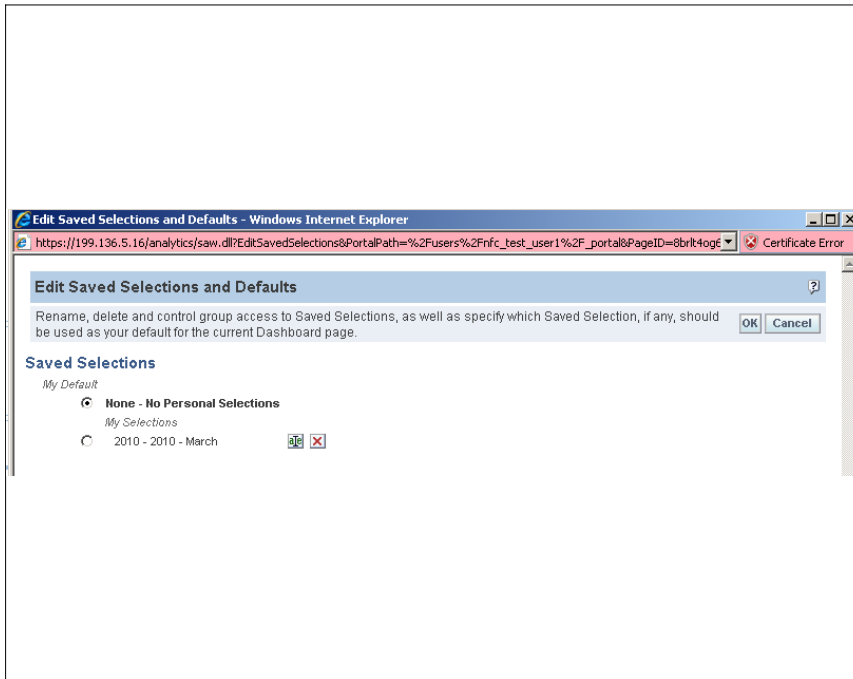

Figure 33. Edit Saved Selections and Defaults page

5. Click the radio button next to any Saved Selection to assign it as your default selection. The default selection is shown in bold type.

6. Click **OK** to save the information or click **Cancel** to return to the Page Options menu (**Figure 31**).

View a Dashboard

Use the steps below to view a dashboard:

1. Log in to Oracle Business Intelligence (BI). For more information refer to **Accessing BI**.

2. Click the name of the dashboard at the top of the page. The dashboard content appears (**Figure 6**).

Navigate to a Dashboard Page

Use the steps below to navigate to a dashboard.

1. Log in to Oracle Business Intelligence (BI). For more information refer to **Accessing BI**.

2. Navigate to a dashboard.

3. Click a dashboard page tab at the top of the page. The dashboard content appears (**Figure 6**). If no content has been added, an empty dashboard notification message appears (**Figure 4**).

Keyboard Shortcuts

Use the following keyboard shortcuts to navigate within a dashboard:

1. Log in to Oracle Business Intelligence (BI). For more information refer to **Accessing BI**.

2. Navigate to a dashboard. Use the keyboard shortcuts below to navigate with the dashboard:

Keyboard Shortcuts	Result
CTRL + SHIFT + F2	Navigates to the first dashboard listed on the page. This is usually your personal dashboard, named **My Dashboard**.
CTRL + SHIFT + F3	Navigates to the first page in the current dashboard.
CTRL + SHIFT + I	Navigates to the next selection of content in the current dashboard. This shortcut navigates first from left to right, and then down.
CTRL + SHIFT + U	Navigates to the previous section of content in the current in the current dashboard. This shortcut navigates first from right to left, and then up.
CTRL + SHIFT + F8	Navigates to the next item within a section of content. If the section is aligned horizontally, this shortcut navigates from the left to right.
CTRL + SHIFT + F7	Navigates to the previous item within a section of content. If the section is align horizontally, this shortcut navigates from right to left.

My Dashboard

My Dashboard allows authorized users to view/create/edit dashboards, access and utilize More Products, and view My Account. This section will discuss options on My Dashboard.
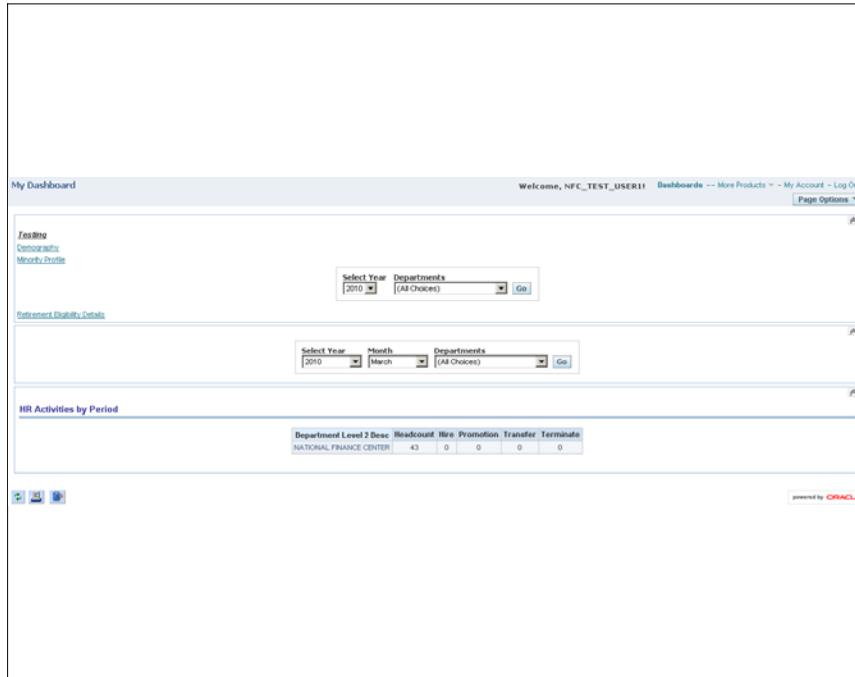
To view and edit More Products.

Figure 34. My Dashboard page

1. Click **More Products** link at the top of the page. The following are 4 options that are available when More Products is selected:

    BI Publisher

    BI Delivers

    Marketing

    Disconnect Analytics

BI Publisher

Oracle BI Publisher creates highly formatted, printable reports. BI Publisher is integrated with BI , and the user accesses BI Publisher from the Oracle BI Answers, Delivers, and Interactive Dashboards applications. BI Publisher reports are built directly against a subject area available through the BI Server, or reports can be based on an Answers request. BI Publisher reports can be added to Dashboard pages. BI Publisher and BI integration also provides single sign-on capability so that when users log into the BI, they are also simultaneously logged into the BI Publisher application.

If using BI Publisher, the user can run, view, and interact with an BI Publisher report in a dashboard page. When included in a dashboard page, BI publisher toolbar offers the option to select a layout

template, change the BI Publisher report's output format, export the BI report, send the BI Publisher report to an available destination (printer, fax, email, or FTP), schedule the BI Publisher report, and analyze the data.

A dashboard page can only contain on BI Publisher report and cannot be created or modified in Answers, used in BI Delivers, or saved in BI Briefing Books. The Add to Briefing Books and printer buttons are disabled for a dashboard page that displays an BI Publisher report.

1. Select **BI Publisher**. The More Products - BI Publisher application appears in a new browser window. This option must be configured before an agency can take advantage of this option.

BI Delivers

Oracle BI Delivers is the interface used to create alerts based on analytics results; however, the Agency/Department must be licensed. The Delivers option is used to detect specific results, and immediately notify the appropriate person or group through the Web, wireless, and mobile communication channels.

This section describes Oracle BI Delivers, provides information about how it works, and explains how to control access to Oracle BI Delivers.

Oracle BI Delivers allows the user to create unique form of information insurance, where any information-based problem or opportunity can be detected, and the appropriate person immediately notified. iBots are software-based agents driven by schedule or events that can access, filter, and performs analytics on data based upon defined criteria. iBots provide proactive delivery of real-time, personalized, and actionable intelligence throughout the business network.

The users can create their own iBot if they have the appropriate permissions and responsibilities.

The user can specify account information and preferences using the **My Account** link (available form BI Answers, from BI Delivers, and from BI Interactive Dashboards).

The following procedures explain how to access Oracle BI Delivers.

2. Select **Delivers**. The More Products - Delivers- Start page (**Figure 35**) is displayed. The Start page has two main areas:

   • Selection pane - The selection pane is located on the left side of the page. It displays Delivers content saved in the Presentation Catalog, such as personal and share iBots.

   • Workspace - The workspace is located to the right of the selection pane. It initially displays the iBot links to create and manage iBots.

When a selection is made from the selection pane, such as clicking a saved iBot, the selection appears in the workspace. When the iBot is clicked in the workspace, the workspace displays tabs for working with the iBot. The tabs will not appear for iBots selected from the Shared iBots folder, unless the user is a Web Administrator and has the proper permissions.
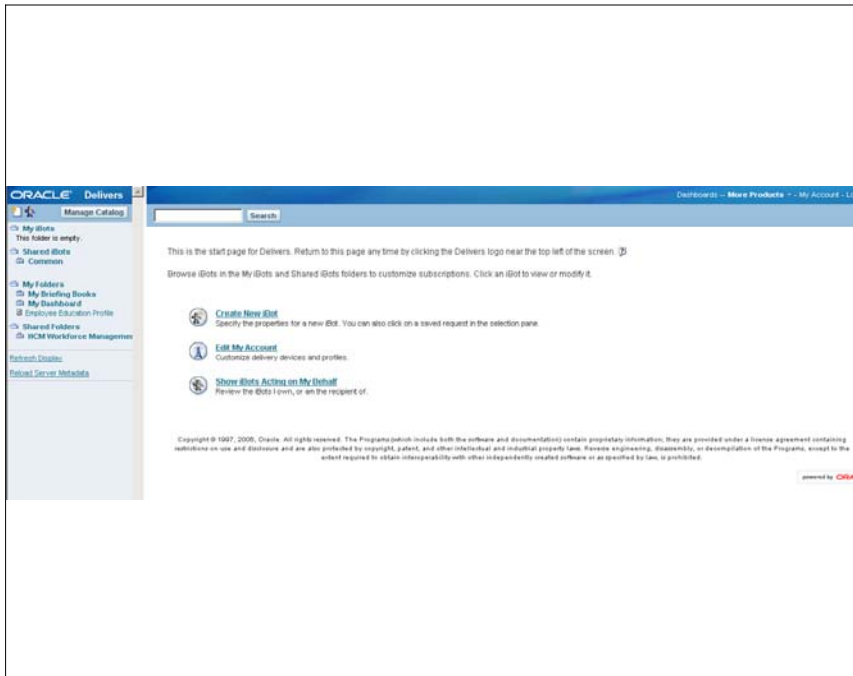
Figure 35. More Products – Delivers Start page

BI Delivers contains various features to be accomplished. The following are the features located in the BI Delivers option:

> **Manage Catalog**
>
> **Create New iBot**
>
> **Edit My Account**
>
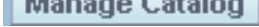> **Show iBots Acting on My Behalf**

Manage Catalog

The Manage Catalog feature is used to edit, rename, set permissions for, and delete folders and items.

The Presentation Catalog holds the content created with BI Answers, BI Delivers, BI Interactive Dashboards, and other Analytics-based applications. The content is organized into folders that are either shared or personal. The types of content that can be stored in the catalog include:

- Requests and Results from BI Answers

- Items created using the BI Interactive Dashboard Editor

  - HTML content

  - Plain text

  - Links to other images

  - Documents

  - Sites

Depending on the security settings specified by the site's administrator or the user and the Analytic products, is what the user can see in the Manage Catalog feature.

To manage a catalog:

1. Click the **Manage Catalog** button. Manage Catalog . The BI Delivers - Manage Catalog page (**Figure 36**) is displayed.
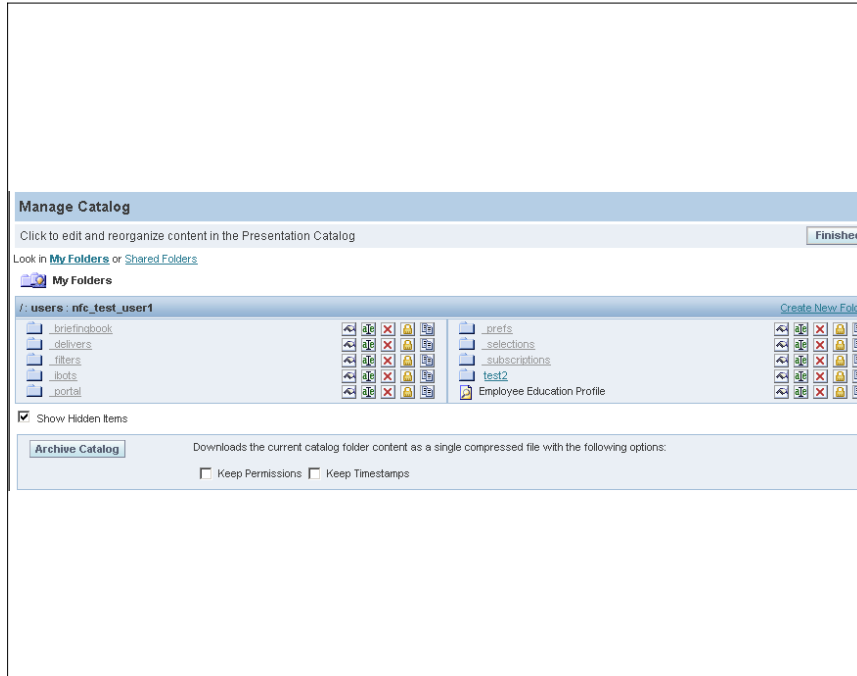
Figure 36. BI Delivers - Manage Catalog page

To work with properties of an item or a folder in a Manage Catalog page:

1. Click the **Item/Folder Properties** icon next to the item or folder. The BI Delivers - Manage Catalog - Item or Folder Properties page (**Figure 37**) is displayed.

Note: If the icon is selected next to an Item, the Item Properties page will display. If the icon is selected next to the Folder Properties, the Folder Properties page will display. The same fields are available for each.
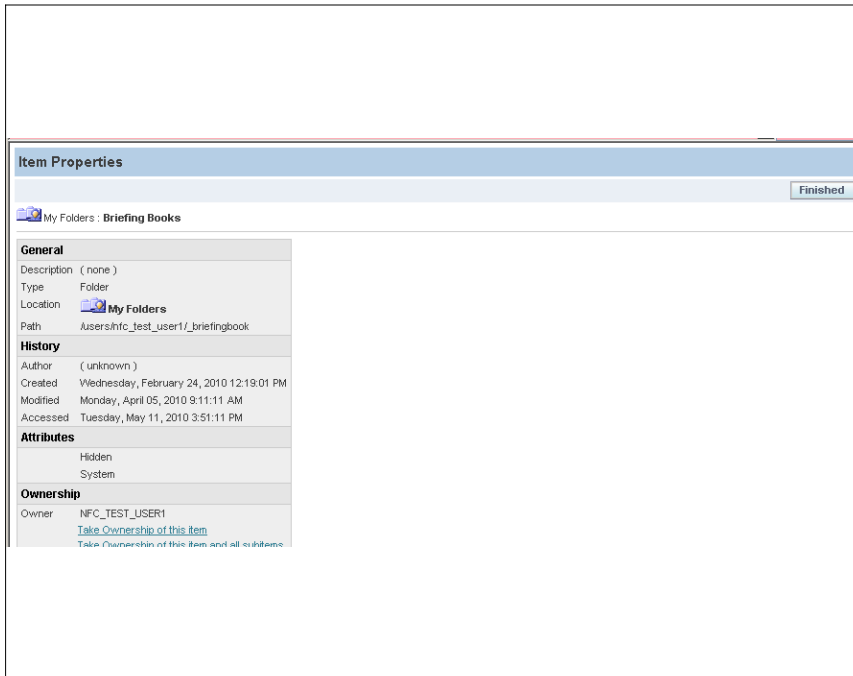
Figure 37. BI Delivers - Manage Catalog - Item Properties page

The Item Properties page allows the user to view general information about the folder or item, such as its type, location and path, as well as historical usage information, ownership, other attributes, and an XML button and URL that are used to build an feed to the folder.

