

Getting Started in the SWIFT Data Warehouse: Using the OBIEE Tutorial

Introduction

The reporting tool for the SWIFT Data Warehouse is called **OBIEE**, an acronym for *Oracle Business Intelligence Enterprise Edition*.

OBIEE allows users to easily build queries, reports and dashboards to present data from the State of Minnesota's SWIFT Data Warehouse.

Initial training for SWIFT Data Warehouse users is through a self-guided tutorial provided by Oracle: *Creating Analyses and Dashboards 11g*. The tutorial will help you become familiar with the basic functions of OBIEE. After completing the exercises in the tutorial, you will have the skills needed to begin creating your own basic queries, reports and dashboards.

The OBIEE Tutorial

When you log in to the tutorial (steps to be covered in the next section), you will launch the OBIEE tool in the "*tutorial environment*," which is a training environment that closely mirrors what you will see in the live SWIFT Data Warehouse production environment.

Please note: While the tutorial environment is very similar to the actual production environment, it is a completely separate area. Even though you will access the tutorial through the State of Minnesota SWIFT Administrative Portal, no State data resides there. The tutorial is an interactive learning guide provided by Oracle. The focus of the tutorial is to help users become familiar with the OBIEE tool, rather than the data itself.

The instructions for working through the tutorial are provided in a pdf document provided by Oracle that we refer to as the *Oracle Tutorial Guide*. This guide leads users through various exercises, beginning with building a basic analysis (query/report). Although it is not essential that users follow the tutorial step by step, later exercises do reference earlier ones, and in some cases, the exercises will build on what you created in earlier exercises.

Some things to keep in mind...

- The *Oracle Tutorial Guide* discusses software requirements, prerequisites and instructions for logging in on pages 1 and 2. Users who have permissions established to access the SWIFT Data Warehouse are already cleared to use the tutorial. The software resides on the State of Minnesota's servers, so there is nothing for you to install. You will access the tutorial via the SWIFT Administrative Portal. Follow the steps that are provided in *this* document to access the tutorial and its tutorial environment.
- You can build and save queries, reports and dashboards in the tutorial environment. Remember that the tutorial is completely separate from the production environment, and you may have

permissions in the tutorial environment that you don't have in the SWIFT Data Warehouse production environment.

- Feel free to add folders and save files as you see fit in the OBIEE Catalog under "My Folders." The OBIEE catalog is similar to the standard Windows catalog/folder structure that you use with other Windows-based software.
- When you are directed to create folders and save files, always save them in "My Folders." Users are not given clearance to save or delete items within the tutorial environment's "Shared Folders."
- The *Oracle Tutorial Guide* provides lots of details and descriptions as it guides you through the exercises. Please note that there are a couple of areas where the illustrations may differ a bit from your own experience in the tutorial. (For example, step 5 of the *Filtering, Sorting and Saving Your Analysis* exercise on page 13 includes an illustration indicating that your saved filter will show up with a folder icon. Actually, you'll see a standard filter icon after you've saved.) Please don't allow those items to slow you down.
- You are not required to follow the steps laid out in the *Oracle Tutorial Guide* in order, nor are you required to complete all the exercises.
- Feel free to click around! The tutorial environment is a great place to become familiar with the layout of the OBIEE tool.

Accessing and Navigating the OBIEE Tutorial – Step by Step

Individuals with permissions for the SWIFT Data Warehouse will access the tutorial through the SWIFT Administrative Portal. As with all applications accessed from the SWIFT Administrative Portal, users may only access the tutorial from a State-networked computer or via a secure VPN connection.

Note: Users who have security clearance for the SWIFT Data Warehouse will also have clearance for the tutorial. If you do not have clearance, check with your agency security administrator.

