



Access and Run Reports, Analyses and Dashboards

User Guide



One Council. One System.

Simpler, quicker, and better Finance, HR and Purchasing systems that help us make better-informed decisions and deliver excellent outcomes for residents.



INTRODUCTION

This document forms part of the wider selection of SMBC's Oracle Fusion training and documentation suite.

THIS DOCUMENT IS INTENDED TO BE USED BY:

- Users who need to run reports

SCOPE OF THIS DOCUMENT:

- The purpose of this document is to provide guidance for users when performing end-user tasks on the Oracle Fusion system.
- This document is intended to act as a guide for detailing the steps involved in a variety of everyday on-system processes
- This document contains some off-system process information, but for in-depth process information, users are advised to refer to either company policy and regulations documentation, or the relevant professional team

OUT OF SCOPE:

- This document does not advise users on specific options to be selected for every possible eventuality
- This document does not advise regarding system administration activities

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1 | REPORTS & ANALYSES IN ORACLE FUSION

1.1 | Overview

OTBI stands for Oracle Transactional Business Intelligence. In **OTBI Reporting and Analytics**, you can create and run business intelligence analyses, dashboards, and reports to gain insights that you can then act on and use to meet specific business requirements.

In Oracle Fusion, you can access and use different types of predefined or custom analytics, dashboards, reports, and Infolets.

Analyses rather than **Reports** are the focus of this guide, and the associated training. The table below explains the differences between the two terms in an Oracle Fusion context, as well as how a collection of **Analyses** may be presented in a **Dashboard**.

	OTBI runs on a separate database and is dependent on scheduled synchronisation processes to run. Depending on how frequently (or infrequently) those processes are set to run, some data may be slightly out of date. This is especially the case if some processes are set to run overnight, and therefore the full up-to-date information is not available until the following morning.
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Object	What It Displays	What It Is Typically Used For
Analysis	Data in an interactive format, often displayed in a table or graph.	Summarise or break down simple, real-time data, which helps you in taking short-term decisions. e.g. A listing of invoices, broken down by Supplier, sorted by invoice amount in descending order, and with higher-value items highlighted.
Report	Data in a predefined format that provides little or no interaction.	Get high-volume data in a high-fidelity output optimised for printing, for example in documents to support internal operations, statutory requirements, and other business needs. e.g. A General Ledger Transactions Report or Payroll Paymaster’s Report.
Dashboard	A collection of analyses/content, presented on one or more pages/tabs.	Get various pieces of information about a particular subject. e.g. A line manager dashboard for viewing a whole host of data relating to team member activity.

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Infolet	A self-contained, interactive 'box' used to display information using text and charts.	Infolets are interactive and typically display high-level, aggregated, essential information for quick consumption at a glance, and then can be acted upon as needed. eg. A single info box that contains specific time-delineated information on invoice processing, showing invoices that are <7 days / 7-14 days, and >14 days since receipt) displayed on a dashboard along with a selection of other Infolets, each with their own specific at-a-glance purpose.
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2 | ACCESSING/VIEWING REPORTS, ANALYSES & DASHBOARDS

2.1 | Overview

This chapter details how to access and run existing reports in Oracle Fusion.

There are a combination of the following available via the Reports and Analytics screen:

- **Seeded reports** – standard reports available in Oracle Fusion
- **Custom reports** – customised reports created specifically for SMBC/SCT



Both seeded reports and custom reports are found in the **Shared Folders**, but only **Custom** reports are found in the **Custom** folder.

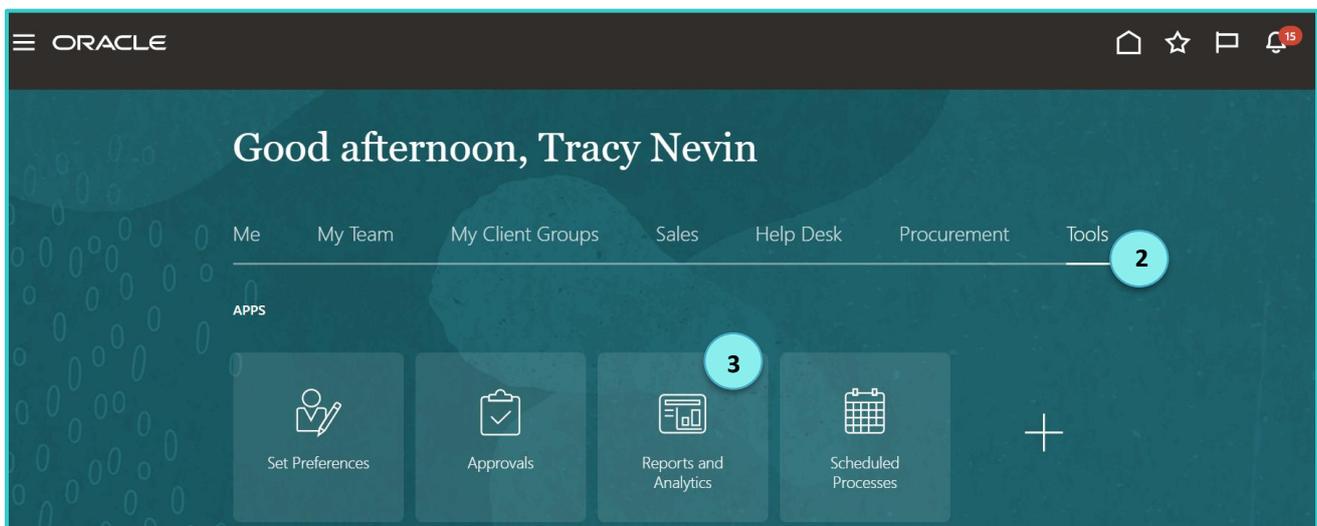
2.2 | Access the 'Reports and Analytics' screen

Follow the navigation steps below:

Log in to **Oracle Fusion** using your credentials.

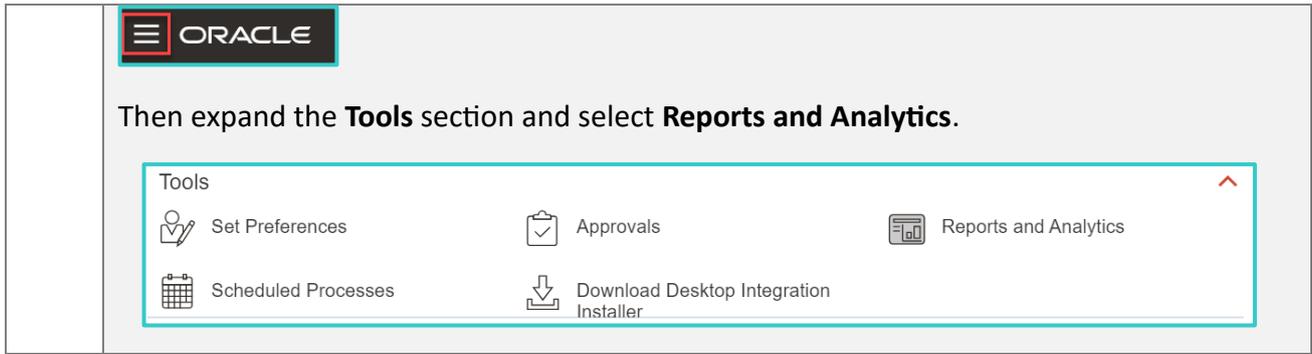
From the **Home** screen, select the **Tools** module.

Select the **Reports and Analytics** tile.

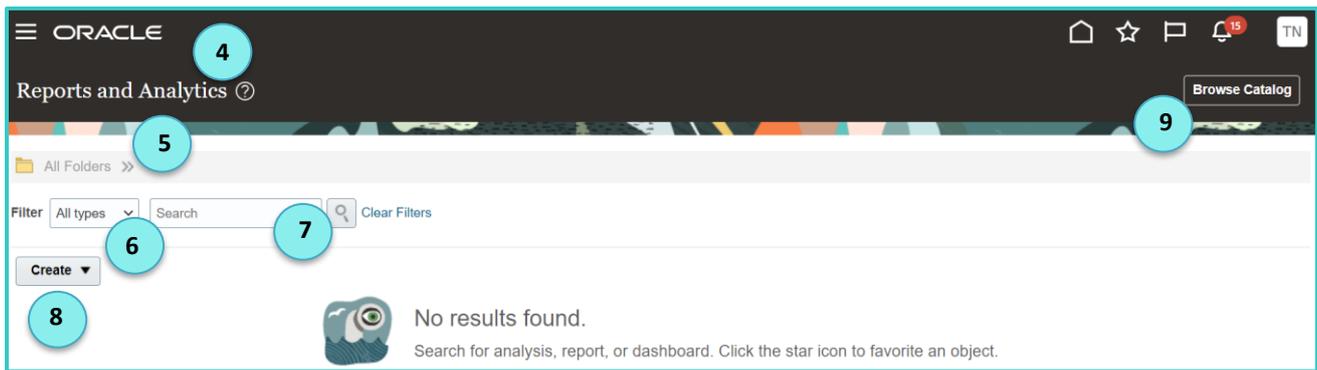


Alternatively, you may access the **Reports and Analytics** screen via the **Navigator**: Select the **Navigator** icon.

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The **Reports & Analytics** screen displays (see below).



Number	Item	Description
4	Reports and Analytics screen	The screen header
5	Folder Selector	View either My Folders or Shared Folders
6	Filter	May be used to show either Dashboards, Reports or Analyses ... or the default: All Types
7	Search	Used to search for a specific report, dashboard or analysis
8	Create	Used to create a new analysis or report
9	Browse Catalog	Used to access the BI Server, where you can see the catalog of available pre-prepared reports, analyses, and dashboards.

