

## Oracle HCM Cloud: Reporting and Analytics Ed 1

Duration: 2 Days

### What you will learn

This Oracle HCM Cloud: Reporting and Analytics training teaches you how to use Oracle Transactional Business

Intelligence to create and share HCM analytics and reports. Expert Oracle University instructors help you gain hands-on

experience with the reporting functionality used to manage reporting and analytics in Oracle HCM Cloud.

### Learn To:

Define the scope of an analysis.

Create, modify, enhance, and share analyses and dashboards.

Incorporate visual aids into analyses.

Manage analysis content and restructure data.

Create briefing books.

### Benefits to You

Oracle Transactional Business Intelligence is a reporting solution with many benefits. This course will help you discover how to use the solution's functionality in order to stay flexible and proficient when addressing your business intelligence needs.

### Please Note

This course is relevant for any customers using Fusion Applications through Release 11.1.11. It's appropriate for both

Oracle Cloud and on-premises deployments.

Note: This course includes a preview of Release 12 new features

### Audience

Business Analysts

Business Intelligence Developer

Data Analyst

Financial Analyst

Financial Reporting Manager

Reports Developer

Statistician

### Related Training

*Suggested Prerequisites*

Introduction to Oracle HCM Cloud

Introduction to Oracle Human Capital Mgmt. Cloud

### Course Objectives

Describe the purpose and format of Oracle Transactional Business Intelligence (OTBI)

Use OTBI to create a wide variety of objects

Display and distribute documents

## **Course Topics**

### **Course Overview**

- Agenda
- Introductions
- Goals and Objectives
- Description of Methodology
- Description of Materials
- Description of Hands-On Activities

### **Getting Started with HCM Cloud Reporting with OTBI**

- Providing an Overview of Oracle Transactional Business Intelligence (OTBI)
- Reviewing the Five Types of Roles in Oracle Application Security
- Examining OTBI Separation of Functional Privileges by Job Role
- Accessing OTBI
- Cofiguring Preferences
- Navigating the Application
- Running Standard Analyses

### **Scoping Analyses**

- Examining Analysis Design
- Assigning Titles and Purposes to Analyses
- Reviewing Distribution

### **Examining Subject Areas**

- Understanding Tree Hierarchy Reporting
- Examining Prepackaged Subject Areas
- Reviewing the Structure of Prepackaged Subject Areas
- Looking at Dimension Folders
- Looking at Fact Folders

### **Constructing Custom Analyses**

- Examining the Process Driving Custom Analyses
- Determining Custom Analysis Content
- Creating Basic Custom Analyses
- Creating Basic Custom Analyses
- Creating Basic Custom Analyses
- Saving Basic Custom Analyses

### **Using Filters**

- Examining Filters
- Building Filters
- Reviewing Filter Components
- Examining Shared Filters
- Using Saved Analyses as Filters

## **Adding Selection Steps**

- Comparing Selection Steps with Filters
- Examining Selection Steps
- Working with Selection Steps
- Filtering via Selection Steps Based on Conditions
- Using Selection Steps Based on Conditions: Exceptions
- Using Selection Steps Based on Conditions: Top/Bottom (Ranking)
- Using Selection Steps Based on Conditions: Match

## **Organizing Data within Analyses**

- Examining Table Prompts
- Examining Sections
- Working with Sections and Table Prompts
- Examining Groups
- Working with Groups
- Examining Calculated Items
- Working with Calculated Items

## **Organizing Analyses within OTBI**

- Exploring the BI Catalog
- Reviewing the OTBI Report Web Catalog
- Working with the New Drop-Down Menu
- Searching the BI Catalog
- Examining More Actions on Analyses
- Printing and Exporting Analyses

## **Using Scheduling Agents**

- Examining Scheduling Agents
- Running Agents
- Listing Agents
- Creating Agents with Conditions
- Examining Actions
- Managing Agent Alerts

## **Working with OTBI Visual Aides: Incorporating Visual Aides into Analyses**

- Examining Compound Layout Panes
- Specifying Table/View Properties
- Examining View Types

- Examining View Editors
- Applying Conditional Formatting

## **Working with OTBI Visual Aides: Understanding Advanced Analysis Views**

- Examining Trellis Views
- Examining Advanced Visual Aids
- Understanding Advanced Analysis Views

Examining Legend, Narrative, Ticker, Logical SQL and View Selector Views

### **Managing Analysis Content: Using Analysis Tools**

Setting Analysis Properties

Working with Column Selectors

Adding Column Selectors to Analyses

### **Managing Analysis Content: Restructuring Data**

Creating Master-Detail Channels

Defining the Master View

Defining the Detail View

Looking at the Master-Detail View in Action

### **Creating Key Performance Indicators**

Understanding Key Performance Indicators

Using KPIs in OTBI

Examining KPI Terms

Building Calculations for KPIs

Building KPIs

### **Scoping Dashboards**

Examining Dashboards

Reviewing Dashboard Content

Scoping Dashboards

### **Building Dashboards**

Creating New Dashboards

Adding Content to Dashboards

Editing and Configuring Dashboard Format and Content

Examining Dashboard Prompts

Using the Tools Toolbar

Configuring Dashboard Preferences from My Account

### **Creating Briefing Books**

Examining Briefing Books

Turning OBI Content into Briefing Books

Editing Briefing Books

Downloading and Viewing Briefing Books

Adding Briefing Books to Dashboards

Using Briefing Books with Agents

### **Course Summary**

Reviewing Course Objectives

Exploring Other OTBI Functions