

OBIEE Quick Reference Guide

Human Capital Management Basic Navigation

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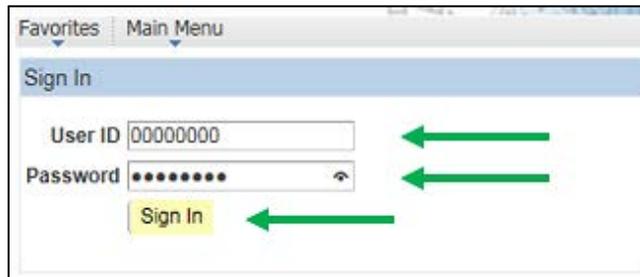
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Prerequisites: SWIFT Access and Data Warehouse Access

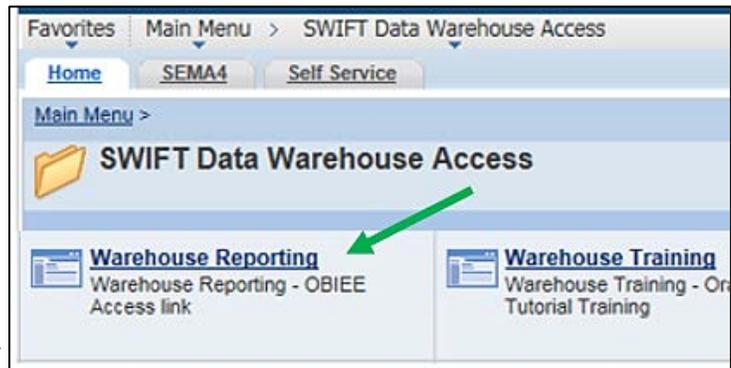
In order to access the Oracle Business Intelligence Enterprise Edition (OBIEE) online application, you will need to be granted access to the Statewide Integrated Financial Tools (SWIFT) system, with specific access to the SWIFT Data Warehouse. To obtain access, you will need to fill out the Request for Access to SWIFT Statewide Systems form. [SWIFT Security Access Forms:](#)
<https://www.mn.gov/mmb/accounting/swift/security/security-forms.jsp>

Logging Into the OBIEE Online Application

- Navigate to the SWIFT Administrative Portal website
[SWIFT Administrative Portal](#)
- Enter your SWIFT User ID and Password, then click the “Sign In” button



On the SWIFT Home Page, click the [SWIFT Data Warehouse Access](#) link, then click the [Warehouse Reporting](#) link to open the OBIEE online application

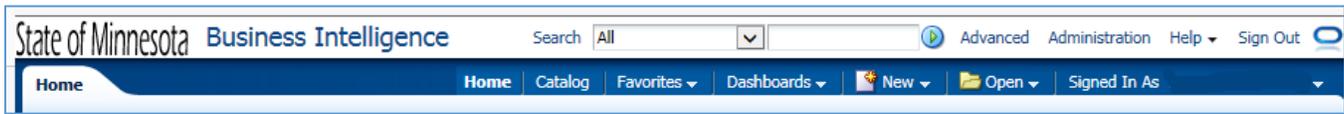


SWIFT will launch a new browser tab and automatically sign you into the OBIEE online application. You may see the [Signing in...](#) loading message while this occurs.

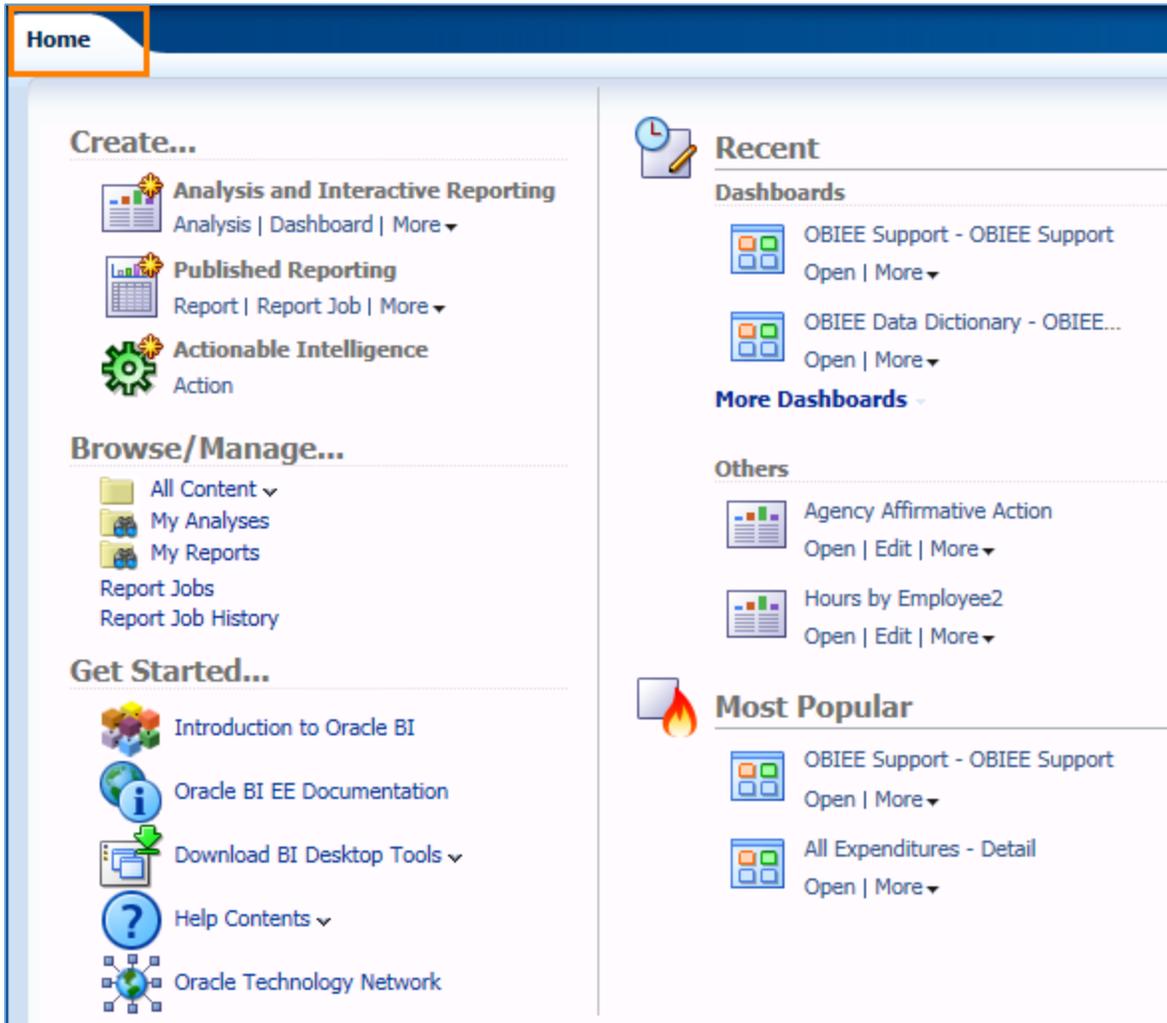


OBIEE Menu and Navigation

Once you have signed in, you will see the following menu options at the top of the page.