If the user has the appropriate authority:

2. Click the ***Take Ownership of this Item*** link to take ownership of the item or folder.

   OR

   Click the ***Take Ownership of this Item or Subitem*** link to take ownership of an item or subitem.

   To assign or change permissions to an item:

Users with the appropriate permissions can delete existing permissions or assign new permissions to an item or a folder. Before permissions can be assigned, they must be set up in the BI Presentation Server.

1. Click the **Manage Catalog** button. Manage Catalog The BI Delivers - Manage Catalog page (**Figure 36**) is displayed.

Figure 38. BI Delivers - Manage Catalog page

1. Click the **Change Permissions** icon next to the item or folder. The BI Delivers - Manage Catalog - Change Item Permissions page (**Figure 39**) is displayed.
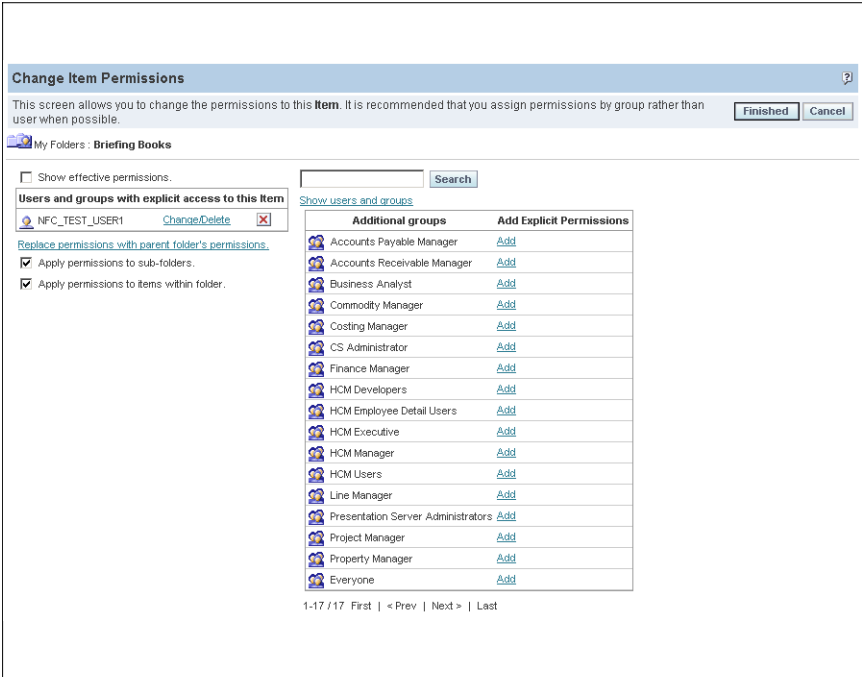
Figure 39. BI Delivers - Manage Catalog - Change Item Permissions page

2. Click the ***Add*** link next to the permission to be added. The added values will be added to the left side of the page (**Figure 40**).

> OR

Click the **Delete** icon to remove permissions from an existing permission.

Figure 40. Added Permissions page

3. Click **Finished** to complete the action. The permissions will be added.

                OR

Click **Cancel** to return to the Manage Catalog page (**Figure 38**) with no additions or changes.

To archive a folder or the catalog:

Users with the appropriate permissions can archive a specific folder or the entire presentation catalog. When creating the archive, the user can choose to keep the permissions and timestamps for the items and folders.

Only an administrator can unarchive and archived a presentation folder or catalog.

1. Click the **Manage Catalog** button . The BI Delivers - Manage Catalog page (**Figure 36**) is displayed.

Figure 41. BI Delivers - Manage Catalog page

To archive the whole presentation catalog, locate the archive catalog section of the page. To archive a specific folder, browse to the folder that should be archived.

2. Complete the fields on the Manage Catalog page:

Keep Permissions	Check this box to archive the permissions that are assigned to each item within the presentation catalog or folder. If this option is not selected, the archiving process will not include any permissions. Upon unarchivng, the system will assign the parent folder's permissions to all of the items and folders.
Keep Timestamp	Check this box to archive the timestamps that are assigned to the item and folder that are being archived. If this options is not selected, the archiving process will not include timestamp information. Upon unarchiving, the system will apply a timestamp indicating the time at which the item or folder was unarchived.

3. Click the **Archive Catalog**. The File Download page appears. For more information refer to Downloading Results .

4. Click **Save**. The Save As page appears.

5. Specify the location to archive the file.

6. Click **Save**.

To edit the name and description of an object in the Presentation Catalog:

Users with the appropriate permissions can use the Manage Catalog feature to edit the names and descriptions of objects in the BI Presentation Catalog. If the user renames and object, they can maintain references to the previous name to prevent possible broken links. This creates a shortcut to the renamed object using the previous name.
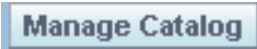
1. Click the **Manage Catalog** button . The BI Delivers - Manage Catalog page (**Figure 42**) is displayed.

Figure 42. BI Delivers - Manage Catalog page

1. Click the **Edit Name and Description** icon ![icon] next to the item or folder. The BI Delivers - Manage Catalog -Edit Item Name and Description page (**Figure 43**) is displayed.

Figure 43. BI Delivers - Manage Catalog - Edit Item Name and Description page

2. Complete the fields as follows:

Name	Type a new name for the object.
Preserve Reference to Old Name of this Item	Check this box to maintain references to the object that use the previous name. This option creates a shortcut with the old name, pointing to the renamed object.
Description	Type and optional description

3. Click the **Update** button to rename.

                OR

Click the **Cancel** button to return to the Manage Catalog page (**Figure 42**) with no changes.

To copy or move a folder or item:

Users with the appropriate permissions can choose to copy and item to a new location.

1. Click the **Manage Catalog** button ![Manage Catalog]. The BI Delivers - Manage Catalog page (**Figure 44**) is displayed.

Data Warehouse

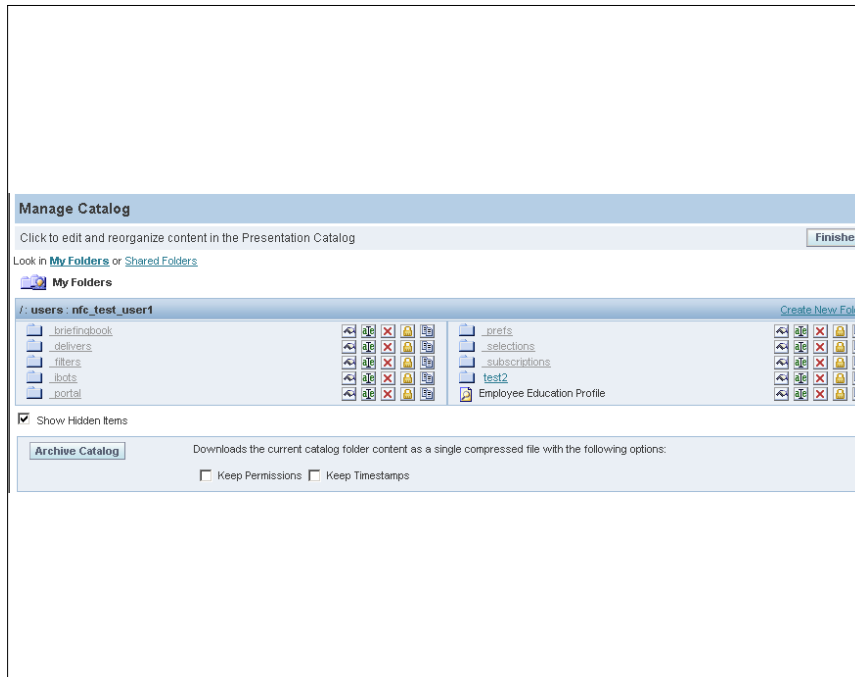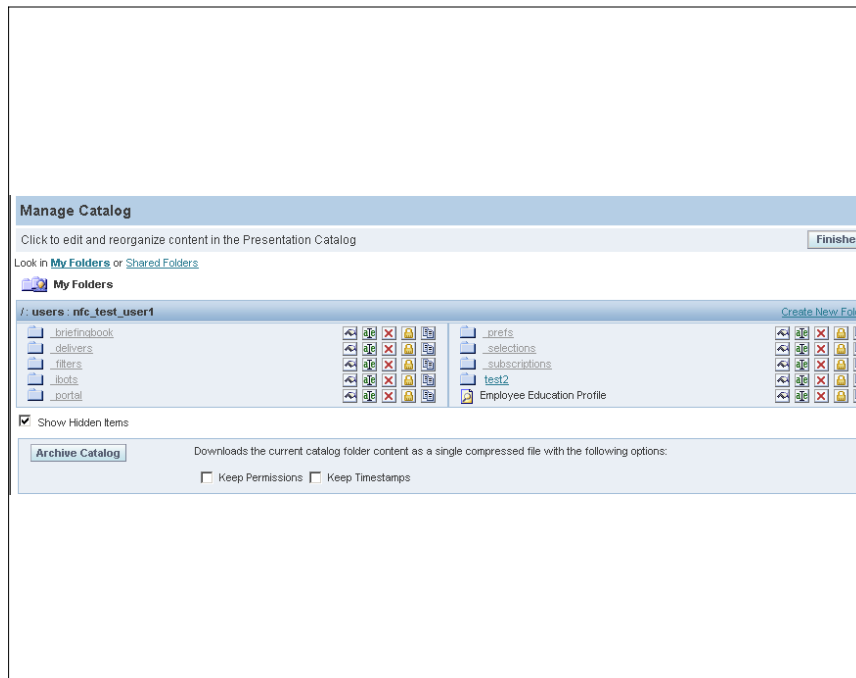**Figure 44. BI Delivers - Manage Catalog page**

1. Click the **Copy/Move** icon next to the item or folder. The BI Delivers - Manage Catalog - Copy/Move Item page (**Figure 45**) is displayed.
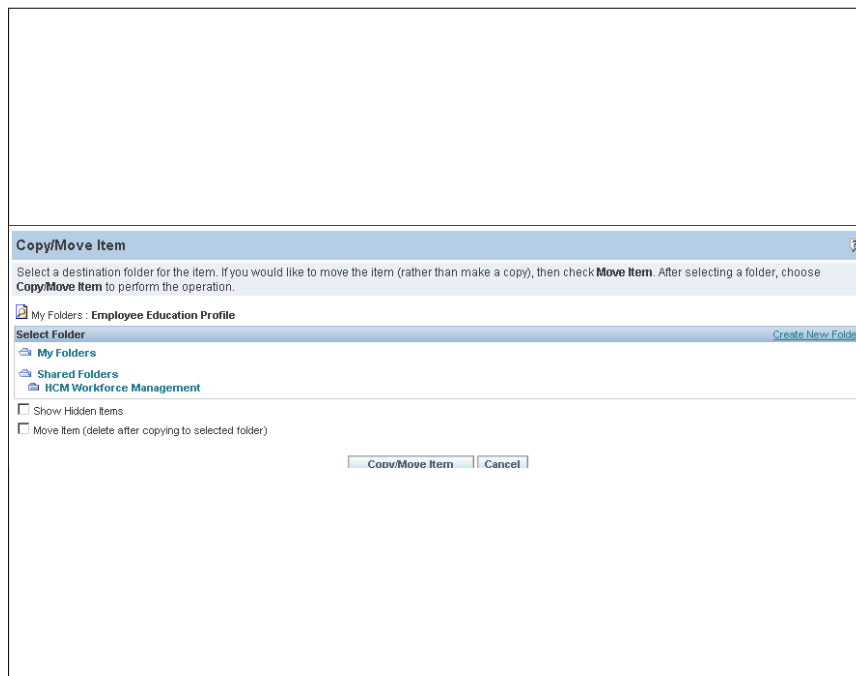
Figure 45. BI Delivers – Manage Catalog - Copy/Move page

2. Click the folder to be copied or move the folder or item.

3. Select the **Move Item** check box.

Note: When a folder or item is copied to a new location, it also remains in the original location. Modifying one instance of the folder or item does not modify both instances of the folder or item.

4. Click the **Copy/Move Item** button to move the selected item.

                    OR

    Click **Cancel** to return to the Manage Catalog page (**Figure 46**) with no changes.

Create New iBot

Note: This function will be implemented in a later phase.

5. Click the **Create New iBot** link on the Dashboard Editor page (**Figure 35**). The More Products - Delivers - Create New iBot -Overview page (**Figure 47**) with the default values displayed. This page summarizes the setting for the current iBot. Each tab/link is used to edit the aspect of the iBot. Select the tabs or click the links to view the pages for each selection.
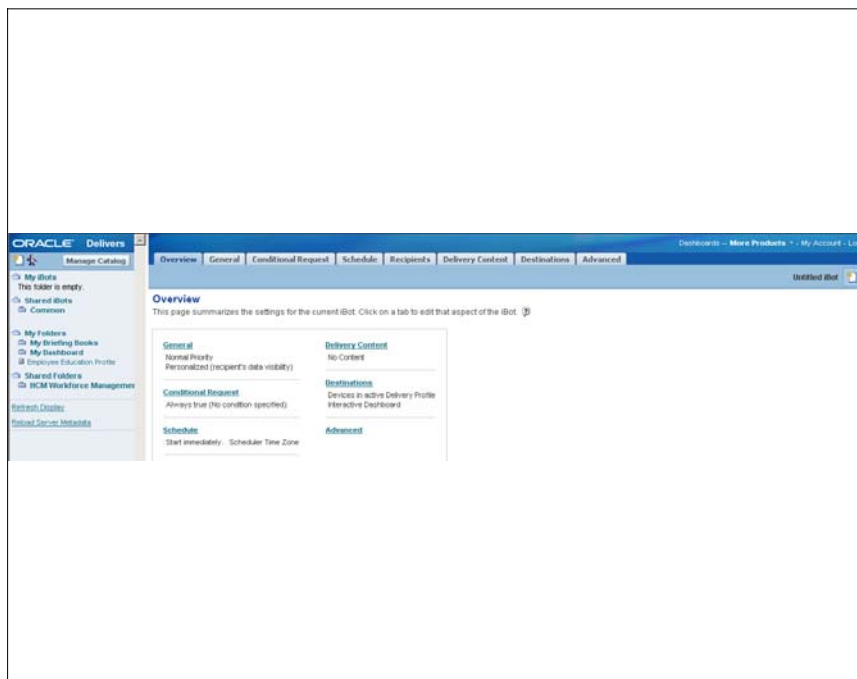
Figure 47. More Products - Delivers - Create New iBot - Overview page

To complete the General tab:

6. Click the **General** tab. The More Products - Delivers - Create New iBot - General page (**Figure 48**) is displayed. The General tab is used to specify the priority of the iBot and how to send the delivery content.
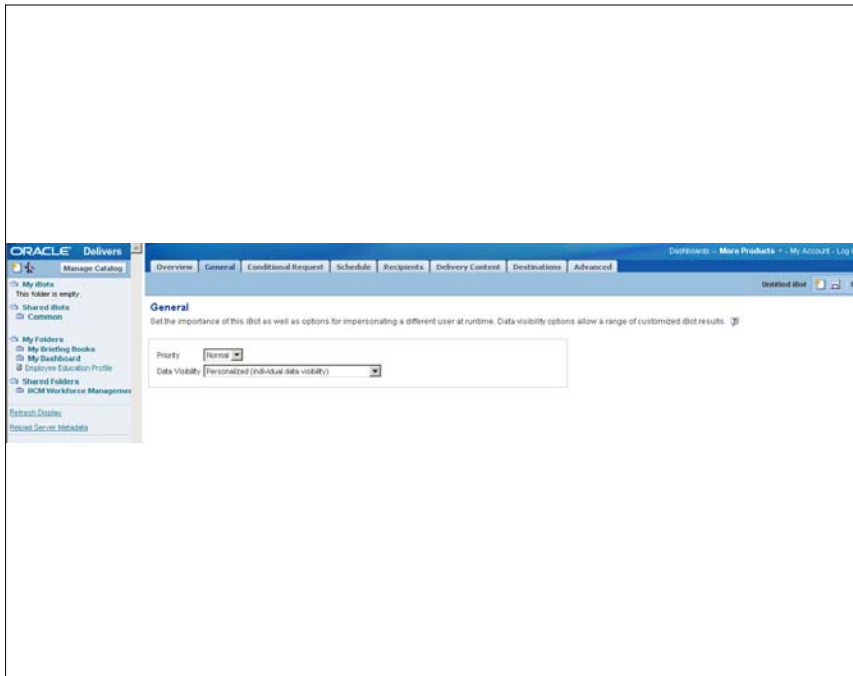
Figure 48. More Products - Delivers - Create New iBot - General page

7. Complete the fields as follows:

Priority	Select the importance of the iBot. The valid values are **High**, **Normal** and **Low**.