2.3 | View Reports via the ‘Reports & Analytics’ screen

	<p>From the Reports and Analytics screen above, you can access either seeded reports or custom reports.</p>
	<p>Seeded Reports are pre-installed, standard, module-based reports, analyses, or dashboards provided to all Oracle Fusion customers.</p>
	<p>These reports are split across various modular folders within the Reports and Analytics screen (e.g. Contracts, Financials, Human Capital Management etc.) Seeded reports are not found in the Custom folder.</p>
	<p>Custom reports are reports, analyses and dashboards that have been customised specifically for SMBC/SCT based on documented custom reporting requirements. These reports have been created according to specification and stored in the Custom folder and its subdirectories.</p>

To access a specific report, dashboard, or analysis, follow the navigational instructions below:

From the **Reports and Analytics** screen, select **All Folders**.

The **My Folders** and **Shared Folders** options display below.



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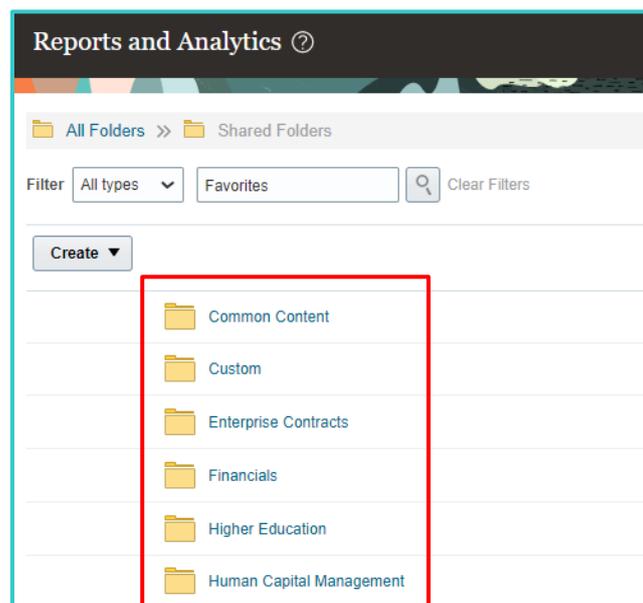
My Folders – contains analyses and dashboards created by you. Only specific nominated users have access to use this folder for creation of new analyses, dashboards, and reports. If you do not have access to it, then it can be ignored.



Shared Folders – its subdirectories contain seeded analyses, reports, and dashboards, and the Custom directory is found there too.

All users have access to the Shared Folders for viewing reports relevant to their role profile. E.g., Procurement team members will be able to see relevant reports to their area. Payables team members will see a different set of reports relevant to them, etc.

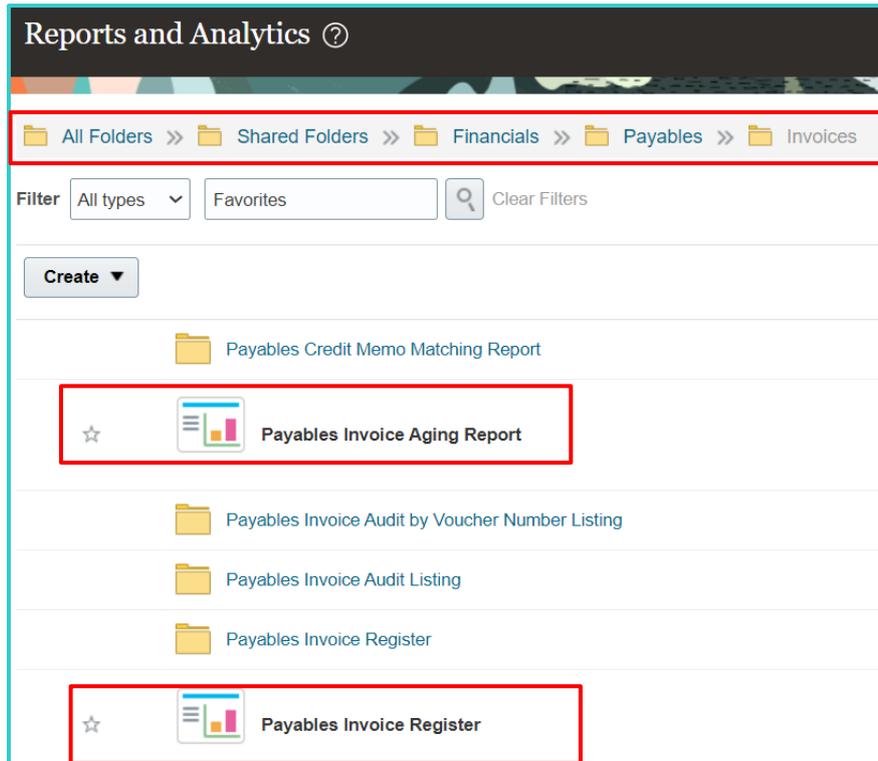
Select the relevant folder to see reports, dashboards or analyses (as well as additional subfolders) specific to that area.



Some folders have further subfolders, which you can select until you reach the lowest level containing the actual reports, analyses, and dashboards.

In the example overleaf, note the path used to navigate to the **Payables Invoice Aging Report**, as displayed at the top of the screen:

Oracle Fusion Guide: Access and Run Reports, Analyses and Dashboards



In the above example, there are two reports available in the *Invoices* subdirectory. There are also folders at this level, which may contain either reports or additional subfolders in which reports can be found.



Note that the same navigation principle applies to each of the folders, whether for Financials, Human Capital Management, Procurement or others.

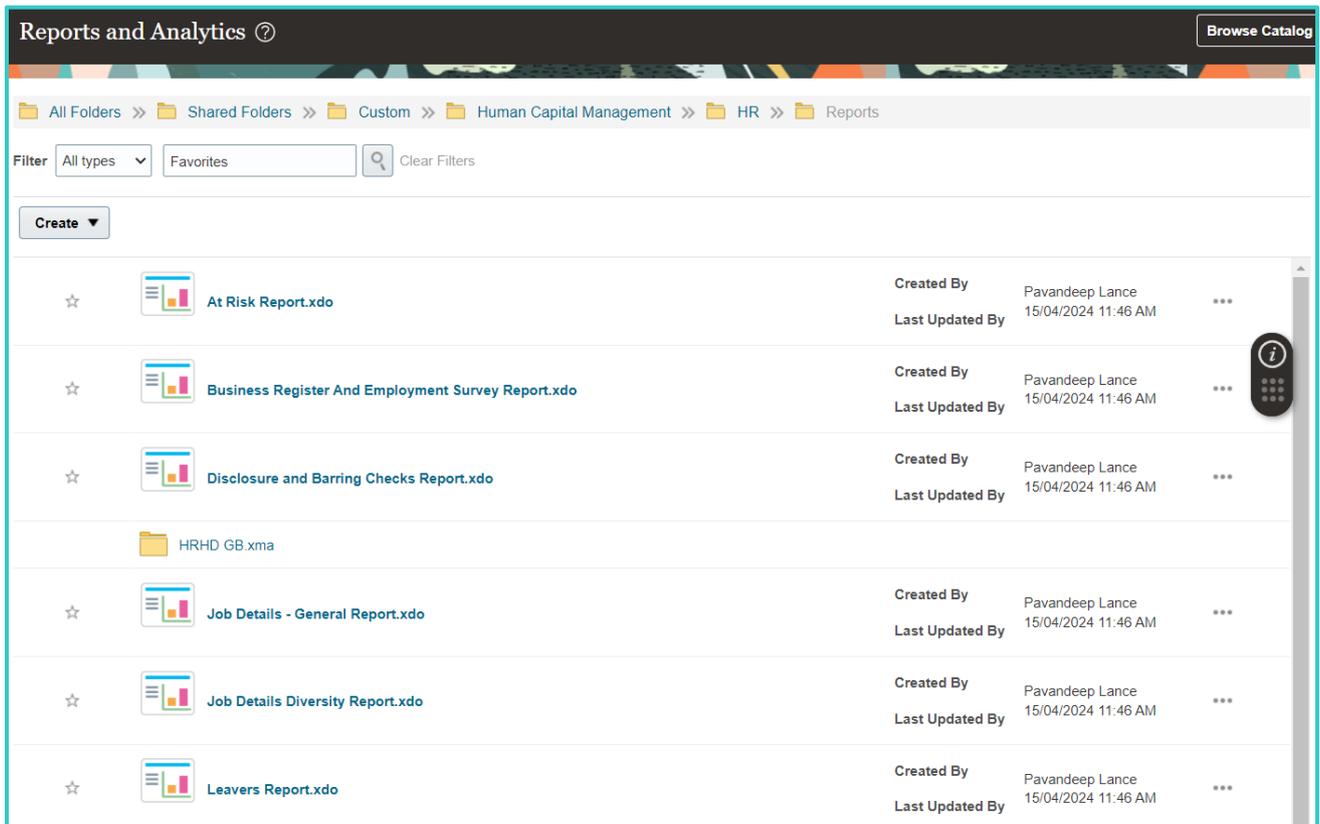
Oracle Fusion Guide: Access and Run Reports, Analyses and Dashboards

2.3.1 | Open a Report; Select Parameters; Run the Report

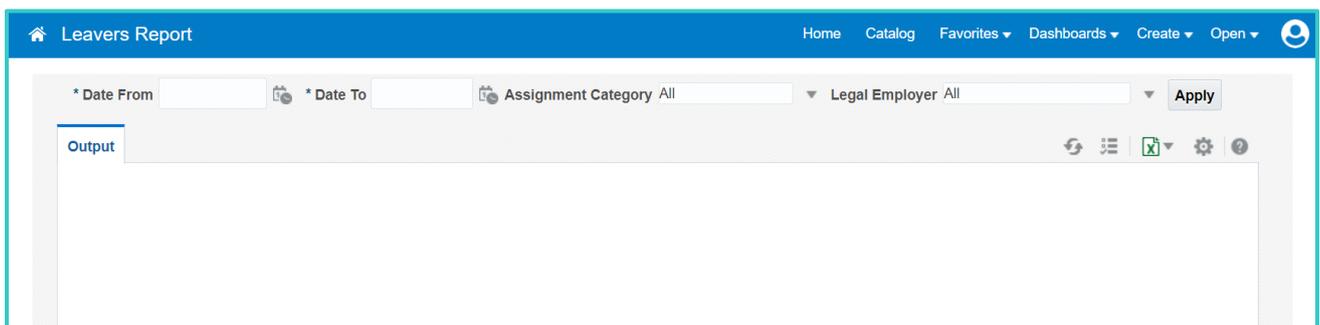
 The same process below applies to both seeded and custom reports.