OBIEE Menu: Home Page



The Home page has options to:

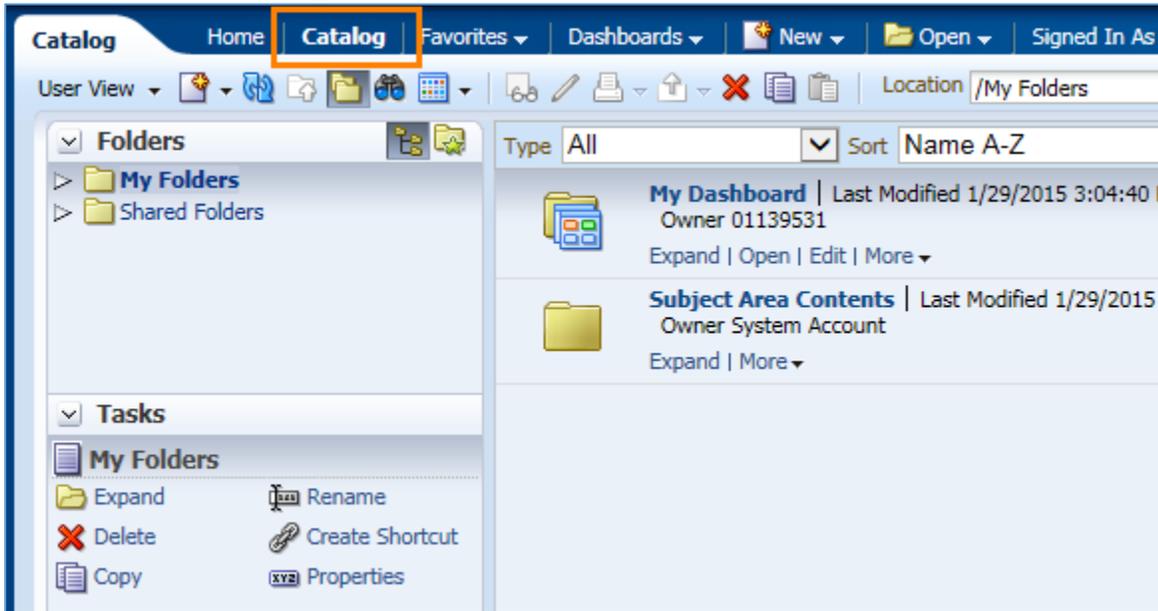
Create new content.

Browse/Manage existing items.

Get Started with OBIEE help documents.

View **Recent** and **Most Popular** items.

OBIEE Menu: Catalog



The Catalog page displays the **Folders** pane, where you can navigate to saved reports and dashboards; the **Tasks** pane, where you can perform actions on items within a folder; the Location bar, which shows the folder path where a selected item is saved; and the folder contents pane, which display all of the items in a selected folder.

Along the top of the Catalog page is a series of buttons that can perform different actions:



New button: Use this to create a new item or a new catalog folder.



Search button: Use this to search the Catalog for items by their name, location, and/or type.



Print button: Use this to print a selected report.



Refresh button: Use this to refresh the folder contents to display any recent changes or updates.



Change List View Type button: Use this to view the folder contents in List, Details, or Descriptive view.



Export button: Use this to export a selected report.



Up button: Use this to navigate to the next outermost folder level (moving “up” the folder tree).



Open button: Use this to open a selected report.



Delete button: Use this to permanently delete a selected report.



Show/Hide Folders Pane button: Use this to hide or display the Folders pane.



Edit button: Use this to edit a selected report.



Copy button: Use this to copy a selected report.



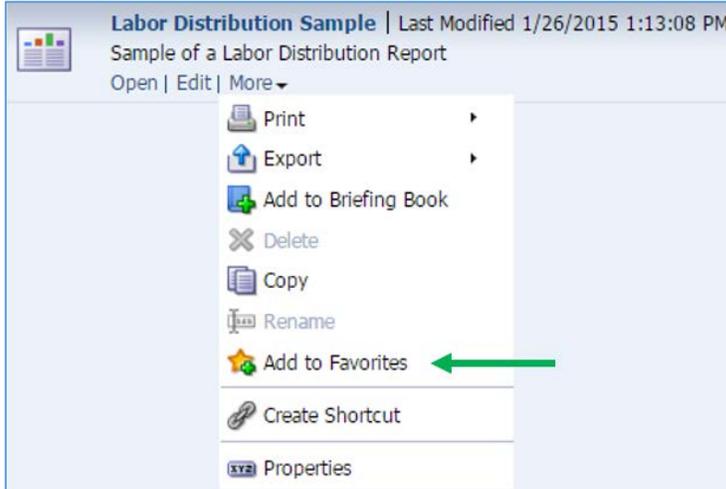
Paste button: Use this to paste a copied report.

OBIEE Menu: Favorites

The Favorites dropdown list will display any reports that you have marked as a favorite.



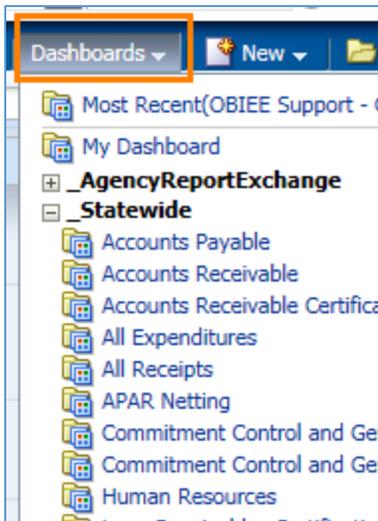
To add a report to your Favorites list, click on the **More** options link below the report name in the Catalog, and select the **Add to Favorites** option.



OBIEE Menu: Dashboards

The Dashboards dropdown list will show the most recently accessed dashboard at the top. To quickly navigate to other dashboards, click the [+] to expand the list and click the name of the dashboard you wish to view.

A dashboard is a customized viewing page that displays the analysis or report. Many existing reports can be found on the Statewide Dashboard or your specific state agency's dashboard.



OBIEE Menu: New

The New dropdown list will show all of the new items you can create. The **Analysis** option is used to select subject areas to create reports.



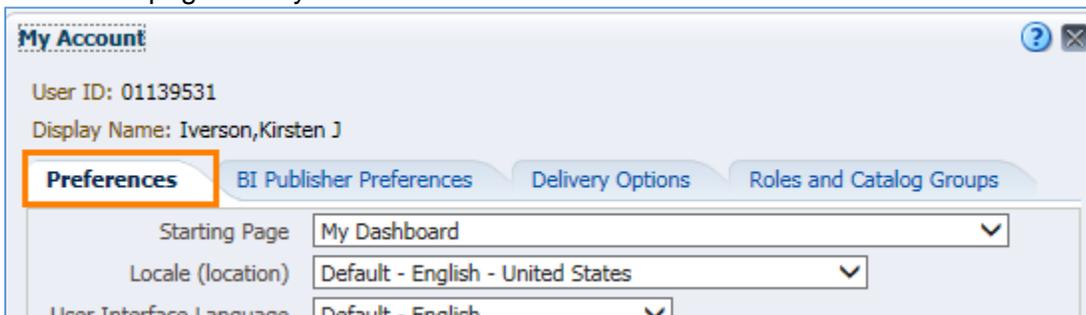
OBIEE Menu: Open

The Open dropdown list displays the **Recent** or **Most Popular** reports and dashboards as a navigate option other than through the Catalog page.