Data Visibility	This field is used to impersonating a different user at runtime. The data visibility option allows a range of customized iBot results. Select the applicable choice from the drop-down list. The valid values are as follows:
Data Visibility	**Definition**
Personalized (individual data visibility)	This option uses the data visibility of each recipient to customize iBot delivery content for each recipient. This setting does not use the Run As field.
Not Personalized (use the Run As user's data visibility)	This option sends the iBot delivery content to the specified recipients. All users receive the same content as if they were the user specified in the Run As field. This option is available only to users defined as Web Administrators with at least one of the following privileges set in BI Web Administrator. ■ Publish iBot for subscription ■ Deliver iBots to specific or dynamically determined users
Not Personalized (use iBot owner's data visibility)	This option sends the iBots delivery content to the specified recipient using the data visibility of the user who created the iBot. All users receive the same content as the iBot owner. This option is available to users that have at least one of the privileges listed previously, but is not required to be defined as a BI Web Administrator.

To complete the Conditional Request tab:

8. Select the ***Conditional Request*** tab. The More Products - Delivers - Create New iBot - Conditional Request page (**Figure 49**) is displayed. Select a request which will trigger the current iBot. The request may be refined further by creating subquery filters. The iBot is considered triggered if the conditional request returns one or more rows.
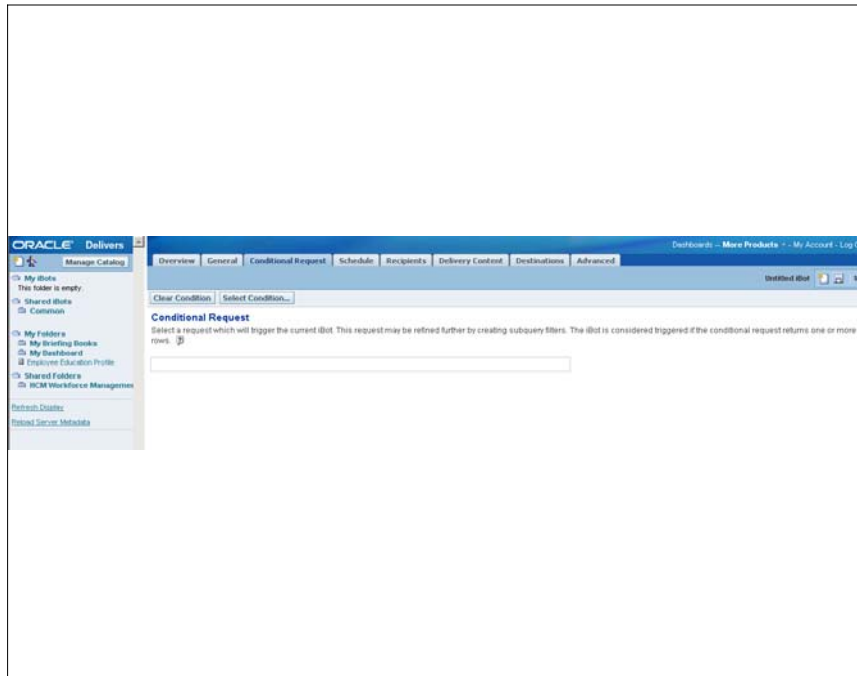
Figure 49. More Products - Delivers - Create New iBot - Conditional Request page

9. Click **Select Condition**. The Choose Request page (**Figure 50**) is displayed.
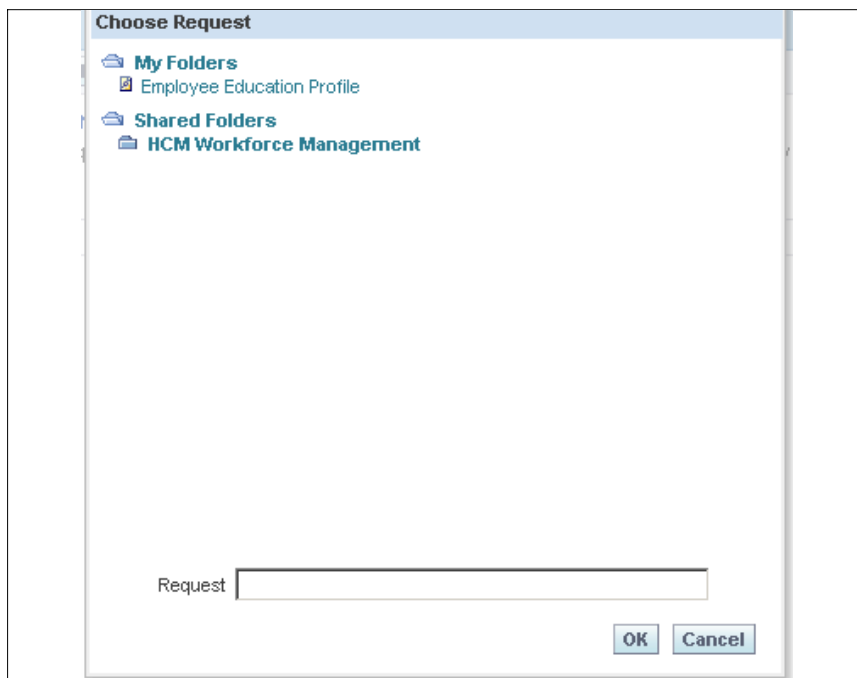
Figure 50. Choose Request page

10. Complete the fields as follows:

Request	The user can chain requests together to create complex conditional logic. Complete the dialog box.

11. Click **OK** to complete the page.

OR

Click **Cancel** to select another tab.

To complete the Schedule tab:

12. Select the *Schedule* tab. The More Products - Delivers - Create New iBot - Schedule page (**Figure 51**) is displayed. Use the Schedule tab to determine when the iBot runs, how often it runs, and when to discontinue running it.

   iBots can execute based on a specified schedule, defined start date and time, a recurrence schedule, and an ending date.

   A nonscheduled iBot can also be created. This is useful when the user wants to create and iBot that runs only as part of an iBot chain, or an iBot that is initiated by an external process.

Figure 51. More Products - Delivers - Create New iBot - Schedule page

To create an iBot with no schedule:

Set Schedule	Remove the check mark to create an iBot with no schedule.

13. Click **Save**.

To start the iBot now:

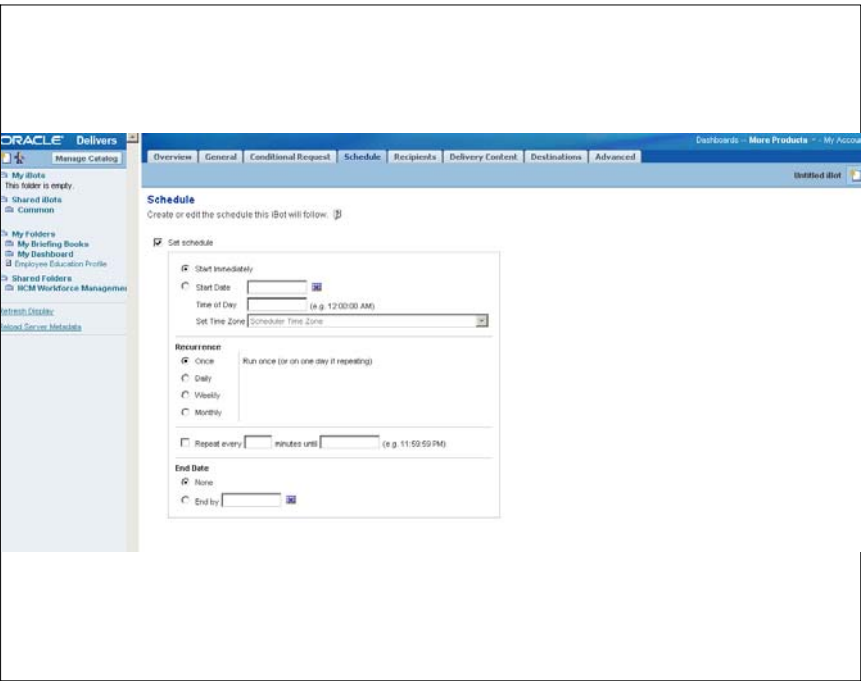|	
Set Schedule	Check this radio button.
Start Immediately	Check this radio button.
Start Date	Enter the start date to start the iBot at a specified date or select a date from the calendar icon. The date specified is determined by the Time Zone selected. The location (time zone) of the machine where the BI Scheduler is located is not relevant.
Time of Day	Enter a starting time of the day, if applicable.
Time Zone	Select the time zone from the drop-down list to determine when the iBot starts. The times specified are determined by the time zone selected. The location (time zone) of the machine where the BI Scheduler is located is not relevant.
Recurrence	Check the applicable radio button. This field works together with the Repeat Every field. ■ Once - Run once (or on 1 day if repeating). This is the default option. ■ Daily - Specify the daily interval, such as every 3 days. ■ Weekly - Specify the weekly interval, such as 1 week. Select the days of the week when the iBot should run, such as Monday through Friday. ■ Monthly - Specify either the day of the month or the day occurrence, such as the first Tuesday. Select the desired months.
Repeat Every	Check this box and enter the applicable information based on the Recurrence selected.
Minutes until	When the Repeat Every field is checked, enter the minutes if applicable.
End Date	None is the default option. Uncheck if applicable.
End by	Enter a date or select a date from the calendar icon. Enter information in this field only if the End Date is unchecked.

To complete the Recipients tab:

14. Select the *Recipients* tab. The More Products - Delivers - Create New iBot - Recipients page (**Figure 52**) is displayed. The Recipients tab is used to select the users and group to receive the deliver content of the iBot.

Note: If the user selects the option to allow the recipients to be determined from the results of a conditional request and choose to show only relevant rows to each user, BI Delivers assumes the results of the conditional request set as the delivery content in the Delivery Content tab. If the content has been set to something else in the Delivery Content tab (through clicking the Clear or Select Content buttons), a message appears. The message asks if the request is to update the delivery content, or **No** to retain the current delivery content. If **No**, the recipients will still be determined from the conditional request, but users will receive all content, and not just the content that pertains to them.
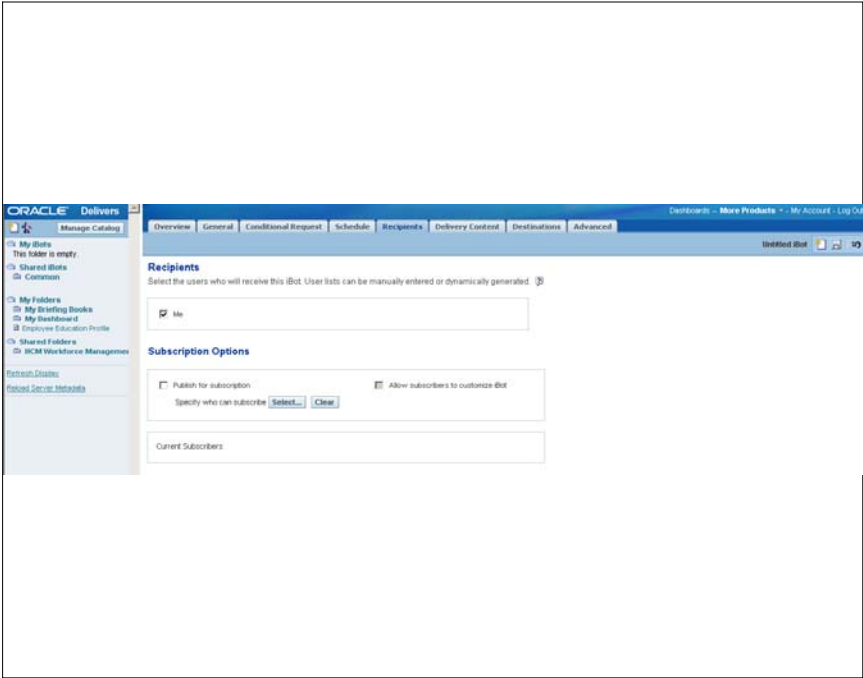
Figure 52. More Products - Delivers - Create New iBot - Recipients page

15. Complete the fields on the Recipients page as follows:

Recipients

Me	This box is checked as the default. The Me option sends the delivery content to the creator of the iBot.

Subscription Options

Publish for Subscription	Check this box to allow users to subscribe to the iBot. When this box is checked, the All Subscribers to customize iBot option is enabled.
	To disallow users from subscribing to the iBot, remove the check in the box. When this option is uncheck, any selected subscribers are disabled and the Allow Subscribers to Customers iBot is cleared and disabled.

16. Click the **Select** button to open the Select Subscribers dialog box (**Figure 53**) and specify the eligible users and groups. The user can only publish iBots that have content that can be shared.
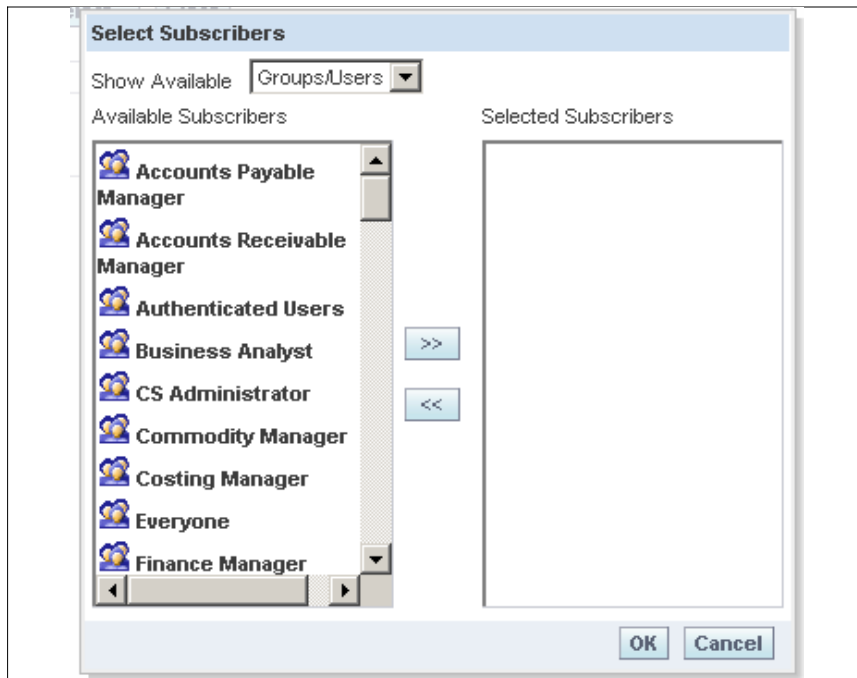
Figure 53. Select Subscribers dialog box

To use the Select Subscribers dialog box:

Show Available	Select the available subscribers from the drop-down list. The valid values are **Groups**, **Groups/Users**, and **Users**.