Select the required report from the relevant folder or subfolder.

In the example below, the **Leavers Report** is accessed.



The report opens in another browser window or tab.

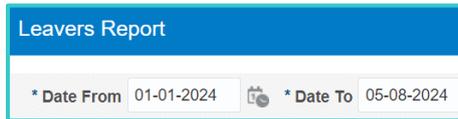


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Depending on the specific report or analysis selected, you may have options to select before the report runs.

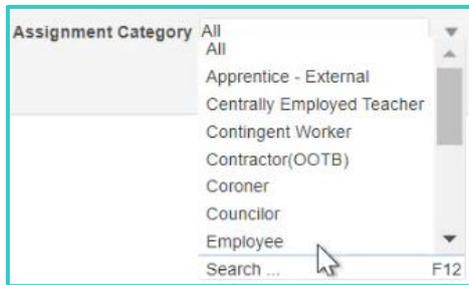
For example:

- Enter a date range where applicable.
 - In the example above, this is a mandatory requirement, as indicated by the asterisks next to the **Date From** and **Date To** fields).



The screenshot shows a form titled "Leavers Report". It contains two date fields: "* Date From" with the value "01-01-2024" and "* Date To" with the value "05-08-2024". Both fields have a calendar icon to their right. The asterisks indicate that these fields are mandatory.

- Select options from any dropdown menus provided.
 - In the example above, the Assignment Category defaults as 'All', but can be changed by the selecting from the dropdown. Likewise with 'Legal Employer'.



The screenshot shows a dropdown menu for "Assignment Category". The menu is open, displaying a list of options: "All", "Apprentice - External", "Centrally Employed Teacher", "Contingent Worker", "Contractor(OOTB)", "Coroner", "Councilor", and "Employee". A mouse cursor is pointing at the "Employee" option. At the bottom of the menu, there is a "Search ..." field and the keyboard shortcut "F12".

Once selections have been made, select **Apply** to run the report or analysis.



The screenshot shows the Oracle Fusion interface for the "Leavers Report". The form is displayed with the following values: "* Date From" 01-01-2024, "* Date To" 05-08-2024, "Assignment Category" Employee, and "Legal Employer" Sandwell Metropolitan Borough. The "Apply" button is highlighted with a red box. Below the form, there is an "Output" tab and several icons for refreshing, printing, and settings.

In the case of reports that are designed to run and display output in the Oracle Fusion browser window, you will see the results display below after a few moments.

The **Report Parameters** that had been set are displayed in the top left corner of the Output tab.

The **Report Results** are displayed below.

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Leavers Report

Date From: 01-01-2024 Date To: 01-31-2024 Assignment Category: All Legal Employer: All

Output

Leavers Report

Parameter	Value
Legal Employer	All
Assignment Category	All
Date From	01-01-2024
Date To	31-01-2024

Legal Employer	Payroll Name	Directorate	Service Area	Sub Service Area	Department	Person Type	Assignment Number	First Name	Last Name	Ethnicity	Disabled Y/N	Date of Birth	Age at leaving date	Age-Band	Position Title	Grade	Grad Band
Sandwell Metropolitan Borough Council	SMBC General Salaries Monthly	SMBC-ACE0000 Chief Executive	SMBC-HSG0000 Housing	SMBC-HSG1210 Housing Management	SMBC-HSG1211 Floating Support Service	Employee	E10998-3			White - Any other White background	N	20/10/1951	72.2	65 plus	Support Officer	SMBC Band E	Band
Sandwell Metropolitan Borough Council	SMBC General Salaries Monthly	SMBC-ACE0000 Chief Executive	SMBC-BSC0000 Business Strategy and Change	SMBC-BSC1210 Human Resources	SMBC-BSC1212 HR Transactional - Traded HR Consultancy	Employee	E75				N	03/03/1978	45.85	45 to 49	Itant	SMBC Band G	Band
Sandwell Metropolitan Borough Council	Sandwell Election Services Monthly				Electoral Services	Employee	E87067			White - Any other White background	N	20/10/1951	72.2	65 plus	s Officer	Elections	Any other Grade
Sandwell Metropolitan Borough Council	SMBC Education Salaries Monthly				SCH Langley Primary	Employee	E90095			White - Any other White background	N	06/03/1967	56.85	55 to 59	ager	SMBC Apr 19 Grade D	Any other Grade

 The report results can then be optionally exported to Excel/PDF or another format using the toolbar.

In the case of reports that are designed to automatically download, a **Report Completed** message displays, and the file downloads to your device.

Leavers Report

Date From: 01-01-2024 Date To: 05-08-2024 Assignment Category: Employee Legal Employer: S

Output

Report Completed

Recent download history

 Leavers Report_Output.xlsx
7.4 KB • Done

Full download history

Open the file from your device to view the report based on the parameters set.

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PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

A1 Leavers Report

Leavers Report

Parameter	Value
Legal Employer	All
Assignment Category	All
Date From	01-01-2024
Date To	31-01-2024

Legal Employer	Payroll Name	Directorate	Service Area	Sub Service Area	Department	Person Type	Assignment Number	First Name	Last Name	Gender	Ethnic Group	Ethnicity	Disabled Y/N	Date of Birth	Age at leaving date	Age-Band	Position Title	Grade	Grade Band
Sandwell Metropolitan Borough Council	SMBC General Salaries Monthly	SMBC-ACE000 Chief Executive	SMBC-HSG000 Housing	SMBC-HSG1210 Housing Management	SMBC-HSG1211 Floating Support Service	Employee	E10998-3			M		White - Any other White background	N	20/10/1951	72.2	65 plus	Support Officer	SMBC Band E	Band E
Sandwell Metropolitan Borough Council	SMBC General Salaries Monthly	SMBC-ACE000 Chief Executive	SMBC-BSC000 Business Strategy and	SMBC-BSC1210 Human Resources	SMBC-BSC1212 HR Transactional - Traded HR	Employee	E75			F			N	03/03/1978	45.85	45 to 49	Itant	SMBC Band G	Band G

Note that data access is set up to control which users can see which data.



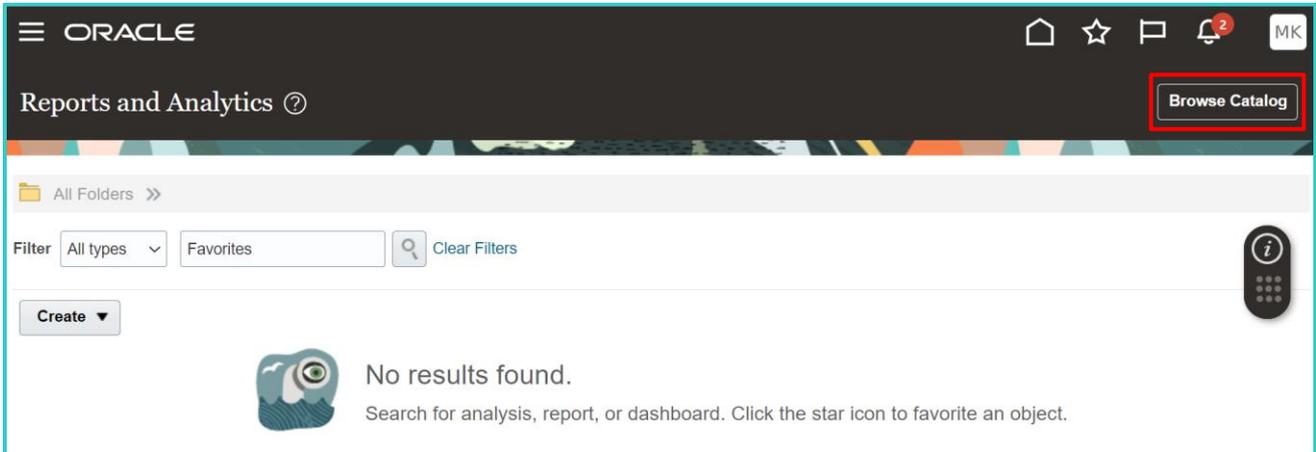
For example, if you are SMBC employee, you may only be permitted to see SMBC data, and not SCT data.

The data you see when you run a report will already have these restrictions applied.