OBIEE Menu: My Account

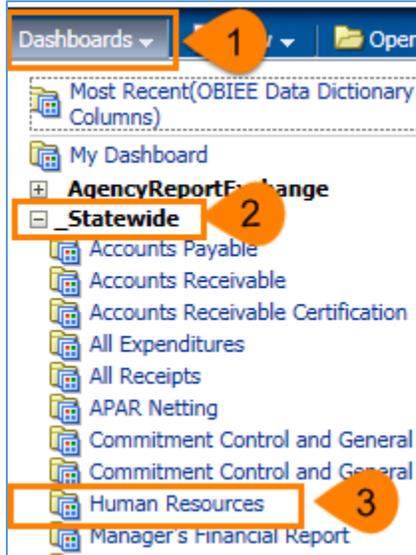
When you click on your name next to Signed In As in the menu, the **My Account** link appears. Click to view and change your account preferences. The **Starting Page** preference allows you to choose what page you see after logging in. You can select from the OBIEE Home page, My Dashboard or any public dashboard pages that you have access to.



Accessing an Existing Report through a Dashboard

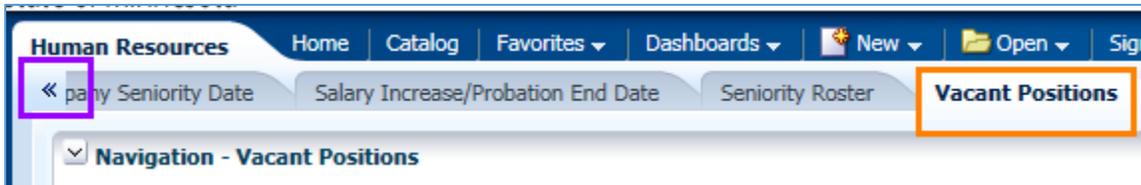
Navigate to the Report

- 1) Select the **Dashboards** dropdown list
- 2) Expand the **Statewide** dashboard folder
- 3) Select **Human Resources**.



This will open the Human Resources dashboard where the list of reports will display in tabs across the top or listed on the page. Select the **Vacant Positions** tab to open the report.

Helpful Tip: Use the directional arrows to expand the report selection. The reports are listed alphabetically.



Running the Report

Note: If you don't have security access to the subject area for a report, the report will not display on the dashboard. Security is the same access as you have in SEMA4.

Many reports on the Dashboard will have a Prompts section. The user can select values to customize the report data that is returned. When the report is first displayed, the results section will be based on the default prompt settings.

For this example change the Prompts to:

- ***Agency Name** - select your agency
- **Agency Nbr** – Select your agency number
- **Position Status** – Leave the All Column Values checked.
- Click the **Apply** button to run the report

Navigation - Vacant Positions

Prompts - Vacant Positions

Select required values from drop-downs. * Asterisk denotes required field.
Each selection criteria is dependent on each other. Your drop down choices will vary accordingly.

* Agency Name Agriculture Dept; Mn Management & Budget

Agency Nbr G10

Position Status (All Column Values)

Abolished

Approved

On Hold-Don't Intend to Fill

Apply Reset

A **Searching...** load message will appear while the report data is retrieved. The results may take several minutes to load, depending on your prompt values.

View the report with the applied prompts in the Results section.

Results - Vacant Positions

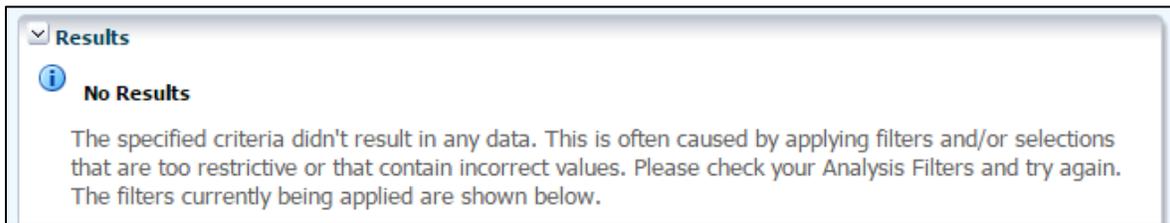
Vacant Positions Report
HCM - Workforce - Position Current
Time run: 5/16/2016 2:25:03 PM

SEMA4 Dept: G100000 - Minnesota Management & Budget

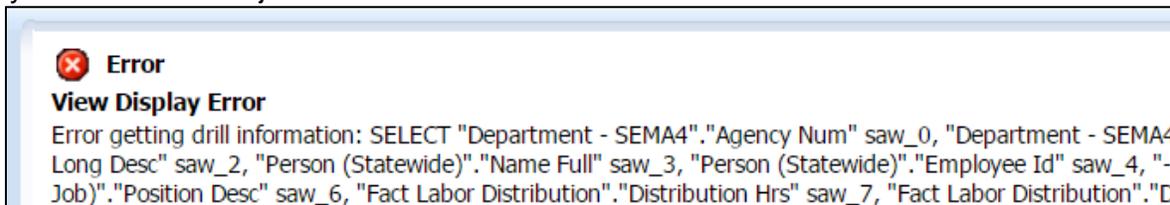
Position		Jobcode and Option		Position Dates	Position		
Position #	Position Description	Position Status	Job Code	Job Description	Int to Fill Date	Int to Fill Step	Max Head Count
00153570	Financial Reporting Analy Supv	Approved	002623	Financial Reporting Analy Supv		3	1

System messages

A report may display a **No Results** message, if your prompt settings are too restrictive and no data is applicable.



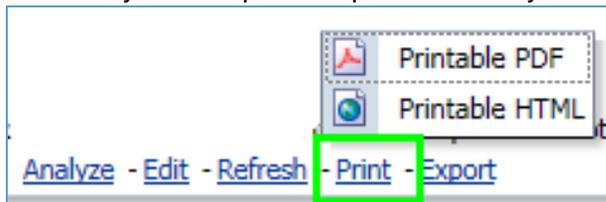
You will receive a **View Display Error** message if you do not have security access to the subject area for a report. You will not be able to run, edit, or access the data for the report unless you are granted security access to the subject area.



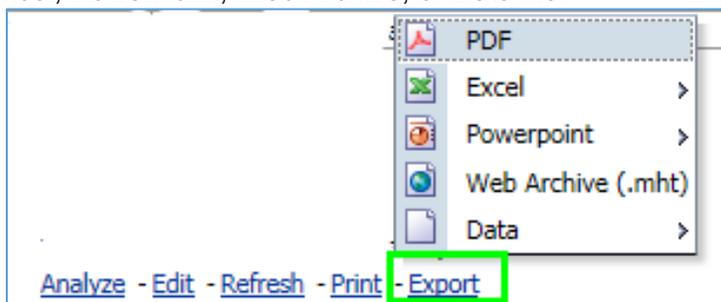
Downloading a Report

At the bottom of the dashboard Results section, there are several links available. There are two ways to download the report from the dashboard.

Method 1: Select the **Print** link to display the report in **Printable PDF** or **Printable HTML** format. This can be saved to your computer or printed directly from the browser.



Method 2: Select the **Export** link to download the report to your computer. The available file types are: PDF, Excel, PowerPoint, Web Archive, or Data file.