Follow these steps to access the tutorial and get started:

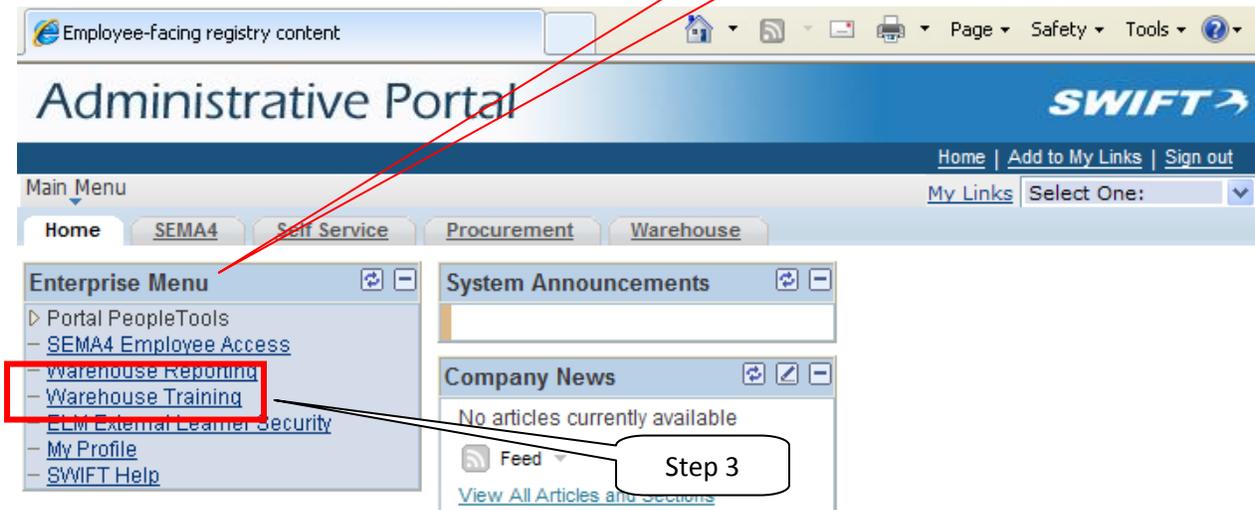
1. Navigate to the SWIFT Administrative Portal at <http://portal.swift.state.mn.us>

The screenshot shows the SWIFT Administrative Portal login page. At the top, it says "Administrative Portal" and "State of Minnesota" with the SWIFT logo. Below this is a "Main Menu" section. On the left, there is a "Sign In" box with fields for "User ID:" and "Password:" and a "Sign In" button. On the right, there is a "System Announcements" box. At the bottom left, there is an "Enterprise Menu" with links for "Forgot Your Password?" and "SWIFT Help".



2. Sign in using your Single Sign-on User ID and password. (This is the same User ID and password that you use for other applications accessed via the SWIFT Portal such as Financial Supply Chain and Employee Self Service.)