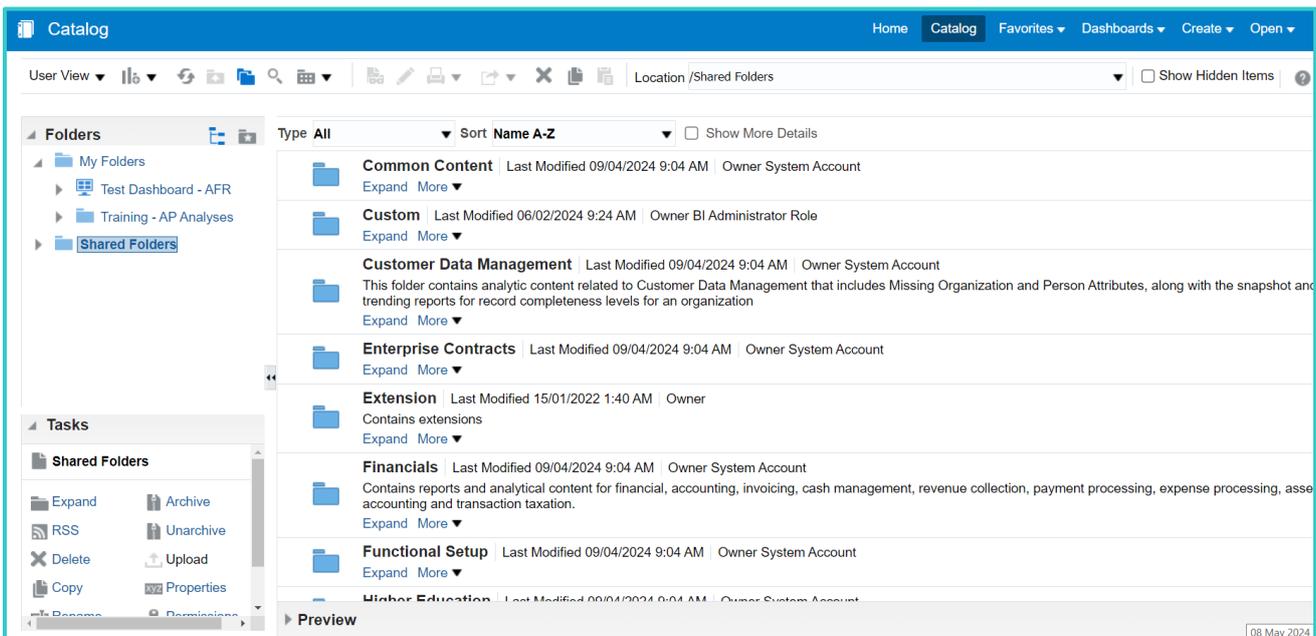
2.4 | View Reports via the Reports Catalog

In addition to being able to view reports via the Reports and Analytics screen, you can alternatively view reports via the **Reports Catalog**.

To access the **Reports Catalog** from the **Reports and Analytics** screen, select the **Browse Catalog** button in the upper right corner of the screen.



The **Reports Catalog** opens in a new browser window or tab.



Important: These reports are no different to those viewable via the **Reports and Analytics** screen, but additional options are available via this screen.

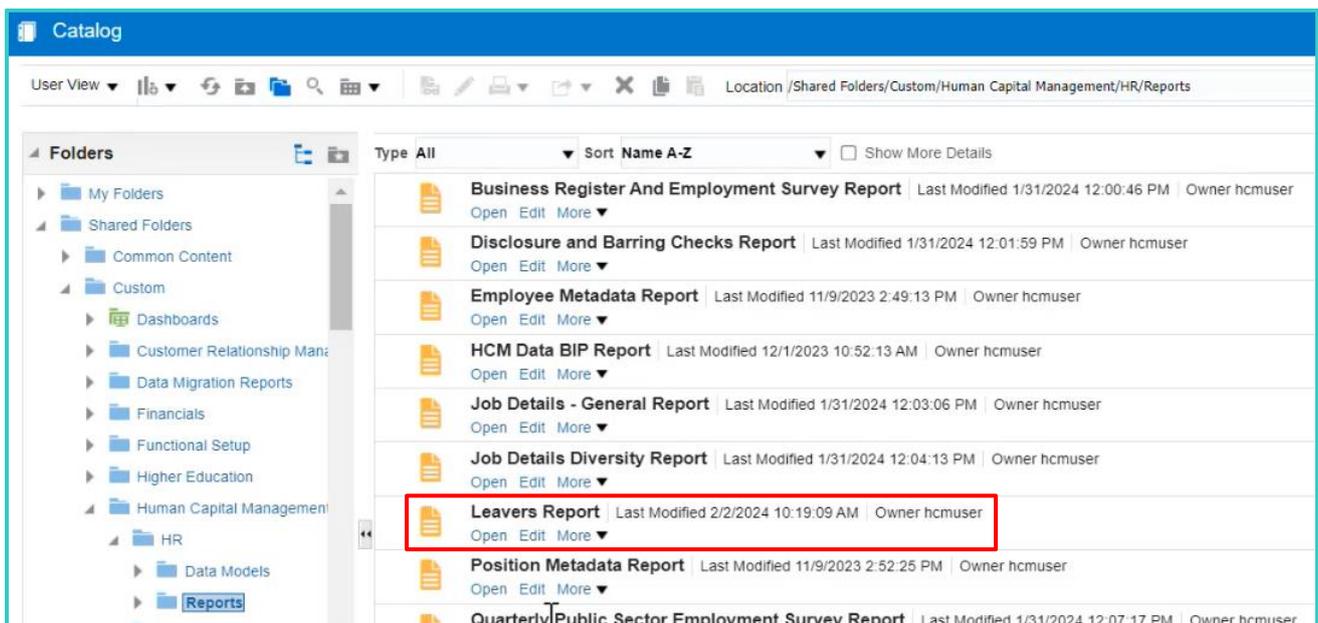
Oracle Fusion Guide: Access and Run Reports, Analyses and Dashboards

In the **Folders** section on the left, select **Shared Folders**.

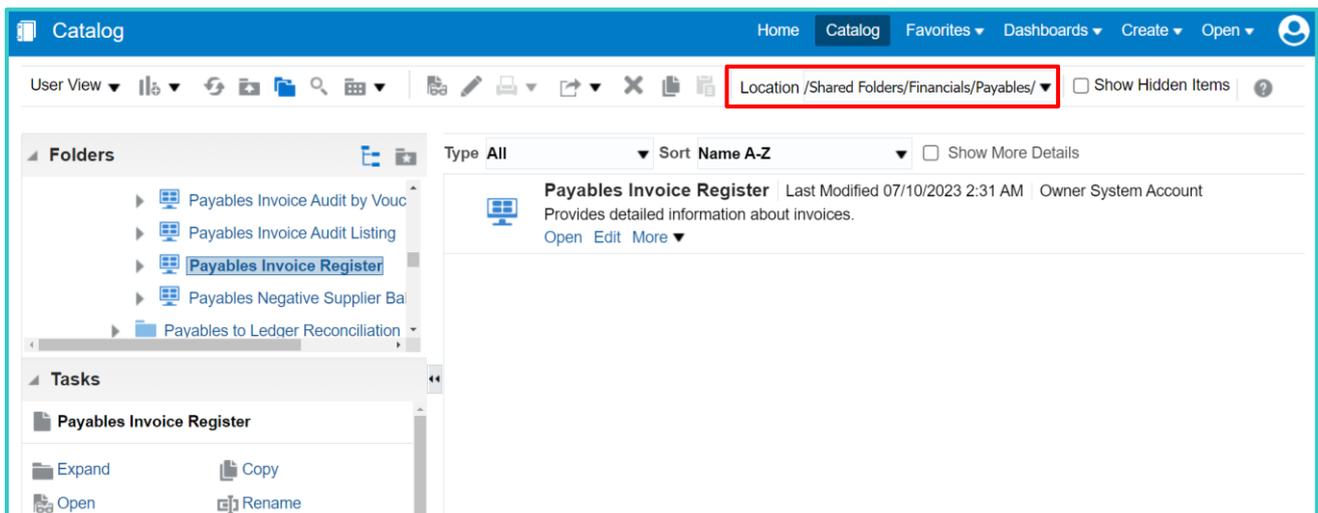
Expand the relevant folders to see reports, dashboards, or analyses (as well as additional subfolders) specific to that area.

Some folders have multiple subfolders, which you can select until you reach the lowest level containing the actual reports, analyses, and dashboards.

In the example below, note the path used to navigate to the **Leavers Report**, as displayed in the navigation bar at the top of the screen:



Another example report from Finance is the **Payables Invoice Register** report.



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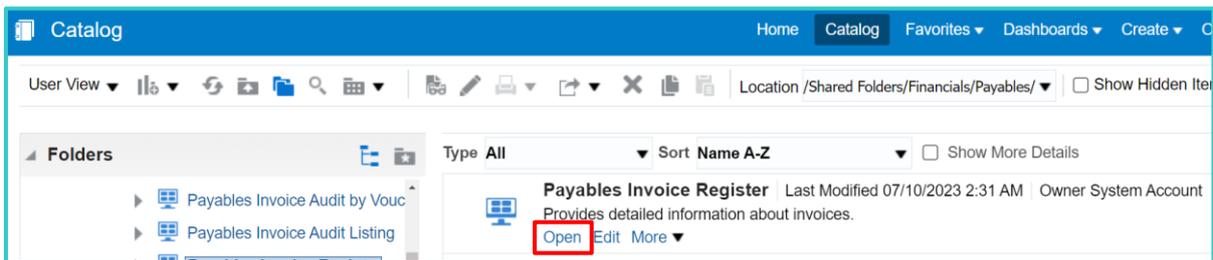
Note that the same navigation principle applies to each of the folders, whether for Financials, Human Capital Management, Procurement or others.

Different types of reports may be available via these folders, including BI Publisher Reports and OTBI Reports.

2.4.1 | Open a BI Publisher Report; Select Parameters; Run the Report

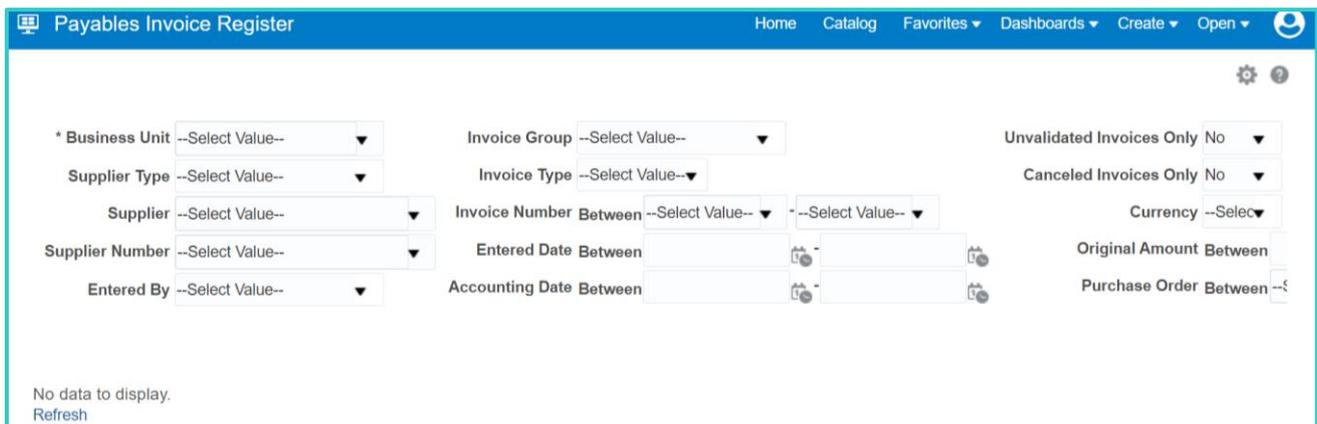
The same process below applies to both seeded and custom reports.