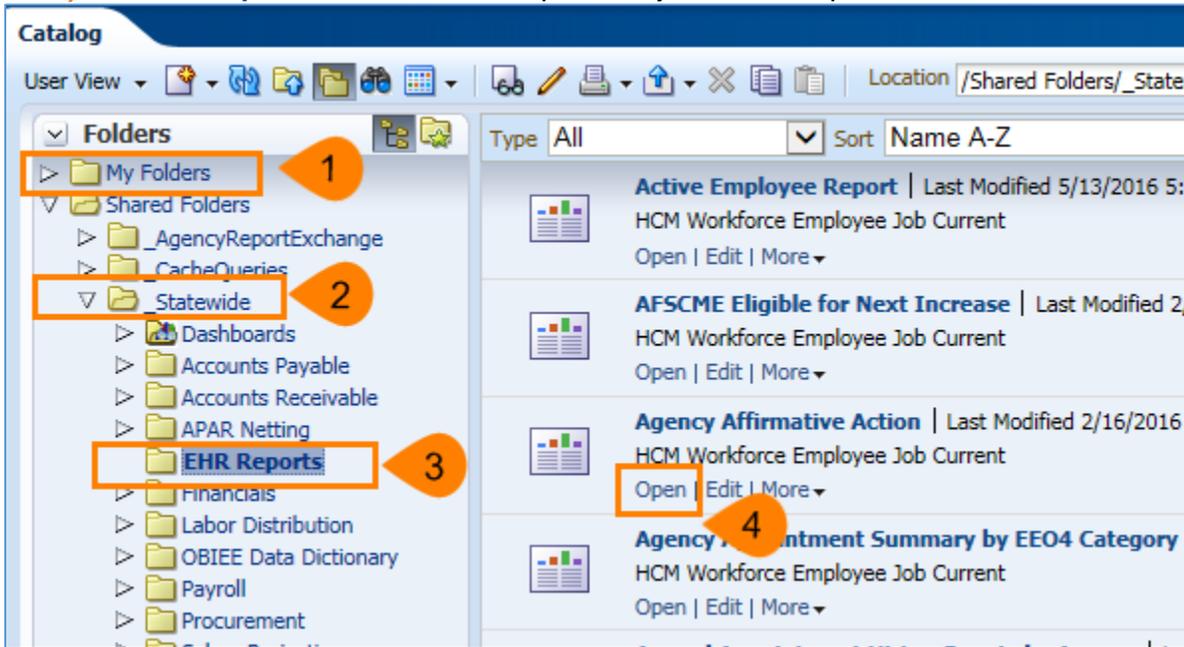


Accessing an Existing Report through the Catalog

If a report has not been added to a dashboard, you will need to access it through the OBIEE Catalog menu page.

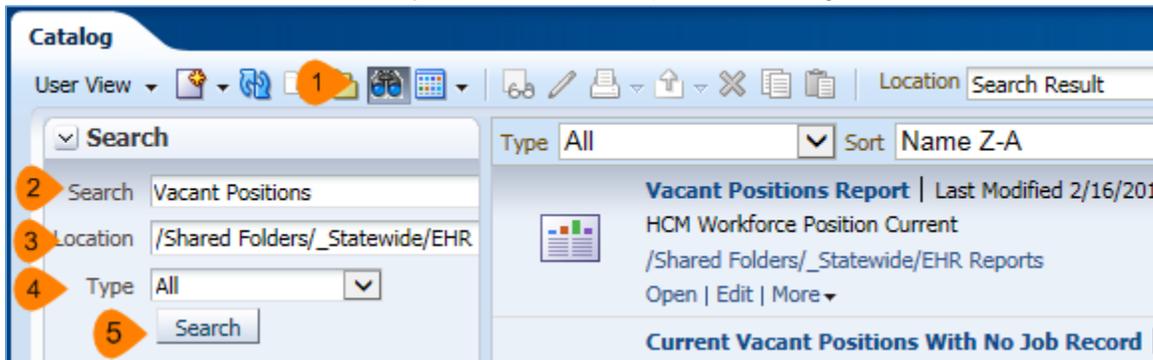
From the Folders list:

- 1) Double click to expand **Shared Folders**
- 2) Double click to expand the **_Statewide** folder
- 3) Click to expand the **EHR Reports** folder.
- 4) Click the **Open** link beneath the report that you want to open.



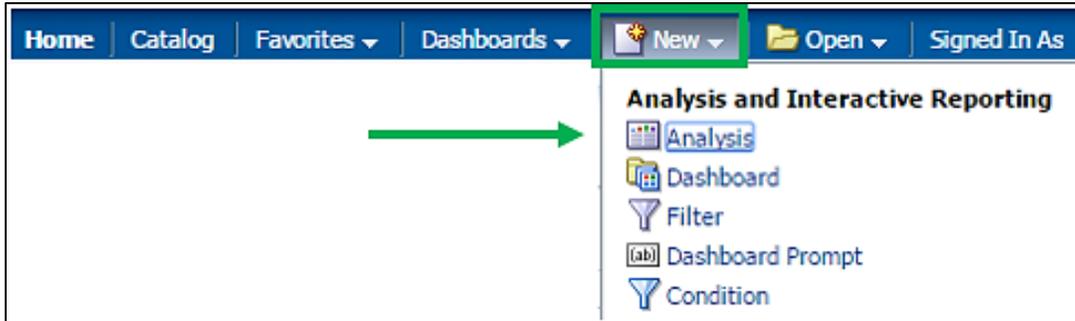
Optional Method: Use the Catalog Search to find a report

- 1) Click the binoculars icon.
- 2) Enter the name of the report in the Search field.
- 3) In the Location field, you may choose a specific folder to search.
- 4) In the Type field you may choose what type of item you are searching for, or search for all item types.
- 5) Click the Search button to view your results in the pane to the right.

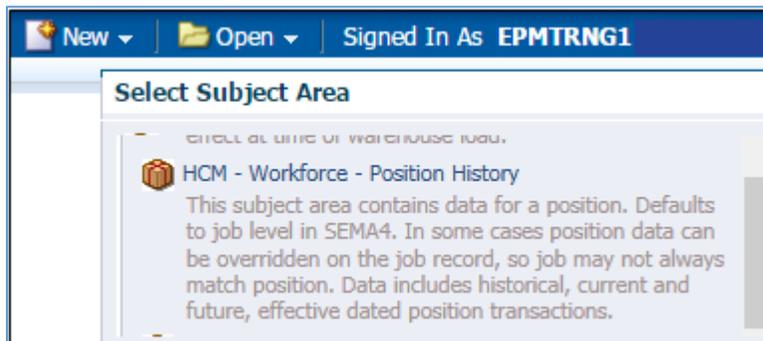


Create a New Analysis by Subject Area

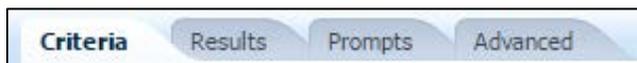
From the OBIEE menu, click the **New** dropdown list, and select the “Analysis” option.



The **Select Subject Area** list will appear. The available subject areas will depend on your OBIEE security access roles. For this training, scroll down and select the **HCM – Workforce – Position History** subject area.