17. Select an Available Subscriber, and click the **>>** to move the selected subscriber into the list of Selected Subscribers (**Figure 54**). To select multiple Subscribers, hold down the **Shift** or **CTRL** keys and select an adjacent or non adjacent recipient.

18. To remove a recipient, click a user or group, and then click the **<<** button. Use the **Shift** or **CTRL** keys to select multiple groups or users.
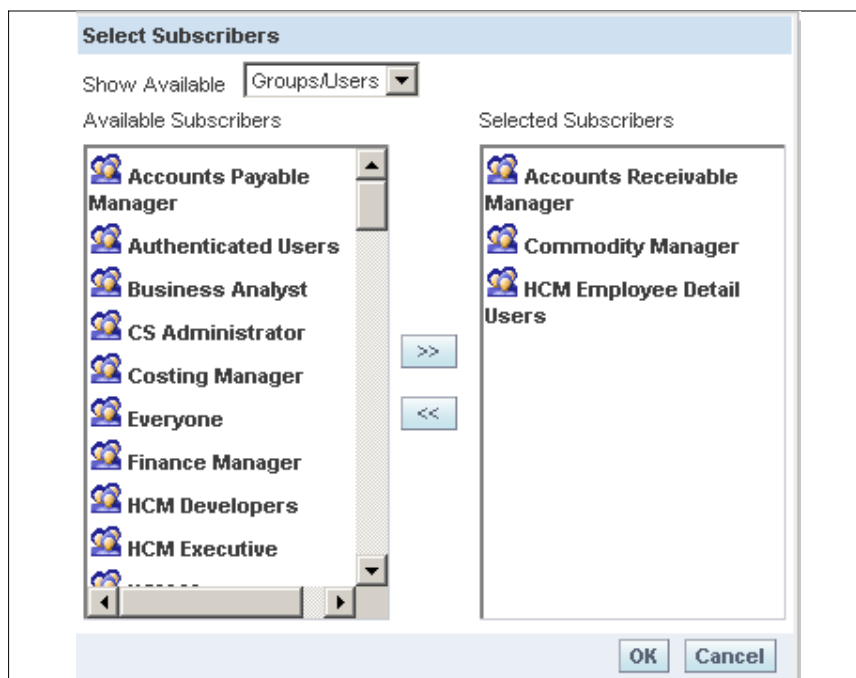
Figure 54. List of Selected Subscibers page

19. Click **OK**. This closes the Recipients Dialog box and returns to the Recipients page. The Selected Subscriber are shown on the Recipients page (**Figure 55**). When more than one subscriber is selected, move the cursor over the people icon to view the list of subscribers selected.

Figure 55. Recipients page with Selected Subscibers

20. Continue to complete the Recipients page:

Allow Subscribers to Customize iBot	This option enables subscribers to supply filter values for prompted filters for columns in an iBot and allows the subscriber to customize the iBot. This option is only available when the Publish for Subscription option is selected.

To complete the Delivery Content tab:

1. Click the *Delivery* tab. The More Products - Delivers - Create New iBot - Delivery Content page (**Figure 56**) is displayed. Use the Delivery Content page to specify the type of content to deliver with the iBot, such as dashboard page or a saved request. A delivery format can also be specified, such as HTML, PDF, XLS, CSV, or text.

    A short descriptive headline can be included with the content. The headline appears as the subject when the iBot is delivered. The user can add a text message to provide context for an iBot attachment. A headline or text message can be personalized by using a repository variable, a session variable, or a presentation variable.

Figure 56. More Products - Delivers - Create New iBot - Delivery Content page

2. Complete the fields as follows:

Headline	Enter a short, descriptive headline or enter a variable in a headline to appear as the iBot subject line. Enter in the headline text box a session variable, a repository variable, or a presentation variable using syntax in the following table:
Variable Type	**Syntax**
Repository	@{Variable_Name}
Session	@{NO_SESSION.Variable_Name}
Presentation	@{Variable_Name}

3. Click the **Select Content** button. The Choose Delivery Content page (**Figure 57**) is displayed. Select a content to activate the Send Content Field.
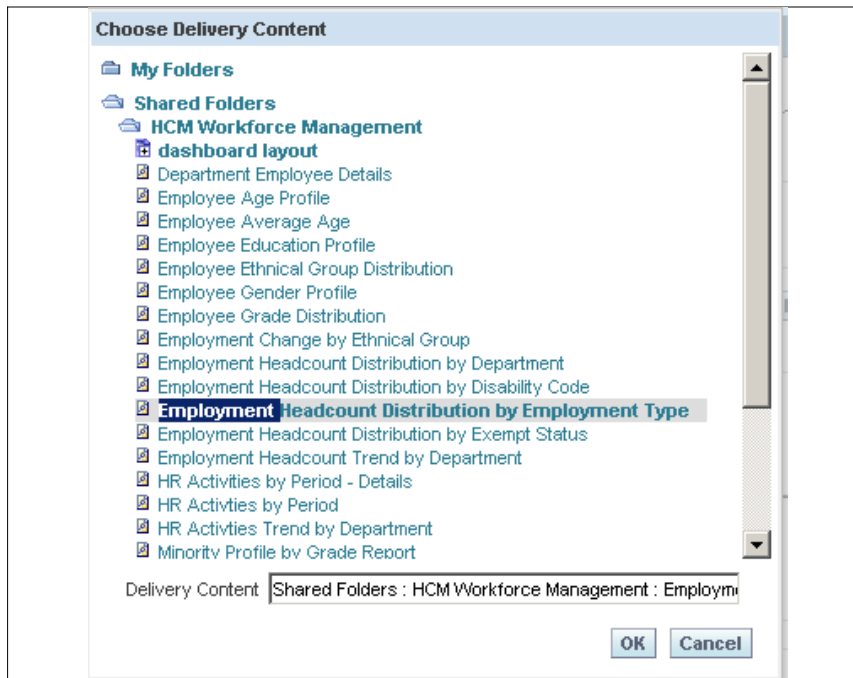
Figure 57. Choose Delivery Content page

4. Complete the field as follows:

Delivery Content	Specify the deliver content and double click to add the information. The following can be specified: ■ The results of the condition request. ■ A narrative text description of the conditional request (only displays when a condition request exists). ■ Dashboard pages from My Dashboard. ■ Dashboard pages from public (shared) dashboards. ■ Briefing Books. ■ Saved requests (shared and private). ■ Disconnected Application Dataset.

5. Click **OK** to add the Delivery Content information to the Delivery Content page (**Figure 56**).

     OR

Click **Cancel**. No information will be added to the Delivery Content page (**Figure 56**).

6. Continue to complete the Delivery Content page.

Send Content as	This field is activated when information on the Choose Delivery Content page is completed. The format option for included content depend upon the type of delivery content selected. Select a format from the drop-down list (not every type of content has all format options). The valid values are as follows:
Delivery Format Options	**Definition**
(Device default)	BI Delivers will use the device default to determine the content format.

Delivery Format Options	Definition
HTML	Delivery content will be send in line as HTML.
Attachment (HTML)	Delivery content will be sent as an HTML attachment.
Attachment (PDF)	Delivery content will be sent as a PDF attachment.
Excel	Delivery content will be sent as an XLS attachment.
Excel 2000	Delivery content will be sent as an XLS attachment.
Attachment (CSV data)	Delivery content will be sent as a Comma Separated Value (CSV) attachment.
Plain Text	Delivery content will be sent in plain text format.

If sent as attachment, include this text	Check this box to add a variable in a text message to provide context to the iBot attachment.
Deliver this message when no records are returned by the conditional request	Enter the text into the text box. or enter a variable in the text message for no iBot content. **Note:** Enter text to be delivered to recipient when there is no iBot to deliver to them. This might be all recipients, if the iBot is configured to run all requests as a specific user on the General page (**Figure 48**).

To complete the Destinations tab:

7. Click the *Destinations* tab. The More Products - Delivers - Create New iBot - Destinations page (**Figure 58**) is displayed. Use the Destinations tab to specify a range of desired devices and destinations for iBots.
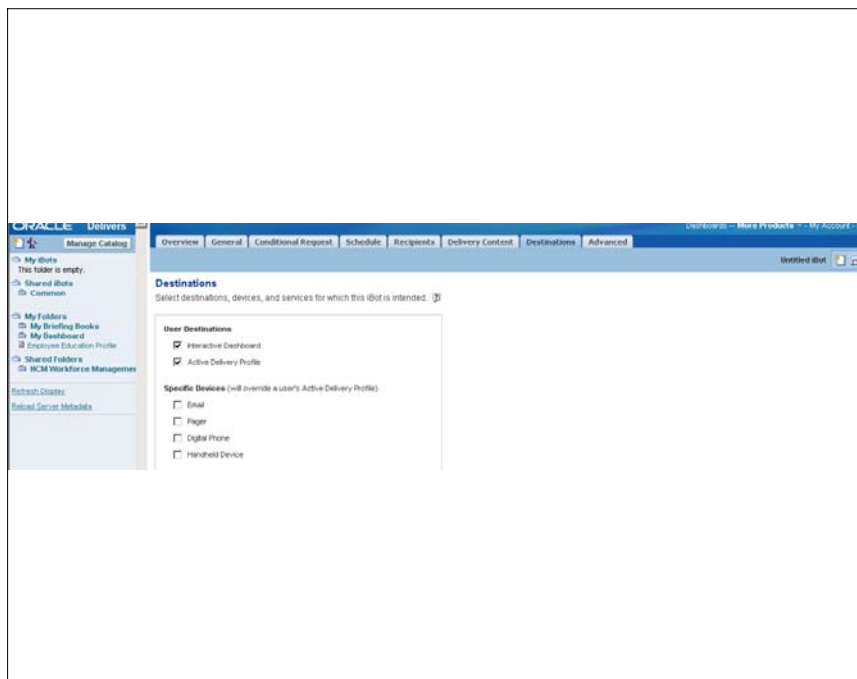

Figure 58. More Products - Delivers - Create New iBot - Destinations page

8. Complete the fields on the Destinations page as follows:

User Destinations

Interative Dashboard	Check this box. The Active iBot will appear in a Dashboard Alerts section as well as the on the Alerts! A link to this summary appears together with the application navigation links when new iBots are delivered. After these are cleared on the Alerts page, the alert link is removed.
Active Deliver Profile	Check this box to send and iBot to a specified device in the active delivery profile. The active delivery profile is configured through My Account page.

Specified Devices (will override a user's Active Delivery Profile)

If a specified devices is selected, the default device selected on the My Account page will override the devices set in the activity delivery profile for a user. Devices specified on this page act as additions to the active delivery profile.

Email	Check this box if applicable.
Pager	Check this box if applicable.
Digital Phone	Check this box if applicable.
Handheld Device	Check this box if applicable.

To complete the Advanced tab:

Use the Advanced tab to specify one or more actions to execute when the iBot completes. Actions will be executed on behalf of each user who is a recipient of the iBot. The default behavior for each iBot action can be changed. Actions include the executive of other iBots. custom scripts, custom Java programs or Workflows. Actions to execute either when iBot conditions are satisfied, or when no record are returned can also be specified.

BI Administrator has the necessary privileges to specify all of these actions. Users are not administrators, and can only specify the execution of other iBots action.

9. Click the ***Advanced*** tab. The More Products - Delivers - Create New iBot - Advanced page (**Figure 59**) is displayed.

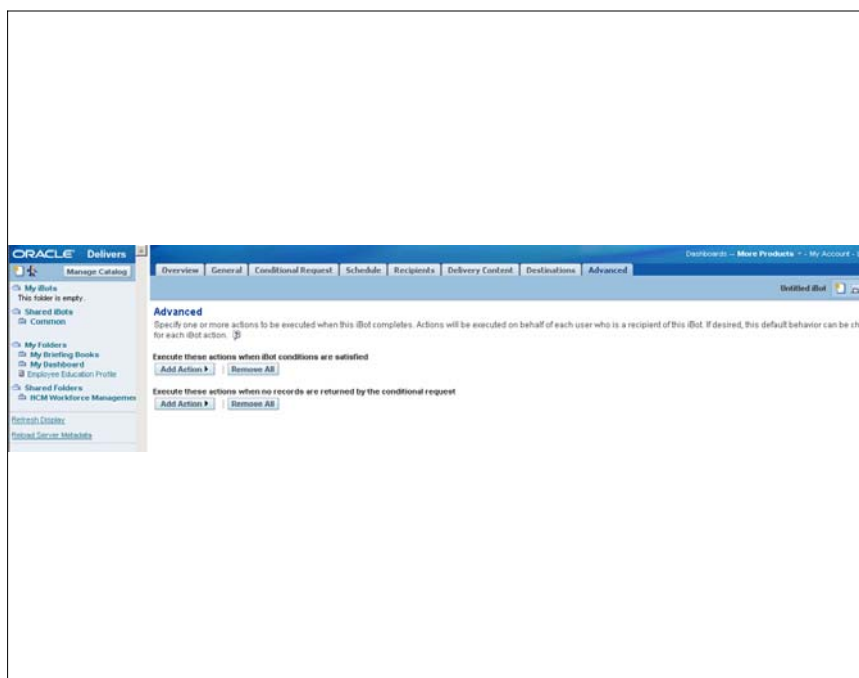**Figure 59. Advanced page**

10. Click the **Add Action** button to execute these actions when iBot conditions are satisfied.

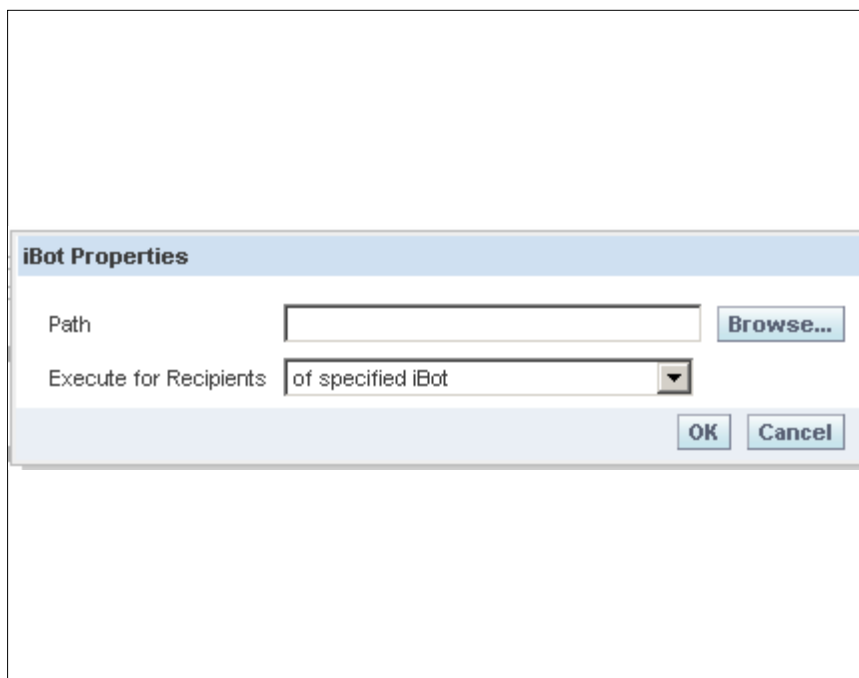11. Select **iBot**. The iBot Properties pop-up box (**Figure 60**) is displayed.

Figure 60. iBot Properties pop-up box

12. Enter details into the Path field or click the **Browse** button to display the Select iBot page. The Select iBot page (**Figure 61**) is displayed.

Figure 61. Select iBot page

13. Select the iBot to run.

14. Click **OK** to add the information to the iBot Properties (**Figure 60**) pop-up box.

    OR

    Click **Cancel** to return to the iBot Properties (**Figure 60**) .

Execute for Recipients	The field is the scope of recipients. Select data from the drop-down list. The valid values are as follows:

Note: When there are filters from originating iBots applied to subsequent iBots, filter values are generated by the conditional request specified at the Conditional Request tab (**Figure 49**)

15. Click **OK** to add the information to the Advanced page (**Figure 59**).

    OR

    Click **Cancel** to return to the Advanced page (**Figure 59**).