1. From the **Catalog** screen, select the **Open** option for the required report from the relevant folder or subfolder.



The above report is an example of a report created via BI Publisher.

In the example below, the **Payables Invoice Register** opens, with various parameter settings available.



Oracle Fusion Guide: Access and Run Reports, Analyses and Dashboards

Depending on the specific report or analysis selected, you may have options to select before the report runs.

For example:

- Enter a date range where applicable.



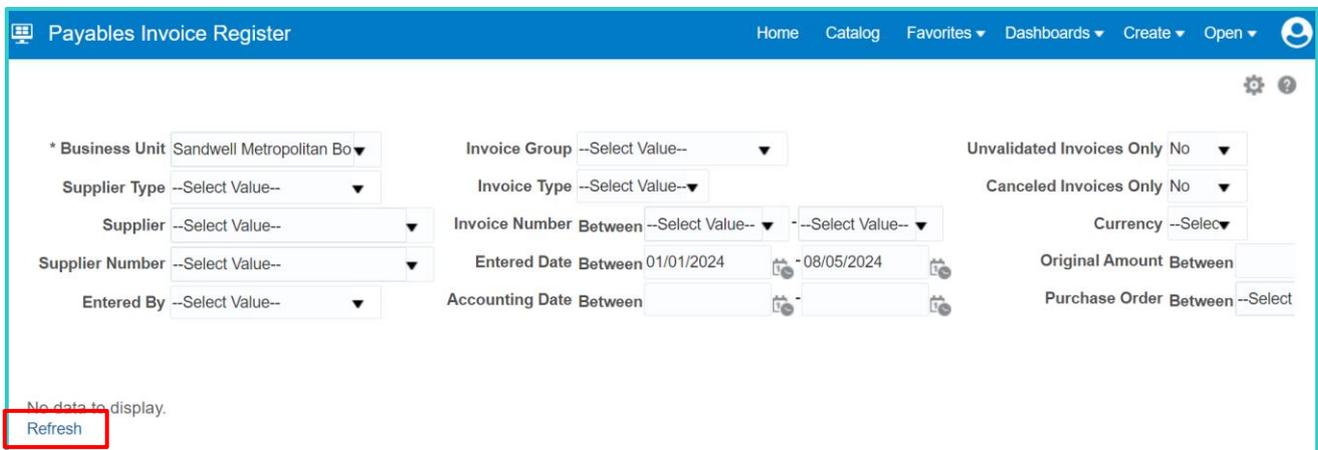
Entered Date Between 01/01/2024 -08/05/2024

- Select options from any dropdown menus provided.



* Business Unit --Select Value-- Inv
Supplier Type Sandwell Children's Trust
Supplier Sandwell Metropolitan Borough Council

Once selections have been made or adjusted, select **Refresh** to re-run the report or analysis.



Payables Invoice Register

Home Catalog Favorites Dashboards Create Open

* Business Unit Sandwell Metropolitan Bo Invoice Group --Select Value-- Unvalidated Invoices Only No
Supplier Type --Select Value-- Invoice Type --Select Value-- Canceled Invoices Only No
Supplier --Select Value-- Invoice Number Between --Select Value-- Currency --Select
Supplier Number --Select Value-- Entered Date Between 01/01/2024 -08/05/2024 Original Amount Between
Entered By --Select Value-- Accounting Date Between Purchase Order Between --Select

No data to display.
Refresh

In the case of reports that are designed to run and display output in the Oracle Fusion browser window, you will see the results display below after a few moments.

The **Report Parameters** that had been set are displayed in the top left corner of the **Output** tab.

The **Report Results** are displayed below.

Oracle Fusion Guide: Access and Run Reports, Analyses and Dashboards

Leavers Report

Parameter	Value
Legal Employer	All
Assignment Category	All
Date From	01-01-2024
Date To	31-01-2024

Legal Employer	Payroll Name	Directorate	Service Area	Department	Person Type	Assignment Number	First Name	Last Name	Disabled Y/N	Date of Birth	Age at leaving date	Age-Band	Position Title	G
Sandwell Metropolitan Borough Council	SMBC General Salaries Monthly	SMBC-ACE0000 Chief Executive	SMBC-HSG0000 Housing	SMBC-HSG1211 Floating Support Service	Employee	E10998-3			N	20/10/1951	72.2	65 plus	Support Officer	SM Bar
Sandwell Metropolitan Borough Council	SMBC General Salaries Monthly	SMBC-ACE0000 Chief Executive	SMBC-BSC0000 Business Strategy and Change	SMBC-BSC1212 HR Transactional - Traded HR Consultancy	Employee	E75			N	03/03/1978	45.85	45 to 49	Itant	SM Bar

 The report results can then be optionally exported to Excel/PDF or another format using the toolbar.

In the case of reports that are designed to automatically download, a **Report Completed** message displays, and the file downloads to your device.

Report Completed

Recent download history

- Leavers Report_Output.xlsx (7.4 KB) - Done

Full download history

Open the file from your device to view the report based on the parameters set.

Oracle Fusion Guide: Access and Run Reports, Analyses and Dashboards

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

A1 Leavers Report

Legal Employer	Payroll Name	Directorate	Service Area	Sub Service Area	Department	Person Type	Assignment Number	First Name	Last Name	Gender	Ethnic Group	Ethnicity	Disabled Y/N	Date of Birth	Age at leaving date	Age-Band	Position Title	Grade	Grade Band
Sandwell Metropolitan Borough Council	SMBC General Salaries Monthly	SMBC-ACE000 Chief Executive	SMBC-HSG000 Housing	SMBC-HSG1210 Housing Management	SMBC-HSG1211 Floating Support Service	Employee	E10998-3			M		White - Any other White background	N	20/10/1951	72.2	65 plus	Support Officer	SMBC Band E	Band E
Sandwell Metropolitan Borough Council	SMBC General Salaries Monthly	SMBC-ACE000 Chief Executive	SMBC-BSC000 Business Strategy and	SMBC-BSC1210 Human Resources	SMBC-BSC1212 HR Transactional - Traded HR	Employee	E75			F			N	03/03/1978	45.85	45 to 49	Itant	SMBC Band G	Band G

Note that data access is set up to control which users can see which data.

For example, if you are SMBC employee, you may only be permitted to see SMBC data, and not SCT data.

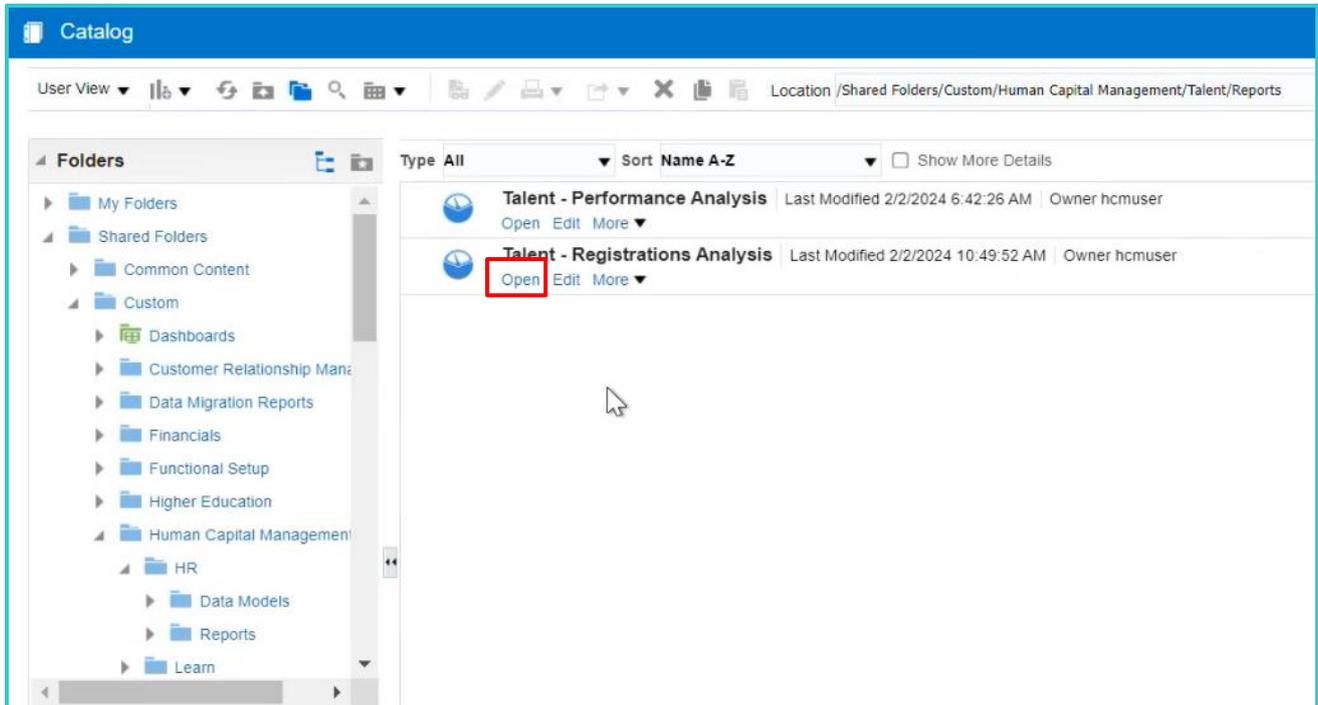
The data you see when you run a report will already have these restrictions applied.