This will open the Analysis page for the selected Subject Area. The Analysis page consists of four component tabs:



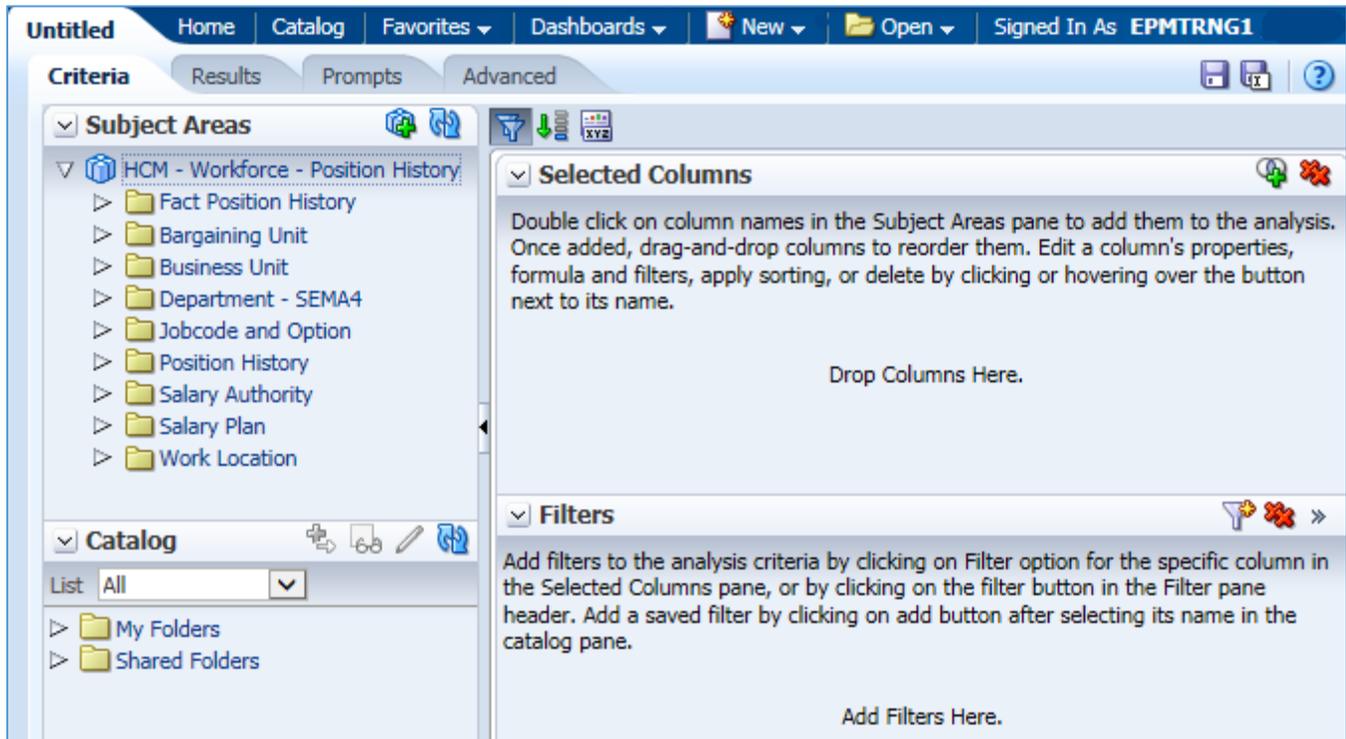
Criteria tab: Select Subject Areas to add to the Selected Columns and Filters to build your report.

Results tab: View of the format and results of your report.

Prompts tab: Add prompts for users when they run this report.

Advanced tab: This tab is for advanced users and will not be covered in this training. This is where you can review and modify the Advanced XML and Advanced SQL code for this analysis.

Criteria Tab



Subject Areas pane: The subject area you selected for your new analysis will be listed here. Within the subject area are category folders, and within these folders are data elements, called columns, which are used to create reports.

Catalog pane: This pane displays the OBIEE Catalog. It is an alternate way to access and reuse previously saved analysis components like filters, calculated items, and groups.

Selected Columns pane: This is where you will identify the data columns from the subject area that you want to include in your analysis.

Filters pane: Filters that are added to the selected columns will be listed here.



Save Analysis icon: Saves a new analysis, and current progress on a saved analysis.

Note: This will overwrite any previous work in a saved analysis. You cannot undo the save action or revert to a previous version of an analysis.



Save As icon: Used to save a separate copy of your current analysis under a different file name or in a different location.



OBIEE Help icon: This will provide helpful information about the components of the page you are currently viewing.

Criteria Tab: Add Columns to your Analysis

To add data columns to your analysis, you will need to locate the columns in the Subject Areas. Click the triangle to the left of the folder name or double-click the folder name to expand the folder the contents. To add the columns to your analysis double-click the column name or click the column name and drag it from the Subject Areas pane into the Selected Columns pane.

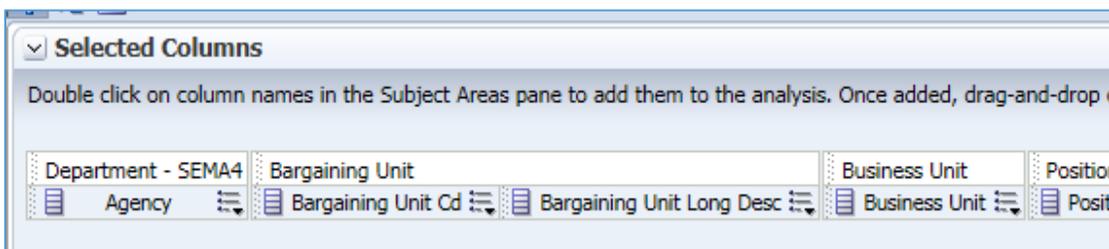
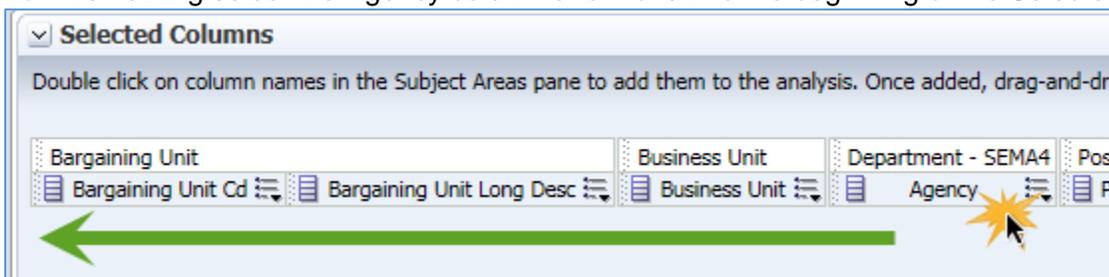
Some columns within the same category folder have similar names but show different data. Make sure that the column name you are selecting exactly matches the column listed in the table.

For this training, add the columns listed to the Selected Columns pane.

- Bargaining Unit Folder
 - Bargaining Unit Cd
 - Bargaining Unit Long Desc
- Business Unit Folder
 - Business Unit
- Department – SEMA4 Folder
 - Agency
 - Agency Name
- Jobcode and Option
 - Jobcode
- Position History Folder
 - Position Number
 - Position Long Desc
 - Position Status Cd
 - Position Status Long Desc
 - Reg Temp Cd
 - Reg Temp Long Desc

The Selected Columns may appear in a different order. The order will not affect the results of the analysis. If you would like to re- order the columns click the column and drag into the order that you would like it to appear.

For this training select the Agency column and move it to the beginning of the Selected Columns.