16. Click **Remove** to remove the Add Action information.

    To continue completing the Advanced page:

17. Click **Add Action** to execute on completion of an iBot.

18. Select **iBot**. The iBot Properties pop-up box (**Figure 62**) is displayed.

Figure 62. iBot Properties pop-up box

19. Enter details into the Path field or click the **Browse** button to display the Select iBot page. The Select iBot page (**Figure 63**) is displayed.
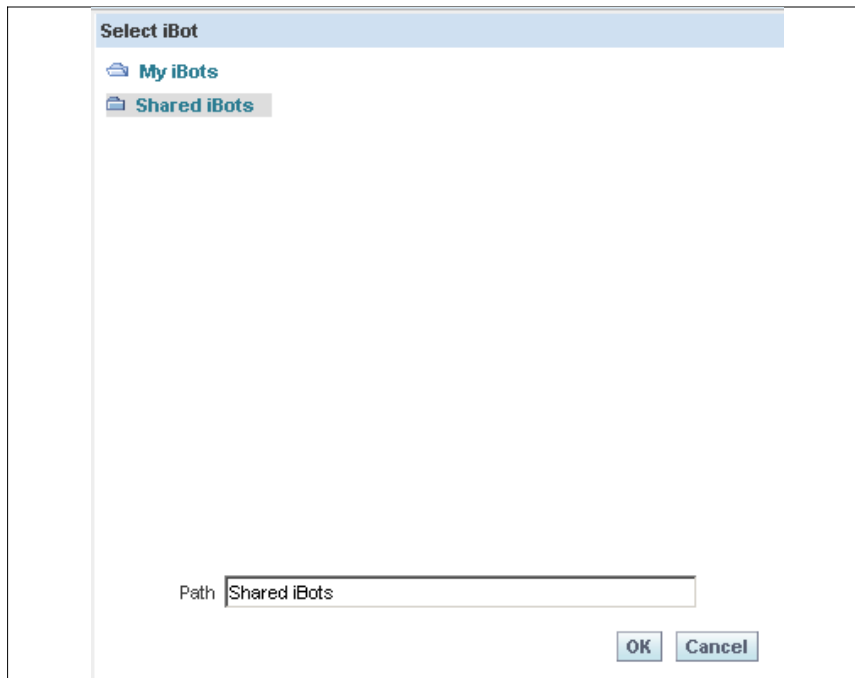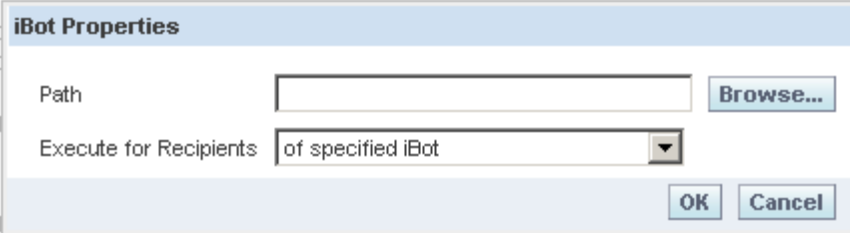

Figure 63. Select iBot page

20. Select the iBot to execute.

21. Click **OK** to add the information to the iBot Properties pop-up box (**Figure 62**).

<div align="center">OR</div>

Click **Cancel** to return to the iBot Properties (**Figure 62**) .

Execute for Recipients	The field is the scope of recipients. Select data from the drop-down list. The valid values are as follows:
Execute for Recipients Valid Values	**Description**
Of Specified iBot	Select this option to use the iBot referenced in this dialog.
Of Current iBot	Select this option to use the current iBot containing subsequent actions.
Of Both Specified and Current iBot	Select this option to use the union of both iBots.
Common to Specified and Current iBot	Select this option to use the intersection of both iBots.
Of Specified iBot, but not Current iBot	Select this option to use the referenced iBot and exclude recipients from the current iBot.

Note: When there are filters from originating iBots applied to subsequent iBots, filter values are generated by the conditional request specified at the Conditional Request tab (**Figure 49**)

22. Click **OK** to add the information to the Advanced page (**Figure 59**).

<div align="center">

OR

</div>

Click **Cancel** to return to the Advanced page (**Figure 59**).

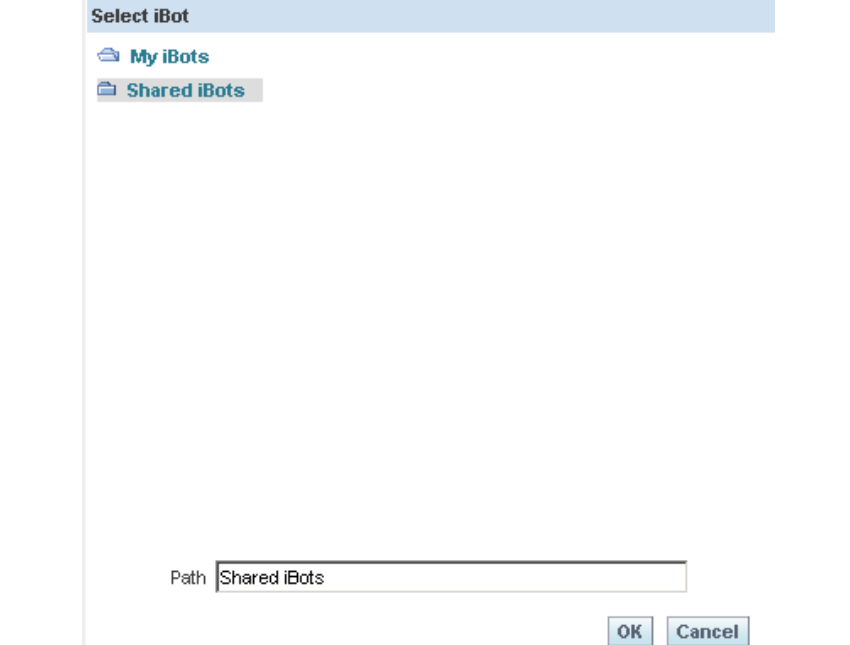23. Click **Remove** to remove the Add Action information.

Using the Save iBot Dialog Box to organize iBots:

The Save iBot dialog box enables the user to organize their iBots by saving them in an existing folder, or in new folders that the user creates. The user can Save the iBot dialog box to create a folder hierarchy in which to save their iBots. Use the Save icon on the top right hand corner of the Recipients page.

To save an iBot in a new folder that you create:

1. Click on of the following options to display the Save iBot dialog box:

- For a new iBot, click the Save This iBot icon. The Save iBot page (**Figure 64**) is displayed.

Figure 64. Save iBot page

To complete the fields on the Save iBot page:

Folder	Enter the folder where the iBot information will be saved.
Name	Enter a folder name.
Description	Enter the description of the folder if applicable.

2. Click the **Create Folder** button. The Create Folder in Shared iBots page (**Figure 65**) is displayed.

Figure 65. Create Folder in Shared iBots page

3. Enter the new folder name.

4. Click **OK** to save the information. The Create Folder in Shared iBots page will displayed.

5. Click **OK** to save the information. Continue to click **OK** to return to the previous page.

> **OR**

Click **Clear** to remove the information entered.

6. Click **OK** to save the information on the Save iBot page (**Figure 64**) and return to the Recipients page (**Figure 52**)
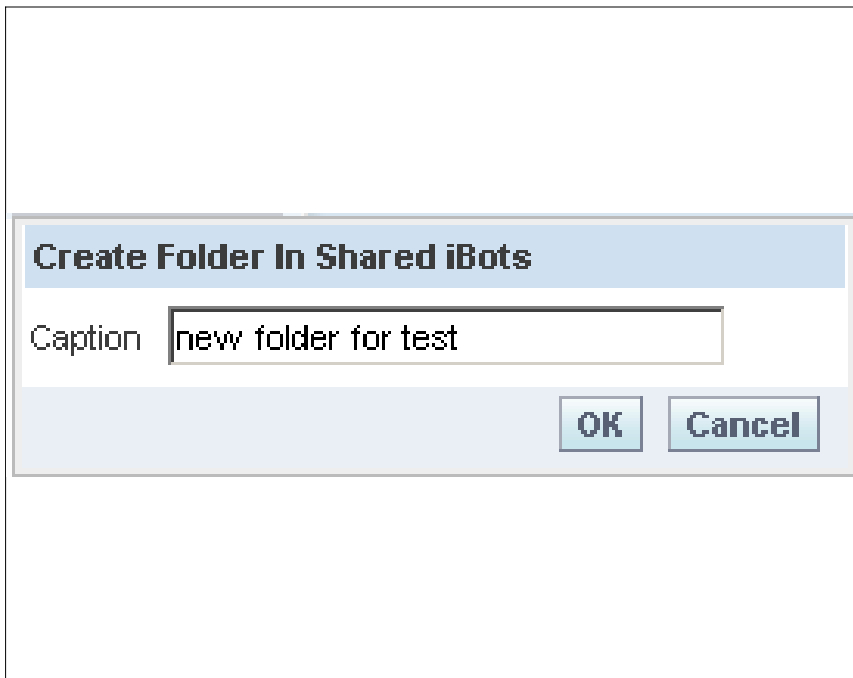
> **OR**

Click **Clear** to remove the information entered.

•   For an existing iBot, click the Save This iBot As icon.

Note: The same pages (**Figure 64**) and (**Figure 65**) appear when the Save This iBot icon is selected.

Note: When the user clicks the Save this iBot button (for an existing iBot), the iBot is saved but the Save iBot dialog box is not displayed. However, the Save iBot dialog box is displayed if the subscription status is change, and the iBot has not been saved.

Note: To remove the information on a page, click the corner reverse arrow in the top right hand of the page.

7. Continue completing the Recipients page.

Edit My Account

8. Select *Delivers*. The More Products - Delivers- Start page (**Figure 66**) is displayed. The Start page has two main areas:

   • Selection pane - the selection pane is located on the left side of the page. It show Delivers content saved in the Presentation Catalog, such as personal and share iBots.

   • Workspace - The workspace is located to the right of the selection pane. It initially shows the iBot links to create and manage iBots.

When a selection is made from the selection pane, such as clicking a saved iBot, the selection appears in the workspace. When the iBot is clicked in the workspace, the workspace displays tabs for working with the iBot. The tabs will not appear for iBots selected from the Shared iBots folder, unless the user is a Web Administrator and has the proper permissions.
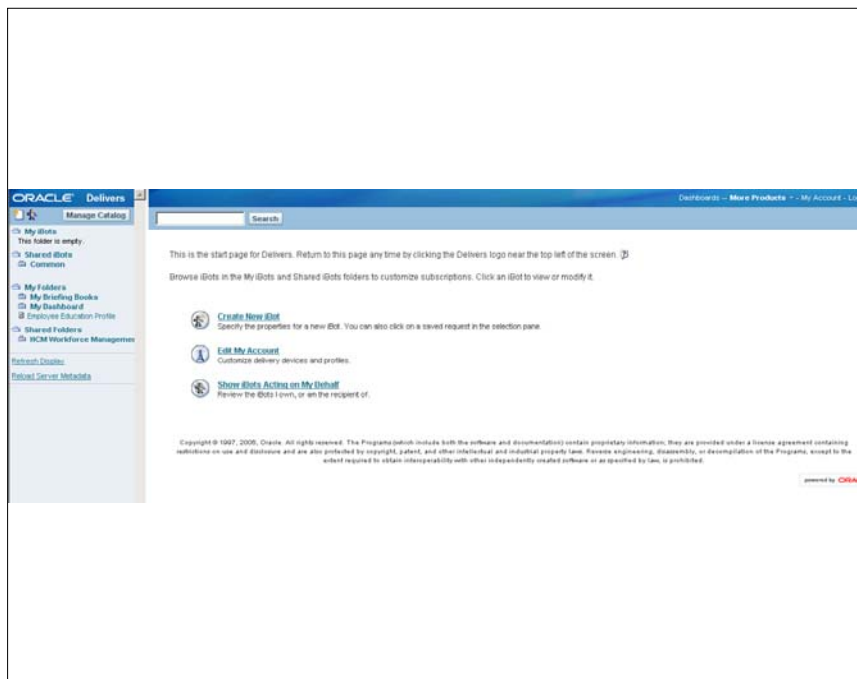

Figure 66. More Products – Delivers Start page

9. Select the *Edit My Account* link. The More Products - Delivers - Edit My Account page (**Figure 67**) is displayed.

Figure 67. More Products - Delivers - Edit My Account page

10. Complete the fields on the Edit Account page as follows:

General

Display Name	This field is the user ID of individual to which My Account belongs.
User ID	This field is the user ID of individual to which My Account belongs.

Preferences

Default Dashboard	This field defaults to **My Dashboard**. To change, select data from the drop-down list. The valid values are dependent on how the agency configures the naming convention of their dashboards.
Local	Select the locale for this session.
User Interface Language	This field defaults to **English**. To change, select data from the drop-down list. This is the language in which BI is to appear.
Time Zone	This field is the BI accounts' preferred time zone. This option allows system users who do not reside in the same physical location to override the default time zone that was set by the system administrator. The time zone selected will apply to any items that are created, modified, run, received, and printed.

11. Click the **Change Password** link to change the login password. For more information refer to Change Password.

Delivery Options

Delivery Options allow the user to add or modify the devices to receive notifications from BI Delivers.

If devices or profiles have been configured, do not change them without first consulting your BI administrator.

Devices and delivery profiles control how BI Delivers will reach you when an alert is triggered by an iBot.

Devices

There are five tabs in the Devices section. The five tabs are **Email**, **Phone**, **Pager**, **Handheld**, and **Other**.

12. Click the applicable tab(s) or the **Add Email Device** link to add a device. The My Account - Device page (**Figure 68**) is displayed.

Figure 68. My Account - Device page

13. Click the applicable icon to add a device. The **Device Type** is populate when the icon is selected.

Figure 69. Email/Telephone/Pager/Handheld/Other

Device Name	Enter the name of the device.
Address/Number	Enter the delivery address or number of the device. For example, for an email, provide and email address, or for a telephone, enter a phone number.

14. Click **Finished** to add a device to My Account page.

OR

Click **Cancel** to exit the with selections and return to My Account page.

Delivery Profiles

15. Click the **Add Delivery Profile** link. The My Account - Delivery Profile page (**Figure 70**) is displayed. A delivery profile determines how content is delivered to you. Multiple profiles can be created – For example, In Office and Away from Office.

Figure 70. My Account - Delivery Profile page

Specify the devices to use when this is the active profile. Content priority (as specified in a Delivers iBot) determines the delivery device the profile will use. Content delivery notifications (Alerts) will also appear in the Alerts section of your Dashboard.

16. Click **Finished** to add a profile to My Account page.

OR

Click **Cancel** to exit the without adding a profile and return to My Account page.

Group Membership

This is the list of groups to which you belong. This list will be different for each user depending on your agency's configuration.

Show iBots Acting on My Behalf

Note: This function will not be used at this time.

Marketing

Marketing is an option from More Products that is accesses through the Dashboard (**Figure 71**).