2.4.2 | Open an OTBI Analysis; Select Parameters; Run the Analysis

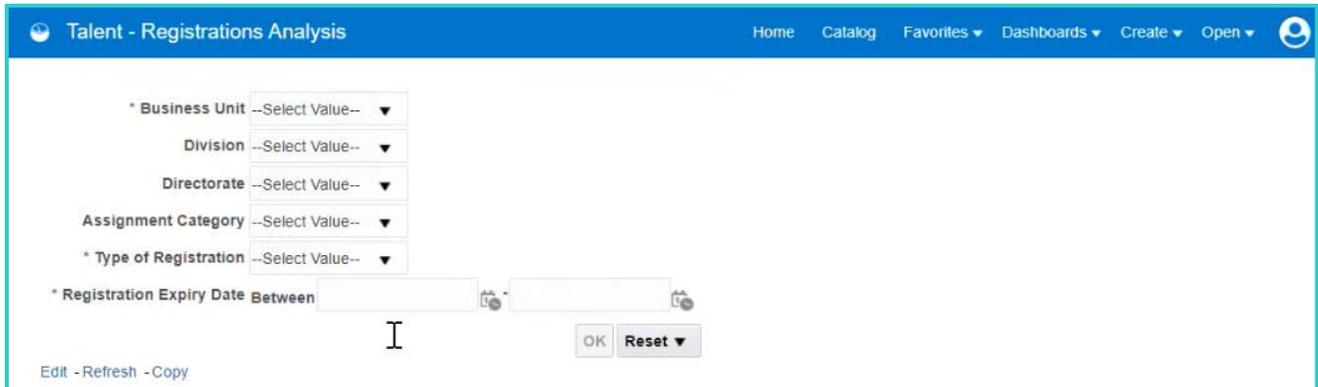
The same process below applies to both seeded and custom reports.

From the **Catalog** screen, elect the **Open** option for the required OTBI Analysis from the relevant folder or subfolder. The example below is a Talent Registrations Analysis.

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The report screen opens, with the parameters shown at the top.



The above report is an example of a report created via OTBI. From an end-user perspective, there is very little difference between a BI Publisher report and an OTBI Analysis.

There may be dropdown lists to choose from, dates or date ranges to select, mandatory (*) and non-mandatory fields etc.

In this example, the **Business Unit**, **Type of Registration**, and **Registration Expiry Date Range** are the mandatory fields.

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Once selections have been made or adjusted, select **OK** to run or re-run the report or analysis.

Talent - Registrations Analysis

* Business Unit Sandwell Metro

Division --Select Value--

Directorate --Select Value--

Assignment Category --Select Value--

* Type of Registration HCPC (Health and Care Professions Council)

* Registration Expiry Date Between 12/01/2024 12/31/2024

OK Reset

Edit - Refresh - Copy

In the case of reports that are designed to run and display output in the Oracle Fusion browser window, you will see the results display below after a few moments.

Talent - Registrations Analysis

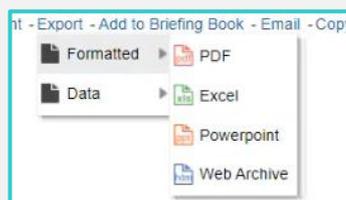
Licenses and Certifications	Type of Registration	Assignment Number	Registration Number	Registration Expiry Date	Email Address	Supervisor Full Name	Date Chased
	HCPC (Health and Care Professions Council)	E10114-3	112233	12/10/2024	sendmail-test-discard@oracle.com		1/11/2024
	HCPC (Health and Care Professions Council)	E35188-3	XYZZ22345	12/1/2024	sendmail-test-discard@oracle.com		11/15/2023
	HCPC (Health and Care Professions Council)	E94268	XYZZ123QRT	12/15/2024	sendmail-test-discard@oracle.com		11/6/2023

Edit - Refresh - Print - Export - Add to Briefing Book - Email - Copy

2.5 | Other Reporting Options (e.g. Export, Print, Email)

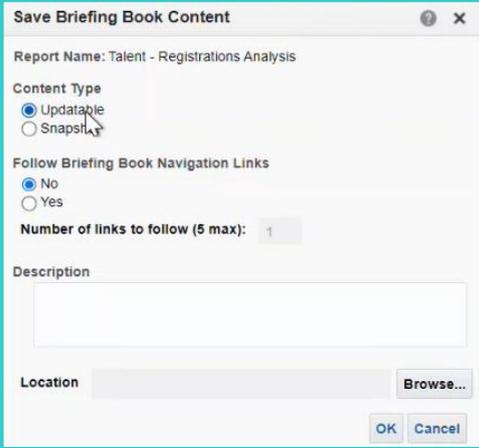
A range of functions are available as per the highlighted box above:

- You can **Refresh** the data in case there have been real-time updates in the last few moments.
- You can **Export** to Excel/PDF or another format.

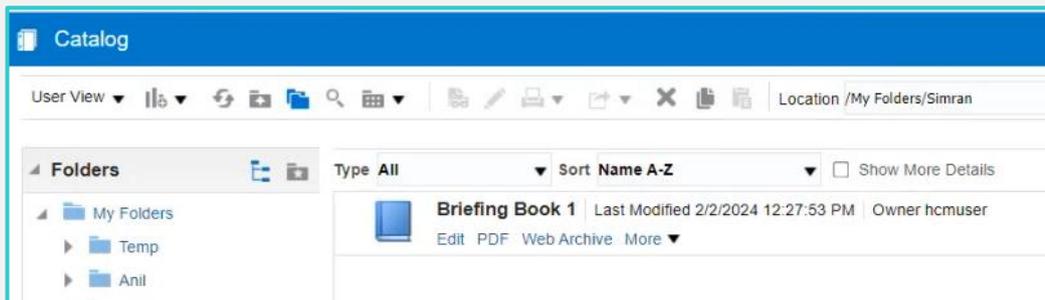


It is always recommended to export **Formatted** results, rather than the raw **Data**.

- You can **Print** the output.
- You can **Add to Briefing Book**. This allows you to run the Briefing book and get either the latest (updateable) version of the analysis, or else a static snapshot of the analysis, without having to access the analysis itself.

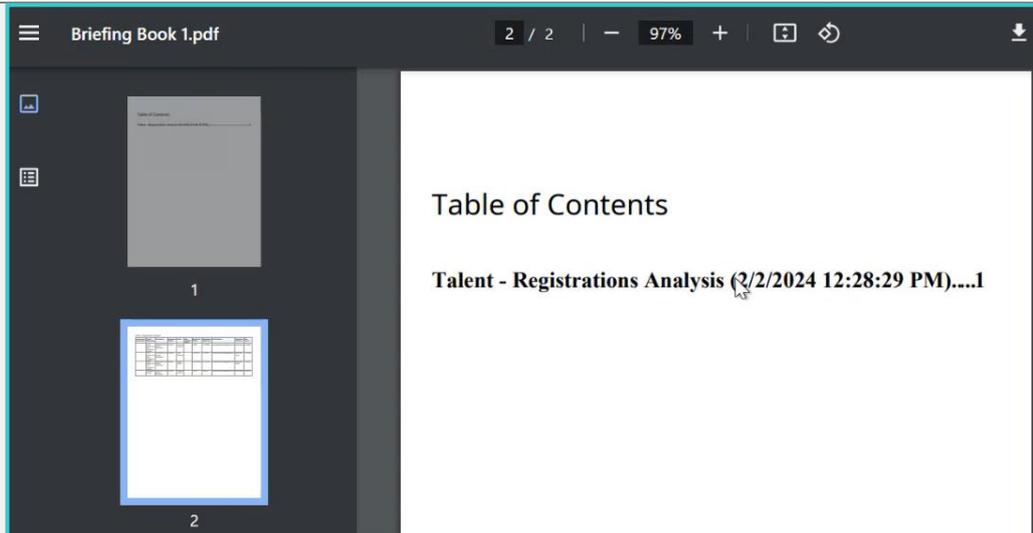


When a Briefing Book is saved, it appears in the location to which you saved it.



You can then select an output option, e.g., PDF. It downloads to your device, where you can open and view the booklet.

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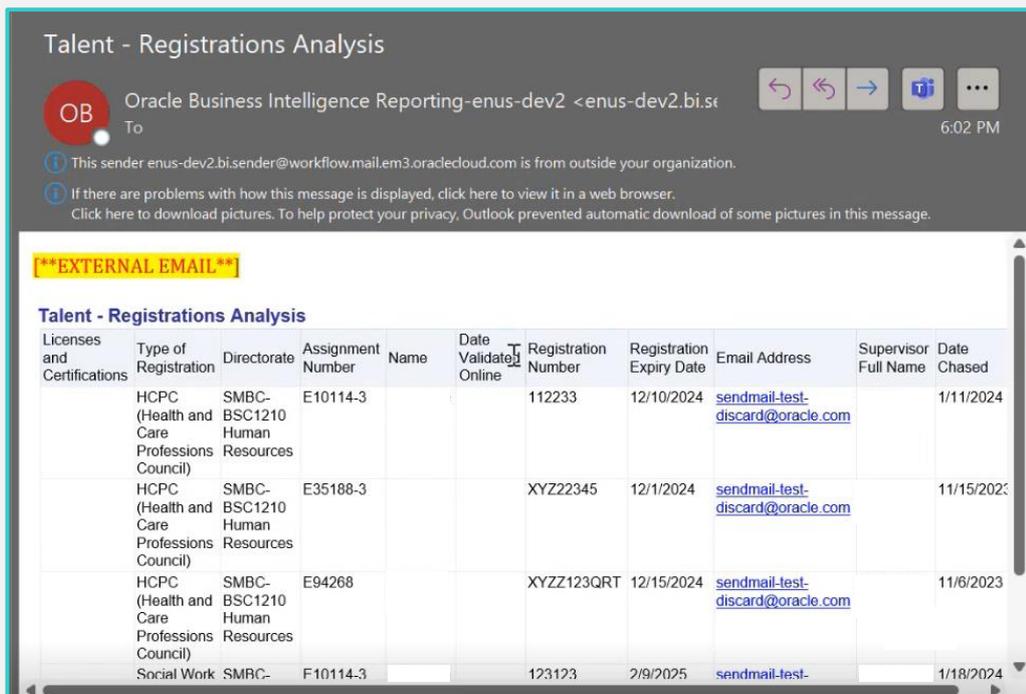


Note that parameters applied at the time of creating a Briefing Book are not retained. When you run it, it will show all of the data from the data set.