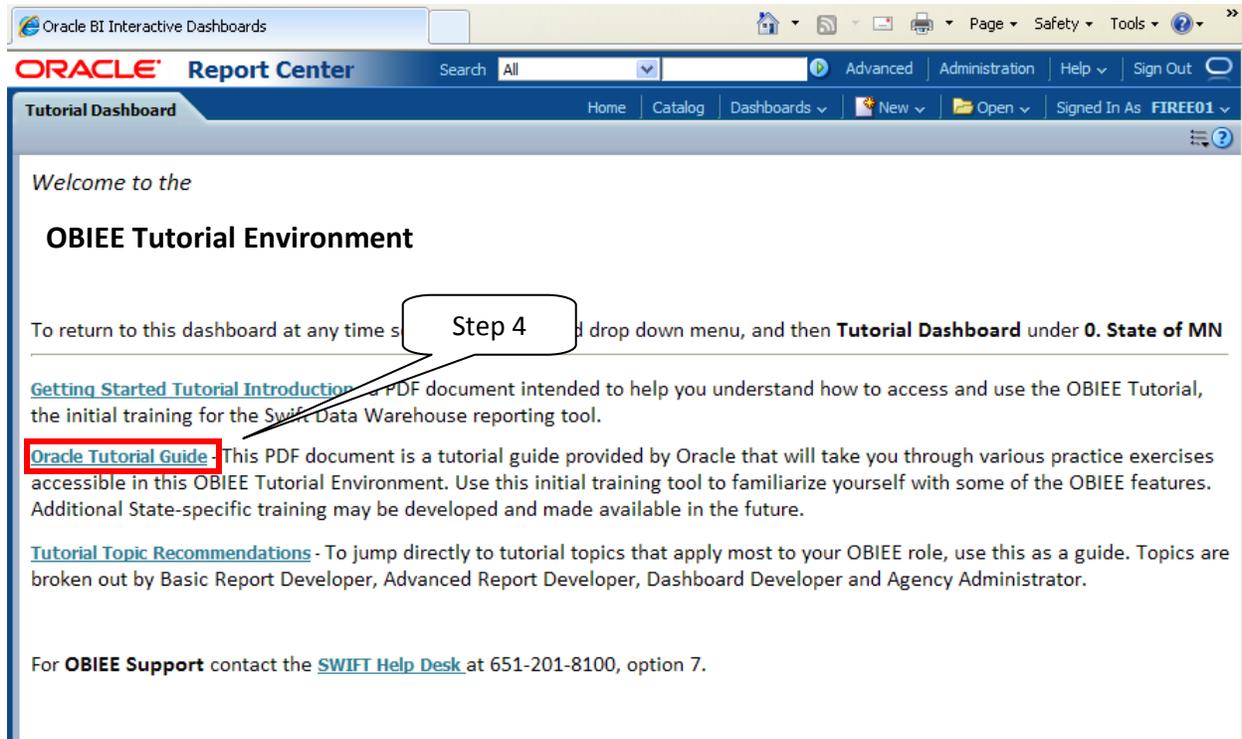
Once you've signed in, the Administrative Portal will appear with links to the applications for which you have security clearance under the **Enterprise Menu**:



3. Click **Warehouse Training** to launch OBIEE in the tutorial environment.

At this point, you've accessed OBIEE in the tutorial environment. *Welcome!*

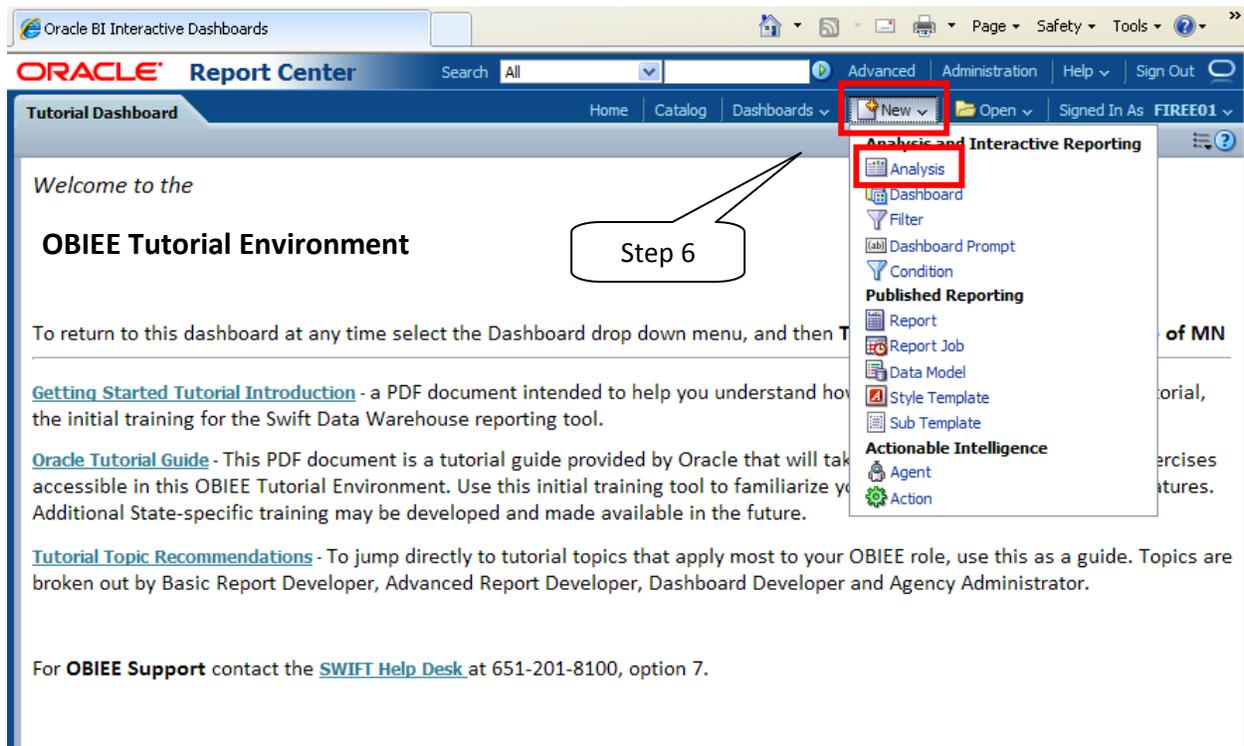
By default, you will be presented with the **Tutorial Dashboard**:



4. Click **Oracle Tutorial Guide** to open the pdf document that will lead you through the tutorial exercises. The guide, which is 131 pages, can be either printed, or you may leave it open and toggle between the guide and the OBIEE tool.

Note: Another document, *Tutorial Topic Recommendations*, is also accessible via the Tutorial Dashboard. This document provides information about the various exercises that are covered, and makes suggestions for users based on the four primary Data Warehouse Roles: *Basic Report Developer*, *Advanced Report Developer*, *Dashboard Developer*, and *Agency Administrator*.

5. Read through the introduction to the tutorial.
Note: You have already signed in (via the State of Minnesota SWIFT Administrative Portal,) so skip the tutorial's Step 1 regarding navigating to the Oracle Business Intelligence Sign in Page and signing in.
6. When you're ready to begin the exercises, Step 2 of the *Oracle Tutorial Guide* will have you click **New**, followed by **Analysis** to begin. Follow the instructions in the *Guide* to continue through the exercises.



You may leave the tutorial at any time by clicking **Sign Out** in the upper right corner of the OBIEE window. To return to the Tutorial at any time, return to the SWIFT Administrative Portal and sign in again. Any work that you saved in "My Folders" in the Catalog will be available to you when you return.

If you have trouble launching the tutorial, please contact the SWIFT Help Desk:

- Call 651-201-8100, option 7 or;
- Establish an on-line web ticket:

Basic Navigation in OBIEE

Although the tutorial will help you become familiar with the OBIEE interface, here is some basic information to help you get started navigating the tool.