Note: Marketing is not available at this time.
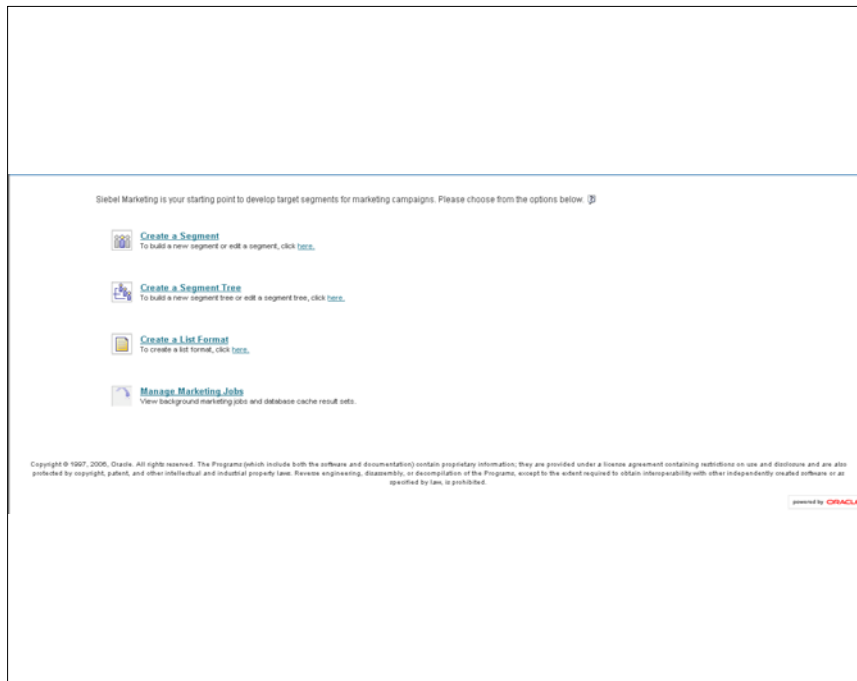
Figure 71. More Products – Marketing page

Disconnect Analytics

Disconnect Analytics is an option from More Products that is accesses through the Dashboard.

Note: Disconnect Analytics is not available at this time.

Business Intelligence Publisher Engine

BI Publisher is the integrated pixel-perfect reporting component, which allows for the creation of highly formatted template, reports, and business documents (i.e., government forms). The user can design template layouts using Microsoft Word or Adobe Acrobat. The BI Publisher Engine will then use these templates, dynamically fill in the content, and bursts these reports to a variety of formats (html, PDF, excel, etc.) and deliver them to any destination. For example: Web, printer, fax, email, portal and content servers. BI Delivers is the interface used to create BI Alerts based on analytics results.

Reports

A report is a Request in BI. Reports can be a table, graph or gauge. Depending on how the report is built, additional data may be displayed by clicking or scrolling over parts of the report.

The data to create the report is extracted from the ***EmpowHR*** Production application and organized into logical subject areas and stored in the data warehouse. The reports are derived from the data in the data warehouse. This enables the user to create more sophistical reports in less time without affecting the processing response in ***EmpowHR***. The data in the Data Warehouse is updated biweekly after each pay processing period (after the BEAR process).

Data Warehouse displays multiple reports in a tabbed interface. The reports are interactive and display highly summarized and graphical data. Users can export reports to PDF and HTML and can be printed or downloaded to Excel and CSV format.

Reports can contain a variety of graphs and prompts to illustrate the different reporting options available with the BI tool.

The data displayed in the reports are based on the agency hierarchy and will be limited based on the level of security of the user. The user can drill-down by clicking the highest level of data and view the lowest level of the organizational stricture. The user can drill down a maximum of six levels of organizational structure depending on the report.

Depending on the security of the user, there will be 9 or 11 reports available on the HR Manager Workforce Management Dashboard. Two of these reports, Activities by Period Details and the Department Employees Details, contain Personal Identification Information; therefore, access is limited to these reports.

By default, the most recent data will be displayed; however, data can be filtered based on the criteria that is selected. The filters are for the entire page and will alter the data displayed for all reports on the page.

Reports can be printed by clicking the print icon or link on the page. This icon opens a printer-friendly page enabling the user to print the reports. When the icon or link is used, the user has an option to open the report in an HTML or PDF format for printing.

The Data Warehouse optimizes, tracks, and monitors various workforce metrics. It allows users to retrieve comprehensive reports on several subject areas. The types of reports below are available in the Data Warehouse; however, will only be available if the Agency users these modules in the ***EmpowHR*** application.

- Workforce Assignments
- Turnover
- Jobs
- Health and Safety
- Organizational Effectiveness
- Grievances
- Disciplinary Actions

The Data Warehouse also allows users to compare results across financial periods and/or years by:

- Headcounts

- Hiring Trends

- Separation Trends

- Demographic Comparisons

Getting Started

This section provides information on the following subjects:

Accessing BI

Changing Your Password

Exiting from BI

Performing Common Tasks

Accessing BI

The user must have a password to Log In to the Oracle Business Intelligence application. The Agency's Security Officer will issue the User Id and Password.

Steps used to log on to the Oracle BI application:

1. Connect to the Internet.

2. Enter the Uniform Resource Locator (URL) on the browser.

3. Click **Go**. The Oracle Business Intelligence Log In page (**Figure 72**) is displayed.

Figure 72. Oracle Business Intelligence Log In page

4. Complete the fields as follows:

User ID	Enter the user ID assigned by the Agency's Security Officer.
Password	Enter the password assigned by the Agency's Security Officer.
Select a Language	This field defaults to **English**. To change the language, select the applicable language from the drop-down list.

5. Click **Log In**. The Welcome page (**Figure 73**) is displayed.

Figure 73. Welcome page

Changing Your Password

To Log In to the Oracle BI application, the user will received a User ID and password from the Agency Security Officer. The user will log in using the issued User Id and Password. The application will prompt the user to change the issued password.

Steps used to change the password:

1. Connect to the Internet.

2. Enter the Uniform Resource Locator (URL) on the browser.

3. Click **Go**. The Oracle Business Intelligence Log In page (**Figure 72**) is displayed.

Figure 74. Oracle Business Intelligence Log In page

4. Complete the fields as follows:

User ID	Enter the user ID assigned by the Agency's Security Officer.
Password	Enter the password assigned by the Agency's Security Officer.
Select a Language	This field defaults to **English**. To change the language, select the applicable language from the drop-down list.

5. Click **Log In**. The Change Password page (**Figure 75**) is displayed.

Figure 75. Change Password page

6. Complete the fields as follows:

*Current Password	Enter the assigned by the Agency's Security Officer.
*New Password	Enter a new password.
*Confirm Password	Confirm the password. This is the password entered in the New Password field.

7. Click **Change Password**. The Welcome page (**Figure 76**) is displayed.

Figure 76. Welcome page

Exiting from BI

This section will explain the steps used to exit the Oracle BI application. The user can log out of Data Warehouse from each tab.

Steps used to exit BI:

1. Click **Logout**. The Oracle Business Intelligence Logged Out page (**Figure 77**) is displayed.

Figure 77. Oracle Business Intelligence Logged Out page

2. Click **here** to log back in. The Oracle Business Intelligence Log In page (**Figure 72**) is displayed.

Performing Common Tasks

This section explains how to perform common tasks in BI. It contains the following topics:
   Viewing a Descriptions on a Dashboard
   Viewing a Saved Request
   Printing a Dashboard or Saved Request
   Emailing a Dashboard or Saved Request
   Downloading Results from Answers
   Refreshing a BI Interactive Dashboard or BI Request
   Navigating in BI (Data Warehouse)

Viewing a Descriptions on a Dashboard

A dashboard can be created with a description in the BI Presentation Catalog. If no description is supplied, the description defaults to the name of the dashboard.

To view the description, pause the cursor over the name of the dashboard in the Interactive Dashboard.

Viewing a Saved Request

A dashboard can be created with a description in the BI Presentation Catalog. If no description is supplied, the description defaults to the name of the saved request.

To view a saved request, pause the cursor over the title of the saved request in the selection pane in BI Answers.

Printing a Dashboard or Saved Request

A printer-friendly version can be displayed of the existing dashboard or request. The printer-friendly version does not contain any extraneous links or hypertext items.

To print use HTML or Adobe PDF (Portable Document Format). Adobe PDF is the only print option available for BI Publisher reports. Adobe Reader 6.0 or greater is required to print using Adobe PDF.

Note: The HTML method of printing relies on the print handling capabilities of the user's browser.

To print a dashboard or a saved request:

1. Navigate to an existing dashboard or request.

2. To print a request, click the print link.

    OR

    To print a dashboard page, locate the dashboard page and click **Print** at the bottom of the dashboard.

3. Choose HTML or PDF.

Note: For HTML, a new window shows the selected item without the extraneous links.

-   Choose *File> Print* on the browser menu.

-   For PDF, use the options available in the Adobe PDF window to save or print the file.

Emailing a Dashboard or Saved Request

A Dashboard page or a request can be emailed as an attachment. The format depends on the browser used, such as Web Archive, Single File (.mht) in Internet Explorer or Mozilla Archive Format (.maf) in Mozilla and Firefox.

Note: The Mozilla Archive Format capability is available as a separate downloaded plug-in.

In any browser, a dashboard page or a request can also be saved as a collection of HTML files. The user can zip and email the corresponding directory of associated files.

To email a dashboard page or request:

1. Navigate to the dashboard page or request that should be sent.

2. To email a request, click the *Print* link (**Figure**), and then choose `HTML` or `PDF`.

    OR

    To email a dashboard page, locate and click the **Print** button at the bottom of the dashboard, and the choose `HTML` or `PDF`.

    A new browser window opens and contains the dashboard page or the request.

3. From the browsers toolbar, choose *File > Save As*.

4. Save the file to the desired location, with the appropriate file type for the browser.

5. Send the saved attachment using an email application.

Note: The saved attachments can also be used as a means to archive and restore requests as they exist at a particular point and time.

Downloading Results from Answers

There are multiple ways to download results. These appear in the BI Answers as options for the Download link. The Download link can also appear with a request in a dashboard.

Below are the options to download results:

Download to Excel

Download Data

Download Web Page (MHTML)

Download to Excel

This option makes the request results available to Microsoft Excel 2000 in HTML format, including tables or chars that appear with the results. It also includes any other views included in the report. Excel controls the positioning of the HTML.
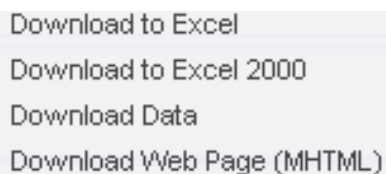
To download to Excel:

1. Navigate to the request.

2. Click the **Download** link or icon and choose either Download to Excel or Download to Excel 2000. The File Download box (**Figure**) is displayed.

3. Save the file to the desired location, or open it in Excel. Excel can be used to refine the formatted results.

Download Data

This option downloads results as a tab-separated list of values. The file will have a .CSV extension to facilitate opening it in Excel. After download a request in a tab-determined format, it can be viewed in the saved third-party application.

To download results as a tab-separated list:

1. Navigate to the request.

2. Click the **Download** link or icon and choose Download Data option.

Download to Excel
Download to Excel 2000
Download Data
Download Web Page (MHTML)

3. The file is saved and is displayed in the format selected.

Download Web Page (MHTML)

This option download results as a Web page. This allow the user to download the underlying data for an existing request as a Web page (MHTML) file.

To download as a Web Page:

1. Navigate to the request.

2. Click the *Download* link or icon and choose Download Web Page (MHTML).

3. The file is saved and is displayed in the format selected.

Refreshing a BI Interactive Dashboard or BI Request

When a BI Interactive Dashboard or BI Request is executed, a temporary storage area called `Caches` is created. This saves frequently accessed or recently accessed results. Storing certain results can help to improve the BI performance. Use the **Refresh** icon to make sure that the request bypasses saved information in the cache and is issued to the BI Server for processing.

To refresh an inactive dashboard or request:

1. Navigate to an existing dashboard or request.

2. Click the **Refresh** button to refresh a dashboard.

> **OR**

Click the *Refresh* link to refresh a request.

Refreshing Information in the BI Selection Pane

The selection pane appears in the BI Answers and BI Delivers. When changes have been made to saved content, the display can be refreshed to access the most current information. Saved requests, filters, briefing books, and dashboard content can be refreshed. The information available in the selection pane is determined by the user's permissions and responsibilities.

To refresh information in the selection pane:

1. Click the *Refresh Display* link at the bottom of the selection pane.

Navigating in BI (Data Warehouse)

When accessing BI, the first page presented is usually the Department's Welcome Dashboard (**Figure 78**). Dashboards typically contains reports and other information for the user's area of responsibility.

Note: Your Department's dashboard may look different than the one below.

Figure 78. Department's Welcome Dashboard

This section contains the following BI features:

Links

Pages

Drill Down (Interactive)

Sorting

Tabs

Preferences

Briefing Books

Links

This section describes the links that provide access to Oracle BI functions. The links are located at in the upper right hand corner of the page. The links available are determined by the user's privileges. Below, is an example of *My Dashboard* (**Figure 79**) with available links.
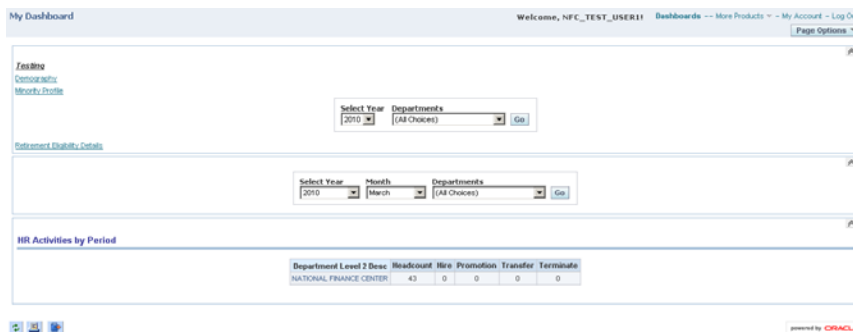

Figure 79. My Dashboard

The links are located near the top of the page. The user can access other links as views, such as Dashboards, Answers, Delivers, Alerts, Administration, and My Account (Answers, Deleivers, Alerts, Administration will become available in a furture release). There are also links in the middle of the page that allow the users to view other sites. The views and access are determined by the user's role and repressibilities. Below is a table that describes some of the BI feature links:

Links	Description
Alerts!	This link accesses the Active Alerts page, where the user can view and manage active alerts. This like appear only if there are active alerts.
Dashboards	This link accesses the Interactive Dashboard page, where the user can view the dashboards to which they have access.
Answers	This link accesses BI Answers, from which the user can view, create, and manage requests.

Links	Description
More Products	This link accesses BI Publisher, Delivers, Marketing and Disconnected Analytics/
Settings/My Account	The Setting link accesses the BI Presentation Services Administration page, the Act As page, and the My Account page. The My Account page enables the user to view general account information and set preference for the BI application.
Log Out	This link is used to log out of BI. Always use this link to log out of the application.

Pages

BI is organized into pages. The Pages have two components:

- Panes - Both BI Delivers and BI Answers pages display a left and right pane. The left pane is the select pane, used to navigate to, select, and manage saved information. The right pane is used to display the work with the content selected in the left pane.

- Tabs - Tabs provide access to other pages related to the current page. The tabs appear in the top part of the page. The list of available tabs depends on the page selected.

BI feature links are used to access these pages. Each feature link provides access to a specific feature or topic. Pages can contain other organization and navigation elements, such as tab, areas, and panes.
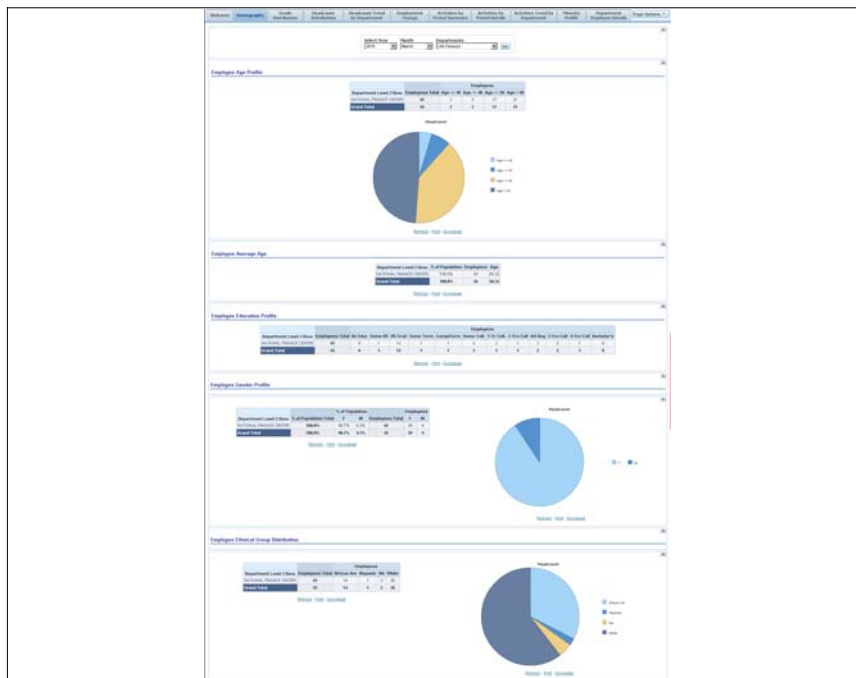

Figure 80. Pane and Tab page

Drill Down (Interactive)

Many of the results that appear on a report represent hierarchical data structure. BI allows the user to access different levels of detail. For example, clicking on a specific region in a chart, will display values relevant to that region.