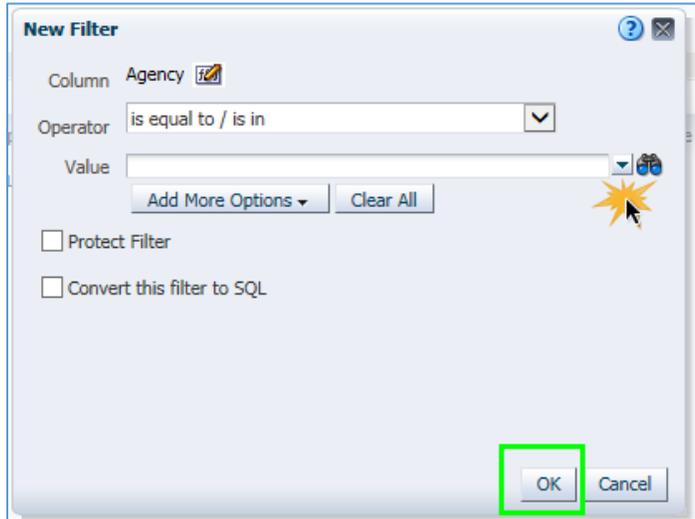


Criteria Tab: Add Filters to your Selected Columns

Filters should be added to columns so that the results are more relevant.

To add a filter, click on the  Column Options button to the right of the column name and select the Filter icon option. This will open the New Filter window.

- In the Value, select your agency.
- Click OK.



You can also click the  Add Filter button in the upper-right corner of the Filters pane. A pop-up window will appear.

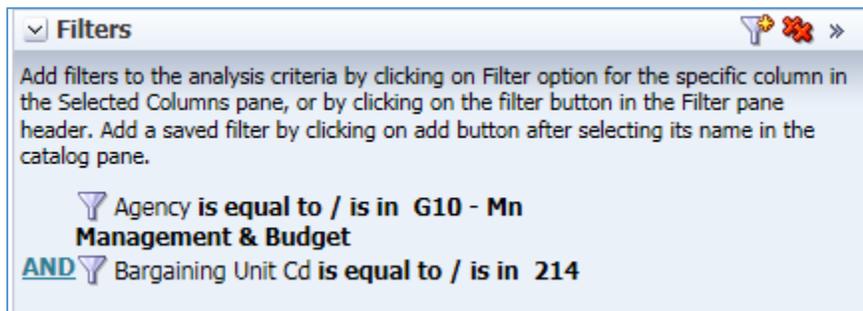
- Select Bargaining Unit Cd
- In the Value, select 214.
- Click OK.

To edit an existing filter, hover the mouse over the added Filter for more options to appear.

Click on the  Edit Filter button to the right of the filter name.

Note: If you are typing in the value of a Filter rather than selecting from the dropdown list, the values are case-sensitive when entering text, for example G10 is not the same as g10.

For this exercise, the Filters pane should appear as below. It is okay if your filters appear in a different order.



Criteria Tab: Save your Analysis to My Folders

Every OBIEE user has a personal catalog folder called My Folders. Anything you save to My Folders cannot be viewed or accessed by other users. To share an analysis with another user, it should be saved in an appropriate location in the Shared Folders.

New and unsaved analysis will display as Untitled in the upper-left corner.

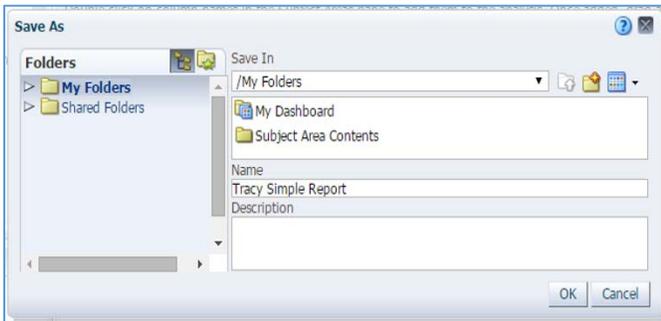
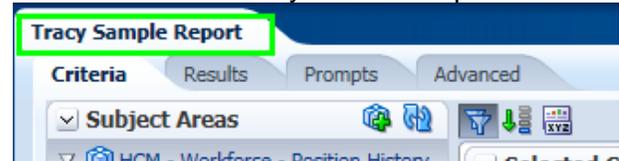


To save, click the Save Analysis icon  in the upper-right hand corner.

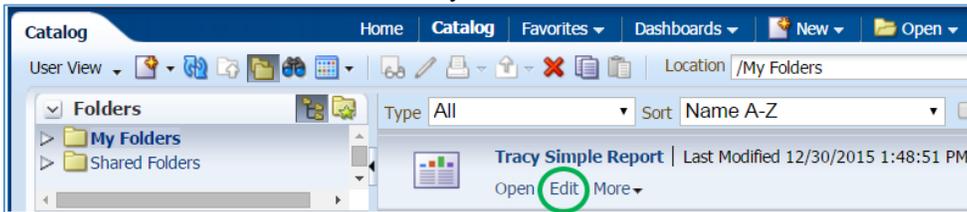
In the Save window, you can choose the location to save the analysis, enter a name for the analysis, and include an optional description.

- Select My Folders as the Save In location
- In the Name field change to YOUR NAME Simple Report
- Click OK.

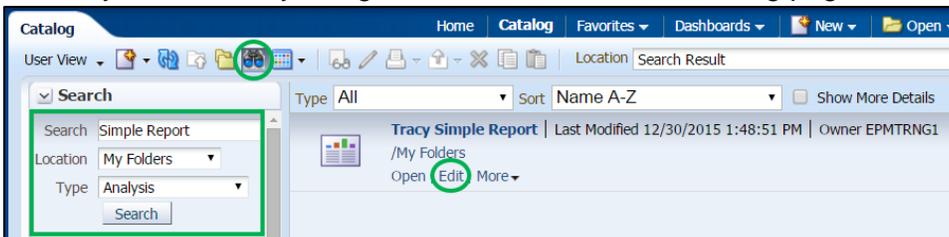
The name of the analysis is now updated.



Once saved, you will be able to locate this report in My Folders in the Catalog. Click the Edit link beneath the analysis name to return to the Criteria tab.



You may also find it by using the Search icon on the Catalog page.



Results Tab: View the Results of your Analysis

Once you have selected the columns and added any filters, click the **Results** tab at the top of the analysis page to view your results.

The Results tab consists of four component panes:

Subject Areas: If needed you may add additional data columns directly into your analysis results. Double-click the column name or drag and drop it into your table view.

Catalog: This pane allows you to add saved groups and calculated items to your results.

Views: This pane lists the different views you have added to your analysis. The default views are Title and Table. You can add, edit, duplicate, delete, and rename your views here too.

Compound Layout pane: This pane displays your analysis results. You can format and rearrange the views to create your desired report layout.

Above the Compound Layout pane is a row of icons.



Print: Choose from Printable PDF or Printable HTML format.



Export: Save the report to your computer as PDF, Excel, PowerPoint, Web Archive, or Data file.



Preview: Finalized display format. This is how the report will appear when opened by a user or displayed in a dashboard.