Global Header

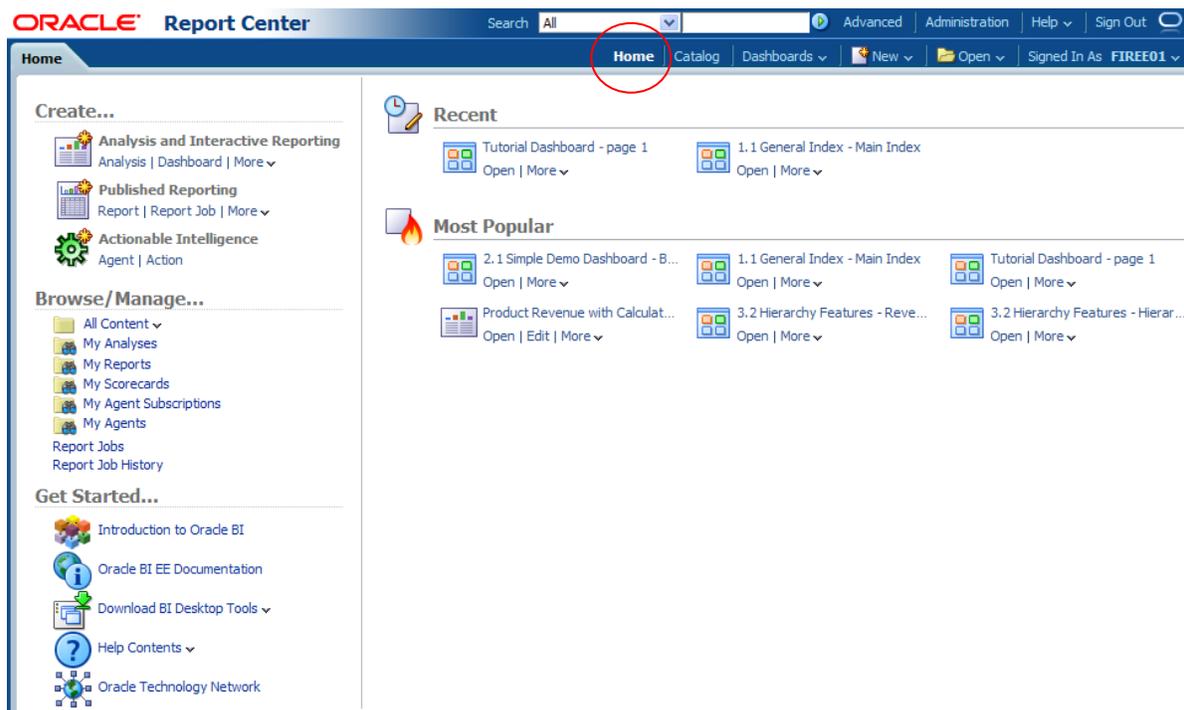


The global header is displayed at the top of the OBIEE interface and is always available as you work. It allows you to easily access the functionality that OBIEE provides. For example, you can access the home page, the OBIEE catalog, and any dashboards for which you have clearance. It also provides a starting point for creating new objects and opening existing objects (such as analyses, filters, and dashboard prompts).

Also included in the global header is the **Help** link. Click “Help,” then “Help Contents,” then “Oracle BI EE” to access Oracle’s comprehensive User’s Guide, *Oracle Business Intelligence Enterprise Edition Help*. Access this guide any time to learn more about the features of OBIEE.

When you’re signed into OBIEE, the global header identifies you as being signed in. The **Sign Out** link is located just above the “Signed In As” indicator.