The user can also drill down in a report to view multiple organizational levels.

Sorting

In a dashboard, the column headers of tables that can be sorted have a slightly raised visual appearance. Click on the column header to sort it.

Preferences

From **My Account** page (**Figure 81**) the user can view general information, such as the display name, and user ID. To navigate to My Account and to change preferences, use the following steps:

1. Navigate to the BI dashboard.

2. Click the **My Account** link at the top of My Dashboard page. My Account page (**Figure 81**) is displayed. The user can change the dashboard viewed upon login, set the location in the **Local** drop-down list, select a language from the **User Interface** language drop-down list, or set a time zone from the **Time Zone** drop-down list. For more information see BI Delivers - Edit My Account link.

Figure 81. My Account page

Briefing Books

Steps to name briefing books:

If your organization licenses BI Briefing Books, the user can store a static snapshot or dashboard pages or individual requests in one or more briefing books. Briefing Books can be downloaded or shared for viewing online. Briefing books and their content can also be updated, scheduled, and delivered using BI Delivers. Although a Brifeing Book folder and adding reports to a Briefing Book can be accomplished, the capability to share a book is through BI Answers will be available in a future release.

1. Click the **Add to Briefing Book** icon at the bottom left hand corner of the Dashboard. The Save Briefing Books page (**Figure 82**) is displayed.

Note: The Add to Briefing Book icon is not available on an empty dashboard page.
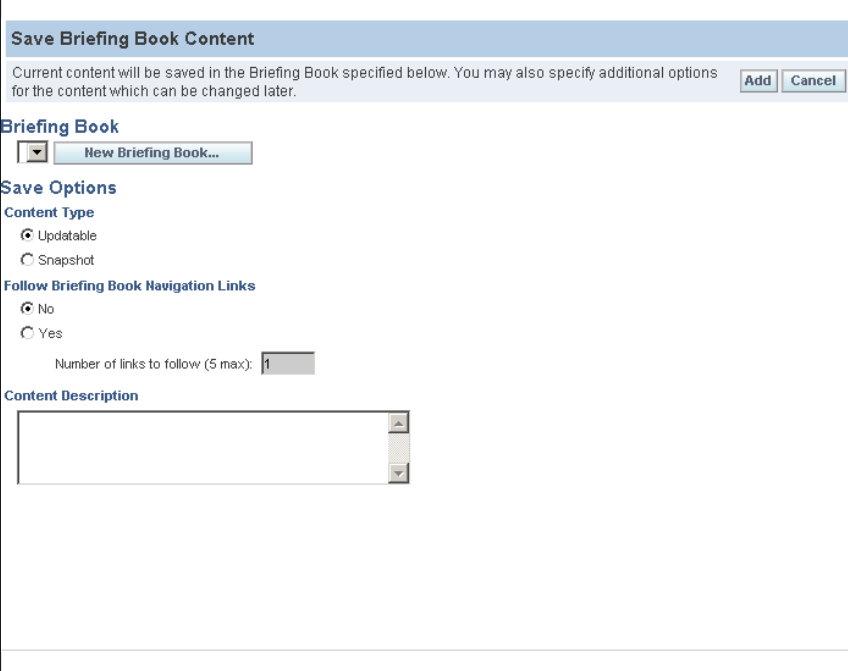
Save Briefing Book Content

Current content will be saved in the Briefing Book specified below. You may also specify additional options for the content which can be changed later.

[Add] [Cancel]

Briefing Book
[▼] [New Briefing Book...]

Save Options
Content Type
⦿ Updatable
○ Snapshot
Follow Briefing Book Navigation Links
⦿ No
○ Yes
        Number of links to follow (5 max): [1]
Content Description

Figure 82. Save Briefing Book Content page

2. Complete the fields as follows:

    Briefing Book

3. Click the **New Briefing Book** link. The New Briefing Book page (**Figure 83**) is displayed.

Figure 83. New Breifing Book page

4. Complete the fields as follows:

Briefing Book Name	Enter the name of the new briefing book.
Description	Enter the description of the new briefing book.

5. Click **Save Briefing Book** to save the new book information.

               OR

Click **Cancel** to return to the Briefing Book page (**Figure 82**).

Note: When a new book is created or if an existing book is changed, the Save Options field group on the Briefing Book page (**Figure 82**) must be completed.

Save Options

Additional options may also be specified for the content and can be changed at a later date.

6. Complete the fields as follows:

Content Type	Check the applicable box. The **Updatable** check box is the default. The **Snap Shot** box can be selected if applicable.
Follow Briefing Book Navigation Links	The **No** check box is the default. The **Yes** box can be selected if applicalble.
Number of Links to Follow (5max)	This field defaults to **1**.. Change the number if applicable.
Content Description	Enter the narrative description of the briefing book.

7. Click **Add** to add the briefing book information.

<div align="center">**OR**</div>

Click **Cancel** to exit books.

Tabs

The Data Warehouse displays multiple tabs that generate reports. These reports are interactive and display summarized and graphical data. The user can click on specific data fields on the report to display information in more detail. The user can also export reports to a PDF and HTML and can be printed or downloaded to Excel and CSV formats.

The following are tabs available:

Demography

Grade Distribution

Headcount Distribution

Headcount Trend by Department

Employment Change

Activities by Period Summary

Activities by Period Details

Activities Trend by Department

Minority Profile

Department Employee Details

Demography

The Demography reports provide a statistical overview of the biographical details of the employees subagency, including age, gender, and ethnicity.

On the Demography tab, information is entered to generate a report. The information below will be included on a single report:

- Employee Age Profile
- Employee Average Age
- Employee Education Profile
- Employee Gender Profile
- Employee Ethnical Group Distribution

Steps to generate a report from the Demography tab:

1. From the Dashboard (**Figure 84**) , complete the fields as follows:

Select Year	Select the applicable year from the drop-down list.
Month	Select the applicable month from the drop-down list.
Departments	Select the applicable department from the drop-down list.
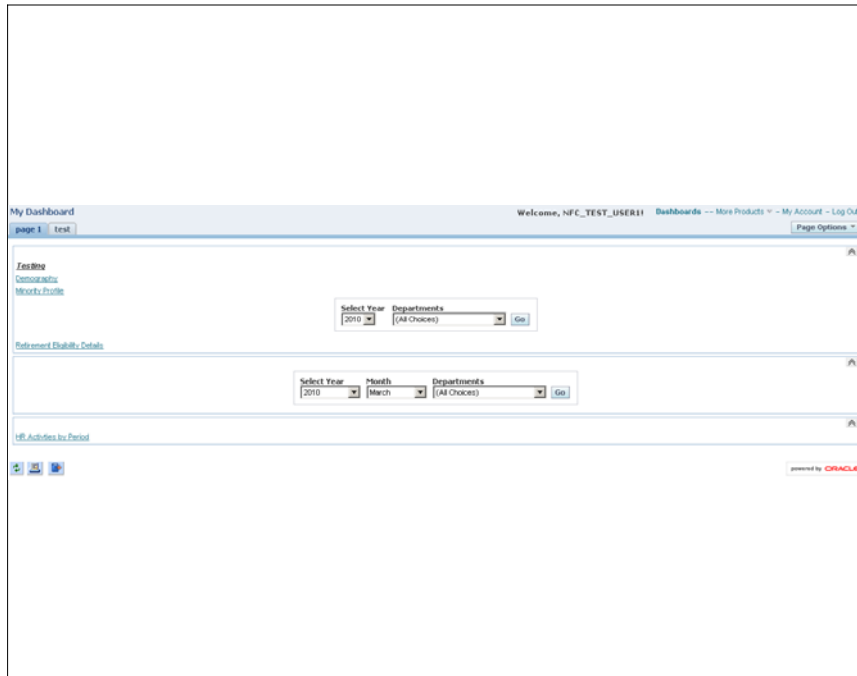
Figure 84. Dashboard page

1. Select the ***Demography*** tab. The Demography page (**Figure 85**)is displayed.
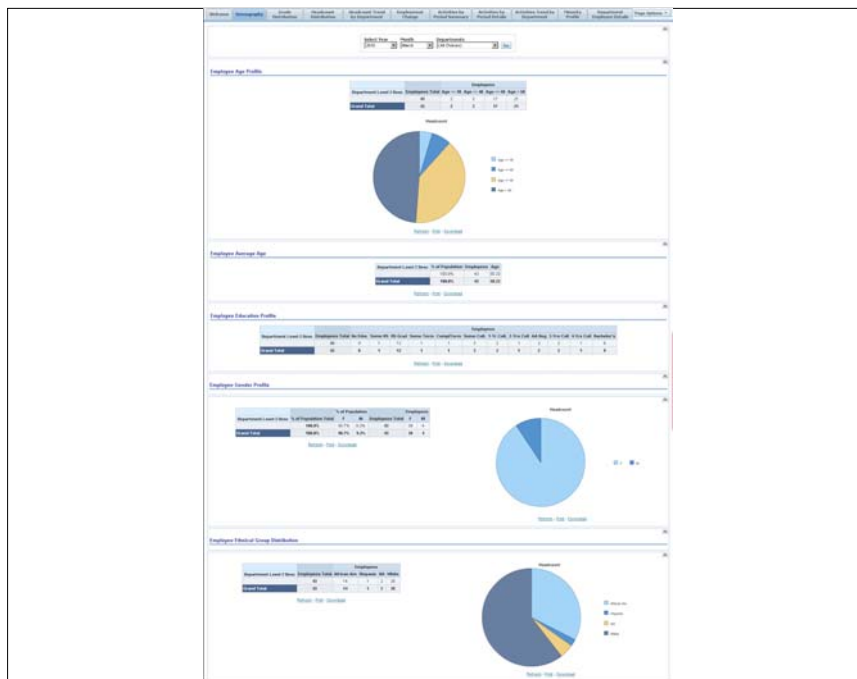
Figure 85. Demography detailed report

Grade Distribution

This report contains the number of employees within each grade and displays the percentage of each.

On the Grade Distribution tab, information is entered to generate a report. The information below will be included on a single report:

- Employee Grade Distribution

Steps to generate a report from the Grade Distribution tab:

1. Select the ***Grade Distribution*** tab. The Employee Grade Distribution page (**Figure 86**) is displayed. The fields entered on the Dashboard will remain when the Grade Distribution tab is selected. The report will automatically display the results.
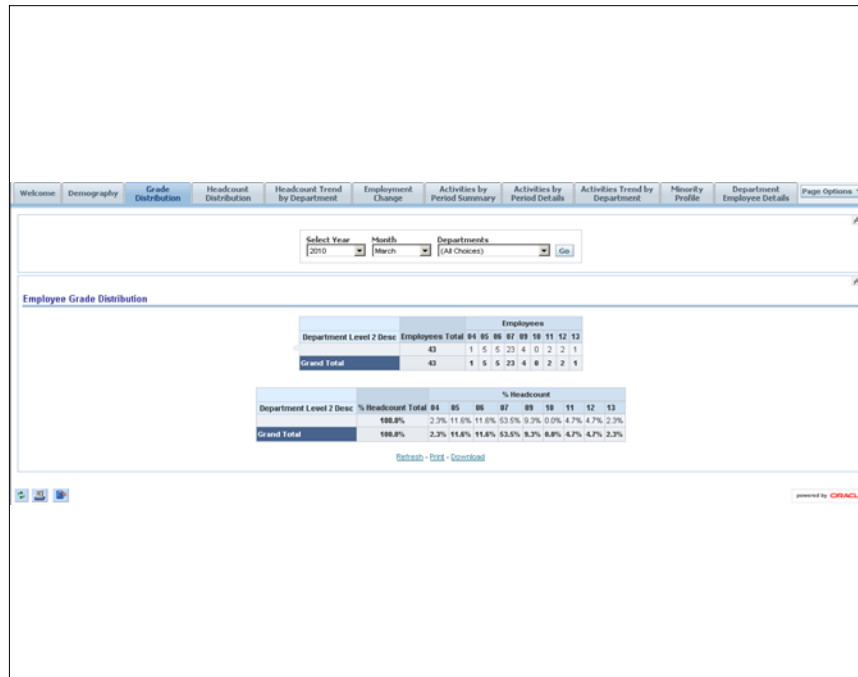
Figure 86. Employee Grade Distribution page

2. Change these fields to run a report with new values:

Select Year	Select the applicable year from the drop-down list.
Month	Select the applicable month from the drop-down list.
Departments	Select the applicable departments from the drop-down list.

3. Click **Go**. The new Employee Grade Distribution report with the new criteria will display.

Headcount Distribution

The Headcount Distribution report displays the number of employes within an organizational structure, total headcount of employees broken down by full time and part time employment and the headcount broken down by exempt and non-exempt.

On the Headcount Distribution tab, information is entered to generate a report. The information below will be included on a single report:

- Employee Headcount Distribution

- Employee Headcount - Employee Type

- Employee Headcount - Exempt Status

Steps to generate a report from the Headcount Distribution tab:

1. Select the *Headcount Distribution* tab. The Headcount Distribution page (**Figure 87**) is displayed. The fields entered on the Dashboard will remain when the Headcount Distribution tab is selected. The report will automatically display the results.
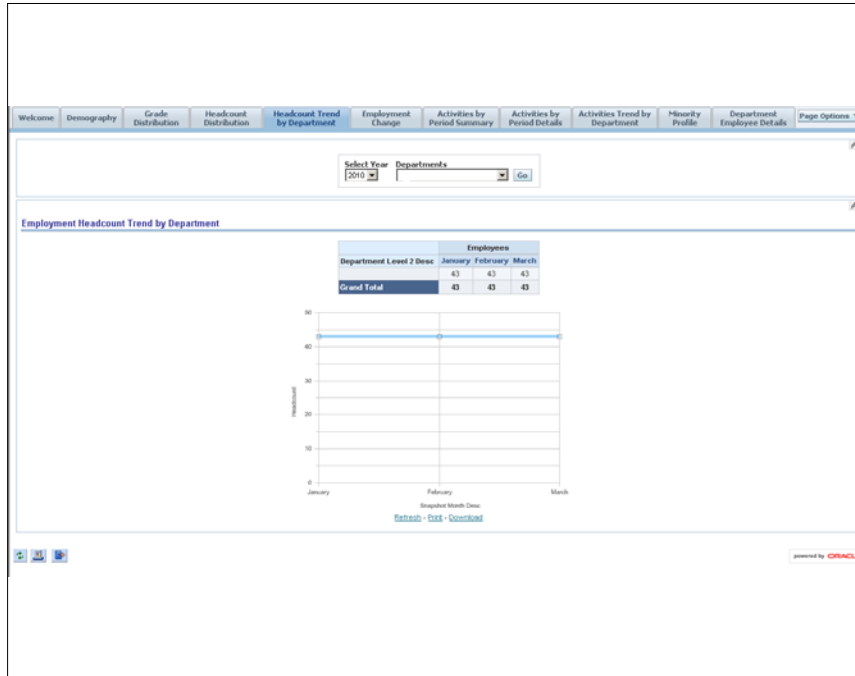

Figure 87. Headcount Distribution page

2. Change these fields to run a report with new values:

Select Year	Select the applicable year from the drop-down list.
Month	Select the applicable month from the drop-down list.
Departments	Select the applicable departments from the drop-down list.