- You can **Email** the output to any valid **Email ID**.

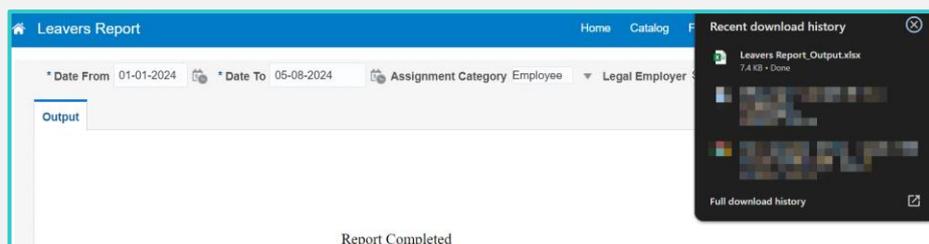
From the popup dialog box, emails optionally can be scheduled to send on a repeat basis (for example daily or weekly).

The email is sent based on either the instruction or the schedule:



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In the case of reports that are designed to automatically download, a **Report Completed** message displays, and the file downloads to your device.



You can then open the file from your device to view the report.



Note that data access is set up to control which users can see which data.

For example, if you are SMBC employee, you may only be permitted to see SMBC data, and not SCT data.

The data you see when you run a report will already have these restrictions applied.

3 | WORKING WITH DASHBOARDS IN ORACLE FUSION

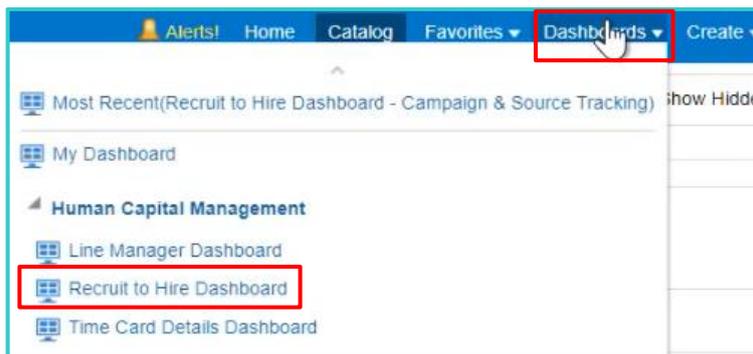
3.1 | View a Seeded Dashboard via the Catalog



A dashboard is essentially a combination of various analyses and reports into one easily accessible screen, providing meaningful summary information, typically related to a specific topic or process (in this example, the Recruit to Hire process).

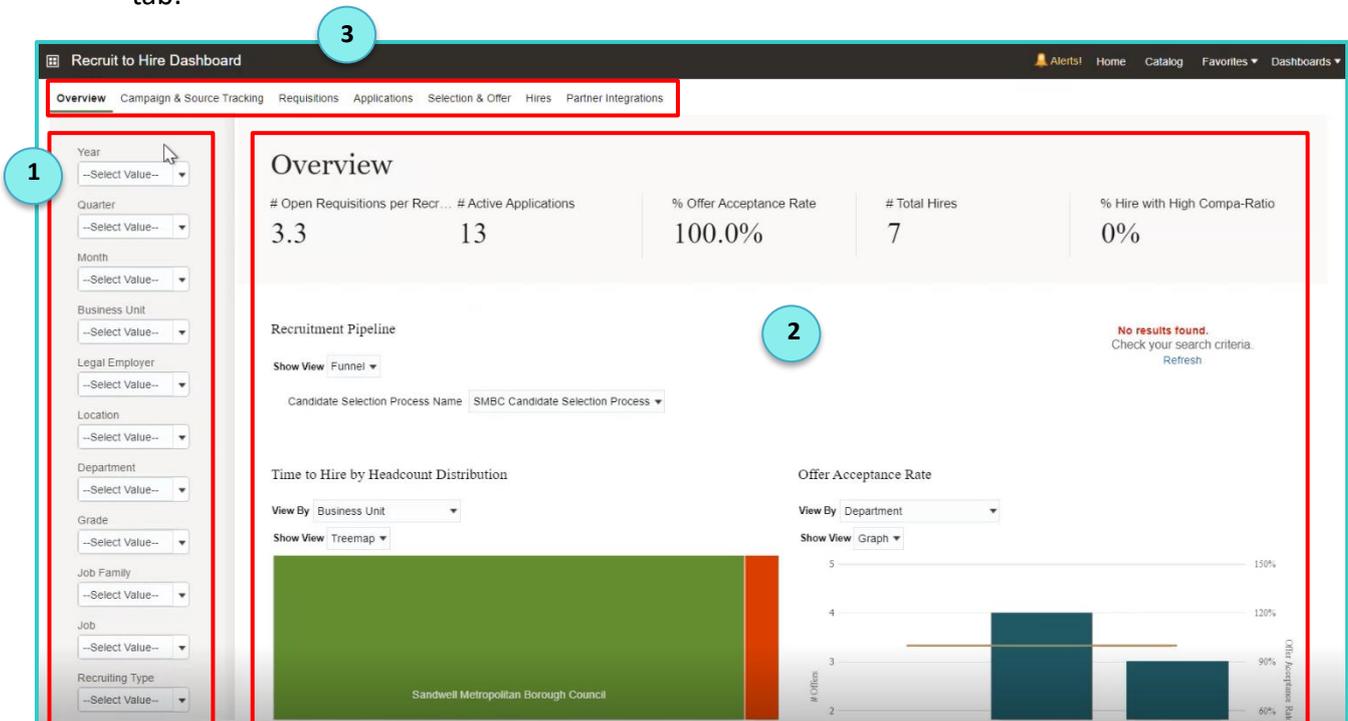
From the **Catalog** screen, select the **Dashboards** tab.

A dropdown menu displays.



Select a dashboard from the list.

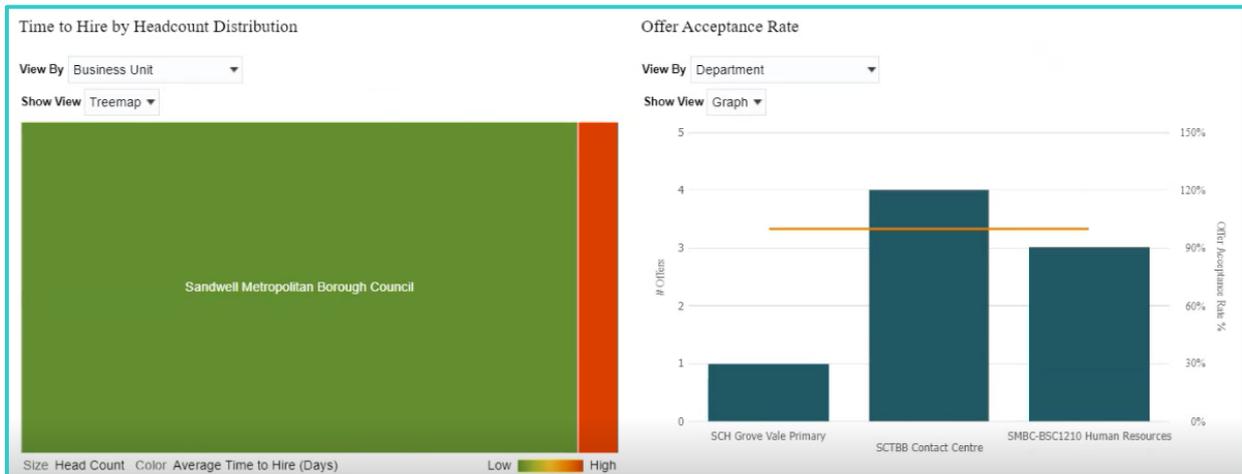
In this example, the seeded **Recruit to Hire Dashboard** opens on the default **Overview** tab.



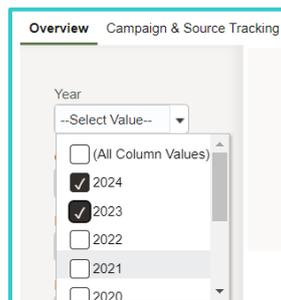
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Number	Item	Description
1	Parameters (Filters)	The parameters listed here may be used to filter information that displays across the various tabs of the dashboard.
2	Dashboard View	Displays information from multiple reports or analyses, incorporating any filters you have applied, combined into one visual representation.
3	Tabs	Each tab typically represents a subdivision or stage of the process being analysed in the overall dashboard, often displayed in sequence.

View the dashboard information in the main dashboard viewing area.



Apply filters if required (e.g. filter by a specific year or years), and then check the updated results in the main dashboard viewing area.