Results Tab: Edit the Table View

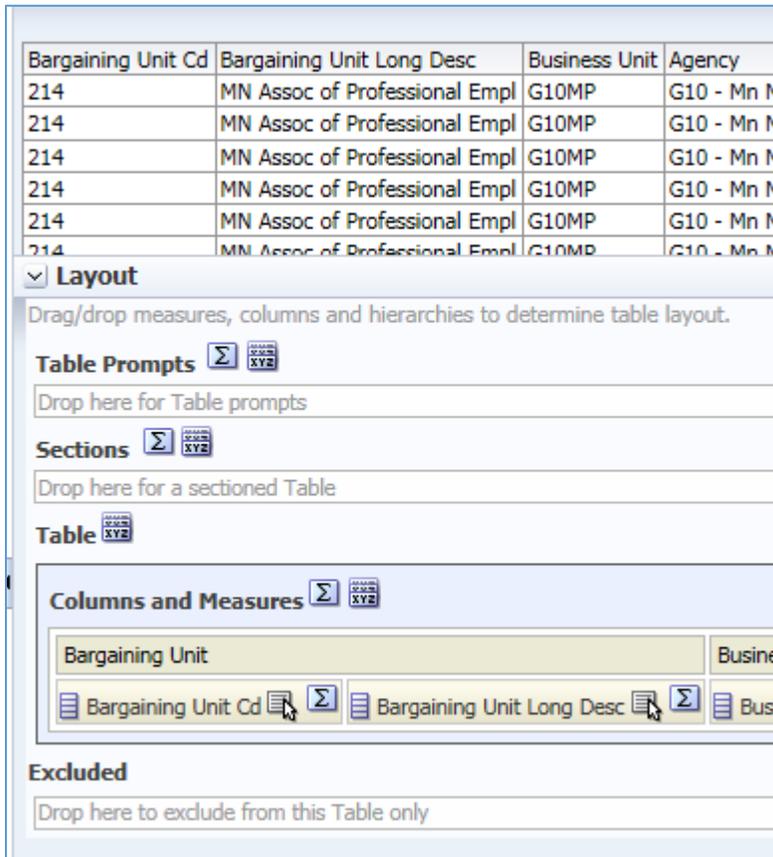
The default Table view contains all of selected columns from the Criteria tab.

To edit the view, click the  Edit View button in the upper-right corner of the Table view.

The current table is displayed at the top of the Edit View window. Any changes you make to the table will be displayed here as you make them.

If the view is not displayed, click the  Display Results button at the top of the window.

Beneath the table display is the Layout pane, where you can customize the design of the table. For a Table view, there are four Layout areas: Table Prompts, Sections, Table, and Excluded.



The screenshot shows the 'Edit View' window. At the top is a table with the following data:

Bargaining Unit Cd	Bargaining Unit Long Desc	Business Unit	Agency
214	MN Assoc of Professional Empl	G10MP	G10 - Mn M
214	MN Assoc of Professional Empl	G10MP	G10 - Mn M
214	MN Assoc of Professional Empl	G10MP	G10 - Mn M
214	MN Assoc of Professional Empl	G10MP	G10 - Mn M
214	MN Assoc of Professional Empl	G10MP	G10 - Mn M
214	MN Assoc of Professional Empl	G10MP	G10 - Mn M

Below the table is the 'Layout' pane, which is expanded to show the 'Table' area. The 'Table' area contains a 'Columns and Measures' section with the following columns:

Columns and Measures	Business Unit
Bargaining Unit	Business Unit
Bargaining Unit Cd	Bargaining Unit Long Desc

The 'Layout' pane also includes sections for 'Table Prompts', 'Sections', and 'Excluded', each with a 'Drop here' instruction. The 'Table Prompts' section has a 'Drop here for Table prompts' area. The 'Sections' section has a 'Drop here for a sectioned Table' area. The 'Excluded' section has a 'Drop here to exclude from this Table only' area.

You can change the arrangement of the columns in the table by clicking the column name in the Layout pane and dragging it to the desired position in the Layout – Table area, or into the other Layout areas.

Edit View window, Layout pane: Formatting Columns

To format the column headings and values:

- Click the  More Options icon to the right of the column name.
- Select the format option to open the Edit Format window.
- Make the desired formatting changes.
- Click OK after each change.

Column Name	More Options Selection	Edit Format:	Edit Format:
Business Unit	Format Values	Font: Arial	Color
Position Long Desc	Format Values	Font: Arial	Cell: un check Wrap Text
Position Status Long Desc	Format Headings	Caption: Position Status	Style: Bold
Position Status Cd	Hidden		

Edit View window, Layout pane: Adding Table Totals and Column Subtotals

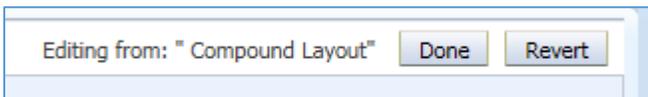
To add a grand total row for the table, click the  **Totals** button to the right of the **Columns** and Measures heading in the Layout – Table area, and select the **After** option. This will add a Grand Total row at the bottom of the table, with total values for any  measure columns.

To add subtotals for a specific column, click the  **Totals** button to the right of the column name in the Layout – Table area.

How to exit from the Edit View window

If you made changes in the Edit View window but want to discard the changes and return the view to its original appearance prior to editing, click the Revert button.

Once you have completed your changes to the Table view, click the **Done** button to exit.



The new view changes will appear in the Compound Layout pane of the Results tab. Now is a good time to save your analysis, if you are satisfied with the changes.

Criteria Tab: Change Column Properties (Column Format and Data Format)

Certain formatting changes must be made from the Column Properties window on the Criteria tab rather than from the Edit View window on the Results tab.

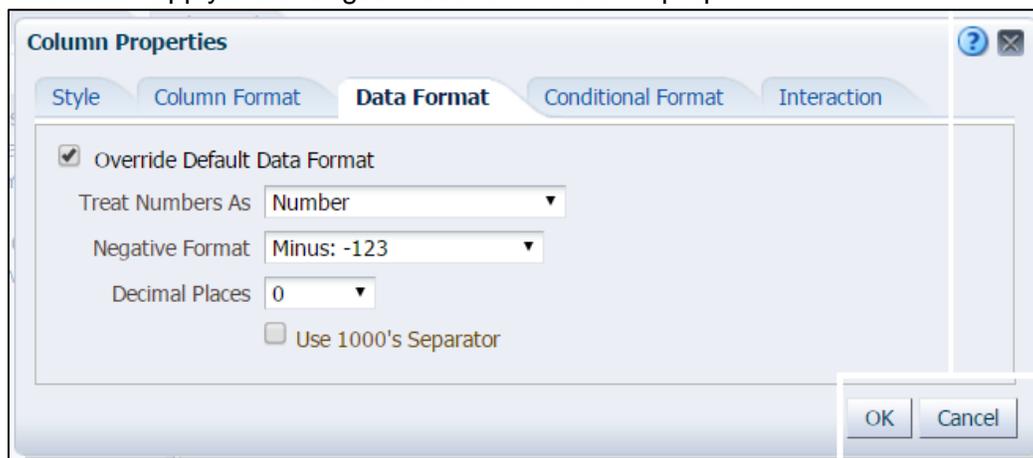
Click on the  Column Options button to the right of the column name in the **Selected Columns** pane, then select the “Column Properties” option.

Select the **Column Format** tab. This tab allows you to change the **Value Suppression** option, which can suppress repeated values in the column into a single merged cell, or restore columns to repeated values.

Select the **Data Format** tab. This tab allows you to change the way that certain types of data are displayed on the Results screen.