3. Click **Go**. The new Headcount Distribution report with the new criteria will display.

Headcount Trend by Department

The Headcount Trend by Department report contains a graph displaying the employe counts of a specified period.

On the Headcount Trend by Department tab, information is entered to generate a report.

Steps to generate a report from the Headcount Trend by Department tab:

1. Select the *Headcount Trend by Department* tab. The Headcount Trend by Department (**Figure 88**) is displayed. The fields entered on the Dashboard will remain when the Headcount Trend by Department tab is selected. The report will automatically display the results.
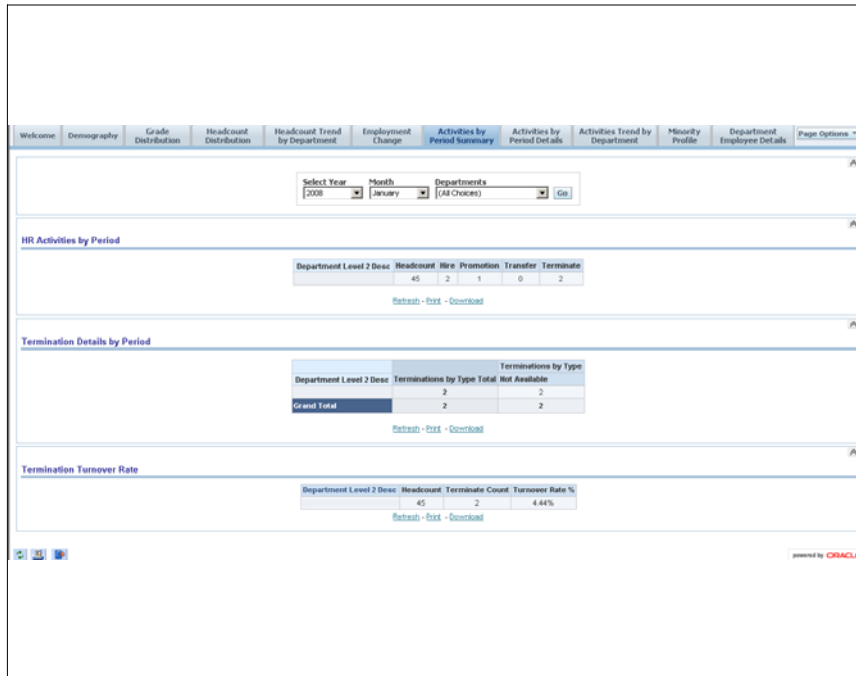

Figure 88. Headcount Trend by Department page

2. Change these fields to run a report with new values:

Select Year	Select the applicable year from the drop-down list.
Month	Select the applicable month from the drop-down list.
Departments	Select the applicable departments from the drop-down list.

3. Click **Go**. The new Headcount Trend by Department report with the new criteria will display.

Employment Change

The Employment Change report displays the percent change in the the employee headcounts broken down by ethnicity.

This section contains the following report:

Employment Change by Ethnical Group

1. Select the *Employment Change* tab. The Employment Change by Ethnical Group page (**Figure 89**) is displayed. The fields entered on the Dashboard will remain when the Employment Change tab is selected. The report will automatically display the results.

Figure 89. Employment Change by Ethnical Group page

2. Change these fields to run a report with new values:

Snapshot Year	Select the applicable year from the drop-down list.
Snapshot Month	Select the applicable month from the drop-down list.
Compare to Year	Select the year to be compared or select a year from the drop-down list.
Compare to Month	Select the month to be compared or select a month from the drop-down list.
Departments	Select the applicable departments from the drop-down list.

3. Click **Go**. The Employment Change by Ethnical Group report with the new criteria will display.

Activities by Period Summary

The Activities by Period Summary report displays the total headcount for the highest level in the organizational structure and the number of terminations, promotions, transfers, and accessions.

On the Activities by Period Summary tab, information is entered to generate a report. The information below will be included on a single report:

- HR Activities by Period
- Termination Details by Period
- Termination Turnover Rate

1. Select the **_Activities by Period Summary_** tab. The Activities by Period Summary reports results page (**Figure 90**) is displayed. The fields entered on the Dashboard will remain when the Activities by Period Summary tab is selected. The report will automatically display the results.
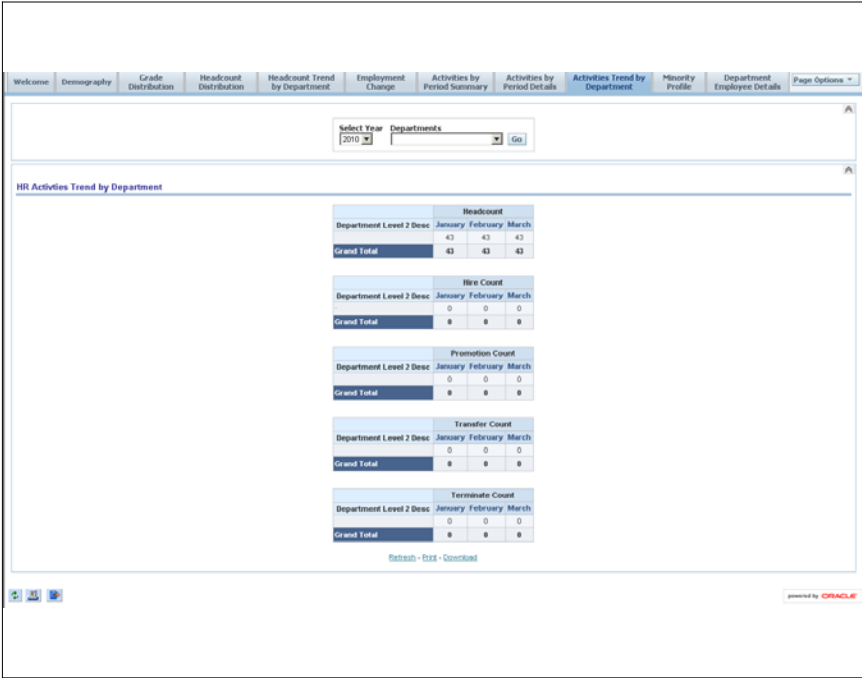
Figure 90. Actiivites by Period Summary reports results page

2. Change these fields to run a report with new values:

Select Year	Select the applicable year from the drop-down list.
Month	Select the applicable month from the drop-down list.
Departments	Select the applicable departments from the drop-down list.

3. Click **Go**. The Activities by Period Summary report with the new criteria will display.

Activities by Period Details

The Activities by Period Details reports contains details of each action that would affect employee headcounts, such as accessions, terminations, promotions, and transfers. Since this report contains employee specific data, not all user will have the security access to this report.

On the Activities by Period Details tab, information is entered to generate a report. The information below will be included on a single report:

• HR Activities by Period - Details

1. Select the ***Activities by Period Summary*** tab. The HR Activities by Period page (**Figure 91**) is displayed. The fields entered on the Dashboard will remain when the Activities by Period Details tab is selected. The report will automatically display the results.
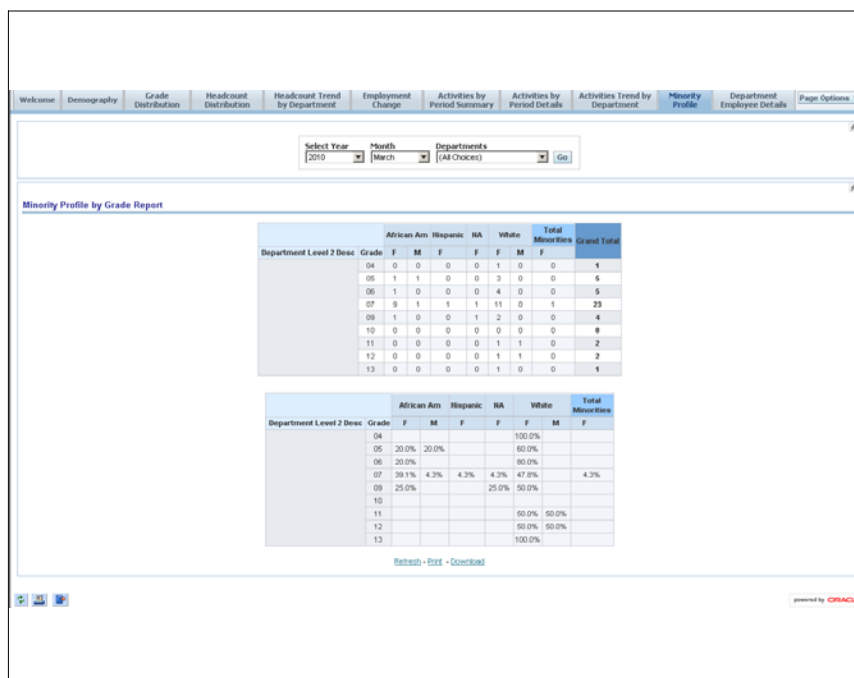
Figure 91. HR Activities by Period page

2. Change these fields to run a report with new values:

Select Year	Select the applicable year from the drop-down list.
Month	Select the applicable month from the drop-down list.
Departments	Select the applicable departments from the drop-down list.

3. Click **Go**. The HR Activities by Period report with the new criteria will display.

Activities Trend by Department

The Activities Trend by Department report contains headcount trends for a department by the number of accessions, transfers, promotions, and terminations over a specified period.

On the Activities Trend by Department tab, information is entered to generate a report. The information below will be included on a single report:

• HR Activities Trend by Department

1. Select the **Activities Trend by Department** tab. The HR Activities Trend by Department page (**Figure 92**) is displayed. The fields entered on the Dashboard will remain when the Activities Trend by Department tab is selected. The report will automatically display the results.

Figure 92. HR Activities Trend by Department page

2. Change these fields to run a report with new values:

Select Year	Select the applicable year from the drop-down list.
Departments	Select the applicable departments from the drop-down list.

3. Click **Go**. The HR Activities Trend by Department report with the new criteria will display.

Minority Report

The Minority Report contains the number of employees in the organizational structure in each grade by ethnicity and the percentage of the employees in the organizational structure in each grade by ethnicity.

On the Minority Report tab, information is entered to generate a report. The information below will be included on a single report:

• Minority Profile by Grade Report

1. Select the **Minority Report** tab. The Minority Profile by Grade Report page (**Figure 93**) is displayed. The fields entered on the Dashboard will remain when the Minority Report tab is selected. The report will automatically display the results.

Figure 93. Minority Profile by Grade page

2. Change these fields to run a report with new values:

Select Year	Select the applicable year from the drop-down list.
Month	Select the applicable month from the drop-down list.
Departments	Select the applicable departments from the drop-down list.

3. Click **Go**. The Minority Profile by Grade report with the new criteria will display.

Department Employee Details

On the Department Employee Details tab, information is entered to generate a report.

1. Select the *Department Employee Details* tab. Information gathered is entered into prompts to build the report. Enter information on each prompt
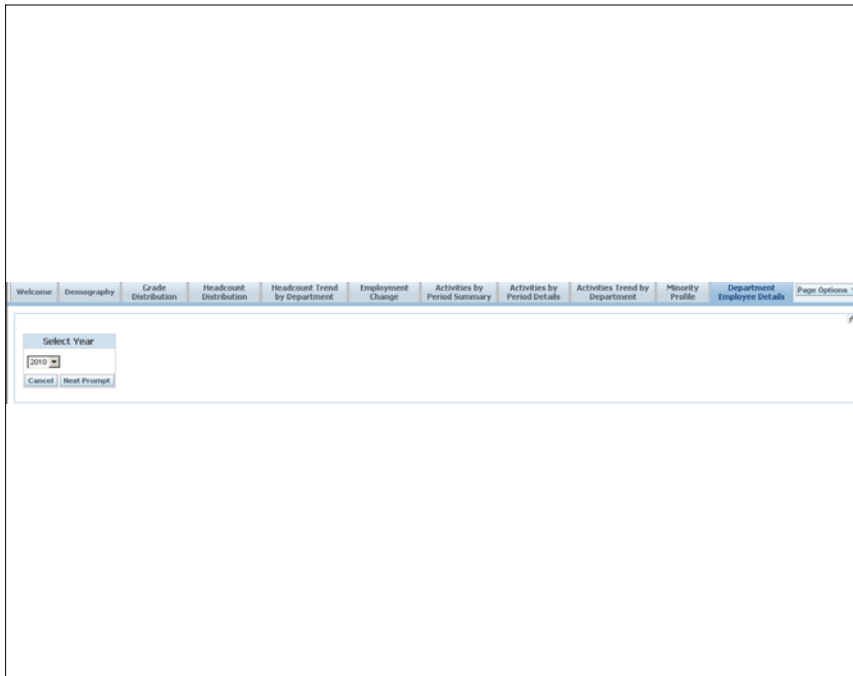
Figure 94. Select Year prompt

2. Select a year from the Select Year prompt (**Figure 94**)drop-down list.

3. Click **Cancel** to make another selection.

                         OR

    Click **Next Prompt** to enter the information in the next prompt (**Figure 95**).
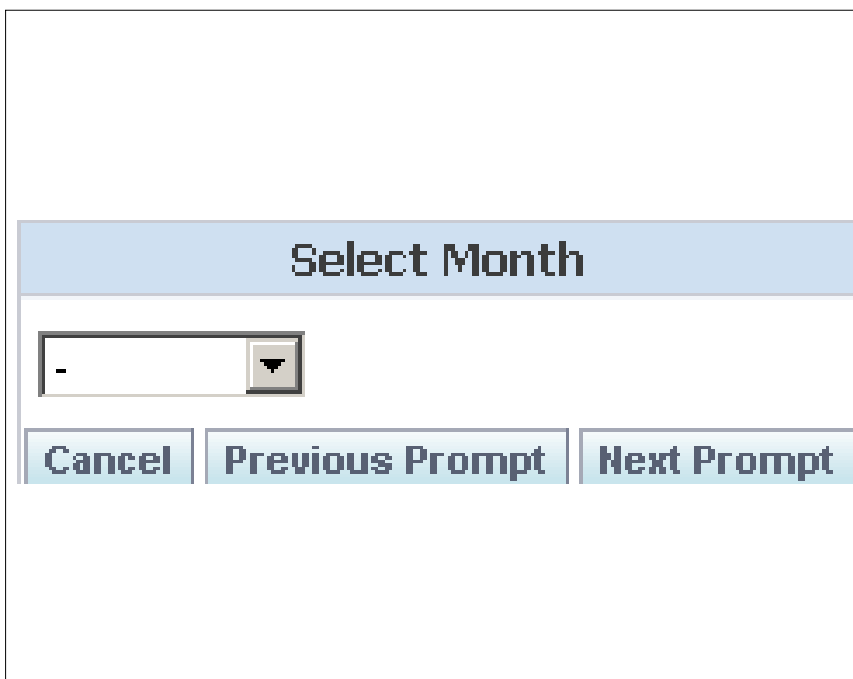
Figure 95. Select a Month prompt

4. Select a month from the Select Month prompt (**Figure 95**) drop-down list.

5. Click **Cancel** to make another selection.

   OR

   Click **Previous Prompt** to go back to the Select Year prompt (**Figure 94**)

   OR

   Click **Next Prompt** to enter information in the Select Department Name prompt (**Figure 96**).

Figure 96. Select Department Name prompt page

6. Select a department name. Multiple departments may be selected.

7. Click **Cancel** to make another selection.

   OR

   Click **Skip Prompt**. Information does not need to be entered in this prompt to run a report.

   OR

   Click **Previous Prompt** to go back to the Select Month prompt (**Figure 95**)

   OR

   Click **Go** to run the report. The Department Employee Details report (**Figure 97**) is displayed.

Figure 97. Department Employee Details report

Heading Index

This index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.