

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.

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

Configuring 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