- For date type columns, check the **Override Default Data Format** box, then select the desired option from the **Date Format** dropdown list.
- For number type columns, check the **Override Default Data Format** box, then select the desired options. Numeric data can be expressed as numbers, currency, percentages, and other options. You can select the format for negative values, indicate the number of decimal places to be shown, and also include commas as the 1000's separator (Example: 1000 versus 1,000).

Click the **OK** button to apply the changes made to the column properties.



Results Tab: Add a New View

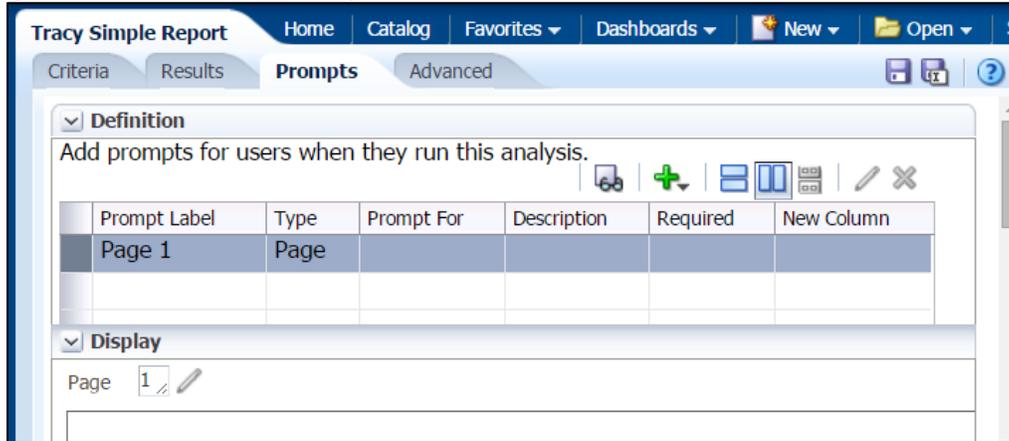
Each new analysis has a Title view and Table view as a default. Other view types include: Pivot Table, Performance Tile, Trellis, Graph, Gauge, Funnel, Legend, Narrative, and Static Text.

To add a new view, click the  New View button from the Views pane or above the Compound Layout pane, and select the view type.

To customize and format the view, click the  Edit View button in the upper-right corner of the view in the Compound Layout pane, or select the view in the Views pane and click the Edit View button in the pane.

Prompts Tab: Add an Inline Prompt

Adding an inline prompt to a report will provide filters for users without the need to edit the analysis when opening a report from the Catalog.

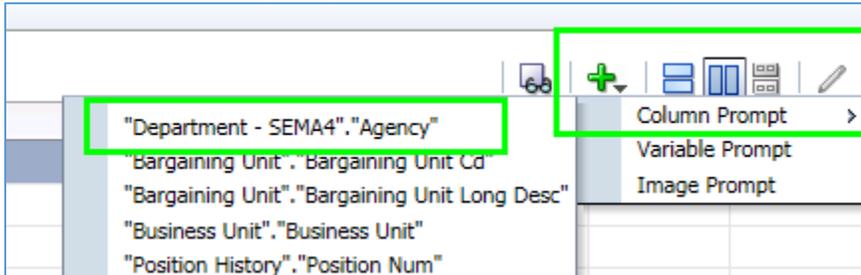


The Prompts tab of the analysis consists of two component panes:

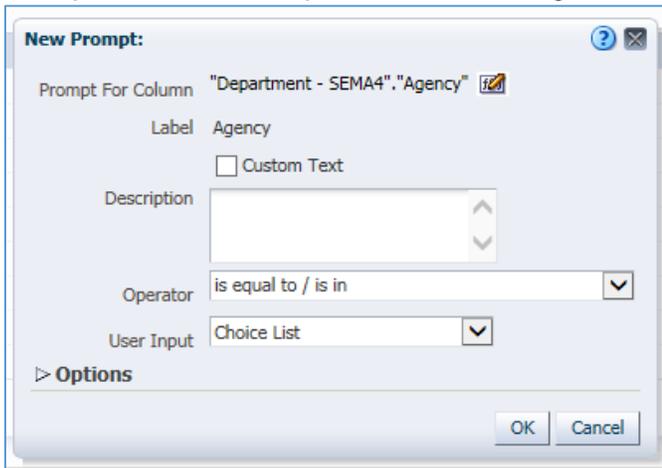
Definition pane: This is where your inline prompts will be listed, and where you can preview your report, add, edit, and delete prompts, and change the layout of the report prompt page.

Display pane: This will show you how your report prompt page will look as you add prompts.

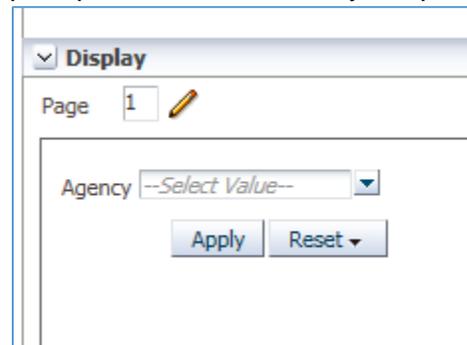
To add a new inline prompt, click the New Prompt button.



Click the **OK** button at the bottom of the New Prompt window to accept the default settings.



The Definition pane now shows the added inline prompt and the Display pane shows what the prompt will look like when you open the report.



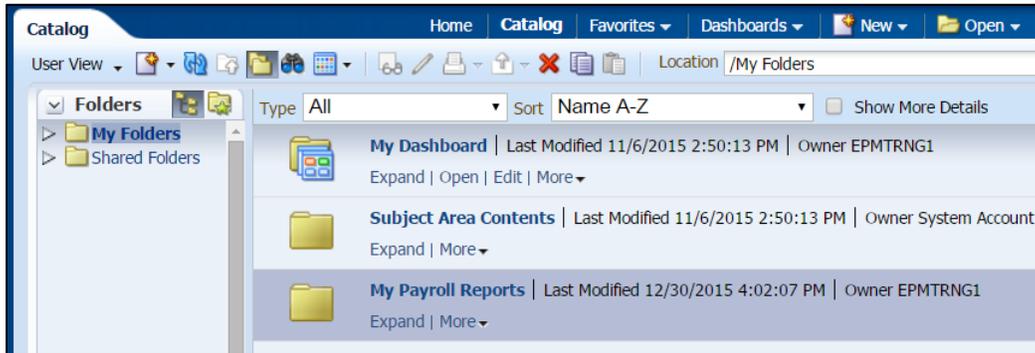
Save your analysis to keep any changes on the Prompts tab.

OBIEE Catalog: Create a New Folder and Copy/Paste an Analysis

You can create subfolders within My Folders in the Catalog to organize your work.

In the Catalog menu

- Select My Folders
- Select the  New item icon.
- Select  Folder from the dropdown list.
- The New Folder window will appear. Enter a name for your folder.
- Click OK.



To copy an item: In the Folders pane, navigate to: Shared Folders > Statewide > Accounts Payable. Select the More dropdown list beneath a report. Select the Copy option.

Or, select a report in the folder contents pane, and click on the  Copy button in the Catalog menu.

To paste an item: Navigate to My Folders and click on the  Paste button in the Catalog menu. A copy of the report will appear in the folder contents pane for the selected folder.