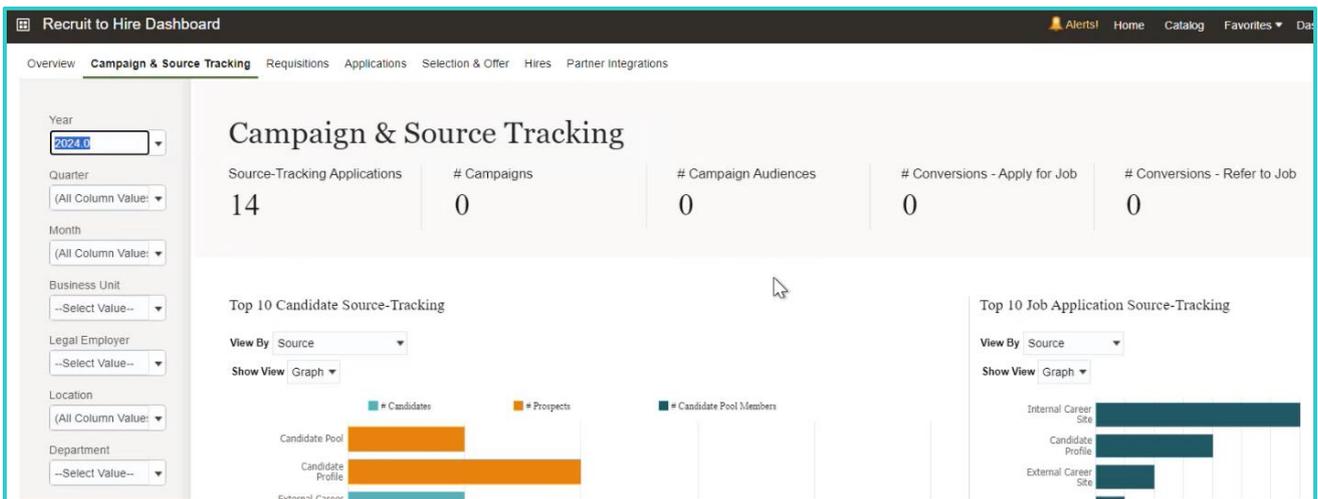
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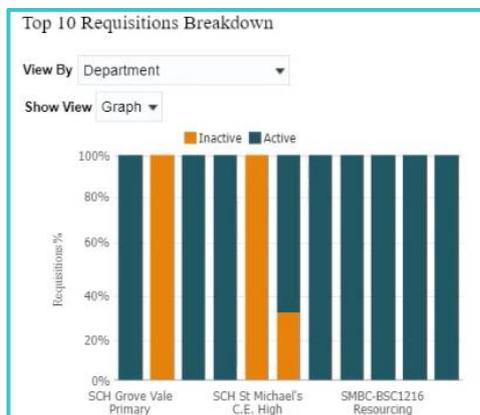
If you see a message such as the following in the dashboard, then it may be because the filters applied are too restrictive. Alternatively, there may simply be no data for this specific element within the dashboard.

No results found.
Check your search criteria.
[Refresh](#)

Scroll between tabs to view specific information related to the tab heading.



In addition to parameters (filters) on the left, some graphs/charts/widgets/tables have their own parameters to select from, for example 'View by' or 'Show View' as seen below.



Some dashboard components have drilldown options, that enable you to select a hyperlinked aggregated value, so as to 'drill down' into the individual records (i.e. access the detailed information that makes up that aggregated value).

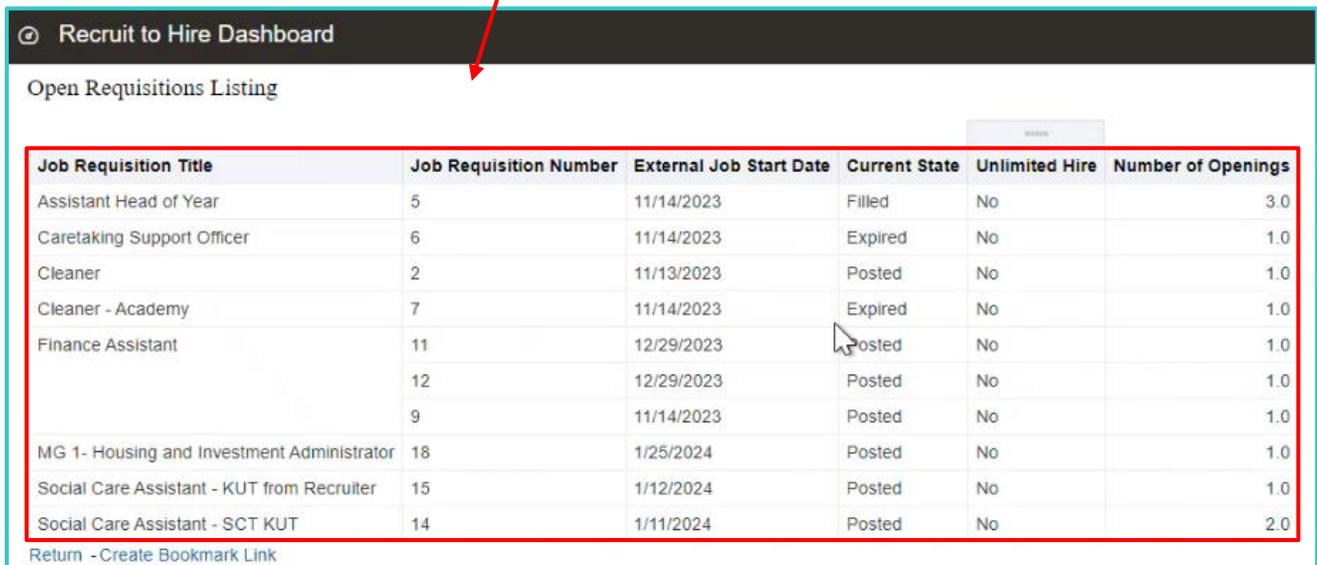
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In the example below, selecting the **# Open Requisitions (10)** drills down to the listing of those specific requisitions.



The screenshot shows the 'Recruit to Hire Dashboard' with the 'Requisitions' tab selected. The 'Requisitions Summary' section displays two key metrics: '# Open Requisitions' with a value of 10 (highlighted in a red box) and '# Open Requisitions per Recr...' with a value of 3.3. The dashboard also includes filters for 'Year' (2024.0) and 'Quarter' (All Column Value).

The drilldown listing opens.



The screenshot shows the 'Open Requisitions Listing' table. A red arrow points from the '10' in the previous screenshot to the table. The table has the following columns: Job Requisition Title, Job Requisition Number, External Job Start Date, Current State, Unlimited Hire, and Number of Openings. The table contains 10 rows of data.

Job Requisition Title	Job Requisition Number	External Job Start Date	Current State	Unlimited Hire	Number of Openings
Assistant Head of Year	5	11/14/2023	Filled	No	3.0
Caretaking Support Officer	6	11/14/2023	Expired	No	1.0
Cleaner	2	11/13/2023	Posted	No	1.0
Cleaner - Academy	7	11/14/2023	Expired	No	1.0
Finance Assistant	11	12/29/2023	Posted	No	1.0
	12	12/29/2023	Posted	No	1.0
	9	11/14/2023	Posted	No	1.0
MG 1- Housing and Investment Administrator	18	1/25/2024	Posted	No	1.0
Social Care Assistant - KUT from Recruiter	15	1/12/2024	Posted	No	1.0
Social Care Assistant - SCT KUT	14	1/11/2024	Posted	No	2.0

Return - Create Bookmark Link

Select the **Return** link to return from the drilldown to the main dashboard view.

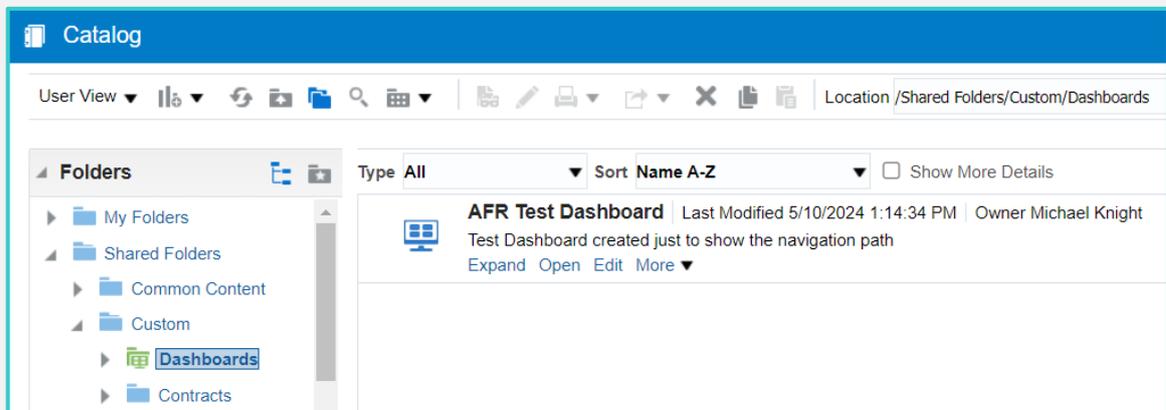
Tables in a dashboard have **Sort** functionality. To sort alphabetically or numerically in ascending or descending order, hover over a column header, and select either the up- or down-pointing arrow.

Job Requisition Title	Job Requisition Number	Candidate Full Name
MG 1- Housing and Investment Administrator	18	
Cleaner	2	
Social Care Assistant - KUT from Recruiter	15	
Social Care Assistant - SCT KUT	14	

3.2 | View a Custom Dashboard via the Catalog

Note that customised SMBC dashboards serve a similar purpose, and function in the same way but are accessed instead via the **Custom** folder and its subfolders (as illustrated in previous reporting and analytics examples above).

Path: *Folders > Shared folders > Custom > Dashboards.*



At the time of writing, no custom dashboards were available in the system, so a dummy dashboard was created just to show the navigation path.

However, this is where custom dashboards may be accessed once created, and you can select **Open** to view any dashboard that appears in the list.

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DOCUMENT HISTORY

Version	Summary of Changes	Document Status	Completion Date
1.0	Version released for publishing	Final	9 Sept 2024



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