Home page

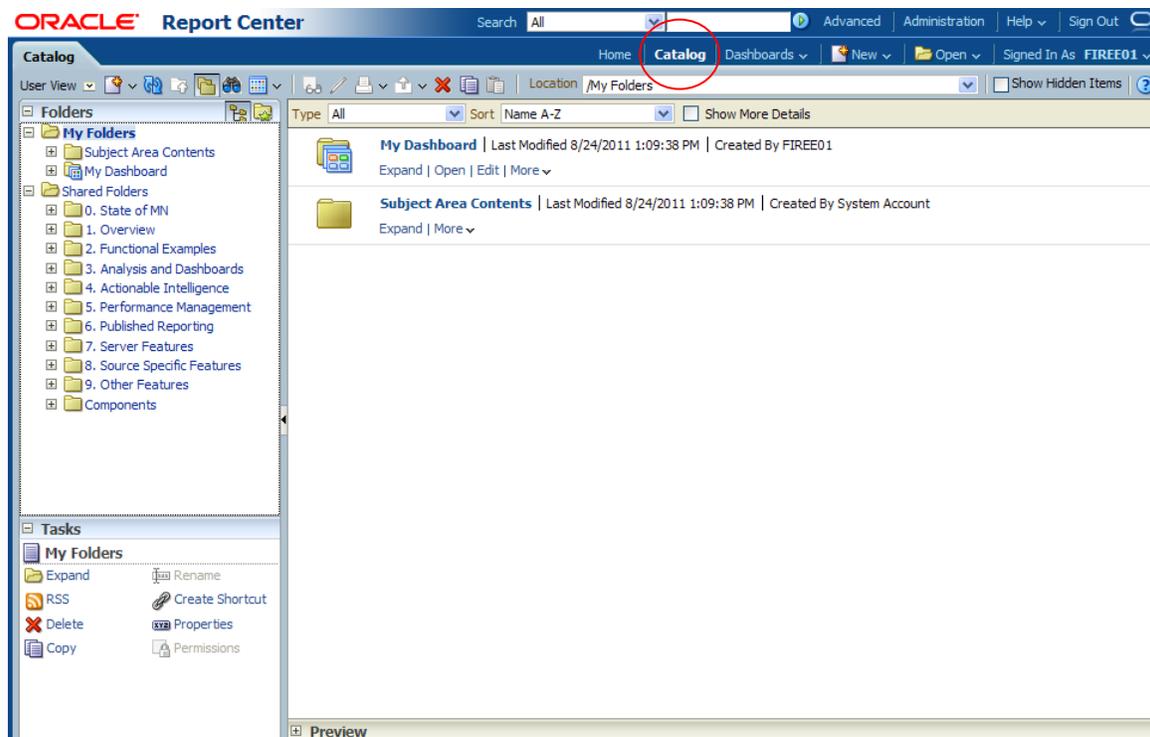


You can access the OBIEE Home page at any time by clicking **Home** from the global header. **Home** provides direct links to items that you've worked on recently, as well as those that you've worked on most often.

It also provides an additional starting point to begin creating new objects. The *Browse/Manage* area of the Home page helps you search for objects that you have created or have shared access to within OBIEE's catalog.

Under the *Get Started* area, you'll find links to various Oracle documentation pieces, as well as another link to **Help**, where you can find a link to the *Oracle OBIEE User's Guide*.

Catalog



The **Catalog** page displays the OBIEE folders and their contents in an expandable tree structure. All items that you have saved in "My Folders" or have clearance to in "Shared Folders" are accessible through this page. Your security clearance determines the items that you are able to see, and the functions that you can perform in the **Catalog**.

Note: You may have permissions for some functionality in the tutorial environment that you will not have in the SWIFT Data Warehouse production environment.

The **Catalog** page allows you to easily open, copy, delete, and search for OBIEE objects like analyses, filters, prompts, etc. You can also manage your OBIEE files by creating folders and moving items to different locations in the **Catalog**.

As you click to expand the folders displayed in the Folders pane, the contents of those folders are displayed in the **Catalog's** main window. Use the available links to perform tasks on the objects in the catalog (e.g., open, edit, delete, copy, rename, view properties).

Wrap-Up

We hope that the Oracle OBIEE tutorial will help to get you started and that you will find OBIEE to be an effective and user-friendly query and reporting tool.

When you are ready to access OBIEE in the SWIFT Data Warehouse, return to the SWIFT Administrative Portal, sign in, and select Warehouse Reporting. Again, you will be directed to OBIEE, but in the live, production environment (using real State data). Instead of the *Tutorial Dashboard*, you'll be presented with the SWIFT Data Warehouse *OBIEE Support* dashboard that includes links to helpful information related to the State production environment. The security roles that have been established for you will determine your permissions for OBIEE functionality and for the data to which you have access.

Have questions? Before you call the SWIFT Help Desk, please check out the *SWIFT Data Warehouse FAQ and Glossary* on the SWIFT Website: <http://mn.gov/mmb/accounting/swift> If you still have questions after reviewing the FAQ, contact the SWIFT Help Desk:

- Call 651-201-8100, option 7

Help Desk team members log and route all issues and will get back to you as soon as possible.